



Main Developments in the Postal Sector (2013-2016)

Country Fiches

Study for the European Commission,
Directorate-General for Internal Market, Industry,
Entrepreneurship and SMEs

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AUSTRIA

COUNTRY FACTS

Total population (million)	2016	8,69
Population density (per sqkm)	2015	104,8
GDP growth rate	2014	0,80%
	2015	1,10%
	2016	1,50%
GDP per capita in PPS (in % EU-28 average)	2016	36.300 (128)

ICT indicators,
% of individuals
aged 16-74
(2016)

85%83%

Broadband

84%82%

Internet usage

53%49%

Internet banking

60%48%

e-government

58%55%

e-commerce

45%18%

e-commerce, cross
border intra EU

■ AT ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	182	Parcel & express items per capita, domestic	13
--	-----	---	----

Volume, 2016 (million items)

1.584

Domestic letter post

111

Domestic parcel & express

Volume index (2013=100%)

1.4

1.2

1

0.8

0.6

2013

2014

2015

2016

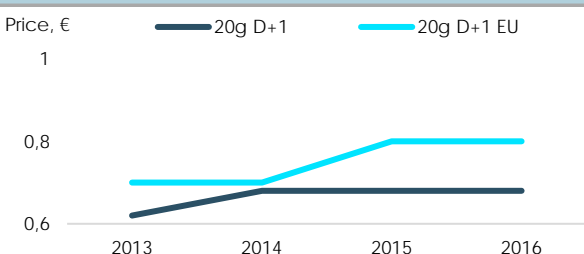
Letters (domestic)

Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	confidential	End-to-end competition	-
SP letters	confidential	End-to-end competition	Marginal
Bulk mail	confidential	End-to-end competition	Marginal
Direct mail	confidential	End-to-end competition	Marginal
Publications	confidential	End-to-end competition	-
Domestic parcel & express	--	--	-
B2C	57%	--	Moderate
B2B	32%	--	Intense
C2C	57%	--	Low
Outbound cross-border letter post	--	--	Low
Outbound cross-border parcel & express	--	--	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	12	--	3	--
Parcels	12	--	3	--

UNIVERSAL SERVICE							
Designated universal service provider							
Name of the universal service provider		Österreichische Post AG		<div>Revenue structure (2016)</div> <div><div><div></div><div></div><div></div></div><div>Letter post*; 73%</div><div>Parcels**; 27%</div></div>			
Legal status		Public limited company					
State ownership		52.8% (via ÖBIB) 47.2% free float					
Total revenue, 2016 (mEUR)		2.031					
EBIT, 2016 (mEUR)		202,3					
EBIT margin, 2016 (EBIT/Revenue)		10%					
<small>*Letter post refers to Austrian Post's mail & branch network. ** Parcels includes parcels and logistics. Source: Austrian Post 2016 Annual Report.</small>							
Ensuring Universal Service							
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				almost 0%			
Percentage of the population that does not receive delivery of parcels at the standard frequency				almost 0%			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No			
Authorization procedure within the universal service area				Designation			
Net cost study				--			
Existence of compensation fund to compensate USP for USO net costs				Authorized but not established			
Other methods of compensation				No			
Scope of universal service							
Service	Ensured	Price regulated		Service standards set			
Single piece letter post (D+1)	Yes	Ex post for all items in this service category		Yes			
Bulk letters	Yes	Ex post for all items in this service category		Yes			
Direct mail	Yes	Ex post for all items in this service category		Yes			
Publications	Yes	Ex post for all items in this service category		No			
Single piece letter post (D+4)	Yes	Ex post for all items in this service category		Yes			
Basic parcel post (domestic)	Yes	Ex post for all items in this service category		Yes			
Bulk parcels	Yes	Ex post for all items in this service category		Yes			
Delivery frequency for letter post		5 days per week		Legally required delivery point		Letters must be delivered to the door of an addressee	
Delivery frequency for parcels		5 days per week					
Universal service indicators							
Price trend (EUR)	2013	2016		Price, €			
20g D+1, domestic	0,62	0,68		<div><div></div><div></div></div> <div>20g D+1</div> <div>20g D+1 EU</div> 			
20g D+4, domestic	--	--					
50g D+4, domestic	--	--					
20g D+1, EU	0,70	0,80					
5kg parcel, domestic	8,30	8,55					
5kg parcel, cross-border (lowest tariff)	19,20	19,25					
Quality of service	2013	2016		Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	95,0%	95,0%		2013	67	2013	--
Actual performance (D+1)	95,5%	--		2014	92	2014	--
Postal outlets (total)	2.501	1.792		2015	90	2015	--
Postal outlets per 10,000 inhabitants	2,2	2,1		2016	159	2016	--
Share of post offices operated by USP	28%	25%					
Employment							
	2016		Average annual change 2013-2016				
Headcount, total in the sector	24.200		-7,62%				
Headcount, total at USP	18.906		-2,77%				
Share of civil servants	40,90%		-5,47%				

REGULATION			
Institutional framework			
Ministry for postal policy	Federal Ministry for Transport, Innovation and Technology		
Ministry for ownership of PPO	Ownership: Federal Ministry for Finance; represented by Österreichische Bundes- und Industriebeteiligungen GmbH (ÖBIB)		
National regulatory authority	Austrian Regulatory Authority for Broadcasting and Telecommunications		
Authority of NRA concerning quality of service			
NRA authority to levy fines	No	Measures quality of service annually	Yes
NRA authority to order remedies	No	Publishes quality of service results annually	Yes
NRA sets monitoring standards	No	Quality measurement method	--
National competition authority			
NRA is the primary enforcer of competition	No		
NRA/NCA cooperation	Share data:	No	Regularly consult: No
Competition cases since 2013	--		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP:	--	Post Codes: Yes Addr. database: Yes
	Public letter-post collection boxes:	No	Post office boxes: No Letter delivery boxes: Yes
	Parcel lockers:	No	Sorting centers: No Return services: --
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	Yes		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Required by law and verified in practice	Required by law and verified in practice
Special tariffs are available to consolidators?	Not required by law nor verified in practice	Not required by law nor verified in practice	Not required by law nor verified in practice
VAT rate for postal products not exempt	20%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+4, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	Yes	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	Yes
Insured mail	Yes	Express letter service	No
Direct mail	Yes	Express parcel service	No
Publications	Yes		
Protection of users			
Protection of users by law	Yes Postal laws and/or regulations include user protection provisions		
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP:	No	By NRA: Yes

BELGIUM

COUNTRY FACTS

Total population (million)	2016	11,31		
Population density (per sqkm)	2015	371,8		
GDP growth rate	2014	1,40%		
	2015	1,40%		
	2016	1,50%		
GDP per capita in PPS (in % EU-28 average)	2016	34.500 (118)		

ICT indicators,
% of individuals
aged 16-74
(2016)

82%83%

87%82%

64%49%

55%48%

57%55%

37%18%

Broadband

Internet usage

Internet banking

e-government

e-commerce

e-commerce, cross
border intra EU

■ BE ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic and international	197*	Parcel & express items per capita, domestic and	15
--	------	---	----

* Including press.

Volume, 2016 (million items)

2.229

Domestic,
outbound and
inbound cross-
border letter
post

119

Domestic and
inbound cross-
border parcel
& express

53

Outbound
cross-border
parcel &
express

Volume index (2013=100%)

210%

160%

110%

60%

2013

2014

2015

2016

Letters (domestic)

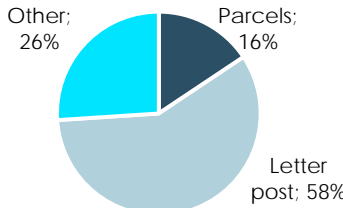
Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	Very high	End-to-end competitor	Marginal
SP letters	Very high	End-to-end competitor	Marginal
Bulk mail	Very high	Downstream competitor	Marginal
Direct mail	Very high	Downstream competitor	Marginal
Publications	Very high	End-to-end competitor	Low
Domestic parcel & express	15-20% based on revenues 25-30% based on volumes	End-to-end competitor	Intense
B2C	Confidential	End-to-end competitor	Intense
B2B	Confidential	End-to-end competitor	Intense
C2C	Confidential	End-to-end competitor	Moderate
Outbound cross-border letter post	High	End-to-end competitor	Marginal
Outbound cross-border parcel & express	Moderate	End-to-end competitor	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	1	End-to-end competition	0	--
Parcels	6*	End-to-end competition	--	--

* minimum, large competitors

UNIVERSAL SERVICE								
Designated universal service provider								
Name of the universal service provider		bpost		<div>Revenue structure (2016)</div> 				
Legal status		Public limited company						
State ownership		51%						
Total revenue, 2016 (mEUR)		2.425						
EBIT, 2016 (mEUR)		496,5						
EBIT margin, 2016 (EBIT/Revenue)		20,5%						
Ensuring Universal Service								
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				0%				
Percentage of the population that does not receive delivery of parcels at the standard frequency				0%				
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No				
Authorization procedure within the universal service area				Bpost is designated until 2023				
Net cost study				Yes				
Existence of compensation fund to compensate USP for USO net costs				Not authorized				
Other methods of compensation				Direct compensation from public funds				
Scope of universal service								
Service	Ensured	Price regulated		Service standards set				
Single piece letter post (D+1)	Yes	Price cap for all items in this service category		Yes				
Bulk letters	Yes	Ex post for all items in this service category		No				
Direct mail	Yes	Ex post for all items in this service category		No				
Publications	Yes	--		No				
Single piece letter post (D+X)	--	--		--				
Basic parcel post (domestic)	Yes	Price cap for all items in this service category		Yes				
Bulk parcels	No	--		No				
Delivery frequency for letter post				5 days per week		Legally required delivery point		Letters must be delivered to the door of an addressee
Delivery frequency for parcels				5 days per week				
Universal service indicators								
Price trend (EUR)	2013	2016	Price, €					
20g D+1, domestic	0,77	0,79	— 20g D+1 — 20g D+1 EU					
20g D+X, domestic	--	--	1,60					
50g D+X, domestic	--	--	1,10					
20g D+1, EU	1,13	1,23	0,60					
5kg parcel, domestic	8,70	6,00*	2013 2014 2015 2016					
5kg parcel, cross-border (lowest tariff)	16,20	16,40						
* Online price. Offline price for 2016 was 8,80€								
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP			
Domestic target (D+1)*	95,0%	95,0%	2013	--	2013	--	--	
Actual performance (D+1)	95,7%	90,9%	2014	--	2014	--	--	
Postal outlets (total)	1.343	1.337	2015	--	2015	--	--	
Postal outlets per 10,000 inhabitants	1,2	1,2	2016	--	2016	--	--	
Share of post offices operated by USP	50%	50%						
* According to the Royal Decree approving the fifth management contract between bpost and the State (2013-2018). There is another objective of 93% based on the Royal Decree of 11 January 2006 as modified in 2014 on which the sanction regime is based.								
Employment								
	2016		Average annual change 2013-2016					
Headcount, total in the sector	36.500		1,22%					
Headcount, total at USP	24.850		-4,74%					
Share of civil servants	42,00%		-9,90%					

REGULATION			
Institutional framework			
Ministry for postal policy	Cabinet of the Deputy Prime Minister and Minister of Development Cooperation, Digital Agenda, Telecom and Postal Services		
Ministry for ownership of PPO	Cabinet of the Deputy Prime Minister and Minister of Development Cooperation, Digital Agenda, Telecom and Postal Services and the Federal Holding and Investment Company (sfpi/fpim)		
National regulatory authority	Belgian Institute for Postal Services and Telecommunications		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	--	Quality measurement method	Panel with RFID technology
National competition authority			
NRA is the primary enforcer of competition	No		
NRA/NCA cooperation	Share data: Yes		Regularly consult: Yes
Competition cases since 2013	Decision of the Belgian competition authority nr. 2012-P/K-32 of 10 December 2012*		
State aid cases since 2013	SA.42366; N1/2013*		
* Cases handled by EU institutions concerning a national postal market			
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP*: Yes	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes*: Yes	Post office boxes: Yes	Letter delivery boxes: Yes
	Parcel lockers: --	Sorting centers*: Yes	Return services: Yes
* bpost states that downstream access is not obligatory by law, but is given by bpost on a voluntary and non-discriminatory basis.			
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	Yes		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Required by law and verified in practice	Not required by law nor verified in practice
Special tariffs are available to consolidators?	Required by law and verified in practice	Required by law and verified in practice	Not required by law nor verified in practice
VAT rate for postal products not exempt	21%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+X, domestic)	--
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	Yes	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	Yes	Express parcel service	No
Publications	Yes		
Protection of users			
Protection of users by law	Yes Postal laws and/or regulations include user protection provisions		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	No		
Publication of annual complaint statistics	By USP: No	By NRA: Yes*	

BULGARIA

COUNTRY FACTS

Total population (million)	2016	7,15
Population density (per sqkm)	2015	66,2
GDP growth rate	2014	1,30%
	2015	3,60%
	2016	3,90%
GDP per capita in PPS (in % EU-28 average)	2016	6.000 (49)

ICT indicators,
% of individuals
aged 16-74
(2016)

Broadband	63%	83%
Internet usage	59%	82%
Internet banking	4%	49%
e-government	19%	48%
e-commerce	17%	55%
e-commerce, cross border intra EU	7%	18%

BG EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	3	Parcel & express items per capita, domestic	20
--	---	---	----

Volume, 2016 (million items)

Domestic and inbound cross-border letter post	31
Outbound cross-border letter post	5
Domestic and inbound cross-border parcel & express	145
Outbound cross-border parcel & express	2

Volume index (2013=100%)

2013	2014	2015	2016
Letters (domestic)			
Parcels (domestic)			

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	--	--	--
SP letters	86%	End-to-end competition	Moderate
Bulk mail	--	--	--
Direct mail	--	--	--
Publications	92%	--	--
Domestic parcel & express	5%	End-to-end competition	Intense
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	95%	End-to-end competition	Low
Outbound cross-border parcel & express	95%	End-to-end competition	Low

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	1	--	0	--
Parcels	1	--	0	--

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider		Bulgarian Posts		<div>Revenue structure (2016)</div> <div>Other; 24%</div> <div>Parcels; 8%</div> <div>Letter post; 68%</div>		
Legal status		Public limited company				
State ownership		100%				
Total revenue, 2016 (mEUR)		67				
EBIT, 2016 (mEUR)		-3,5				
EBIT margin, 2016 (EBIT/Revenue)		-5,3%				
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				--		
Percentage of the population that does not receive delivery of parcels at the standard frequency				--		
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No		
Authorization procedure within the universal service area				Individual license		
Net cost study				--		
Existence of compensation fund to compensate USP for USO net costs				Not authorized		
Other methods of compensation				Direct compensation from public funds		
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex ante for all items in this service category		Yes		
Bulk letters	No	No price regulation		No		
Direct mail	No	No price regulation		No		
Publications	Yes	Ex ante for all items in this service category		No		
Single piece letter post (D+2)	Yes	Ex ante for all items in this service category		Yes		
Basic parcel post (domestic)	Yes	Ex ante for all items in this service category		Yes		
Bulk parcels	No	No price regulation		No		
Delivery frequency for letter post				5 days per week	Legally required delivery point	Letters must be delivered to the door of an addressee
Delivery frequency for parcels				--		
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> <div><div>20g D+1</div><div>20g D+2</div><div>20g D+1 EU</div></div> <div>2013201420152016</div>			
20g D+1, domestic	0,43	0,43	0,9			
20g D+2, domestic	0,33	0,33	0,7			
50g D+2, domestic	0,33	0,33	0,5			
20g D+1, EU	0,92	0,92	0,3			
5kg parcel, domestic	1,64	1,64				
5kg parcel, cross-border (lowest tariff)	16,72	18,91				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	80,0%	80,0%	2013	127	2013	996
Actual performance (D+1)	50,7%	59,7%	2014	117	2014	685
Postal outlets (total)	2.981	2.980	2015	197	2015	2.437
Postal outlets per 10,000 inhabitants	4,1	4,2	2016	146	2016	7.031
Share of post offices operated by USP	100%	100%				
Employment						
		2016	Average annual change 2013-2016			
Headcount, total in the sector		22.400	1,38%			
Headcount, total at USP		10.508	-1,89%			
Share of civil servants		0%				

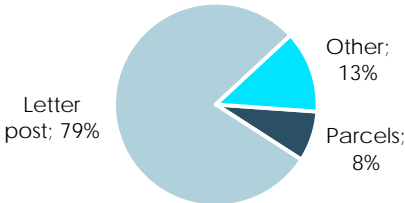
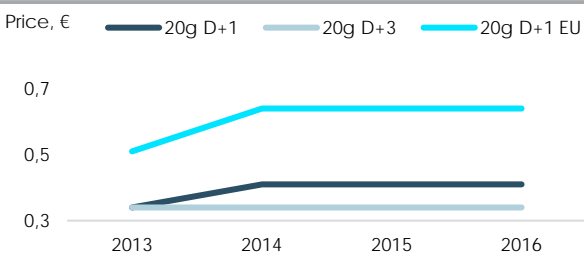
REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Transport, Information Technology and Communications		
Ministry for ownership of PPO	Ministry of Transport, Information Technology and Communications		
National regulatory authority	Communications Regulation Commission		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	--
NRA authority to order remedies	No	Publishes quality of service results annually	--
NRA sets monitoring standards	--	Quality measurement method	--
National competition authority			
NRA is the primary enforcer of competition	No		
NRA/NCA cooperation	Share data: ---	Regularly consult: ---	
Competition cases since 2013	--		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: --	Post Codes: --	Addr. database: No
	Public letter-post collection boxes: --	Post office boxes: No	Letter delivery boxes: Yes
	Parcel lockers: --	Sorting centers: --	Return services: --
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	No		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Not required by law nor verified in practice	--	Not required by law nor verified in practice
Special tariffs are available to consolidators?	Required by law and verified in practice	--	Required by law and verified in practice
VAT rate for postal products not exempt	20%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+2, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	No	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	Yes		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	No		
Publication of annual complaint statistics	By USP: No	By NRA: Yes	

CROATIA					
COUNTRY FACTS					
Total population (million)	2016	4,19			
Population density (per sqkm)	2015	74,4			
GDP growth rate	2014	-0,10%			
	2015	2,30%			
	2016	3,20%			
GDP per capita in PPS (in % EU-28 average)	2016	11.000 (60)			
ICT indicators, % of individuals aged 16-74 (2016)					
	Broadband				
	Internet usage				
	Internet banking				
	e-government				
	e-commerce				
	e-commerce, cross border intra EU				
Source: European Commission					
MARKET FACTS					
Market size and demand (2016)					
Letter post items per capita, domestic	68	Parcel & express items per capita, domestic	5		
Volume, 2016 (million items)					
Market structure and key market players					
	Market share of incumbent	Type of competition	Perceived level of competition by NRA		
Domestic letter post	Confidential	Confidential	Confidential		
SP letters					
Bulk mail					
Direct mail					
Publications					
Domestic parcel & express					
B2C					
B2B					
C2C					
Outbound cross-border letter post					
Outbound cross-border parcel & express					
	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition	
Letter post	confidential				
Parcels					

UNIVERSAL SERVICE							
Designated universal service provider							
Name of the universal service provider		Hrvatska pošta		<div>Revenue structure (2016)</div> <div><div>Postal services; 63%</div><div>Other*; 37%</div></div>			
Legal status		State enterprise					
State ownership		100%					
Total revenue, 2016 (mEUR)		226					
EBIT, 2016 (mEUR)		18,2					
EBIT margin, 2016 (EBIT/Revenue)		8%					
*Other contains financial services and retail makes up 14% of other. Source: Hrvatska pošta, 2016 Annual Report							
Ensuring Universal Service							
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				2-3%			
Percentage of the population that does not receive delivery of parcels at the standard frequency				2-3%			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No			
Authorization procedure within the universal service area				Individual license			
Net cost study				Yes			
Existence of compensation fund to compensate USP for USO net costs				Not authorized			
Other methods of compensation				Direct compensation from public funds			
Scope of universal service							
Service	Ensured	Price regulated		Service standards set			
Single piece letter post (D+1)	Yes	Price cap where dominant, otherwise ex post		Yes			
Bulk letters	No	No price regulation		--			
Direct mail	No	No price regulation		--			
Publications	No	No price regulation		--			
Single piece letter post (D+3)	Yes	Price cap where dominant, otherwise ex post		Yes			
Basic parcel post (domestic)	Yes	No price regulation		Yes			
Bulk parcels	No	No price regulation		--			
Delivery frequency for letter post		5 days per week		Legally required delivery point	Letters must be delivered to the door of an addressee Parcels must be delivered to addressee for appropriate charge to addressee		
Delivery frequency for parcels		5 days per week					
Universal service indicators							
Price trend (EUR)	2013	2016	Price, €				
20g D+1, domestic	0,60	0,60	20g D+1				
20g D+3, domestic	0,40	0,40	20g D+3				
50g D+3, domestic	0,40	0,40	20g D+1 EU				
20g D+1, EU	1,45	1,45					
5kg parcel, domestic	3,35	3,35					
5kg parcel, cross-border (lowest tariff)	29,35	22,00					
<div><div></div><div></div><div></div></div>							
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP		
Domestic target (D+1)	85,0%	85,0%	2013	46	2013	30.105	
Actual performance (D+1)	85,2%	85,2%	2014	58	2014	30.574	
Postal outlets (total)	1.018	1.016	2015	70	2015	35.609	
Postal outlets per 10,000 inhabitants	2,4	2,4	2016	90	2016	42.119	
Share of post offices operated by USP	100%	100%					
Employment							
		2016	Average annual change 2013-2016				
Headcount, total in the sector		12.600	2,50%				
Headcount, total at USP		8.078	2,99%				
Share of civil servants		0%					

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of the Sea, Transport and Infrastructure		
Ministry for ownership of PPO	Ministry of the Sea, Transport and Infrastructure		
National regulatory authority	Croatian Regulatory Authority for Network Industries		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	No
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	Panel with manual reporting
National competition authority			
NRA is the primary enforcer of competition		No	
NRA/NCA cooperation		Share data: Yes	Regularly consult: Yes
Competition cases since 2013		--	
State aid cases since 2013		--	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes: No	Post office boxes: No	Letter delivery boxes: No
	Parcel lockers: No	Sorting centers: Yes	Return services: Yes
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Not required by law nor verified in practice	Not required by law nor verified in practice	Not required by law nor verified in practice
Special tariffs are available to consolidators?	--	--	--
Affordable tariffs defined:	--	Affordable tariffs monitored:	--
Cost oriented tariffs defined:	--	Cost oriented tariffs monitored:	Price caps ensure cost-orientation
Transparent tariffs defined:	Requirement to publish tariffs	Transparent tariffs monitored:	--
Non-discrimination defined:	Tariffs and applicable discounts should be offered on the same basis to all postal service users under similar conditions	Non-discrimination monitored:	--
VAT rate for postal products not exempt		25%	
VAT exemption is applied		On universal services provided by USP	
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+3, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	--	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	--
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	No		
Protection of users			
Protection of users by law	Yes Postal laws and/or regulations include user protection provisions		
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: Yes	By NRA: Yes	

CYPRUS					
COUNTRY FACTS					
Total population (million)	2016	0,85			
Population density (per sqkm)	2015	92			
GDP growth rate	2014	-1,40%			
	2015	2,00%			
	2016	3,00%			
GDP per capita in PPS (in % EU-28 average)	2016	21.500 (83)			
ICT indicators, % of individuals aged 16-74 (2016)					
	Broadband				
	Internet usage				
	Internet banking				
	e-government				
	e-commerce				
	e-commerce, cross border intra EU				
Source: European Commission					
MARKET FACTS					
Market size and demand (2016)					
Letter post items per capita, domestic	51	Parcel & express items per capita, domestic	4		
Volume, 2016 (million items)					
Market structure and key market players					
	Market share of incumbent	Type of competition	Perceived level of competition by NRA		
Domestic letter post	100%	--	--		
SP letters	100%	--	--		
Bulk mail	100%	--	--		
Direct mail	--	--	--		
Publications	100%	--	--		
Domestic parcel & express	2%	--	--		
B2C	--	--	--		
B2B	--	--	--		
C2C	--	--	--		
Outbound cross-border letter post	100%	--	--		
Outbound cross-border parcel & express	10%	--	--		
	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition	
Letter post	--	--	--	--	
Parcels	--	--	--	--	

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider		Cyprus Post		<div>Revenue structure (2016)</div>  <div>Letter post; 79% Other; 13% Parcels; 8%</div>		
Legal status		Government department				
State ownership		100%				
Total revenue, 2016 (mEUR)		28,6				
EBIT, 2016 (mEUR)		3,0				
EBIT margin, 2016 (EBIT/Revenue)		10,6%				
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				--		
Percentage of the population that does not receive delivery of parcels at the standard frequency				--		
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No		
Authorization procedure within the universal service area				They must submit and application for authorization to the Commissioner		
Net cost study				--		
Existence of compensation fund to compensate USP for USO net costs				Authorized but not established		
Other methods of compensation				No		
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex ante for all items in this service category		Yes		
Bulk letters	Yes	Ex ante for all items in this service category		No		
Direct mail	--	--		No		
Publications	Yes	Ex ante for all items in this service category		No		
Single piece letter post (D+3)	Yes	Ex ante for all items in this service category		No		
Basic parcel post (domestic)	Yes	Ex ante for all items in this service category		No		
Bulk parcels	Yes	Ex ante for all items in this service category		No		
Delivery frequency for letter post				5 days per week	Legally required delivery point	Letters must be delivered to the door of an addressee
Delivery frequency for parcels				No specific requirement		
Universal service indicators						
Price trend (EUR)	2013	2016		Price, €		
20g D+1, domestic	0,34	0,41		20g D+1		
20g D+3, domestic	0,34	0,34		20g D+3		
50g D+3, domestic	0,43	0,34		20g D+1 EU		
20g D+1, EU	0,51	0,64				
5kg parcel, domestic	2,57	5,40				
5kg parcel, cross-border (lowest tariff)	37,59	29,00				
						
Quality of service	2013	2016		Number of user complaints sent to NRA		Number of user complaints sent to USP
Domestic target (D+1)	90,0%	90,0%		2013	--	2013
Actual performance (D+1)	87,3%	90,0%		2014	--	2014
Postal outlets (total)	1.132	1.093		2015	--	2015
Postal outlets per 10,000 inhabitants	13,1	12,9		2016	--	2016
Share of post offices operated by USP	100%	100%				
Employment						
		2016		Average annual change 2013-2016		
Headcount, total in the sector		1.600		7,17%		
Headcount, total at USP		650		-18,71%		
Share of civil servants		44%		-2,03%		

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Transport Communications and Works		
Ministry for ownership of PPO	Ministry of Transport Communications and Works		
National regulatory authority	Office of the Commissioner for Electronic Communication and Postal Regulation		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	--
National competition authority			
NRA is the primary enforcer of competition	--		
NRA/NCA cooperation	Share data: Yes	Regularly consult: Yes	
Competition cases since 2013	Commission for the Protection of Competition 22/2014		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law*	Downstream access to USP: --	Post Codes: No	Addr. database: Yes
	Public letter-post collection boxes: No	Post office boxes: Yes	Letter delivery boxes: Yes
	Parcel lockers: No	Sorting centers: --	Return services: --
* According to article 126A of Law 112(I)/2004, though no such order has been issued yet.			
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	Yes		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Not required by law but verified in practice	Required by law and verified in practice
Special tariffs are available to consolidators?	--	--	--
VAT rate for postal products not exempt	--		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+3, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	Yes	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	Yes
Insured mail	Yes	Express letter service	Yes
Direct mail	--	Express parcel service	Yes
Publications	Yes		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: Yes	By NRA: Yes	

CZECH REPUBLIC

COUNTRY FACTS

Total population (million)	2016	10,55
Population density (per sqkm)	2015	136,6
GDP growth rate	2014	2,70%
	2015	5,30%
	2016	2,60%
GDP per capita in PPS (in % EU-28 average)	2016	16.500 (88)

ICT indicators,
% of individuals
aged 16-74
(2016)

Broadband	80%	83%
Internet usage	82%	82%
Internet banking	51%	49%
e-government	36%	48%
e-commerce	47%	55%
e-commerce, cross border intra EU	9%	18%

■ CZ ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	47	Parcel & express items per capita, domestic	7
--	----	---	---

Source: European Commission

Volume, 2016 (million items)

495

Domestic letter post

71

Domestic parcel & express

Volume index (2013=100%)

2013	2014	2015	2016
1,0	1,0	1,1	1,2

— Letters (domestic) — Parcels (domestic)

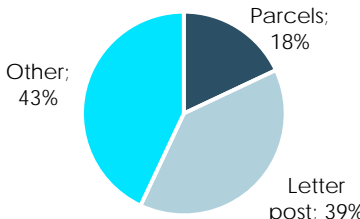
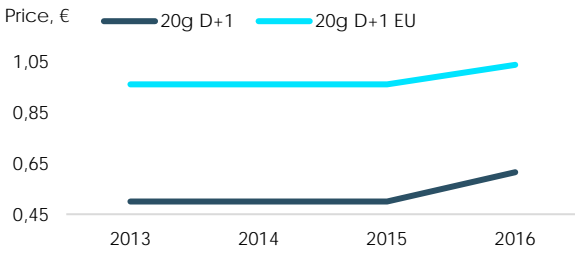
Source: European Commission. Note: outbound parcel & express value from 2015.

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	Confidential	Confidential	
SP letters			
Bulk mail			
Direct mail			
Publications			
Domestic parcel & express			
B2C			
B2B			
C2C			
Outbound cross-border letter post			
Outbound cross-border parcel & express			

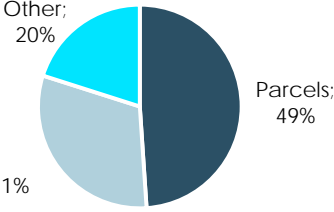
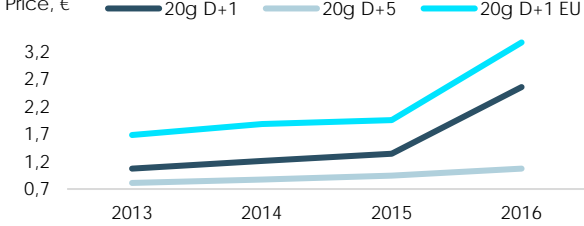
	Market Entries since 2013*	Type of competition	Market Exits since 2013	Type of competition
Letter post	27	--	10	--
Parcels	28	End-to-end competition	8	--

* The NRA has information about providers since 2013. Some of the operators provided postal services also before 2013.

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	Česká pošta, s.p.		<div>Revenue structure (2016)</div> 			
Legal status	State enterprise					
State ownership	100%					
Total revenue, 2016 (mEUR)	716					
EBIT, 2016 (mEUR)	8,0					
EBIT margin, 2016 (EBIT/Revenue)	1,1%					
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			--			
Percentage of the population that does not receive delivery of parcels at the standard frequency			--			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			Yes			
Authorization procedure within the universal service area			General authorisation			
Net cost study			--			
Existence of compensation fund to compensate USP for USO net costs			Not authorized			
Other methods of compensation			Other			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex post for all items in this service category		Yes		
Bulk letters	No	No price regulation		--		
Direct mail	No	No price regulation		--		
Publications	No	No price regulation		--		
Single piece letter post (D+X)	No	No price regulation		--		
Basic parcel post (domestic)	Yes	Ex post for all items in this service category		Yes		
Bulk parcels	No	No price regulation		--		
Delivery frequency for letter post			5 days per week	Legally required delivery point	Letters must be delivered to the door of an addressee	
Delivery frequency for parcels			5 days per week			
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> 			
20g D+1, domestic	0,50	0,62				
20g D+X, domestic	--	--				
50g D+X, domestic	--	--				
20g D+1, EU	0,96	1,04				
5kg parcel, domestic	2,27	3,12				
5kg parcel, cross-border (lowest tariff)	12,50	12,50				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	92,0%	92,0%	2013	241	2013	1.850
Actual performance (D+1)	93,1%	93,9%	2014	584	2014	2.481
Postal outlets (total)	Confidential		2015	365	2015	1.993
Postal outlets per 10,000 inhabitants			2016	275	2016	1.991
Share of post offices operated by USP	--	--				
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	44.700		-2,14%			
Headcount, total at USP (2015)	58.345		-2,36%			
Share of civil servants	0%					

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Industry and Trade (MIT)		
Ministry for ownership of PPO	Ministry of Interior		
National regulatory authority	Czech Telecommunication Office		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	No
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets and minimum requirements	Quality measurement method	--
National competition authority			
NRA is the primary enforcer of competition		No	
NRA/NCA cooperation		Share data: Yes	Regularly consult: No
Competition cases since 2013			
State aid cases since 2013		SA.45281(2016/PN) - Czech Post - State compensation of the USO net costs for 2013-2017; SA.42004 - State compensation for electronic data-boxes for 2009-2017	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes: No	Post office boxes: Yes	Letter delivery boxes: Yes
	Parcel lockers: No	Sorting centers: No	Return services: Yes
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Not required by law nor verified in practice	Not required by law nor verified in practice	Not required by law nor verified in practice
Special tariffs are available to consolidators?	Not required by law nor verified in practice	Not required by law nor verified in practice	Not required by law nor verified in practice
VAT rate for postal products not exempt	21%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+X, domestic)	No
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	No	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	No		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: Yes	By NRA: --	

DENMARK					
COUNTRY FACTS					
Total population (million)	2016	5,71			
Population density (per sqkm)	2015	132,4			
GDP growth rate	2014	1,60%			
	2015	1,60%			
	2016	2,00%			
GDP per capita in PPS (in % EU-28 average)	2016	45.800 (124)			
ICT indicators, % of individuals aged 16-74 (2016)					
	Broadband	92%	83%		
	Internet usage	97%	82%		
	Internet banking	88%	49%		
	e-government	88%	48%		
	e-commerce	82%	55%		
	e-commerce, cross border intra EU	39%	18%		
■ DK ■ EU-28					
Source: European Commission					
MARKET FACTS					
Market size and demand (2016)					
Letter post items per capita, domestic	Confidential	Parcel & express items per capita, domestic	Confidential		
Volume, 2016 (million items)					
Confidential					
Market structure and key market players					
	Market share of incumbent	Type of competition	Perceived level of competition by NRA		
Domestic letter post	Confidential	Confidential	Confidential		
SP letters					
Bulk mail					
Direct mail					
Publications					
Domestic parcel & express					
B2C					
B2B					
C2C					
Outbound cross-border letter post					
Outbound cross-border parcel & express					
	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition	
Letter post	0	--	--	--	
Parcels	--	--	--	--	

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	Post Danmark A/S		<div>Revenue structure (2016)</div>  <div>Letter post; 31%</div>			
Legal status	Limited company					
State ownership	Owned by PostNord AB. Co-owned by the Danish and Swedish state					
Total revenue, 2016 (mEUR)	911					
EBIT, 2016 (mEUR)	-181,0					
EBIT margin, 2016 (EBIT/Revenue)	-6,5%					
Source: Post Danmark A/S, 2016 Annual Report						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			--			
Percentage of the population that does not receive delivery of parcels at the standard frequency			<1%			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			No			
Authorization procedure within the universal service area			Designation and individual license			
Net cost study			No			
Existence of compensation fund to compensate USP for USO net costs			Not authorized			
Other methods of compensation			Other			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	No	Ex ante for all items in this service category		No		
Bulk letters	No	No price regulation		No		
Direct mail	No	No price regulation		No		
Publications	Yes	No price regulation		Yes		
Single piece letter post (D+5)	Yes	Ex ante for all items in this service category		Yes		
Basic parcel post (domestic)	Yes	No price regulation		No		
Bulk parcels	No	No price regulation		No		
Delivery frequency for letter post	No specific requirement		Legally required delivery point	--		
Delivery frequency for parcels	5 days per week					
Universal service indicators						
Price trend (EUR)	2013	2016	Price, €			
20g D+1, domestic*	1,07	2,55				
20g D+5, domestic	0,81	1,07				
50g D+5, domestic	0,81	1,07				
20g D+1, EU	1,68	3,36				
5kg parcel, domestic	14,77	13,42				
5kg parcel, cross-border**	37,58	40,94				
* non-USO from 2016; ** lowest tariff category						
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	--	--	2013	115	2013	25.814
Actual performance (D+1)	93,2%	86,8%	2014	205	2014	16.011
Postal outlets (total)	779	1.077	2015	220	2015	19.407
Postal outlets per 10,000 inhabitants	1,4	1,9	2016	180	2016	11.892
Share of post offices operated by USP	--	--				
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	22.200		0,15%			
Headcount, total at USP	9.314		-9,88%			
Share of civil servants	30%		-10,78%			

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Transport, Building and Housing		
Ministry for ownership of PPO	Ministry of Transport, Building and Housing		
National regulatory authority	Danish Transport, Construction, and Housing Authority		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	No	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	Panel with RFID technology
National competition authority			
NRA is the primary enforcer of competition		No	
NRA/NCA cooperation		Share data: Yes	Regularly consult: No
Competition cases since 2013		Selectively low prices in respect of non-addressed mail (Supreme court, case no 2/2008); Retroactive rebates offered to direct mail customers (Competition Council, case no 2009-0019768); Individual rebates offered to three magazine mail customers (Competition Council, case no 16/03595)	
State aid cases since 2013		--	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes: No	Post office boxes: Yes	Letter delivery boxes: Yes
	Parcel lockers: Yes	Sorting centers: No	Return services: No
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		No	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law but not verified in practice	Required by law but not verified in practice	Required by law but not verified in practice
Special tariffs are available to consolidators?	--	--	--
VAT rate for postal products not exempt		25%	
VAT exemption is applied		On universal services provided by USP	
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	No	Basic letter post (D+5, domestic)	Yes
Basic letter post (D+1, cross-border)	No	Basic parcel post (domestic)	No
Bulk letters	No	Basic parcel post (cross-border)	No
Registered mail	No	Bulk parcels	No
Insured mail	No	Express letter service	Yes
Direct mail	No	Express parcel service	Yes
Publications	No		
Protection of users			
Protection of users by law		Yes Both postal and consumer protection laws apply to postal users	
Implementing authority(ies)		Both NRA and NCPA enforce user protection provisions for postal services	
Postal operators required to provide reimbursement and/or compensation where warranted		Yes	
Publication of annual complaint statistics		By USP: Yes	By NRA: No

ESTONIA

COUNTRY FACTS

Total population (million)	2016	1,32
Population density (per sqkm)	2015	30,3
GDP growth rate	2014	2,90%
	2015	1,70%
	2016	2,10%
GDP per capita in PPS (in % EU-28 average)	2016	13.700 (75)

ICT indicators, % of individuals aged 16-74 (2016)

85%83%

87%82%

79%49%

77%48%

56%55%

23%18%

Broadband

Internet usage

Internet banking

e-government

e-commerce

e-commerce, cross border intra EU

EEEU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	62	Parcel & express items per capita, domestic	5
--	----	---	---

Volume, 2016 (million items)

81,3

Domestic letter post

7,1

Domestic parcel & express

Volume index (2013=100%)

1,6

1,1

0,6

2013

2014

2015

2016

Letters (domestic)

Parcels (domestic)

Note: international volumes are confidential.

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	Confidential	Confidential	Confidential
SP letters			
Bulk mail			
Direct mail			
Publications			
Domestic parcel & express			
B2C			
B2B			
C2C			
Outbound cross-border letter post			
Outbound cross-border parcel & express			

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	1	End-to-end competition	5	End-to-end competition
Parcels	13	End-to-end competition	4	End-to-end competition

UNIVERSAL SERVICE							
Designated universal service provider							
Name of the universal service provider		Eesti Post		<div>Revenue structure (2016)</div> <div><div><div>Postal services; 32%</div><div>Parcels; 33%</div><div>Other*; 35%</div></div></div>			
Legal status		Public limited company					
State ownership		100%					
Total revenue, 2016 (mEUR)		92,6					
EBIT, 2016 (mEUR)		1,3					
EBIT margin, 2016 (EBIT/Revenue)		1,4%					
* International business services makes up 86% of other. Source: Eesti Post 2016 Annual Report							
Ensuring Universal Service							
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				very little			
Percentage of the population that does not receive delivery of parcels at the standard frequency				very little			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No			
Authorization procedure within the universal service area				Designation, individual license			
Net cost study				Yes			
Existence of compensation fund to compensate USP for USO net costs				Established			
Other methods of compensation				No			
Scope of universal service							
Service	Ensured	Price regulated		Service standards set			
Single piece letter post (D+1)	Yes	Price cap for all items in this service category		Yes			
Bulk letters	No	Ex post for all items in this service category		No			
Direct mail	No	--		No			
Publications	No	--		No			
Single piece letter post (D+X)	Yes	Price cap for all items in this service category		Yes			
Basic parcel post (domestic)	Yes	Price cap for all items in this service category		No			
Bulk parcels	No	Ex post for all items in this service category		No			
Delivery frequency for letter post		5 days per week		Legally required delivery point		Letters must be delivered to the door of an addressee	
Delivery frequency for parcels		5 days per week					
Universal service indicators							
Price trend (EUR)	2013	2016		Price, €			
20g D+1, domestic	0,45	0,65		— 20g D+1 — 20g D+1 EU			
20g D+X, domestic	--	--		1,4			
50g D+X, domestic	--	--		0,9			
20g D+1, EU	1,00	1,40		0,4			
5kg parcel, domestic	--	--		2013 2014 2015 2016			
5kg parcel, cross-border (lowest tariff)	--	--					
Quality of service	2013	2016		Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	90,0%	90,0%		2013	62	2013	17
Actual performance (D+1)	88,7%	88,6%		2014	53	2014	1.12
Postal outlets (total)	338	320		2015	38	2015	1.45
Postal outlets per 10,000 inhabitants	2,6	2,4		2016	62	2016	1.49
Share of post offices operated by USP	77%	47%					
Employment							
		2016		Average annual change 2013-2016			
Headcount, total in the sector		3.700		3,89%			
Headcount, total at USP		1.804		-4,31%			
Share of civil servants		0%		--			

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Economic Affairs and Communications		
Ministry for ownership of PPO	Ministry of Economic Affairs and Communications		
National regulatory authority	Estonian Competition Authority		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	No	Quality measurement method	Panel with manual reporting
National competition authority			
NRA is the primary enforcer of competition		Yes. NRA and NCA is the same entity in Estonia.	
NRA/NCA cooperation		Share data: Yes	Regularly consult: Yes
Competition cases since 2013		OU CMS Direct 2013; AS ONOFF Eesti; AS Express Post	
State aid cases since 2013		AS Express Post	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: Yes	Addr. database: No
	Public letter-post collection boxes: No	Post office boxes: Yes	Letter delivery boxes: No
	Parcel lockers: No	Sorting centers: Yes	Return services: Yes
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Not required by law nor verified in practice	Required by law and verified in practice
Special tariffs are available to consolidators?	Not required by law nor verified in practice	Not required by law nor verified in practice	Not required by law nor verified in practice
VAT rate for postal products not exempt		20%	
VAT exemption is applied		On universal services provided by USP	
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+X, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	No	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	No		
Protection of users			
Protection of users by law		Yes Both postal and consumer protection laws apply to postal users	
Implementing authority(ies)		Both NRA and NCPA enforce user protection provisions for postal services	
Postal operators required to provide reimbursement and/or compensation where warranted		Yes	
Publication of annual complaint statistics		By USP: Yes	By NRA: Yes

FINLAND

COUNTRY FACTS

Total population (million)	2016	5,49
Population density (per sqkm)	2015	18
GDP growth rate	2014	-0,60%
	2015	0,10%
	2016	2,10%
GDP per capita in PPS (in % EU-28 average)	2016	34.700 (109)

ICT indicators,
% of individuals
aged 16-74
(2016)

91%83%

94%82%

86%49%

82%48%

67%55%

34%18%

Broadband

Internet usage

Internet banking

e-government

e-commerce

e-commerce, cross
border intra EU

FI

EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	273	Parcel & express items per capita, domestic	12
--	-----	---	----

Volume, 2016 (million items)

1540

15

64

Domestic and
inbound cross-
border letter
post

Outbound
cross-border
letter post

Domestic
parcel &
express

Volume index (2013=100%)

1,2

1

0,8

0,6

2013

2014

2015

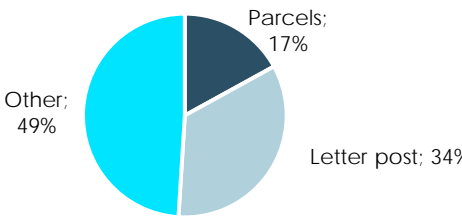
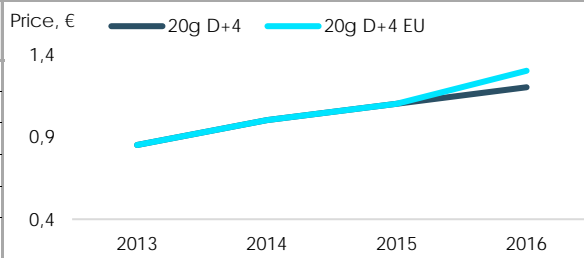
2016

Letters (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	70%	End-to-end competition	--
SP letters	100%	--	--
Bulk mail	--	--	--
Direct mail	--	--	--
Publications	--	--	--
Domestic parcel & express	60%	--	--
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	--	--	--
Outbound cross-border parcel & express	--	--	--

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	13	Downstream competition	0	--
Parcels	--	--	--	--

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	Posti Ltd		<div>Revenue structure (2016)</div> 			
Legal status	Public limited company					
State ownership	100%					
Total revenue, 2016 (mEUR)	1.608					
EBIT, 2016 (mEUR)	30,7					
EBIT margin, 2016 (EBIT/Revenue)	1,9%					
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			< 1% (91 households on average)			
Percentage of the population that does not receive delivery of parcels at the standard frequency			--			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			--			
Authorization procedure within the universal service area			Designation			
Net cost study			--			
Existence of compensation fund to compensate USP for USO net costs			Not authorized			
Other methods of compensation			No			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+4)	Yes	Ex post for all items in this service category		Yes		
Bulk letters	No	No price regulation		No		
Direct mail	No	No price regulation		No		
Publications	No	No price regulation		No		
Single piece letter post (D+X)	--	--		--		
Basic parcel post (domestic)	Yes	Ex post for all items in this service category		No		
Bulk parcels	No	No price regulation		No		
Delivery frequency for letter post	5 days per week		Legally required	--		
Delivery frequency for parcels	--		delivery point			
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> 			
20g D+4, domestic	0,85	1,20				
20g D+X, domestic	--	--				
50g D+X, domestic	--	--				
20g D+4, EU	0,85	1,30				
5kg parcel, domestic	0,00	9,60				
5kg parcel, cross-border (lowest tariff)	0,00	25,00				
Quality of service						
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+4)	80,0%	80,0%	2013	--	2013	--
Actual performance (D+4)	90,2%	--	2014	--	2014	--
Postal outlets (total)	1.311	902	2015	--	2015	--
Postal outlets per 10,000 inhabitants	2,4	1,6	2016	--	2016	--
Share of post offices operated by USP	--	3%				
Note: domestic target information provided by the USP.						
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	20.000		-0,98%			
Headcount, total at USP	16.220		-4,48%			
Share of civil servants	0%					

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Transport and Communications		
Ministry for ownership of PPO	Prime Minister's Office, Ownership Steering Department		
National regulatory authority	Finnish Communications Regulatory Authority		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets and minimum requirements	Quality measurement method	Panel with manual reporting
National competition authority			
NRA is the primary enforcer of competition	No		
NRA/NCA cooperation	Share data: No	Regularly consult: No	
Competition cases since 2013	SSM (Suomen suoramarkkinointi)		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: (USP: No)	Post Codes: Yes	Addr. database: No (USP: Yes)
	Public letter-post collection boxes: No	Post office boxes: No (USP: Yes)	Letter delivery boxes: No
	Parcel lockers: No	Sorting centers: No	Return services: No
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	Yes		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	--	--	--
Special tariffs are available to consolidators?	--	--	--
VAT rate for postal products not exempt	24%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+4, domestic)	Yes	Basic letter post (D+X, domestic)	--
Basic letter post (D+4, cross-border)	Yes	Basic parcel post (domestic)	No
Bulk letters	No	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	No		
Note: VAT exemption is not applied to basic services listed above if the service is based on a contract and invoiced from the customer.			
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	NCPA enforces user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: Yes	By NRA: No	

FRANCE

COUNTRY FACTS

Total population (million)	2016	66,76
Population density (per sqkm)	2015	105,3
GDP growth rate	2014	0,90%
	2015	1,10%
	2016	1,20%
GDP per capita in PPS (in % EU-28 average)	2016	31.700 (104)

ICT indicators,
% of individuals
aged 16-74
(2016)

79%

83%

Broadband

86%

82%

Internet usage

59%

49%

Internet banking

66%

48%

e-government

66%

55%

e-commerce

22%

18%

e-commerce, cross
border intra EU

■ FR ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	182	Parcel & express items per capita, domestic	6
--	-----	---	---

Volume, 2016 (million items)

12123

Domestic letter post

297

Outbound cross-border letter post

23

Outbound cross-border parcel & express

Volume index (2013=100%)

1,2

1

0,8

0,6

2013

2014

2015

2016

— Letters (domestic)

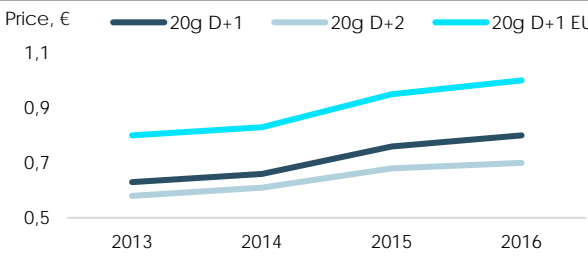
Note: parcel & express items per capita information comes from the USP. It includes export figures and excludes express.

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	--	--	--
SP letters	>99%	--	Marginal
Bulk mail	>99%	End-to-end competition	Marginal
Direct mail	>99%	End-to-end competition	Marginal
Publications	--	End-to-end competition	--
Domestic parcel & express	45%	--	Intense
B2C	--	--	Intense
B2B	--	--	--
C2C	--	--	Low
Outbound cross-border letter post	--	--	Moderate
Outbound cross-border parcel & express	--	--	--

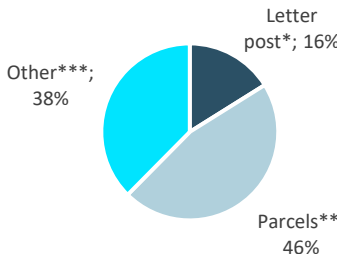
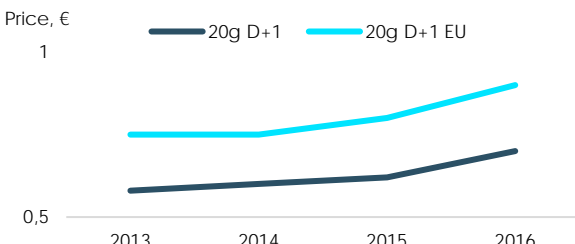
	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	16	End-to-end competition	0	End-to-end competition
Parcels	--	End-to-end competition*	--	--

* Information comes from the USP

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	La Poste		<div>Revenue structure (2016)</div> <div><div><div></div><div></div></div><div>Other; 51%</div><div>Services - Mail - Parcels; 49%</div></div>			
Legal status	Public limited company					
State ownership	The State: 74%; The "Caisse des Dépôts et des Consignations": 26%					
Total revenue, 2016 (mEUR)	23.300*					
EBIT, 2016 (mEUR)	975*					
EBIT margin, 2016 (EBIT/Revenue)	4,2%					
* Group level financials Source: La Poste 2016 Annual Report						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			< 0,1 %			
Percentage of the population that does not receive delivery of parcels at the standard frequency			< 0,1 %			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			No			
Authorization procedure within the universal service area			La Poste was designed by the law starting on 1st January 2011 for 15 years. Besides, it holds an individual licence for letter post services.			
Net cost study			No			
Existence of compensation fund to compensate USP for USO net costs			Authorized but not established			
Other methods of compensation			No			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Price cap		Yes		
Bulk letters	Yes	Price cap		No		
Direct mail	No	No price regulation		No		
Publications	Yes	Price cap		Yes		
Single piece letter post (D+2)	Yes	Price cap		Yes		
Basic parcel post (domestic)	Yes	Price cap		Yes		
Bulk parcels	No	No price regulation		No		
Delivery frequency for letter post			6 days per week	Legally required delivery point	Letters must be delivered to the door of an addressee	
Delivery frequency for parcels			6 days per week			
Universal service indicators						
Price trend (EUR)	2013	2016	Price, € 			
20g D+1, domestic	0,63	0,80				
20g D+2, domestic	0,58	0,70				
50g D+2, domestic	0,97	1,40				
20g D+1, EU	0,80	1,00				
5kg parcel, domestic	11,90	12,50				
5kg parcel, cross-border (lowest tariff)	28,95	21,20				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	85,0%	85,0%	2013	71	2013	1.419.175
Actual performance (D+1)	87,4%	84,9%	2014	44	2014	1.302.243
Postal outlets (total)	17.054	17.133	2015	39	2015	1.319.303
Postal outlets per 10,000 inhabitants	2,6	2,6	2016	52	2016	1.378.249
Share of post offices operated by USP	57%	52%				
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	249.900		1,37%			
Headcount, total at USP	220.572		-2,60%			
Share of civil servants	43,3%		-6,15%			

REGULATION				
Institutional framework				
Ministry for postal policy	Ministry of Economy and Finance (Ministère de l'économie et des finances)			
Ministry for ownership of PPO	(agency of state participations) Agence des Participations de l'Etat			
National regulatory authority	Regulation Authority for Electronic Communications and Posts (Autorité de régulation des communications électroniques et des postes)			
Authority of NRA concerning quality of service				
NRA authority to levy fines	Yes	Measures quality of service annually	No*	
NRA authority to order remedies	Yes	Publishes quality of service results annually	No*	
NRA sets monitoring standards	No**	Quality measurement method	--	
* Information from the USP. ** The minister in charge of postal affairs sets the QS level.				
National competition authority				
NRA is the primary enforcer of competition	No			
NRA/NCA cooperation	Share data: Yes	Regularly consult: When relevant		
Competition cases since 2013	Messagerie - décision de l'ADLC n° 15-D-19 du 15 décembre 2015; ,Contrats commerciaux - décision de la Cour d'Appel Paris du 4 avril 2013; Kiala - décision de la Cour d'Appel Paris du 4 avril 2013décision de l'ADLC du 12 mai 2011; Recy'go			
State aid cases since 2013	SA.36512; SA.41147; SA 49469			
Access to postal infrastructure by competitors				
Types of access to USP infrastructure required by Law	Downstream access to USP:	No*	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes:	No	Post office boxes: Yes	Letter delivery boxes: Yes
	Parcel lockers:	No*	Sorting centers: No*	Return services: No*
* Answer provided by the USP.				
Regulation of cross-border services				
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		No (USP: Yes)		
Regulation of prices				
	Bulk letters	Direct mail	Bulk parcels	
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Required by law and verified in practice	Not required by law nor verified in practice	
Special tariffs are available to consolidators?	--	--	Not required by law nor verified in practice	
VAT rate for postal products not exempt	20%			
VAT exemption is applied	On universal services provided by USP			
	VAT Exempt		VAT Exempt	
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+2, domestic)	Yes	
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes	
Bulk letters	Yes	Basic parcel post (cross-border)	Yes	
Registered mail	Yes	Bulk parcels	No	
Insured mail	Yes	Express letter service	No	
Direct mail	No	Express parcel service	No	
Publications	Yes			
Protection of users				
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users			
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services			
Postal operators required to provide reimbursement and/or compensation where warranted	Yes			
Publication of annual complaint statistics	By USP: Yes	By NRA: Yes		

GERMANY				
COUNTRY FACTS				
Total population (million)	2016	82,18		
Population density (per sqkm)	2015	228,6		
GDP growth rate	2014	1,90%		
	2015	1,70%		
	2016	1,90%		
GDP per capita in PPS (in % EU-28 average)	2016	34.700 (123)		
ICT indicators, % of individuals aged 16-74 (2016)				
Source: European Commission				
MARKET FACTS				
Market size and demand (2016)				
Letter post items per capita, domestic	179	Parcel & express items per capita, domestic	--	
Volume, 2016 (million items)				
<p>15.911</p> <p>Domestic and inbound cross-border letter post</p>		<p>Volume index (2013=100%)</p> <p>Letters (domestic)</p>		
Market structure and key market players				
	Market share of incumbent	Type of competition	Perceived level of competition by NRA	
Domestic letter post	81%	End-to-end competition	Moderate	
SP letters	--	--	--	
Bulk mail	--	--	--	
Direct mail	--	--	--	
Publications	--	--	--	
Domestic parcel & express	--	--	--	
B2C	--	--	--	
B2B	--	--	--	
C2C	--	--	--	
Outbound cross-border letter post	76%	--	--	
Outbound cross-border parcel & express	--	--	--	
	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	355	--	472	--
Parcels	0	--	0	--

UNIVERSAL SERVICE								
Designated universal service provider								
Name of the universal service provider		Deutsche Post AG		<div>Revenue structure (2016)</div> 				
Legal status		Public limited company						
State ownership		20.9% (via KfW)						
Note: Germany does not have a universal service provider by designation. US is ensured by the market forces with Deutsche Post DHL providing the largest share.		Total revenue, 2016 (mEUR)					57.334	
		EBIT, 2016 (mEUR)					3.491	
		EBIT margin, 2016 (EBIT/Revenue)		6,1%				
* Post business unit revenues in 2017. ** Includes parcel and express which is equal to eCommerce – Parcel and Express division revenues in 2017 (including international operations). *** Rest of revenues in 2017 for the DPDHL Group. Source: Deutsche Post DHL 2017 Annual Report								
Ensuring Universal Service								
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				--				
Percentage of the population that does not receive delivery of parcels at the standard frequency				--				
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No				
Authorization procedure within the universal service area				--				
Net cost study				Yes				
Existence of compensation fund to compensate USP for USO net costs				Authorized but not established				
Other methods of compensation				No				
Scope of universal service								
Service	Ensured	Price regulated		Service standards set				
Single piece letter post (D+1)	Yes	Price cap where dominant, otherwise ex post		Yes				
Bulk letters	Yes	Ex post for all items in this service category		No				
Direct mail	Yes	Ex post for all items in this service category		No				
Publications	Yes	Ex post for all items in this service category		Yes				
Single piece letter post (D+X)	No	--		--				
Basic parcel post (domestic)	Yes	Ex post for all items in this service category		Yes				
Bulk parcels	Yes	Ex post for all items in this service category		Yes				
Delivery frequency for letter post	6 days per week		Legally required delivery point	Letters must be delivered to the door of an addressee				
Delivery frequency for parcels	--							
Universal service indicators								
Price trend (EUR)	2013	2016	Price, €					
20g D+1, domestic	0,58	0,70						
20g D+X, domestic	--	--						
50g D+X, domestic	--	--						
20g D+1, EU	0,75	0,90						
5kg parcel, domestic	6,90	6,99						
5kg parcel, cross-border (lowest tariff)	15,00	15,99						
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP			
Domestic target (D+1)	80,0%	80,0%	2013	1.230	2013	--		
Actual performance (D+1)	91,2%	89,8%	2014	1.950	2014	--		
Postal outlets (total)	13.106	13.023	2015	3.318	2015	--		
Postal outlets per 10,000 inhabitants	1,6	1,6	2016	4.015	2016	--		
Share of post offices operated by USP	5%	6%						
Employment								
	2016		Average annual change 2013-2016					
Headcount, total in the sector	326.600		2,71%					
Headcount, total at USP	146.826		-0,64%					
Share of civil servants	16%		-7,15%					

REGULATION			
Institutional framework			
Ministry for postal policy	Federal Ministry for Economic Affairs and Energy		
Ministry for ownership of PPO	--		
National regulatory authority	Federal Network Agency for Electricity, Gas, Telecommunications, Post and Railway		
Authority of NRA concerning quality of service			
NRA authority to levy fines	No	Measures quality of service annually	No
NRA authority to order remedies	No	Publishes quality of service results annually	Yes
NRA sets monitoring standards	No	Quality measurement method	Panel with manual reporting
National competition authority			
NRA is the primary enforcer of competition		Yes	
NRA/NCA cooperation		Share data: Yes	Regularly consult: Yes
Competition cases since 2013		Alleged rebates for large customers from the telecommunications sector (BKartA B9-128/12)	
State aid cases since 2013		--	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes*	Post Codes: --	Addr. database: Yes
	Public letter-post collection boxes: --	Post office boxes: Yes	Letter delivery boxes: Yes
	Parcel lockers: --	Sorting centers: Yes	Return services: --
* Downstream access is limited to letter services subject to individual licensing (i.e. the carriage of addressed letters up to 1000g)			
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Required by law and verified in practice	Required by law and verified in practice
Special tariffs are available to consolidators?	Required by law and verified in practice	Required by law and verified in practice	Required by law and verified in practice
VAT rate for postal products not exempt	19%		
VAT exemption is applied	--		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+X, domestic)	--
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	No	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	No		
Protection of users			
Protection of users by law	Yes Postal laws and/or regulations include user protection provisions		
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	No		
Publication of annual complaint statistics	By USP: No	By NRA: No	No

GREECE

COUNTRY FACTS

Total population (million)	2016	10,78
Population density (per sqkm)	2015	81,9
GDP growth rate	2014	0,70%
	2015	-0,30%
	2016	-0,20%
GDP per capita in PPS (in % EU-28 average)	2016	17.100 (68)

ICT indicators, % of individuals aged 16-74 (2016)

68%

83%

Broadband

69%

82%

Internet usage

19%

49%

Internet banking

49%

48%

e-government

31%

55%

e-commerce

9%

18%

e-commerce, cross border intra EU

■ EL ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	25	Parcel & express items per capita, domestic	6
--	----	---	---

Volume, 2016 (million items)

295

Domestic and inbound cross-border letter post

13

Outbound cross-border letter post

65

Domestic and inbound cross-border parcel & express

2

Outbound cross-border parcel & express

Volume index (2013=100%)

1,4

1,2

1

0,8

0,6

2013

2014

2015

2016

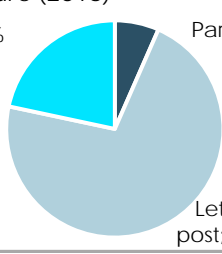
Letters (domestic)

Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	90%	End-to-end competition	Low
SP letters	--	--	--
Bulk mail	89%	End-to-end competition	Moderate
Direct mail	89%	End-to-end competition	Moderate
Publications	99%	End-to-end competition	Low
Domestic parcel & express	3,8%	End-to-end competition	Intense
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	99,9%	End-to-end competition	Marginal
Outbound cross-border parcel & express	8,1%	End-to-end competition	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	8	End-to-end competition	6	End-to-end competition
Parcels	270	End-to-end competition	264	End-to-end competition

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider		ELTA		<div>Revenue structure (2016)</div> 		
Legal status		Public limited company				
State ownership		90% (State owned) 10% (EUROBANK ERGASIAS S.A)				
Total revenue, 2016 (mEUR)		312				
EBIT, 2016 (mEUR)		29				
EBIT margin, 2016 (EBIT/Revenue)		10,9%				
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				6%		
Percentage of the population that does not receive delivery of parcels at the standard frequency				7%		
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				Yes		
Authorization procedure within the universal service area				Individual license		
Net cost study				--		
Existence of compensation fund to compensate USP for USO net costs				Authorized but not established		
Other methods of compensation				--		
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex ante for all items in this service category		Yes		
Bulk letters	Yes	Ex ante for all items in this service category		No		
Direct mail	Yes	Ex ante for all items in this service category		No		
Publications	Yes	Ex ante for all items in this service category		No		
Single piece letter post (D+3)	Yes	Ex ante for all items in this service category		No		
Basic parcel post (domestic)	Yes	Ex ante for all items in this service category		No		
Bulk parcels	Yes	Ex ante for all items in this service category		No		
Delivery frequency for letter post				Legally required delivery point		
5 days per week				Letters must be delivered to the door of an addressee		
Delivery frequency for parcels				5 days per week		
Universal service indicators						
Price trend (EUR)	2013	2016	Price, €			
20g D+1, domestic	0,62	0,72	20g D+1			
20g D+3, domestic	0,57	0,65	20g D+3			
50g D+3, domestic	0,83	0,85	20g D+1 EU			
20g D+1, EU	0,78	0,90				
5kg parcel, domestic	6,10	2,50				
5kg parcel, cross-border (lowest tariff)	29,84	29,84				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	87,0%	87,0%	2013	204	2013	10.887
Actual performance (D+1)	90,5%	86,1%	2014	179	2014	12.618
Postal outlets (total)	1.455	1.403	2015	168	2015	11.004
Postal outlets per 10,000 inhabitants	1,3	1,3	2016	159	2016	---
Share of post offices operated by USP	50%	51%				
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	16.100		5,27%			
Headcount, total at USP	8.039		0,26%			
Share of civil servants	87%		-3,97%			

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Digital Policy, Telecommunications and Information		
Ministry for ownership of PPO	Ministry of Digital Policy, Telecommunications and Information		
National regulatory authority	Hellenic Telecommunications And Post Commission (E.E.T.T.)		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	Panel with manual reporting
National competition authority			
NRA is the primary enforcer of competition		Yes	
NRA/NCA cooperation		Share data: Yes	Regularly consult: No
Competition cases since 2013		Case on abuse of dominant position by ELTA	
State aid cases since 2013		--	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes: No	Post office boxes: Yes	Letter delivery boxes: No
	Parcel lockers: --	Sorting centers: Yes	Return services: Yes
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Required by law and verified in practice	Required by law and verified in practice
Special tariffs are available to consolidators?	Required by law and verified in practice	Required by law and verified in practice	Required by law and verified in practice
VAT rate for postal products not exempt	24%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+3, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	Yes	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	Yes
Insured mail	Yes	Express letter service	No
Direct mail	Yes	Express parcel service	No
Publications	Yes		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: Yes	By NRA: No	

HUNGARY

COUNTRY FACTS

Total population (million)	2016	9,83
Population density (per sqkm)	2015	105,8
GDP growth rate	2014	4,20%
	2015	3,40%
	2016	2,20%
GDP per capita in PPS (in % EU-28 average)	2016	11.300 (67)

ICT indicators,
% of individuals
aged 16-74
(2016)

Broadband	78%	83%
Internet usage	79%	82%
Internet banking	35%	49%
e-government	48%	48%
e-commerce	39%	55%
e-commerce, cross border intra EU	12%	18%

■ HU ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	64	Parcel & express items per capita, domestic	5
--	----	---	---

Volume, 2016 (million items)

Domestic and inbound cross-border letter post	667
Outbound cross-border letter post	20
Domestic and inbound cross-border parcel & express	57
Outbound cross-border parcel & express	4

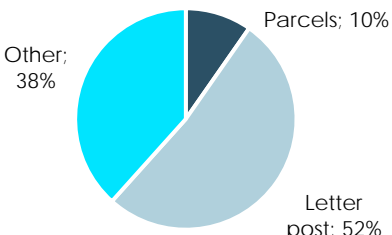
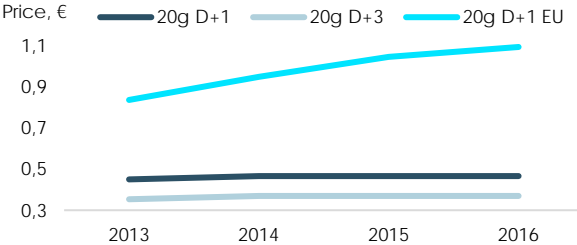
Volume index (2013=100%)

2013	2014	2015	2016
Letters (domestic)	1,0	0,9	0,9
Parcels (domestic)	1,0	1,3	1,8

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	100%	--	Marginal
SP letters	100%	--	Marginal
Bulk mail	100%	--	Low
Direct mail	100%	--	Marginal
Publications	--	--	--
Domestic parcel & express	32%	End-to-end competition	Intense
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	100%	--	--
Outbound cross-border parcel & express	4,7%	End-to-end competition	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	1	End-to-end competition	0	End-to-end competition
Parcels	82	End-to-end competition	24	End-to-end competition

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider		Magyar Posta		<div>Revenue structure (2016)</div> 		
Legal status		Public limited company				
State ownership		75% + 1 vote				
Total revenue, 2016 (mEUR)		592				
EBIT, 2016 (mEUR)		11,8				
EBIT margin, 2016 (EBIT/Revenue)		2,0%				
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				--		
Percentage of the population that does not receive delivery of parcels at the standard frequency				--		
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No		
Authorization procedure within the universal service area				Designation, individual license, general authorisation		
Net cost study				--		
Existence of compensation fund to compensate USP for USO net costs				Authorized but not established		
Other methods of compensation				Direct compensation from public funds		
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Price cap for all items in this service category*		Yes		
Bulk letters	Yes	Price cap for all items in this service category*		Yes		
Direct mail	Yes	No price regulation		Yes		
Publications	No	No price regulation		No		
Single piece letter post (D+3)	Yes	Price cap for all items in this service category*		Yes		
Basic parcel post (domestic)	Yes	No price regulation		Yes		
Bulk parcels	Yes	No price regulation		Yes		
* up to 50g						
Delivery frequency for letter post	5 days per week		Legally required delivery point	Letters must be delivered to the door of an addressee		
Delivery frequency for parcels	5 days per week					
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> 			
20g D+1, domestic	0,45	0,47				
20g D+3, domestic	0,35	0,37				
50g D+3, domestic	0,47	0,48				
20g D+1, EU	0,83	1,09				
5kg parcel, domestic	3,82	4,78				
5kg parcel, cross-border (lowest tariff)	27,63	28,19				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	90,0%	90,0%	2013	87	2013	24.219
Actual performance (D+1)	92,8%	90,0%	2014	249	2014	21.854
Postal outlets (total)	2.687	2.637	2015	216	2015	26.481
Postal outlets per 10,000 inhabitants	2,7	2,7	2016	272	2016	24.062
Share of post offices operated by USP	100%	90%				
Employment						
		2016	Average annual change 2013-2016			
Headcount, total in the sector		46.800	2,47%			
Headcount, total at USP		27.967	2,74%			
Share of civil servants		0%				

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of National Development		
Ministry for ownership of PPO	Ministry of National Development		
National regulatory authority	National Media and Infocommunications Authority		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	No
NRA sets monitoring standards	No	Quality measurement method	Panel with manual reporting
National competition authority			
NRA is the primary enforcer of competition	No		
NRA/NCA cooperation	Share data:	Yes	Regularly consult: Yes
Competition cases since 2013	Vj-57/2013		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP:	No	Post Codes: Yes
	Public letter-post collection boxes:	No	Addr. database: No
	Parcel lockers:	No	Letter delivery boxes: Yes
		Sorting centers:	Return services: No
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	Yes		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Not required by law nor verified in practice	Required by law and verified in practice
Special tariffs are available to consolidators?	Not required by law nor verified in practice	Not required by law nor verified in practice	Not required by law nor verified in practice
VAT rate for postal products not exempt	27%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+3, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	Yes	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	Yes
Insured mail	Yes	Express letter service	No
Direct mail	Yes	Express parcel service	No
Publications	No		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP:	Yes	By NRA: Yes

ICELAND

COUNTRY FACTS

Total population (million)	2016	0,33
Population density (per sqkm)	2015	3,3
GDP growth rate	2014	2,10%
	2015	4,30%
	2016	7,40%
GDP per capita in PPS (in % EU-28 average)	2016	36.900 (128)

ICT indicators, % of individuals aged 16-74 (2014)

93%

78%

Broadband

98%

78%

Internet usage

91%

44%

Internet banking

85%

47%

e-government

66%

50%

e-commerce

31%

15%

e-commerce, cross border intra EU

■ IS

■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	81	Parcel & express items per capita, domestic	2
--	----	---	---

Volume, 2016 (million items)

31

2

1

0,05

Domestic and inbound cross-border letter post

Outbound cross-border letter post

Domestic and inbound cross-border parcel & express

Outbound cross-border parcel & express

Volume index (2013=100%)

1,4

1,2

1

0,8

0,6

2013

2014

2015

2016

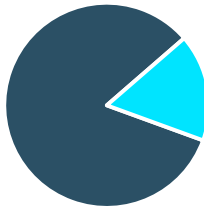
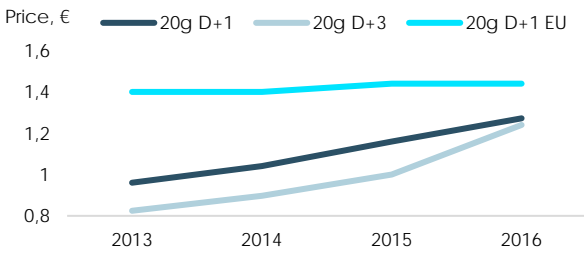
Letters (domestic)

Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	--	--	--
SP letters	100%	--	--
Bulk mail	100%	--	--
Direct mail	--	--	--
Publications	--	--	--
Domestic parcel & express	--	--	--
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	--	--	--
Outbound cross-border parcel & express	--	--	--

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	--	--	--	--
Parcels	--	--	--	--

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	Íslandspóstur		<div>Revenue structure (2016)</div> <div><div>Postal services; 83%</div><div></div><div>Other; 17%</div></div>			
Legal status	Public limited company					
State ownership	100%					
Total revenue, 2016 (mEUR)	68,2					
EBIT, 2016 (mEUR)	2,6					
EBIT margin, 2016 (EBIT/Revenue)	3,9%					
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			--			
Percentage of the population that does not receive delivery of parcels at the standard frequency			--			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			No			
Authorization procedure within the universal service area			Individual license			
Net cost study			Yes			
Existence of compensation fund to compensate USP for USO net costs			Authorized but not established			
Other methods of compensation			No			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex ante for all items in this service category		Yes		
Bulk letters	Yes	Ex ante for all items in this service category		No		
Direct mail	Yes	--		No		
Publications	Yes	--		No		
Single piece letter post (D+3)	Yes	--		Yes		
Basic parcel post (domestic)	Yes	--		--		
Bulk parcels	No	--		--		
Delivery frequency for letter post			5 days per week	Legally required delivery point	Letters must be delivered to the door of an addressee	
Delivery frequency for parcels			5 days per week			
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> <div><div>20g D+1</div><div>20g D+3</div><div>20g D+1 EU</div></div> 			
20g D+1, domestic	0,96	1,27				
20g D+3, domestic	0,82	1,24				
50g D+3, domestic	0,82	1,24				
20g D+1, EU	1,40	1,44				
5kg parcel, domestic	10,95	11,58				
5kg parcel, cross-border (lowest tariff)	35,99	42,07				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	85,0%	85,0%	2013	--	2013	--
Actual performance (D+1)	88,0%	87,0%	2014	--	2014	--
Postal outlets (total)	145	124	2015	--	2015	--
Postal outlets per 10,000 inhabitants	4,5	3,7	2016	16	2016	7.576
Share of post offices operated by USP	0%	28%				
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	1.300		5,73%			
Headcount, total at USP	1.115		1,93%			
Share of civil servants	0%					

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Transport and Local Government.		
Ministry for ownership of PPO	The Ministry of Finance		
National regulatory authority	Post and Telecom Administration		
Authority of NRA concerning quality of service			
NRA authority to levy fines	No	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	--
National competition authority			
NRA is the primary enforcer of competition	No		
NRA/NCA cooperation	Share data: Yes	Regularly consult: Yes	
Competition cases since 2013	Decision no. 8/2017		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: --	Post Codes: --	Addr. database: --
	Public letter-post collection boxes: --	Post office boxes: --	Letter delivery boxes: --
	Parcel lockers: --	Sorting centers: --	Return services: --
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	Yes		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	--	--
Special tariffs are available to consolidators?	Required by law and verified in practice	--	--
VAT rate for postal products not exempt	24%		
VAT exemption is applied	--		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+3, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	No
Bulk letters	Yes	Basic parcel post (cross-border)	No
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	Yes	Express parcel service	No
Publications	Yes		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: Yes	By NRA: --	

IRELAND

COUNTRY FACTS

Total population (million)	2016	4,72
Population density (per sqkm)	2015	67,9
GDP growth rate	2014	8,30%
	2015	25,60%
	2016	5,10%
GDP per capita in PPS (in % EU-28 average)	2016	53.600 (183)

ICT indicators,
% of individuals
aged 16-74
(2016)

86%83%

82%82%

52%49%

52%48%

59%55%

34%18%

Broadband

Internet usage

Internet banking

e-government

e-commerce

e-commerce, cross
border intra EU

■ IE

■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	103	Parcel & express items per capita, domestic	--
--	-----	---	----

Volume, 2015 (million items)

553,016

Domestic and inbound cross-border letter post

Volume index (2013=100%)

1,2

1

0,8

0,6

2013

2014

2015

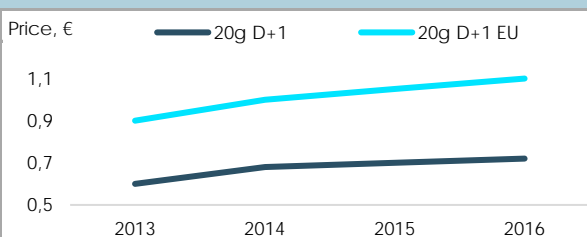
Letters (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	--	--	--
SP letters	>90%	--	Low
Bulk mail	--	--	Low
Direct mail	--	--	--
Publications	--	--	--
Domestic parcel & express	25%	End-to-end competition	Intense
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	--	--	--
Outbound cross-border parcel & express	--	--	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	--	--	--	--
Parcels	--	--	--	--

UNIVERSAL SERVICE

Designated universal service provider						
Name of the universal service provider		An Post		<div>Revenue structure (2016)</div> <div><div><div>Other; 36%</div><div>Letter post and parcels*; 64%</div></div></div>		
Legal status		Private Limited Company, Government Owned				
State ownership		100%				
Total revenue, 2016 (mEUR)		826				
EBIT, 2016 (mEUR)		-13,7				
EBIT margin, 2016 (EBIT/Revenue)		-1,7%				
* Letter post and parcels includes election and referenda post. Source: An Post 2016 Annual Report						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				--		
Percentage of the population that does not receive delivery of parcels at the standard frequency				--		
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				In progress		
Authorization procedure within the universal service area				General authorisation		
Net cost study				Yes		
Existence of compensation fund to compensate USP for USO net costs				Authorized but not established		
Other methods of compensation				No		
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex post for all items in this service category		Yes		
Bulk letters	Yes	Ex post for all items in this service category		No		
Direct mail	No	No price regulation		No		
Publications	No	No price regulation		No		
Single piece letter post (D+2)	No	No price regulation		No		
Basic parcel post (domestic)	Yes	Ex post for all items in this service category		No		
Bulk parcels	No	No price regulation		No		
Delivery frequency for letter post	5 days per week		Legally required delivery point	Letters must be delivered to the door of an addressee		
Delivery frequency for parcels	5 days per week					
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> <div><div>20g D+1</div><div>20g D+1 EU</div></div> 			
20g D+1, domestic	0,60	0,72				
20g D+X, domestic	--	--				
50g D+X, domestic	--	--				
20g D+1, EU	0,90	1,10				
5kg parcel, domestic	14,50	14,60				
5kg parcel, cross-border (lowest tariff)	42,00	42,60				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	94,0%	94,0%	2013	--	2013	--
Actual performance (D+1)	87,0%	91,0%	2014	--	2014	--
Postal outlets (total)	1.288	1.236	2015	--	2015	--
Postal outlets per 10,000 inhabitants	2,8	2,6	2016	--	2016	--
Share of post offices operated by USP	--	--				
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	15.500		-1,46%			
Headcount, total at USP	7.803		-1,84%			
Share of civil servants	11%		-7,68%			

REGULATION			
Institutional framework			
Ministry for postal policy	Department of Communications, Climate Action and Environment		
Ministry for ownership of PPO	Department of Communications, Climate Action and Environment		
National regulatory authority	Commission for Communication Regulation		
Authority of NRA concerning quality of service			
NRA authority to levy fines	No	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	Panel with manual reporting
National competition authority			
NRA is the primary enforcer of competition	No		
NRA/NCA cooperation	Share data: Yes	Regularly consult: Yes	
Competition cases since 2013	Periodicals case in 2014		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes: Yes	Post office boxes: Yes	Letter delivery boxes: Yes
	Parcel lockers: --	Sorting centers: --	Return services: --
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	Yes		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law but not verified in practice	--	Required by law but not verified in practice
Special tariffs are available to consolidators?	Required by law but not verified in practice	--	Required by law but not verified in practice
VAT rate for postal products not exempt	--		
VAT exemption is applied	--		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+X, domestic)	--
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	--	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	--
Insured mail	Yes	Express letter service	--
Direct mail	--	Express parcel service	--
Publications	--		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: No	By NRA: No	

ITALY

COUNTRY FACTS

Total population (million)	2016	60,67
Population density (per sqkm)	2015	201
GDP growth rate	2014	0,10%
	2015	1,00%
	2016	0,90%
GDP per capita in PPS (in % EU-28 average)	2016	25.900 (97)

ICT indicators, % of individuals aged 16-74 (2016)

77%

83%

Broadband

69%

82%

Internet usage

29%

49%

Internet banking

24%

48%

e-government

29%

55%

e-commerce

12%

18%

e-commerce, cross border intra EU

■ IT ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	38	Parcel & express items per capita, domestic	5
--	----	---	---

Volume, 2016 (million items)

2.468

66

326

39

Domestic and inbound cross-border letter post

Outbound cross-border letter post

Domestic and inbound cross-border parcel & express

Outbound cross-border parcel & express

Volume index (2013=100%)

1,6

1,1

0,6

2013

2014

2015

2016

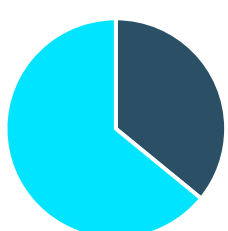
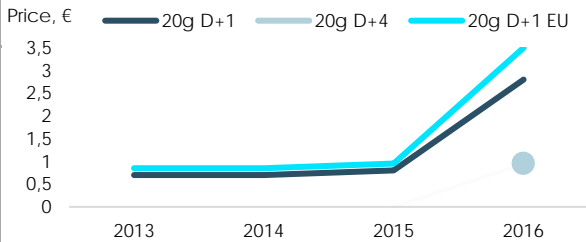
Letters (domestic)

Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	93%	End-to-end competition	Low
SP letters	99,5%	End-to-end competition	Low
Bulk mail	71%	End-to-end competition	Moderate
Direct mail	--	--	--
Publications	100%	--	Low
Domestic parcel & express	19,8%	End-to-end competition	Intense
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	94%	End-to-end competition	Low
Outbound cross-border parcel & express	5%	End-to-end competition	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	--	--	--	--
Parcels	--	--	--	--

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider		Poste Italiane S.p.A.		<div>Revenue structure (2016)</div>  <p>Mail, parcels, and distributi...</p> <p>Other; 64%</p>		
Legal status		Public limited company				
State ownership		29,26% Ministry of Economic Development, 35% Cassa Depositi e Prestiti				
Total revenue, 2016 (mEUR)		10.643				
EBIT, 2016 (mEUR)		1.041				
EBIT margin, 2016 (EBIT/Revenue)		9,8%				
Source: Poste Italiane 2016 Annual Report						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				Up to 23,2%		
Percentage of the population that does not receive delivery of parcels at the standard frequency				Up to 23,2%		
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				--		
Authorization procedure within the universal service area			Individual license			
Net cost study			Yes			
Existence of compensation fund to compensate USP for USO net costs			Authorized but not established			
Other methods of compensation			Direct compensation from public funds			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex ante for all items in this service category		Yes		
Bulk letters	Yes	Ex ante for all items in this service category		Yes		
Direct mail	No	No price regulation		No		
Publications	Yes	Ex ante for all items in this service category		Yes		
Single piece letter post (D+4)	Yes	Ex ante for all items in this service category		Yes		
Basic parcel post (domestic)	Yes	Ex ante for all items in this service category		Yes		
Bulk parcels	No	No price regulation		No		
Delivery frequency for letter post	5 days per week		Legally required	--		
Delivery frequency for parcels	5 days per week		delivery point			
Universal service indicators						
Price trend (EUR)	2013	2016	Price, €			
20g D+1, domestic	0,70	2,80	 <p>20g D+1 20g D+4 20g D+1 EU</p>			
20g D+4, domestic	--	0,95				
50g D+4, domestic	--	2,55				
20g D+1, EU	0,85	3,50				
5kg parcel, domestic	9,10	9,00				
5kg parcel, cross-border (lowest tariff)	22,35	25,00				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP*	
Domestic target (D+1)	89,0%	80,0%	2013	251	2013	55.025
Actual performance (D+1)	90,7%	83,9%	2014	115	2014	85.230
Postal outlets (total)	13.310	12.845	2015	450	2015	70.582
Postal outlets per 10,000 inhabitants	2,2	2,1	2016	609	2016	72.624
Share of post offices operated by USP	100%	100%	* Only concerning US products			
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	198.400		3,51%			
Headcount, total at USP	134.002		-1,65%			
Share of civil servants	0%					

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Economic Development - Department of Communications		
Ministry for ownership of PPO	Ministry of Economy & Finance		
National regulatory authority	Regulatory Authority for communications and media		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	Panel with manual reporting
National competition authority			
NRA is the primary enforcer of competition		Yes	
NRA/NCA cooperation		Share data: No	Regularly consult: Yes
Competition cases since 2013		A413; A441; SP/157; A493	
State aid cases since 2013		SA.43243	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: --	Addr. database: No
	Public letter-post collection boxes: Yes	Post office boxes: Yes	Letter delivery boxes: --
	Parcel lockers: No	Sorting centers: Yes	Return services: No
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Not required by law nor verified in practice	--
Special tariffs are available to consolidators?	Not required by law nor verified in practice	Not required by law nor verified in practice	--
VAT rate for postal products not exempt		22%	
VAT exemption is applied		On universal services provided by USP	
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+4, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	Yes	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	Yes		
Protection of users			
Protection of users by law		Yes Both postal and consumer protection laws apply to postal users	
Implementing authority(ies)		Both NRA and NCA enforce user protection provisions for postal services	
Postal operators required to provide reimbursement and/or compensation where warranted		Yes	
Publication of annual complaint statistics		By USP: Yes	By NRA: --

LATVIA

COUNTRY FACTS

Total population (million)	2016	1,97
Population density (per sqkm)	2015	31,8
GDP growth rate	2014	1,90%
	2015	3,00%
	2016	2,20%
GDP per capita in PPS (in % EU-28 average)	2016	11.000 (65)

ICT indicators, % of individuals aged 16-74 (2016)

75%

83%

Broadband

80%

82%

Internet usage

62%

49%

Internet banking

69%

48%

e-government

44%

55%

e-commerce

20%

18%

e-commerce, cross border intra EU

■ LV

■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	15	Parcel & express items per capita, domestic	3
--	----	---	---

Volume, 2016 (million items)

38,7

3,6

7,4

1,4

Domestic and inbound cross-border letter post

Outbound cross-border letter post

Domestic and inbound cross-border parcel & express

Outbound cross-border parcel & express

Volume index (2013=100%)

1,6

1,1

0,6

2013

2014

2015

2016

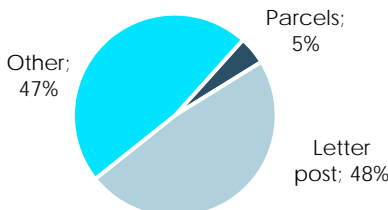
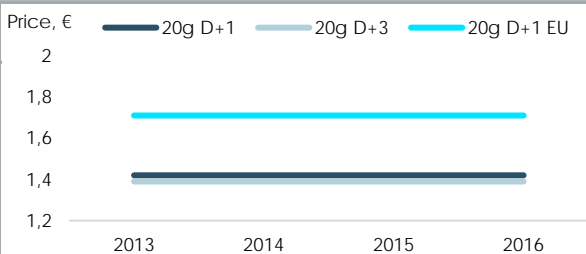
Letters (domestic)

Parcels (domestic)

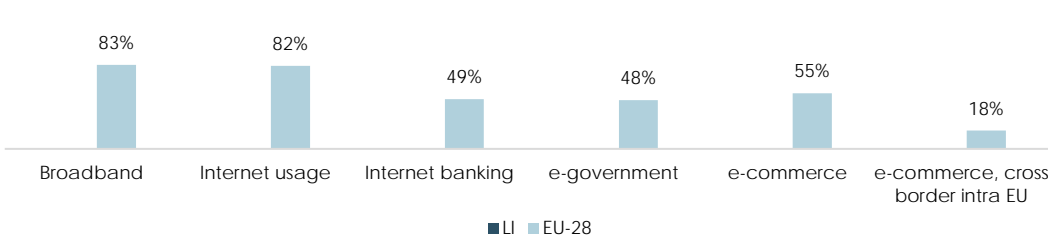
Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	--	End-to-end competition	Low
SP letters	--	End-to-end competition	Moderate
Bulk mail	--	End-to-end competition	Low
Direct mail	--	End-to-end competition	Low
Publications	--	End-to-end competition	Low
Domestic parcel & express	--	End-to-end competition	Substantial
B2C	--	End-to-end competition	Intense
B2B	--	End-to-end competition	Substantial
C2C	--	End-to-end competition	Intense
Outbound cross-border letter post	--	--	Low
Outbound cross-border parcel & express	--	Downstream competition	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	7	End-to-end competition	--	--
Parcels	10	End-to-end competition	--	--

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	Latvijas Pasts		<div>Revenue structure (2016)</div> 			
Legal status	Public limited company					
State ownership	100%					
Total revenue, 2016 (mEUR)	63					
EBIT, 2016 (mEUR)	3					
EBIT margin, 2016 (EBIT/Revenue)	4,8%					
Source: Latvijas Pasts 2016 Annual Report						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			--			
Percentage of the population that does not receive delivery of parcels at the standard frequency			--			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			No			
Authorization procedure within the universal service area			General authorisation			
Net cost study			Yes			
Existence of compensation fund to compensate USP for USO net costs			Authorized but not established			
Other methods of compensation			No			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex post for all items in this service category		Yes		
Bulk letters	Yes	No price regulation		Yes		
Direct mail	Yes	No price regulation		No		
Publications	Yes	No price regulation		No		
Single piece letter post (D+3)	Yes	Ex post for all items in this service category		Yes		
Basic parcel post (domestic)	Yes	Ex post for all items in this service category		Yes		
Bulk parcels	No	No price regulation		No		
Delivery frequency for letter post	5 days per week		Legally required delivery point	Letters must be delivered to the communal letter box		
Delivery frequency for parcels	5 days per week					
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> 			
20g D+1, domestic	1,42	1,42				
20g D+3, domestic	1,39	1,39				
50g D+3, domestic	1,41	1,41				
20g D+1, EU	1,71	1,71				
5kg parcel, domestic	--	--				
5kg parcel, cross-border (lowest tariff)	--	--				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	90,0%	90,0%	2013	17	2013	777
Actual performance (D+1)	90,5%	94,5%	2014	26	2014	779
Postal outlets (total)	618	618	2015	16	2015	795
Postal outlets per 10,000 inhabitants	3,1	3,1	2016	27	2016	878
Share of post offices operated by USP	0%	--				
Employment						
		2016	Average annual change 2013-2016			
Headcount, total in the sector		4.900	6,12%			
Headcount, total at USP		4.239	1,16%			
Share of civil servants		0%				

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Transport		
Ministry for ownership of PPO	Ministry of Transport		
National regulatory authority	Public Utilities Commission		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	Panel with manual reporting
National competition authority			
NRA is the primary enforcer of competition		Yes	
NRA/NCA cooperation		Share data: Yes	Regularly consult: No
Competition cases since 2013		--	
State aid cases since 2013		--	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: No	Post Codes: --	Addr. database: No
	Public letter-post collection boxes: --	Post office boxes: No	Letter delivery boxes: Yes
	Parcel lockers: No	Sorting centers: No	Return services: No
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Required by law and verified in practice	Not required by law nor verified in practice
Special tariffs are available to consolidators?	Required by law and verified in practice	Required by law and verified in practice	Not required by law nor verified in practice
VAT rate for postal products not exempt		21%	
VAT exemption is applied		On universal services provided by USP	
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+3, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	Yes	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	Yes
Insured mail	Yes	Express letter service	No
Direct mail	Yes	Express parcel service	No
Publications	Yes		
Protection of users			
Protection of users by law	Yes Postal laws and/or regulations include user protection provisions		
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: Yes	By NRA: --	

LIECHTENSTEIN				
COUNTRY FACTS				
Total population (million)	2016	0,04		
Population density (per sqkm)	2015	234,3		
GDP growth rate*	2014	2,90%		
	2015	-0,70%		
	2016	1,40%		
GDP per capita in PPS (in % EU-28 average)	2016	--		
ICT indicators, % of individuals aged 16-74 (2016)				
Source: European Commission. * Source: NRA				
MARKET FACTS				
Market size and demand (2016)				
Letter post items per capita, domestic	--	Parcel & express items per capita, domestic	--	
Volume, 2016 (million items)				
Not available				
Market structure and key market players				
	Market share of incumbent	Type of competition	Perceived level of competition by NRA	
Domestic letter post	--	--	--	
SP letters	--	--	--	
Bulk mail	--	--	--	
Direct mail	--	--	--	
Publications	--	--	--	
Domestic parcel & express	--	--	--	
B2C	--	--	--	
B2B	--	--	--	
C2C	--	--	--	
Outbound cross-border letter post	--	--	--	
Outbound cross-border parcel & express	--	--	--	
	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	--	--	--	--
Parcels	--	--	--	--

UNIVERSAL SERVICE																											
Designated universal service provider																											
Name of the universal service provider		Liechtensteinische Post		<div>Revenue structure (2016)</div> <div><div><div></div><div></div><div></div></div><div>Other; 56%</div><div>Letter post; 31%</div><div>Parcels; 14%</div></div>																							
Legal status		Public limited company																									
State ownership		75%; 25% Schweizerische Post																									
Total revenue, 2016 (mEUR)		37																									
EBIT, 2016 (mEUR)		0,3																									
EBIT margin, 2016 (EBIT/Revenue)		0,7%																									
Source: Liechtensteinische Post 2016 Annual Report																											
Ensuring Universal Service																											
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				--																							
Percentage of the population that does not receive delivery of parcels at the standard frequency				--																							
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No																							
Authorization procedure within the universal service area				Designation																							
Net cost study				No																							
Existence of compensation fund to compensate USP for USO net costs				Authorized but not established																							
Other methods of compensation				No																							
Scope of universal service																											
Service	Ensured	Price regulated			Service standards set																						
Single piece letter post (D+1)	Yes	No price regulation			Yes																						
Bulk letters	No	No price regulation			No																						
Direct mail	No	No price regulation			No																						
Publications	Yes	No price regulation			No																						
Single piece letter post (D+2)	Yes	No price regulation			Yes																						
Basic parcel post (domestic)	Yes	No price regulation			Yes																						
Bulk parcels	No	No price regulation			No																						
Delivery frequency for letter post		6 days per week		Legally required delivery point		Letters must be delivered to the door of an addressee																					
Delivery frequency for parcels		5 days per week																									
Universal service indicators																											
Price trend (EUR)	2013	2016	<div>Price, €</div> <div><div></div>20g D+1<div></div>20g D+2<div></div>20g D+1 EU</div> <table><thead><tr><th>Year</th><th>20g D+1</th><th>20g D+2</th><th>20g D+1 EU</th></tr></thead><tbody><tr><td>2013</td><td>0,88</td><td>0,74</td><td>1,31</td></tr><tr><td>2014</td><td>0,88</td><td>0,74</td><td>1,31</td></tr><tr><td>2015</td><td>0,88</td><td>0,74</td><td>1,31</td></tr><tr><td>2016</td><td>0,88</td><td>0,74</td><td>1,31</td></tr></tbody></table>					Year	20g D+1	20g D+2	20g D+1 EU	2013	0,88	0,74	1,31	2014	0,88	0,74	1,31	2015	0,88	0,74	1,31	2016	0,88	0,74	1,31
Year	20g D+1	20g D+2	20g D+1 EU																								
2013	0,88	0,74	1,31																								
2014	0,88	0,74	1,31																								
2015	0,88	0,74	1,31																								
2016	0,88	0,74	1,31																								
20g D+1, domestic	0,88	0,88																									
20g D+2, domestic	0,74	0,74																									
50g D+2, domestic	0,74	0,74																									
20g D+1, EU	1,31	1,31																									
5kg parcel, domestic	9,65	9,65																									
5kg parcel, cross-border (lowest tariff)	42,10	42,10																									
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP																						
Domestic target (D+1)	--	--	2013	--	2013	--	--																				
Actual performance (D+1)	--	--	2014	--	2014	--	--																				
Postal outlets (total)	--	--	2015	--	2015	--	--																				
Postal outlets per 10,000 inhabitants	--	--	2016	--	2016	--	--																				
Share of post offices operated by USP	--	--																									
Employment																											
	2016		Average annual change 2013-2016																								
Headcount, total in the sector	--		--																								
Headcount, total at USP	--		--																								
Share of civil servants	--		--																								

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry for Infrastructure, Economic Affairs and Sport		
Ministry for ownership of PPO	Ministry for Infrastructure, Economic Affairs and Sport		
National regulatory authority	Government Principality of Liechtenstein		
Authority of NRA concerning quality of service			
NRA authority to levy fines	No	Measures quality of service annually	No
NRA authority to order remedies	No	Publishes quality of service results annually	No
NRA sets monitoring standards	No	Quality measurement method	--
National competition authority			
NRA is the primary enforcer of competition		--	
NRA/NCA cooperation		Liechtenstein has not a National Competition Authority	
Competition cases since 2013		--	
State aid cases since 2013		--	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: --	Post Codes: --	Addr. database: --
	Public letter-post collection boxes: --	Post office boxes: --	Letter delivery boxes: --
	Parcel lockers: --	Sorting centers: --	Return services: --
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		No	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	--	--	--
Special tariffs are available to consolidators?	--	--	--
VAT rate for postal products not exempt		--	
VAT exemption is applied		--	
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	--	Basic letter post (D+2, domestic)	--
Basic letter post (D+1, cross-border)	--	Basic parcel post (domestic)	--
Bulk letters	--	Basic parcel post (cross-border)	--
Registered mail	--	Bulk parcels	--
Insured mail	--	Express letter service	--
Direct mail	--	Express parcel service	--
Publications	--		
Protection of users			
Protection of users by law		Yes Postal laws and/or regulations include user protection provisions	
Implementing authority(ies)		Neither NRA nor NCPA enforces user protection provisions for postal services	
Postal operators required to provide reimbursement and/or compensation where warranted		No	
Publication of annual complaint statistics		By USP: Yes	By NRA: --

LITHUANIA

COUNTRY FACTS

Total population (million)	2016	2,89
Population density (per sqkm)	2015	46,4
GDP growth rate	2014	3,50%
	2015	2,00%
	2016	2,30%
GDP per capita in PPS (in % EU-28 average)	2016	12.000 (75)

ICT indicators,
% of individuals
aged 16-74
(2016)

71%

83%

Broadband

74%

82%

Internet usage

54%

49%

Internet banking

45%

48%

e-government

33%

55%

e-commerce

12%

18%

e-commerce, cross
border intra EU

■ LT ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	22	Parcel & express items per capita, domestic	4
--	----	---	---

Volume, 2016 (million items)

73

Domestic and inbound cross-border letter post

5

Outbound cross-border letter post

14

Domestic and inbound cross-border parcel & express

2

Outbound cross-border parcel & express

Volume index (2013=100%)

1,2

1

0,8

0,6

2013

2014

2015

2016

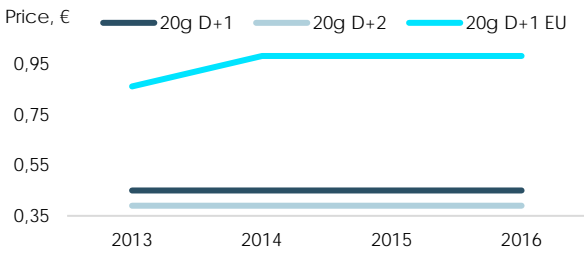
Letters (domestic)

Parcels (domestic)

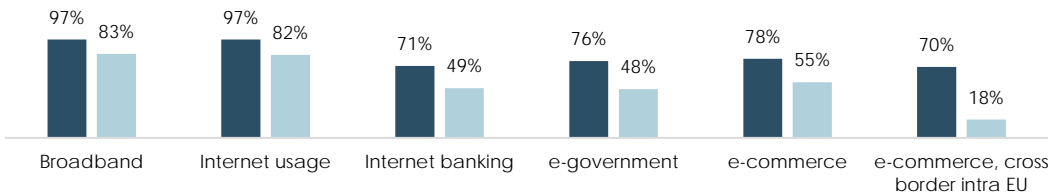
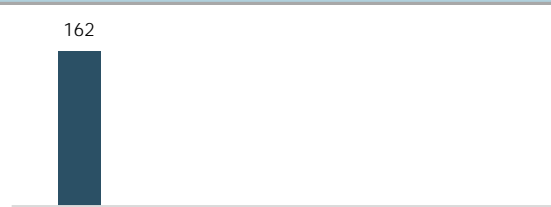
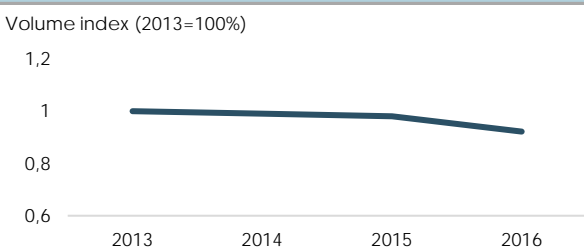
Market structure and key market players

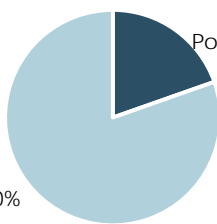
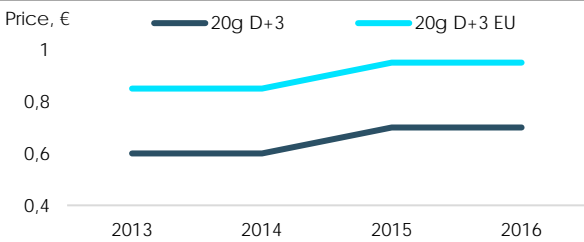
	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	--	Upstream competition	--
SP letters	61,8%	--	Moderate
Bulk mail	--	--	--
Direct mail	--	--	--
Publications	--	--	--
Domestic parcel & express	1,9%	End-to-end competition	Intense
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	99,3%	End-to-end competition	Low
Outbound cross-border parcel & express	6,1%	End-to-end competition	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	32	End-to-end competition	41	--
Parcels	36	End-to-end competition	41	--

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider		AB Lithuanian Post		<div>Revenue structure (2016)</div> <div><div><div>Postal services; 58%</div><div>Courier services; 3%</div><div>Other; 39%</div></div></div>		
Legal status		Public limited company				
State ownership		100%				
Total revenue, 2016 (mEUR)		67				
EBIT, 2016 (mEUR)		0,9				
EBIT margin, 2016 (EBIT/Revenue)		1,3%				
Source: AB Lithuanian Post 2016 Annual Report						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				--		
Percentage of the population that does not receive delivery of parcels at the standard frequency				--		
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No		
Authorization procedure within the universal service area				General authorisation		
Net cost study				Yes		
Existence of compensation fund to compensate USP for USO net costs				Not authorized		
Other methods of compensation				Direct compensation from public funds		
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Price cap for all items in this service category		Yes		
Bulk letters	No	No price regulation		No		
Direct mail	No	No price regulation		No		
Publications	No	Price cap for all items in this service category*		No		
Single piece letter post (D+2)	Yes	Price cap for all items in this service category		Yes		
Basic parcel post (domestic)	Yes	Price cap for all items in this service category		Yes		
Bulk parcels	No	No price regulation		No		
* Publications are not considered postal services. Prices are set by the Government.						
Delivery frequency for letter post		5 days per week		Legally required delivery point		Letters must be delivered to the door of an addressee
Delivery frequency for parcels		5 days per week				
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> <div><div>20g D+1</div><div>20g D+2</div><div>20g D+1 EU</div></div> 			
20g D+1, domestic	0,45	0,45				
20g D+2, domestic	0,39	0,39				
50g D+2, domestic	0,42	0,42				
20g D+1, EU	0,86	0,98				
5kg parcel, domestic	3,75	3,75				
5kg parcel, cross-border (lowest tariff)	16,61	16,61				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	85,0%	85,0%	2013	77	2013	--
Actual performance (D+1)	90,0%	83,1%	2014	58	2014	--
Postal outlets (total)	723	648	2015	55	2015	2.928
Postal outlets per 10,000 inhabitants	2,4	2,2	2016	49	2016	3.240
Share of post offices operated by USP	100%	100%				
Employment						
		2016	Average annual change 2013-2016			
Headcount, total in the sector		5.100	-14,98%			
Headcount, total at USP		5.783	-2,67%			
Share of civil servants		0%	--			

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Transport and Communications of Lithuania		
Ministry for ownership of PPO	Ministry of Transport and Communications of Lithuania		
National regulatory authority	Communications Regulatory Authority of the Republic of Lithuania (RRT)		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	No
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	No	Quality measurement method	Panel with manual reporting
National competition authority			
NRA is the primary enforcer of competition		No	
NRA/NCA cooperation		Share data: Yes	Regularly consult: Yes
Competition cases since 2013		Civil case; Abuse of a dominant position	
State aid cases since 2013		--	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: Yes	Addr. database: --
	Public letter-post collection boxes: No	Post office boxes: Yes	Letter delivery boxes: Yes
	Parcel lockers: No	Sorting centers: Yes	Return services: Yes
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law but not verified in practice	--	Required by law but not verified in practice
Special tariffs are available to consolidators?	Required by law but not verified in practice	--	Required by law but not verified in practice
VAT rate for postal products not exempt		21%	
VAT exemption is applied		On universal services provided by USP	
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+2, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	No	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	No		
Protection of users			
Protection of users by law		Yes Both postal and consumer protection laws apply to postal users	
Implementing authority(ies)		Both NRA and NCPA enforce user protection provisions for postal services	
Postal operators required to provide reimbursement and/or compensation where warranted		Yes	
Publication of annual complaint statistics		By USP: Yes	By NRA: --

LUXEMBOURG				
COUNTRY FACTS				
Total population (million)	2016	0,58		
Population density (per sqkm)	2015	220,3		
GDP growth rate	2014	5,80%		
	2015	2,90%		
	2016	3,10%		
GDP per capita in PPS (in % EU-28 average)	2016	81.700 (258)		
ICT indicators, % of individuals aged 16-74 (2016)				
	■ LU ■ EU-28			
Source: Eurostat				
MARKET FACTS				
Market size and demand (2016)				
Letter post items per capita, domestic	246	Parcel & express items per capita, domestic	--	
Volume, 2016 (million items)				
				
Domestic and inbound cross-border letter post		Letters (domestic)		
Market structure and key market players				
	Market share of incumbent	Type of competition	Perceived level of competition by NRA	
Domestic letter post	Confidential	Confidential		
SP letters				
Bulk mail				
Direct mail				
Publications				
Domestic parcel & express				
B2C				
B2B				
C2C				
Outbound cross-border letter post				
Outbound cross-border parcel & express				
	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	29	--	3	--
Parcels	29	--	3	--

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	POST Luxembourg		<div>Revenue structure (2016)</div> 			
Legal status	State enterprise					
State ownership	100%					
Total revenue, 2016 (mEUR)	728					
EBIT, 2016 (mEUR)	28,8					
EBIT margin, 2016 (EBIT/Revenue)	4,0%					
*73% of other includes the telecommunication service and 3% of other includes financial postal services. Source: POST Luxembourg 2016 Annual Report						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			--			
Percentage of the population that does not receive delivery of parcels at the standard frequency			--			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			--			
Authorization procedure within the universal service area			Individual license for US and general authorisation (with notification) for non US			
Net cost study			No			
Existence of compensation fund to compensate USP for USO net costs			Authorized but not established			
Other methods of compensation			No			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+3)	Yes	Ex ante for all items in this service category*		Yes		
Bulk letters	Yes	--		Yes		
Direct mail	No	--		No		
Publications	No	--		--		
Single piece letter post (D+5)	No	--		--		
Basic parcel post (domestic)	Yes	--		No		
Bulk parcels	Yes	--		No		
* up to 50g						
Delivery frequency for letter post	5 days per week		Legally required delivery point	Letters must be delivered to the door of an addressee		
Delivery frequency for parcels	5 days per week					
Universal service indicators						
Price trend (EUR)	2013	2016	Price, €			
20g D+3, domestic	0,60	0,70	20g D+3			
20g D+5, domestic	--	--	20g D+3 EU			
50g D+5, domestic	--	--				
20g D+3, EU	0,85	0,95				
5kg parcel, domestic	8,00	8,40				
5kg parcel, cross-border (lowest tariff)	12,00	18,05				
						
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	--	--	2013	--	2013	2.903
Actual performance (D+1)	99,6%	--	2014	--	2014	4.321
Postal outlets (total)	116	96	2015	--	2015	6.382
Postal outlets per 10,000 inhabitants	2,2	1,7	2016	6	2016	6.716
Share of post offices operated by USP	84%	65%				
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	--		--			
Headcount, total at USP	1.385		0,22%			
Share of civil servants	51%		-3,98%			

REGULATION				
Institutional framework				
Ministry for postal policy	Service des Médias et des Communications du Ministère d'État (State Ministry Media and Communications service)			
Ministry for ownership of PPO	Ministère de l'Économie (Ministry of the Economy of Luxembourg)			
National regulatory authority	Institut Luxembourgeois de Régulation (Luxembourg institute for regulation)			
Authority of NRA concerning quality of service				
NRA authority to levy fines	Yes	Measures quality of service annually	Yes	
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes	
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	Panel with manual reporting	
National competition authority				
NRA is the primary enforcer of competition		No		
NRA/NCA cooperation		Share data: No	Regularly consult: No	
Competition cases since 2013		civil case; Abuse of a dominant position		
State aid cases since 2013		--		
Access to postal infrastructure by competitors				
Types of access to USP infrastructure required by Law	Downstream access to USP:	No	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes:	No	Post office boxes: Yes	Letter delivery boxes: Yes
	Parcel lockers:	--	Sorting centers: --	Return services: Yes
Regulation of cross-border services				
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes		
Regulation of prices				
	Bulk letters	Direct mail	Bulk parcels	
Special tariffs are transparent and non-discriminatory?	Required by law but not verified in practice	Required by law but not verified in practice	Required by law but not verified in practice	
Special tariffs are available to consolidators?	--	--	--	
VAT rate for postal products not exempt	17%			
VAT exemption is applied	On universal services provided by USP			
	VAT Exempt		VAT Exempt	
Basic letter post (D+3, domestic)	Yes	Basic letter post (D+5, domestic)	Yes	
Basic letter post (D+3, cross-border)	Yes	Basic parcel post (domestic)	Yes	
Bulk letters	Yes	Basic parcel post (cross-border)	Yes	
Registered mail	Yes	Bulk parcels	Yes	
Insured mail	Yes	Express letter service	No	
Direct mail	No	Express parcel service	No	
Publications	No			
Protection of users				
Protection of users by law	Yes Postal laws and/or regulations include user protection provisions			
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services			
Postal operators required to provide reimbursement and/or compensation where warranted	--			
Publication of annual complaint statistics	By USP: Yes	By NRA: No		

MALTA

COUNTRY FACTS

Total population (million)	2016	0,43
Population density (per sqkm)	2015	1369,5
GDP growth rate	2014	8,20%
	2015	7,20%
	2016	5,50%
GDP per capita in PPS (in % EU-28 average)	2016	20.100 (96)

ICT indicators, % of individuals aged 16-74 (2016)

82%83%

77%82%

46%49%

44%48%

48%55%

43%18%

Broadband

Internet usage

Internet banking

e-government

e-commerce

e-commerce, cross border intra EU

MT

EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	67	Parcel & express items per capita, domestic	1
--	----	---	---

Volume, 2016 (million items)

33,9

2,0

1,2

0,2

Domestic and inbound cross-border letter post

Outbound cross-border letter post

Domestic and inbound cross-border parcel & express

Outbound cross-border parcel & express

Volume index (2013=100%)

1,2

1

0,8

0,6

2013

2014

2015

2016

Letters (domestic)

Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	--	--	--
SP letters	100%	--	--
Bulk mail	100%	--	--
Direct mail	--	--	--
Publications	--	--	--
Domestic parcel & express	29%	End-to-end competition	Moderate
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	100%	--	--
Outbound cross-border parcel & express	7,6%	End-to-end competition	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	0	--	0	--
Parcels	7	End-to-end competition	1	--

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	MaltaPost p.l.c.		<div>Revenue structure (2016)</div> <div><div>Parcel; 4%</div><div><div></div><div></div><div></div></div><div>Other; 39%</div><div>Letter; 57%</div></div>			
Legal status	Public limited company					
State ownership	71.5% (Redbox United); 28.5% free float					
Total revenue, 2016 (mEUR)	28					
EBIT, 2016 (mEUR)	2,8					
EBIT margin, 2016 (EBIT/Revenue)	9,9%					
Source: MaltaPost 2016 Annual Report						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			0%			
Percentage of the population that does not receive delivery of parcels at the standard frequency			0%			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			No			
Authorization procedure within the universal service area			Individual license			
Net cost study			--			
Existence of compensation fund to compensate USP for USO net costs			Authorized but not established			
Other methods of compensation			Other			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex ante for all items in this service category		Yes		
Bulk letters	Yes	Ex ante for all items in this service category		Yes		
Direct mail	Yes	--		Yes		
Publications	Yes	No price regulation		Yes		
Single piece letter post (D+X)	No	No price regulation		--		
Basic parcel post (domestic)	Yes	Ex ante for all items in this service category		Yes		
Bulk parcels	Yes	No price regulation		Yes		
Delivery frequency for letter post	6 days per week		Legally required delivery point	Letters must be delivered to the door of an addressee		
Delivery frequency for parcels	6 days per week					
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> <div><div></div><div></div></div> <div>2013201420152016</div>			
20g D+1, domestic	0,26	0,26				
20g D+X, domestic	--	--				
50g D+X, domestic	--	--				
20g D+1, EU	0,40	0,59				
5kg parcel, domestic	9,00	9,00				
5kg parcel, cross-border (lowest tariff)	37,84	37,84				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	94,0%	95,0%	2013	12	2013	1.558
Actual performance (D+1)	95,6%	93,2%	2014	9	2014	1.367
Postal outlets (total)	65	70	2015	4	2015	1.060
Postal outlets per 10,000 inhabitants	1,5	1,6	2016	9	2016	1.276
Share of post offices operated by USP	52%	57%				
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	800		-3,85%			
Headcount, total at USP	665		1,60%			
Share of civil servants	0%					

REGULATION			
Institutional framework			
Ministry for postal policy	Parliamentary Secretariat for Financial Services, Digital Economy and Innovation (within Office of the Prime Minister)		
Ministry for ownership of PPO	---		
National regulatory authority	Malta Communications Authority		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	--
NRA authority to order remedies	Yes	Publishes quality of service results annually	--
NRA sets monitoring standards	Yes, quality targets and minimum requirements	Quality measurement method	Panel with manual reporting
National competition authority			
NRA is the primary enforcer of competition		No	
NRA/NCA cooperation		Share data: Yes	Regularly consult: --
Competition cases since 2013		MaltaPost p.l.c. vs Malta Communications Authority (39/14VG)	
State aid cases since 2013		--	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP:	No	Post Codes: Yes Addr. database: No
	Public letter-post collection boxes:	No	Post office boxes: Yes Letter delivery boxes: No
	Parcel lockers:	No	Sorting centers: No Return services: No
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law but not verified in practice	Required by law but not verified in practice	Required by law but not verified in practice
Special tariffs are available to consolidators?	Required by law but not verified in practice	Required by law but not verified in practice	Required by law but not verified in practice
VAT rate for postal products not exempt		18%	
VAT exemption is applied		On universal services provided by USP	
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+X, domestic)	--
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	Yes	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	Yes
Insured mail	Yes	Express letter service	No
Direct mail	Yes	Express parcel service	No
Publications	Yes		
Protection of users			
Protection of users by law		Yes Both postal and consumer protection laws apply to postal users	
Implementing authority(ies)		Both NRA and NCPA enforce user protection provisions for postal services	
Postal operators required to provide reimbursement and/or compensation where warranted		Yes	
Publication of annual complaint statistics		By USP: Yes	By NRA: No

NETHERLANDS

COUNTRY FACTS

Total population (million)	2016	16,98
Population density (per sqkm)	2015	502,9
GDP growth rate	2014	1,40%
	2015	2,30%
	2016	2,20%
GDP per capita in PPS (in % EU-28 average)	2016	39.500 (128)

ICT indicators,
% of individuals
aged 16-74
(2016)

95%

83%

Broadband

93%

82%

Internet usage

85%

49%

Internet banking

76%

48%

e-government

74%

55%

e-commerce

25%

18%

e-commerce, cross
border intra EU

■ NL

■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	166	Parcel & express items per capita, domestic	14
--	-----	---	----

Volume, 2016 (million items)

2937

Domestic and inbound cross-border letter post

241

Outbound cross-border letter post

270

Domestic and inbound cross-border parcel & express

80

Outbound cross-border parcel & express

Volume index (2013=100%)

1,6

1,4

1,2

1

0,8

0,6

2013

2014

2015

2016

Letters (domestic)

Parcels (domestic)

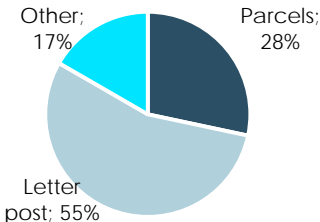
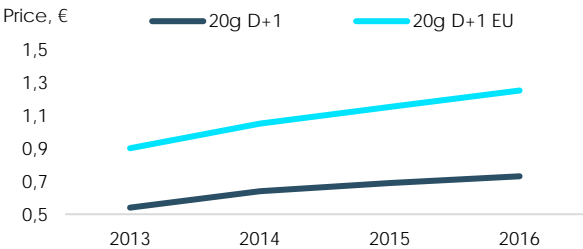
Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	75-80%	End-to-end competition	Moderate
SP letters	100%	--	Low
Bulk mail	70-80%	End-to-end competition	Moderate
Direct mail	70-80%	End-to-end competition	Moderate
Publications	70-80%	End-to-end competition	Moderate
Domestic parcel & express	55-65%*	End-to-end competition	Substantial
B2C	60-70%	End-to-end competition	Moderate
B2B	40-50%	End-to-end competition	Intense
C2C	90-100%	End-to-end competition	Low
Outbound cross-border letter post	--	--	
Outbound cross-border parcel & express	20-30%	End-to-end competition	Intense

* Does not include express segment.

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	0*	--	0*	--
Parcels	0*	--	0*	--

* USP disagrees

UNIVERSAL SERVICE							
Designated universal service provider							
Name of the universal service provider		PostNL		<div>Revenue structure (2016)</div> 			
Legal status		Public limited company					
State ownership		0%					
Total revenue, 2016 (mEUR)		3.413					
UCOI*, 2016 (mEUR)		245,0					
UCOI* margin, 2016		7,2%					
* Underlying Cash Operating Income							
Ensuring Universal Service							
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				--			
Percentage of the population that does not receive delivery of parcels at the standard frequency				--			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No*			
* NRA: The Ministry of Economic Affairs has published an analysis. USP: Three separate studies were conducted by the Ministry of Economic Affairs in 2016/2017							
Authorization procedure within the universal service area				Designation			
Net cost study				--			
Existence of compensation fund to compensate USP for USO net costs				Not authorized			
Other methods of compensation				No			
Scope of universal service							
Service	Ensured	Price regulated			Service standards set		
Single piece letter post (D+1)	Yes	Price cap for all items in this service category			Yes		
Bulk letters	No	No price regulation			No		
Direct mail	No	No price regulation			No		
Publications	No	No price regulation			No		
Single piece letter post (D+X)	No	No price regulation			No		
Basic parcel post (domestic)	Yes	Price cap for all items in this service category			No		
Bulk parcels	No	No price regulation			No		
Delivery frequency for letter post	5 days per week			Legally required	Letters must be delivered to the door of an addressee		
Delivery frequency for parcels	No specific requirement			delivery point			
Universal service indicators							
Price trend (EUR)	2013	2016		Price, €			
20g D+1, domestic	0,54	0,73					
20g D+X, domestic	--	--					
50g D+X, domestic	--	--					
20g D+1, EU	0,90	1,25					
5kg parcel, domestic	6,75	6,95					
5kg parcel, cross-border (lowest tariff)	19,50	19,50					
Quality of service							
Quality of service	2013	2016		Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	95,0%	95,0%		2013	--	2013	--
Actual performance (D+1)	95,8%	96,4%		2014	--	2014	--
Postal outlets (total)	2.185	1.843		2015	--	2015	--
Postal outlets per 10,000 inhabitants	1,3	1,1		2016	--	2016	--
Share of post offices operated by USP	--	--					
Employment							
		2016		Average annual change 2013-2016			
Headcount, total in the sector		63.500		-0,31%			
Headcount, total at USP		46.456		-7,80%			
Share of civil servants		0%					

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Economic Affairs and Climate		
Ministry for ownership of PPO	--		
National regulatory authority	The Netherlands Authority for Consumers & Markets.		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	No
NRA authority to order remedies	Yes	Publishes quality of service results annually	No
NRA sets monitoring standards	No	Quality measurement method	--
National competition authority			
NRA is the primary enforcer of competition	--		
NRA/NCA cooperation	Share data: --		Regularly consult: --
Competition cases since 2013	ECLI:NL:CBB:2016:311; ECLI:NL:RBROT:2013:7337		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP:	No	Post Codes: Yes
	Public letter-post collection boxes:	--	Letter delivery boxes: No
	Parcel lockers:	No	Return services: Yes
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	The NRA is by law authorised to ensure compliance with the PSD.*		
* Answer from the USP.			
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Not required by law but verified in practice	Not required by law but verified in practice	Not required by law but verified in practice
Special tariffs are available to consolidators?	--	--	--
VAT rate for postal products not exempt	21%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+X, domestic)	No
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	No	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	No		
Protection of users			
Protection of users by law	Yes Postal laws and/or regulations include user protection provisions		
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP:	No	By NRA: No

NORWAY

COUNTRY FACTS

Total population (million)	2016	5,21
Population density (per sqkm)	2015	17,1
GDP growth rate	2014	2,00%
	2015	2,00%
	2016	1,10%
GDP per capita in PPS (in % EU-28 average)	2016	68.200 (148)

ICT indicators,
% of individuals
aged 16-74
(2016)

96%83%

97%82%

91%49%

85%48%

78%55%

36%18%

Broadband

Internet usage

Internet banking

e-government

e-commerce

e-commerce, cross border intra EU

■ NO

■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016) (Note: data of the USP)

Letter post items per capita, domestic	148	Parcel & express items per capita, domestic	--
--	-----	---	----

Volume, 2016 (million items) (Note: data of the USP)

769

Domestic letter post

Volume index (2013=100%)

1,2

1

0,8

0,6

2013

2014

2015

2016

Letters (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	Not available	Not available	Not available
SP letters			
Bulk mail			
Direct mail			
Publications			
Domestic parcel & express			
B2C			
B2B			
C2C			
Outbound cross-border letter post			
Outbound cross-border parcel & express			

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	Not available	Not available	Not available	Not available
Parcels				

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	Posten Norge AS		<div>Revenue structure (2016)</div> <div><div><div></div><div></div></div><div>Mail; 37%</div><div>Logistics; 63%</div></div>			
Legal status	Public limited company					
State ownership	100%					
Total revenue, 2016 (mEUR)	2.642					
EBIT, 2016 (mEUR)	19					
EBIT margin, 2016 (EBIT/Revenue)	0,7%					
Source: Posten Norge 2016 Annual Report						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			0,2%			
Percentage of the population that does not receive delivery of parcels at the standard frequency			0,2%			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			Yes			
Authorization procedure within the universal service area			--			
Net cost study			Yes			
Existence of compensation fund to compensate USP for USO net costs			Not authorized			
Other methods of compensation			Public procurement			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+2)*	Yes	Ex post for all items in this service category		Yes		
Bulk letters	Yes	--		No		
Direct mail	No	Ex post for all items in this service category		No		
Publications	Yes	Ex post for all items in this service category		Yes		
Single piece letter post (D+4)*	Yes	Ex post for all items in this service category		Yes		
Basic parcel post (domestic)	Yes	Ex post for all items in this service category		Yes		
Bulk parcels	No	--		No		
* Until January 2018 these products were respectively D+1 and D+3						
Delivery frequency for letter post		5 days per week	Legally required delivery point	--		
Delivery frequency for parcels		5 days per week				
Universal service indicators						
Price trend (EUR)	2013	2016	Price, €			
20g D+1, domestic*	1,01	1,17	20g D+1			
20g D+3, domestic*	0,96	1,07	20g D+3			
50g D+3, domestic*	1,49	1,60	20g D+1 EU			
20g D+1, EU	1,39	1,49				
5kg parcel, domestic	14,93	17,06				
5kg parcel, cross-border (lowest tariff)	36,79	42,02				
* Since January 2018 D+2 and D+4 respectively						
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)*	--	--	2013	--	2013	--
Actual performance (D+1)*	86,0%	85,9%	2014	--	2014	--
Postal outlets (total)	1.412	1.351	2015	--	2015	--
Postal outlets per 10,000 inhabitants	2,8	2,6	2016	--	2016	--
Share of post offices operated by USP	7%	2%				
* Since January 2018 D+2						
Employment						
		2016	Average annual change 2013-2016			
Headcount, total in the sector		18.500	1,29%			
Headcount, total at USP		16.992	-3,69%			
Share of civil servants		0%				

REGULATION			
Institutional framework			
Ministry for postal policy		Ministry of Transport and Communications	
Ministry for ownership of PPO		Ministry of Trade, Industry and Fisheries	
National regulatory authority		Norwegian Communication Authority	
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	No
NRA authority to order remedies	Yes	Publishes quality of service results annually	No
NRA sets monitoring standards	Yes, quality targets*	Quality measurement method	--
* The Ministry sets the targets, the NRA monitors the standards			
National competition authority			
NRA is the primary enforcer of competition		--	
NRA/NCA cooperation		Share data: Yes	Regularly consult: Yes
Competition cases since 2013		Schenker companies against Posten Norge AS (ordinary national civil lawsuit in Norway); Bring Citymail Denmark A/S against Post Denmark A/S (now PostNord) - (ordinary national civil lawsuit in Denmark)	
State aid cases since 2013		--	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: No	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes: --	Post office boxes: Yes	Letter delivery boxes: --
	Parcel lockers: No	Sorting centers: No	Return services: Yes
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Not required by law nor verified in practice	Not required by law nor verified in practice	Not required by law nor verified in practice
Special tariffs are available to consolidators?	Not required by law nor verified in practice	Not required by law nor verified in practice	Not required by law nor verified in practice
VAT rate for postal products not exempt	--		
VAT exemption is applied	--		
	VAT Exempt		VAT Exempt
Basic letter post (D+2, domestic)*	--	Basic letter post (D+4, domestic)*	--
Basic letter post (D+1, cross-border)	--	Basic parcel post (domestic)	--
Bulk letters	--	Basic parcel post (cross-border)	--
Registered mail	--	Bulk parcels	--
Insured mail	--	Express letter service	--
Direct mail	--	Express parcel service	--
Publications	--		
* Until January 2018 these products were respectively D+1 and D+3			
Protection of users			
Protection of users by law	Yes	Postal laws and/or regulations include user protection provisions	
Implementing authority(ies)	--		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: No	By NRA: No	No

<

UNIVERSAL SERVICE							
Designated universal service provider							
Name of the universal service provider	Poczta Polska			<div>Revenue structure (2016)*</div> <div></div> <div>Letter post; 90%</div>			
Legal status	Public limited company						
State ownership	100%						
Total revenue, 2016 (mEUR)	1.246						
EBIT, 2016 (mEUR)	-16,4						
EBIT margin, 2016 (EBIT/Revenue)	-1,3%						
* The revenue structure relates only to USO services							
Ensuring Universal Service							
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				0%			
Percentage of the population that does not receive delivery of parcels at the standard frequency				0%			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No			
Authorization procedure within the universal service area				Designation			
Net cost study				--			
Existence of compensation fund to compensate USP for USO net costs				Authorized but not established			
Other methods of compensation				Direct compensation from public funds			
Scope of universal service							
Service	Ensured	Price regulated		Service standards set			
Single piece letter post (D+1)	Yes	Ex ante for all items in this service category		Yes			
Bulk letters	No	No price regulation		No			
Direct mail	No	No price regulation		No			
Publications	No	No price regulation		No			
Single piece letter post (D+2)	Yes	Ex ante for all items in this service category		Yes			
Basic parcel post (domestic)	Yes	Ex ante for all items in this service category		Yes			
Bulk parcels	No	No price regulation		No			
Delivery frequency for letter post		5 days per week		Legally required delivery point		To the individual letter boxes and groups of roadside letter boxes in rural areas	
Delivery frequency for parcels		5 days per week					
Universal service indicators							
Price trend (EUR)	2013	2016	<div>Price, €</div> <div></div>				
20g D+1, domestic	0,54	0,58					
20g D+2, domestic	0,37	0,46					
50g D+2, domestic	0,37	0,46					
20g D+1, EU	1,05	1,39					
5kg parcel, domestic	3,01	4,17					
5kg parcel, cross-border (lowest tariff)	9,51	9,51					
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP*		
Domestic target (D+1)	82,0%	82,0%	2013	--	2013	162.492	
Actual performance (D+1)	66,7%	59,2%	2014	--	2014	258.071	
Postal outlets (total)	7.884	7.497	2015	--	2015	486.099	
Postal outlets per 10,000 inhabitants	2,1	2,0	2016	--	2016	579.007	
Share of post offices operated by USP	81%	62%	* The figures relate to all services provided by the USP				
Employment							
		2016	Average annual change 2013-2016				
Headcount, total in the sector		129.200	-1,53%				
Headcount, total at USP		74.601	-3,67%				
Share of civil servants		12%	-1,72%				

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Infrastructure		
Ministry for ownership of PPO	Ministry of Infrastructure		
National regulatory authority	Office of Electronic Communications		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	---	Quality measurement method	--
National competition authority			
NRA is the primary enforcer of competition		No	
NRA/NCA cooperation		Share data: Yes	Regularly consult: No
Competition cases since 2013		III SK 21/16	
State aid cases since 2013		SA.38869	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: No	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes: No	Post office boxes: Yes	Letter delivery boxes: Yes
	Parcel lockers: No	Sorting centers: No	Return services: No
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Not required by law nor verified in practice	Not required by law nor verified in practice	Not required by law nor verified in practice
Special tariffs are available to consolidators?	Not required by law nor verified in practice	Not required by law nor verified in practice	Not required by law nor verified in practice
VAT rate for postal products not exempt		23%	
VAT exemption is applied		On universal services provided by USP	
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+2, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	No	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	No		
Protection of users			
Protection of users by law		Yes Postal laws and/or regulations include user protection provisions	
Implementing authority(ies)		Postal NRA enforces user protection provisions for postal services	
Postal operators required to provide reimbursement and/or compensation where warranted		Yes	
Publication of annual complaint statistics		By USP: No	By NRA: Yes

PORTUGAL

COUNTRY FACTS

Total population (million)	2016	10,34
Population density (per sqkm)	2015	112,3
GDP growth rate	2014	0,90%
	2015	1,80%
	2016	1,60%
GDP per capita in PPS (in % EU-28 average)	2016	16.900 (77)

ICT indicators, % of individuals aged 16-74 (2016)

73%

83%

Broadband

70%

82%

Internet usage

29%

49%

Internet banking

45%

48%

e-government

31%

55%

e-commerce

16%

18%

e-commerce, cross border intra EU

■ PT ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	72	Parcel & express items per capita, domestic	4
--	----	---	---

Volume, 2016 (million items)

780

26

51

4

Domestic and inbound cross-border letter post

Outbound cross-border letter post

Domestic and inbound cross-border parcel & express

Outbound cross-border parcel & express

Volume index (2013=100%)

1,2

1

0,8

0,6

2013

2014

2015

2016

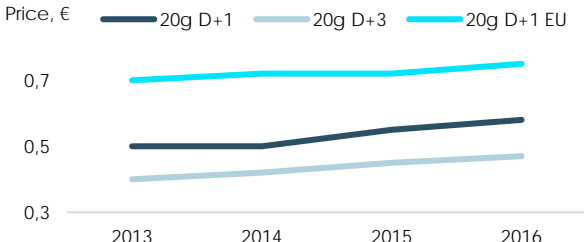
Letters (domestic)

Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	97,1%	End-to-end competition	Low
SP letters	98,7%	End-to-end competition	Low
Bulk mail	--	--	--
Direct mail	100%	End-to-end competition	Marginal
Publications	75,6%	End-to-end competition	Moderate
Domestic parcel & express	31,9%	End-to-end competition	Intense
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	95,5%	End-to-end competition	Low
Outbound cross-border parcel & express	13,7%	End-to-end competition	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	4	End-to-end competition	5	End-to-end competition
Parcels	18	End-to-end competition	16	End-to-end competition

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider		CTT Correios		<div>Revenue structure (2016)</div> <div><div>Other; 10%</div><div>Letter post; 72%</div><div>Parcels & Express; 18%</div></div>		
Legal status		Public limited company				
State ownership		0%				
Total revenue, 2016 (mEUR)		695				
EBIT, 2016 (mEUR)		94,7				
EBIT margin, 2016 (EBIT/Revenue)		13,6%				
Source: CTT Correios 2016 Annual Report						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				--		
Percentage of the population that does not receive delivery of parcels at the standard frequency				--		
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				Yes		
Authorization procedure within the universal service area				Individual license		
Net cost study				--		
Existence of compensation fund to compensate USP for USO net costs				Authorized but not established		
Other methods of compensation				No		
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Price cap for all items in this service category		Yes		
Bulk letters	Yes	Ex post for all items in this service category		Yes		
Direct mail	No	No price regulation		--		
Publications	Yes	Price cap for all items in this service category		Yes		
Single piece letter post (D+3)	Yes	Price cap for all items in this service category		Yes		
Basic parcel post (domestic)	Yes	Price cap for all items in this service category		Yes		
Bulk parcels	Yes	Price cap for all items in this service category		Yes		
Delivery frequency for letter post	5 days per week		Legally required	Letters must be delivered to the door of an addressee		
Delivery frequency for parcels	5 days per week		delivery point			
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> <div><div>20g D+1</div><div>20g D+3</div><div>20g D+1 EU</div></div> 			
20g D+1, domestic	0,50	0,58				
20g D+3, domestic	0,40	0,47				
50g D+3, domestic	0,57	0,60				
20g D+1, EU	0,70*	0,75*				
5kg parcel, domestic	6,25**	7,1**				
5kg parcel, cross-border (lowest tariff)	33,00	33,00				
* For Spain 0,60 and 0,65 respectively. ** This is the price for sending a parcel across all the Portuguese mainland.						
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP*	
Domestic target (D+1)	94,5%	94,5%	2013	8.313	2013	54.056
Actual performance (D+1)	94,9%	93,8%	2014	8.012	2014	58.276
Postal outlets (total)	2.443	2.339	2015	7.609	2015	67.692
Postal outlets per 10,000 inhabitants	2,3	2,3	2016	9.656	2016	73.773
Share of post offices operated by USP	26%	26%	* Complaints about universal services. Number of complaints replied by USP			
Employment						
		2016	Average annual change 2013-2016			
Headcount, total in the sector		15.900	-4,23%			
Headcount, total at USP		10.881	-0,49%			
Share of civil servants		0%	--			

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Planning and Infrastructures		
Ministry for ownership of PPO	--		
National regulatory authority	National Communications Authority (ANACOM)		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	No*
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets and minimum requirements	Quality measurement method	Both panel with manual reporting and RFID technology
* Annual measurement of quality of service is carried out by independent external bodies (contracted by USP)			
National competition authority			
NRA is the primary enforcer of competition	No		
NRA/NCA cooperation	Share data: Yes	Regularly consult: --	
Competition cases since 2013	PRC 2015/04		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes: No*	Post office boxes: Yes	Letter delivery boxes: Yes**
	Parcel lockers: --	Sorting centers: Yes	Return services: Yes**
* The placing on public road of mailboxes intended for deposit of postal items falls within the scope of the concession. According to the Bases of the Concession it is provided by the concessionaire in an exclusive regime. ** Answer from USP.			
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	Yes		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Not required by law nor verified in practice	--
Special tariffs are available to consolidators?	Required by law and verified in practice	Not required by law nor verified in practice	--
VAT rate for postal products not exempt	--		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+3, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	Yes	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	Yes
Insured mail	Yes	Express letter service	--
Direct mail	--	Express parcel service	--
Publications	Yes		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: Yes	By NRA: Yes	

ROMANIA

COUNTRY FACTS

Total population (million)	2016	19,76
Population density (per sqkm)	2015	86,1
GDP growth rate	2014	3,10%
	2015	4,00%
	2016	4,80%
GDP per capita in PPS (in % EU-28 average)	2016	7.700 (58)

ICT indicators,
% of individuals
aged 16-74
(2016)

70%

83%

Broadband

60%

82%

Internet usage

5%

49%

Internet banking

9%

48%

e-government

12%

55%

e-commerce

2%

18%

e-commerce, cross
border intra EU

■ RO ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	10	Parcel & express items per capita, domestic	16
--	----	---	----

Volume, 2016 (million items)

220

4

Domestic and inbound cross-border letter post

318

3

Domestic and inbound cross-border parcel & express

Volume index (2013=100%)

10,3

5,3

0,3

2013

2014

2015

2016

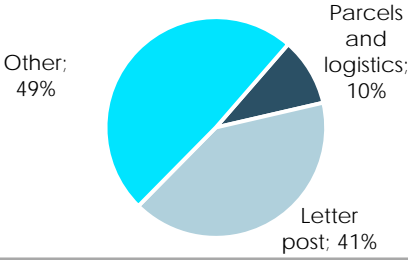
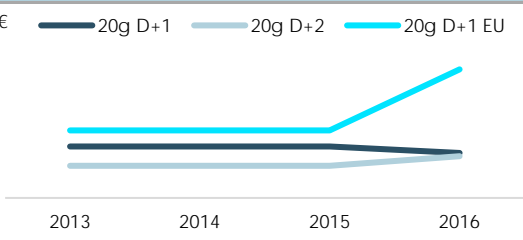
Letters (domestic)

Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	66,3%	End-to-end competition	Intense
SP letters	--	--	--
Bulk mail	--	--	--
Direct mail	--	--	--
Publications	--	--	--
Domestic parcel & express	12,6%	End-to-end competition	Moderate
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	--	--	--
Outbound cross-border parcel & express	--	--	--

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	--	--	--	--
Parcels	--	--	--	--

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider		Compania Nationala Posta Română		<div>Revenue structure (2016)</div> 		
Legal status		Public limited company				
State ownership		75% state ownership 25% S.C. Fondul Proprietatea S.A.				
Total revenue, 2016 (mEUR)		245				
EBIT, 2016 (mEUR)		4,9				
EBIT margin, 2016 (EBIT/Revenue)		2,0%				
Source: Universal postal union						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				--		
Percentage of the population that does not receive delivery of parcels at the standard frequency				--		
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No		
Authorization procedure within the universal service area			Designation and general authorisation			
Net cost study			Yes			
Existence of compensation fund to compensate USP for USO net costs			Authorized but not established			
Other methods of compensation			Direct compensation from public funds			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex ante for all items in this service category		Yes		
Bulk letters	No	No price regulation		No		
Direct mail	No	No price regulation		No		
Publications	Yes	Ex ante for all items in this service category		No		
Single piece letter post (D+2)	Yes	Ex ante for all items in this service category		No		
Basic parcel post (domestic)	Yes	Ex ante for all items in this service category		No		
Bulk parcels	No	No price regulation		No		
Delivery frequency for letter post	5 days per week		Legally required delivery point	Letters must be delivered to the door of an addressee		
Delivery frequency for parcels	5 days per week					
Universal service indicators						
Price trend (EUR)	2013	2016	Price, €			
20g D+1, domestic	0,35	0,31	— 20g D+1 — 20g D+2 — 20g D+1 EU			
20g D+2, domestic	0,22	0,28				
50g D+2, domestic	0,35	0,31				
20g D+1, EU	0,46	0,87				
5kg parcel, domestic	1,57	1,48				
5kg parcel, cross-border (lowest tariff)	14,06	26,35				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	85,0%	85,0%	2013	32	2013	--
Actual performance (D+1)	34,3%	33,1%	2014	92	2014	--
Postal outlets (total)	5.580	5.592	2015	462	2015	--
Postal outlets per 10,000 inhabitants	2,8	2,8	2016	506	2016	--
Share of post offices operated by USP	100%	100%				
Employment						
		2016	Average annual change 2013-2016			
Headcount, total in the sector		37.500	-6,65%			
Headcount, total at USP		24.139	-4,20%			
Share of civil servants		0%	--			

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry for the Information Society		
Ministry for ownership of PPO	Ministry for the Information Society		
National regulatory authority	National Authority for Management and Regulation in Communications of Romania		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	No
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets and minimum requirements	Quality measurement method	--
National competition authority			
NRA is the primary enforcer of competition	--		
NRA/NCA cooperation	Share data: Yes	Regularly consult: Yes	
Competition cases since 2013	--		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: --	Post Codes: Yes	Addr. database: No
	Public letter-post collection boxes: --	Post office boxes: No	Letter delivery boxes: No
	Parcel lockers: --	Sorting centers: --	Return services: --
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	Yes		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Not required by law nor verified in practice	Required by law and verified in practice
Special tariffs are available to consolidators?	Required by law and verified in practice	Not required by law nor verified in practice	Required by law and verified in practice
VAT rate for postal products not exempt	19%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+2, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	No	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	Yes		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: Yes	By NRA: Yes	

SLOVAKIA

COUNTRY FACTS

Total population (million)	2016	5,43
Population density (per sqkm)	2015	110,6
GDP growth rate	2014	2,80%
	2015	3,90%
	2016	3,30%
GDP per capita in PPS (in % EU-28 average)	2016	14.600 (77)

ICT indicators,
% of individuals
aged 16-74
(2016)

78%83%

Broadband

80%82%

Internet usage

45%49%

Internet banking

48%48%

e-government

56%55%

e-commerce

22%18%

e-commerce, cross
border intra EU

■ SK ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	43	Parcel & express items per capita, domestic	6
--	----	---	---

Volume, 2016 (million items)

266

Domestic and inbound cross-border letter post

12

Outbound cross-border letter post

40

Domestic and inbound cross-border parcel & express

2

Outbound cross-border parcel & express

Volume index (2013=100%)

1,6

1,1

0,6

2013

2014

2015

2016

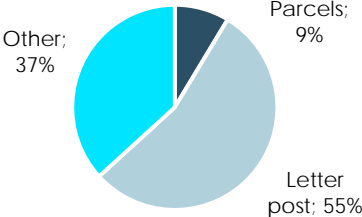
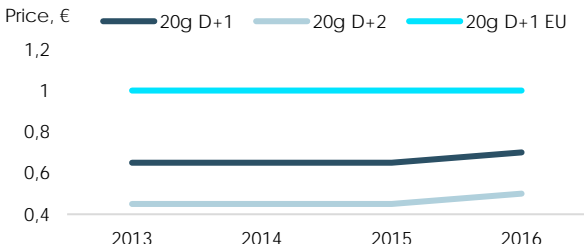
Letters (domestic)

Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	89%	End-to-end competition	Moderate
SP letters	--	--	--
Bulk mail	--	--	--
Direct mail	--	End-to-end competition	Low
Publications	86%	End-to-end competition	Moderate
Domestic parcel & express	25%	End-to-end competition	Intense
B2C	--	End-to-end competition	--
B2B	--	End-to-end competition	--
C2C	--	End-to-end competition	--
Outbound cross-border letter post	--	End-to-end competition	Marginal
Outbound cross-border parcel & express	36%	End-to-end competition	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	1	End-to-end competition	2	End-to-end competition
Parcels	3	End-to-end competition	1	End-to-end competition

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider		Slovenská pošta		<div>Revenue structure (2016)</div> 		
Legal status		Public limited company				
State ownership		100%				
Total revenue, 2016 (mEUR)		314,07				
EBIT, 2016 (mEUR)		4				
EBIT margin, 2016 (EBIT/Revenue)		1,3%				
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				less than 1%		
Percentage of the population that does not receive delivery of parcels at the standard frequency				less than 1%		
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No		
Authorization procedure within the universal service area			Individual license and general authorisation			
Net cost study			Yes			
Existence of compensation fund to compensate USP for USO net costs			Established			
Other methods of compensation			No			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex ante for all items in this service category		Yes		
Bulk letters	Yes	--		No		
Direct mail	Yes	Ex ante for all items in this service category		Yes		
Publications	No	No price regulation		No		
Single piece letter post (D+2)	Yes	Ex ante for all items in this service category		Yes		
Basic parcel post (domestic)	Yes	Ex ante for all items in this service category		Yes		
Bulk parcels	Yes	--		No		
Delivery frequency for letter post	5 days per week		Legally required delivery point	Letters must be delivered to the door of an addressee		
Delivery frequency for parcels	5 days per week					
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> 			
20g D+1, domestic	0,65	0,70				
20g D+2, domestic	0,45	0,50				
50g D+2, domestic	0,45	0,50				
20g D+1, EU	1,00	1,00				
5kg parcel, domestic	4,00	3,90				
5kg parcel, cross-border (lowest tariff)	10,50	10,50				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	93,0%	93,0%	2013	77	2013	51.607
Actual performance (D+1)	94,7%	95,5%	2014	32	2014	46.046
Postal outlets (total)	1.589	1.584	2015	31	2015	51.107
Postal outlets per 10,000 inhabitants	2,9	2,9	2016	21	2016	61.351
Share of post offices operated by USP	97%	97%				
Employment						
		2016	Average annual change 2013-2016			
Headcount, total in the sector		23.200	2,25%			
Headcount, total at USP		14.049	-0,73%			
Share of civil servants		0%	--			

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Transport and Construction of the Slovak Republic		
Ministry for ownership of PPO	Ministry of Transport and Construction of the Slovak Republic		
National regulatory authority	Regulatory Authority for Electronic Communications and Postal Services		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	--
National competition authority			
NRA is the primary enforcer of competition		Yes	
NRA/NCA cooperation		Share data: Yes	Regularly consult: No
Competition cases since 2013		T-556/08 and C-293/15 P	
State aid cases since 2013		--	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: --	Post Codes: Yes	Addr. database: No
	Public letter-post collection boxes: Yes	Post office boxes: No	Letter delivery boxes: Yes
	Parcel lockers: No	Sorting centers: Yes	Return services: Yes
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Required by law and verified in practice	Required by law and verified in practice
Special tariffs are available to consolidators?	Required by law and verified in practice	Required by law and verified in practice	Required by law and verified in practice
VAT rate for postal products not exempt	20%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+2, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	Yes	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	Yes
Insured mail	Yes	Express letter service	No
Direct mail	Yes	Express parcel service	No
Publications	No		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: Yes	By NRA: --	

SLOVENIA

COUNTRY FACTS

Total population (million)	2016	2,06
Population density (per sqkm)	2015	102,4
GDP growth rate	2014	3,00%
	2015	2,30%
	2016	3,10%
GDP per capita in PPS (in % EU-28 average)	2016	18.500 (83)

ICT indicators,
% of individuals
aged 16-74
(2016)

Broadband	78%	83%
Internet usage	75%	82%
Internet banking	35%	49%
e-government	45%	48%
e-commerce	40%	55%
e-commerce, cross border intra EU	17%	18%

■ SI ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	118	Parcel & express items per capita, domestic	6
--	-----	---	---

Volume, 2016 (million items)

Domestic and inbound cross-border letter post	256,2
Outbound cross-border letter post	5,2
Domestic and inbound cross-border parcel & express	13,0
Outbound cross-border parcel & express	0,5

Volume index (2013=100%)

2013	2014	2015	2016
Letters (domestic)	1,0	0,95	0,9
Parcels (domestic)	1,0	1,05	1,2

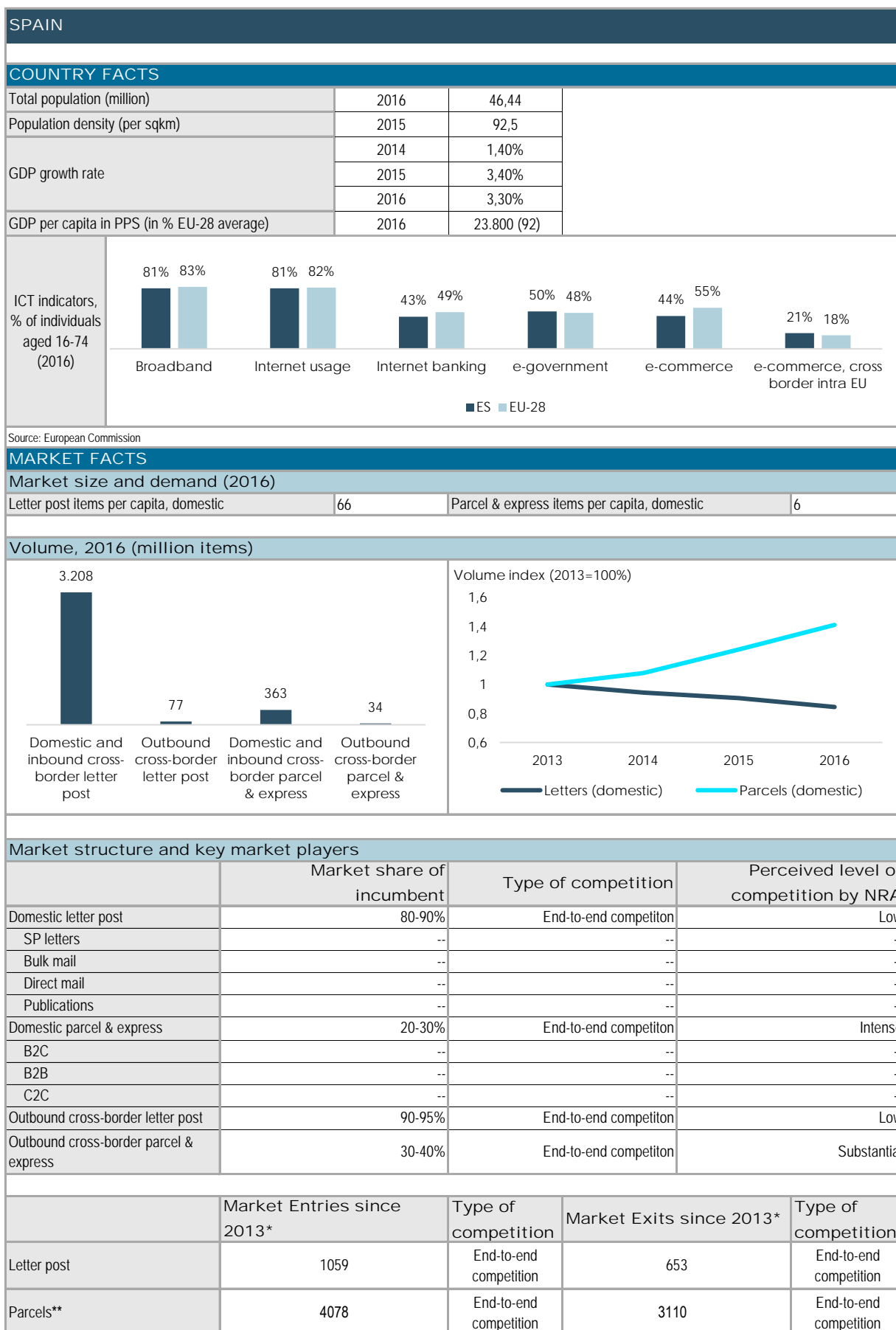
Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	--	--	--
SP letters	85%	Downstream competition	Moderate
Bulk mail	--	--	--
Direct mail	--	--	--
Publications	37%	End-to-end competition	Intense
Domestic parcel & express	53%	--	Substantial
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	100%	--	Marginal
Outbound cross-border parcel & express	25%	--	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	2	Downstream competition	3	Downstream competition
Parcels	6	End-to-end competition	2	End-to-end competition

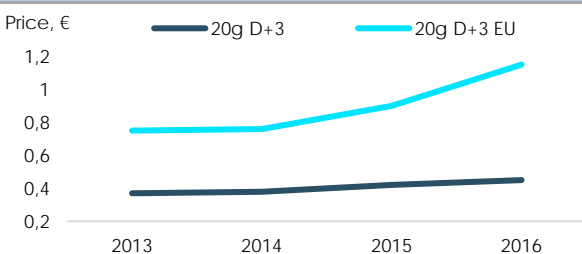
UNIVERSAL SERVICE							
Designated universal service provider							
Name of the universal service provider	Pošta Slovenije			<div>Revenue structure (2016)</div> <div>Other; 32%</div> <div>Parcels; 11%</div> <div>Letter post; 57%</div>			
Legal status	Public limited company						
State ownership	100%						
Total revenue, 2016 (mEUR)	216						
EBIT, 2016 (mEUR)	12,3						
EBIT margin, 2016 (EBIT/Revenue)	5,6%						
Ensuring Universal Service							
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				Less than 1%			
Percentage of the population that does not receive delivery of parcels at the standard frequency				Less than 1%			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				No			
Authorization procedure within the universal service area			Designation for USP, individual for those working in scope of US and general for all others.				
Net cost study			--				
Existence of compensation fund to compensate USP for USO net costs			Authorized but not established				
Other methods of compensation			No				
Scope of universal service							
Service	Ensured	Price regulated		Service standards set			
Single piece letter post (D+1)	Yes	Ex ante for all items in this service category		Yes			
Bulk letters	No	No price regulation		--			
Direct mail	Yes	No price regulation		No			
Publications	Yes	Ex ante for all items in this service category		Yes			
Single piece letter post (D+X)	No	No price regulation		--			
Basic parcel post (domestic)	Yes	Ex ante for all items in this service category		Yes			
Bulk parcels	No	No price regulation		No			
Delivery frequency for letter post	5 days per week		Legally required delivery point	Letters must be delivered to the door of an addressee			
Delivery frequency for parcels	5 days per week						
Universal service indicators							
Price trend (EUR)	2013	2016	<div>Price, €</div> <div>20g D+1</div> <div>20g D+1 EU</div>				
20g D+1, domestic	0,29	0,37					
20g D+X, domestic	--	--					
50g D+X, domestic	--	--					
20g D+1, EU	0,60	1,00					
5kg parcel, domestic	3,83	2,99					
5kg parcel, cross-border (lowest tariff)	20,48	20,48					
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP		
Domestic target (D+1)	95,0%	95,0%	2013	17	2013	1.902	
Actual performance (D+1)	96,2%	96,6%	2014	29	2014	1.865	
Postal outlets (total)	556	525	2015	24	2015	2.437	
Postal outlets per 10,000 inhabitants	2,7	2,5	2016	26	2016	2.359	
Share of post offices operated by USP	91%	68%					
Employment							
	2016		Average annual change 2013-2016				
Headcount, total in the sector	8.600		4,21%				
Headcount, total at USP	5.510		0,97%				
Share of civil servants	0%						

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Economic Development and Technology		
Ministry for ownership of PPO	Slovenian Sovereign Holding		
National regulatory authority	Agency for Communication Networks and Services of the Republic of Slovenia		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	--
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	Panel with RFID technology
National competition authority			
NRA is the primary enforcer of competition	Yes		
NRA/NCA cooperation	Share data: Yes	Regularly consult: --	
Competition cases since 2013	--		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: Yes	Addr. database: Yes
	Public letter-post collection boxes: No	Post office boxes: Yes	Letter delivery boxes: No
	Parcel lockers: --	Sorting centers: Yes	Return services: No
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	--		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law but not verified in practice	Required by law but not verified in practice	Required by law but not verified in practice
Special tariffs are available to consolidators?	Required by law but not verified in practice	Required by law but not verified in practice	Required by law but not verified in practice
VAT rate for postal products not exempt	22%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+X, domestic)	--
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	--	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	--
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	Yes		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: Yes	By NRA: --	



*Source: USP based on Ministry of Public Works, CNCM.

** Data comes from the Ministry of Public Works (Transport Section)'s registry, which gathers all companies providing freight services.

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	Correos		Revenue structure (2016) Confidential			
Legal status	Public limited company					
State ownership	100%					
Total revenue, 2016 (mEUR)	1.591					
EBIT, 2016 (mEUR)	Confidential					
EBIT margin, 2016 (EBIT/Revenue)	Confidential					
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			--			
Percentage of the population that does not receive delivery of parcels at the standard frequency			--			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			No			
Authorization procedure within the universal service area			Individual license			
Net cost study			--			
Existence of compensation fund to compensate USP for USO net costs			Authorized but not established			
Other methods of compensation			Direct compensation from public funds			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set*		
Single piece letter post (D+3)	Yes	Ex post for all items in this service category		Yes**		
Bulk letters	Yes	Ex post for all items in this service category		Yes**		
Direct mail	No	No price regulation		No		
Publications	No	No price regulation		No		
Single piece letter post (D+X)	--	--		--		
Basic parcel post (domestic)	Yes	Ex post for all items in this service category		Yes**		
Bulk parcels	Yes	Ex post for all items in this service category		No (USP: Yes)		
* There is no difference between service standards for single piece and for bulk services. ** There has been no legislative development since the Postal Act (Law 43/2010), so the quality provisions in force are taken from the Postal Regulation of 1999.						
Delivery frequency for letter post	5 days per week		Legally required	--		
Delivery frequency for parcels	5 days per week		delivery point			
Universal service indicators						
Price trend (EUR)	2013	2016	Price, €			
20g D+3, domestic	0,37	0,45				
20g D+X, domestic	--	--				
50g D+X, domestic	--	--				
20g D+3, EU	0,75	1,15				
5kg parcel, domestic	6,50	7,87				
5kg parcel, cross-border (lowest tariff)	41,53	42,22				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+3)	93,0%	93,0%	2013	--	2013	65.913
Actual performance (D+3)	96,6%	92,7%	2014	--	2014	77.103
Postal outlets (total)	9.288	8.787	2015	--	2015	154.398
Postal outlets per 10,000 inhabitants	2,0	1,9	2016	--	2016	160.887
Share of post offices operated by USP	100%	100%				
Employment						
		2016	Average annual change 2013-2016			
Headcount, total in the sector		111.200	4,55%			
Headcount, total at USP		49.785	4,08%			
Share of civil servants		28%	-10,19%			

REGULATION			
Institutional framework			
Ministry for postal policy	Ministry of Public Works		
Ministry for ownership of PPO	Ministry of Finance and Public Administration (through the State Industrial Holdings Company)		
National regulatory authority	Spanish Authority for Markets and Competition (CNMC)		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	Yes
NRA authority to order remedies	--	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets	Quality measurement method	Both panel with manual reporting and RFID technology
National competition authority			
NRA is the primary enforcer of competition		Yes*	
NRA/NCA cooperation		Share data: --	Regularly consult: --
Competition cases since 2013		--	
State aid cases since 2013		SA.37977	
* CNMC (the Spanish NRA) is a cross-sectoral regulatory authority created through the merge of former sectoral NRAs (Postal, Transport, Telecommunications, Media and Energy) and the National Competition Authority.			
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: Yes*	Addr. database: Yes*
	Public letter-post collection boxes: --	Post office boxes: --	Letter delivery boxes: Yes*
	Parcel lockers: --	Sorting centers: Yes	Return services: --
* In practice			
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Required by law but not verified in practice*	Required by law and verified in practice
Special tariffs are available to consolidators?	Required by law and verified in practice	Required by law but not verified in practice*	Required by law and verified in practice
* Direct mail is out of the US scope unless that mail is either sent as letter/postcard containing written communications in any format up to 2 kg or postal parcels, with or without commercial value, up to 20 kg (article 21.2 Postal Act).			
VAT rate for postal products not exempt	21%		
VAT exemption is applied	On universal services provided by USP*		
	VAT Exempt		VAT Exempt
Basic letter post (D+3, domestic)	Yes	Basic letter post (D+X, domestic)	--
Basic letter post (D+3, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	Yes	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	Yes
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	No		
* The VAT exemption is not applied when the service conditions are negotiated individually.			
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Postal NRA enforces user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	Yes		
Publication of annual complaint statistics	By USP: --	By NRA: Yes	

SWEDEN

COUNTRY FACTS

Total population (million)	2016	9,85
Population density (per sqkm)	2015	24,1
GDP growth rate	2014	2,60%
	2015	4,50%
	2016	3,20%
GDP per capita in PPS (in % EU-28 average)	2016	42.600 (123)

ICT indicators,
% of individuals
aged 16-74
(2016)

89%83%

93%82%

83%49%

78%48%

76%55%

25%18%

Broadband

Internet usage

Internet banking

e-government

e-commerce

e-commerce, cross
border intra EU

SE

EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	231	Parcel & express items per capita, domestic	--
--	-----	---	----

Volume, 2015 (million items)

2.387

69

97

Domestic and inbound cross-border letter post

Outbound cross-border letter post

Domestic parcel & express

Volume index (2013=100%)

1.4

1.2

1

0.8

0.6

2013

2014

2015

2016

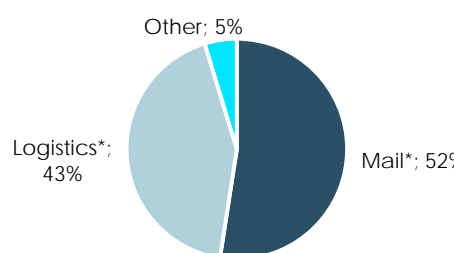
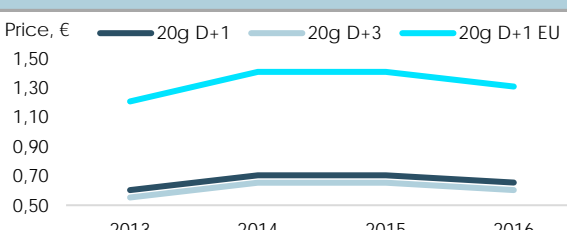
Letters (domestic)

Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	80,7%	End-to-end competition	Moderate
SP letters	--	Upstream competition	Marginal
Bulk mail	--	End-to-end competition	Substantial
Direct mail	--	End-to-end competition	Substantial
Publications	--	End-to-end competition	Moderate
Domestic parcel & express	--	End-to-end competition	Moderate
B2C	--	End-to-end competition	Moderate
B2B	--	End-to-end competition	Substantial
C2C	--	End-to-end competition	Moderate
Outbound cross-border letter post	--	--	Marginal
Outbound cross-border parcel & express	--	--	Marginal

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	2	End-to-end competition	4	End-to-end competition
Parcels	--	--	--	--

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	PostNord Group AB		<div>Revenue structure (2016)</div> 			
Legal status	Limited company					
State ownership	100 % owned by PostNord AB, a public limited company owned by the Swedish (60 %) and Danish (40 %) states.					
Total revenue, 2016 (mEUR)	2.300					
EBIT, 2016 (mEUR)	84,7					
EBIT margin, 2016 (EBIT/Revenue)	3,7%					
* Mail includes "communication services" and logistics includes "eCommerce & Logistics". Source: PostNord Group 2016 Annual Report						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			--			
Percentage of the population that does not receive delivery of parcels at the standard frequency			--			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			--			
Authorization procedure within the universal service area			Individual license			
Net cost study			--			
Existence of compensation fund to compensate USP for USO net costs			Not authorized			
Other methods of compensation			No			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	Ex post for all items in this service category		Yes		
Bulk letters*	No	Ex post for all items in this service category		No		
Direct mail	No	Ex post for all items in this service category		No		
Publications**	No	Ex post for all items in this service category		No		
Single piece letter post (D+X)	--	--		--		
Basic parcel post (domestic)	Yes	No price regulation		No		
Bulk parcels	No	No price regulation		No		
* No explicit requirement to provide bulk letter services but if such services are provided by the USP these are regarded as US. ** Publications in addressed envelopes are regarded as any other letter mail items and subject to the same price control.						
Delivery frequency for letter post	5 days per week		Legally required	--		
Delivery frequency for parcels	5 days per week		delivery point			
Universal service indicators						
Price trend (EUR)	2013	2016	Price, €			
20g D+1, domestic	0,60	0,65	20g D+1			
20g D+3, domestic	0,55	0,60	20g D+3			
50g D+3, domestic	1,11	1,21	20g D+1 EU			
20g D+1, EU	1,21	1,31				
5kg parcel, domestic	18,59	16,78				
5kg parcel, cross-border (lowest tariff)	47,24	44,02				
						
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP	
Domestic target (D+1)	85,0%	85,0%	2013	550	2013	152.000
Actual performance (D+1)	94,4%	91,2%	2014	650	2014	143.000
Postal outlets (total)	6.110	--	2015	850	2015	177.000
Postal outlets per 10,000 inhabitants	6,4	--	2016	2.520	2016	166.800
Share of post offices operated by USP	5%	--				
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	33.100		-4,33%			
Headcount, total at USP	20.272		-5,10%			
Share of civil servants	6%		-9,08%			

REGULATION			
Institutional framework			
Ministry for postal policy	The Ministry of Enterprise		
Ministry for ownership of PPO	The Ministry of Finance		
National regulatory authority	The Swedish Post and Telecom Authority		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	No
NRA authority to order remedies	No	Publishes quality of service results annually	No
NRA sets monitoring standards	No	Quality measurement method	--
National competition authority			
NRA is the primary enforcer of competition	No		
NRA/NCA cooperation	Share data: Yes		Regularly consult: Yes
Competition cases since 2013	Changes in annual discounts re consolidators (dnr 638 and 639/2015); Pricing of unaddressed mail/magazines (dnr 215/2015); Rebate in hybrid service(dnr 298/2017)		
State aid cases since 2013	--		
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP:	--	Post Codes: Yes Addr. database: No
	Public letter-post collection boxes:	No	Post office boxes: Yes Letter delivery boxes: No
	Parcel lockers:	No	Sorting centers: No Return services: --
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?	Yes		
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Required by law and verified in practice	Required by law and verified in practice	--
Special tariffs are available to consolidators?	Not required by law nor verified in practice	Not required by law nor verified in practice	Not required by law nor verified in practice
VAT rate for postal products not exempt	25%		
VAT exemption is applied	On universal services provided by USP		
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+X, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	No	Basic parcel post (cross-border)	Yes
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	No		
Protection of users			
Protection of users by law	Yes Both postal and consumer protection laws apply to postal users		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	No		
Publication of annual complaint statistics	By USP: No	By NRA: Yes	

SWITZERLAND

COUNTRY FACTS

Total population (million)	2016	8,33
Population density (per sqkm)	2015	207,1
GDP growth rate	2014	2,40%
	2015	1,20%
	2016	1,40%
GDP per capita in PPS (in % EU-28 average)	2016	57.900 (161)

ICT indicators,
% of individuals
aged 16-74
(2014)

Broadband	86%	78%
Internet usage	90%	78%
Internet banking	54%	44%
e-government	71%	47%
e-commerce	67%	50%

■ CH ■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	425	Parcel & express items per capita, domestic	17
--	-----	---	----

Volume, 2016 (million items)

3.729

Domestic and inbound cross-border letter post

142

Outbound cross-border letter post

153

Domestic and inbound cross-border parcel & express

6

Outbound cross-border parcel & express

Volume index (2013=100%)

2013	2014	2015	2016
1.0	1.0	0.95	0.9
1.0	1.0	1.05	1.1

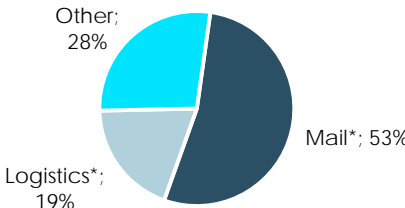
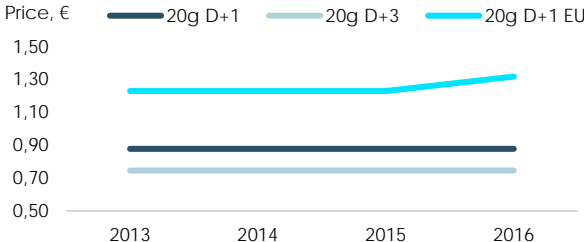
— Letters (domestic) — Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	98,6%	--	Marginal
SP letters	--	--	--
Bulk mail	--	--	--
Direct mail	--	--	--
Publications	--	--	--
Domestic parcel & express	79,0%	--	Moderate
B2C	--	--	--
B2B	--	--	--
C2C	--	--	--
Outbound cross-border letter post	--	--	Moderate
Outbound cross-border parcel & express	--	--	Intense

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	41	--	--	--
Parcels	41	--	--	--

Note: Market entries count letters, parcels and express & courier together

UNIVERSAL SERVICE								
Designated universal service provider								
Name of the universal service provider		Schweizerische Post AG		<div>Revenue structure (2016)</div> 				
Legal status		Public limited company						
State ownership		100%						
Total revenue, 2016 (mEUR)		7.183						
EBIT, 2016 (mEUR)		618						
EBIT margin, 2016 (EBIT/Revenue)		8,6%						
*Mail includes the "communication market" and logistics includes the "logistics market". Source: Schweizerische Post 2016 Annual Report								
Ensuring Universal Service								
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency				0.07%				
Percentage of the population that does not receive delivery of parcels at the standard frequency				0.07%				
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces				Yes				
Authorization procedure within the universal service area				General authorisation				
Net cost study				Yes				
Existence of compensation fund to compensate USP for USO net costs				Not authorized				
Other methods of compensation				No				
Scope of universal service								
Service	Ensured	Price regulated		Service standards set				
Single piece letter post (D+1)	Yes	Ex ante where dominant, otherwise ex post		Yes				
Bulk letters	Yes	Ex post for all items in this service category		No				
Direct mail	No	--		No				
Publications	Yes	Ex post for all items in this service category		No				
Single piece letter post (D+3)	Yes	Ex ante where dominant, otherwise ex post		Yes				
Basic parcel post (domestic)	Yes	Ex post for all items in this service category		Yes				
Bulk parcels	Yes	Ex post for all items in this service category		No				
Delivery frequency for letter post				5 days per week		Legally required delivery point		Letters must be delivered to the door of an addressee
Delivery frequency for parcels				5 days per week				
Universal service indicators								
Price trend (EUR)	2013	2016		Price, €				
20g D+1, domestic	0,88	0,88						
20g D+3, domestic	0,75	0,75						
50g D+3, domestic	0,75	0,75						
20g D+1, EU	1,23	1,32						
5kg parcel, domestic	7,90	7,90						
5kg parcel, cross-border (lowest tariff)	39,48	39,48						
Quality of service	2013	2016		Number of user complaints sent to NRA		Number of user complaints sent to USP		
Domestic target (D+1)	97,0%	97,0%		2013	50	2013	207.802	
Actual performance (D+1)	97,6%	98,0%		2014	48	2014	203.013	
Postal outlets (total)	2.231	2.172		2015	38	2015	208.024	
Postal outlets per 10,000 inhabitants	2,8	2,6		2016	41	2016	230.960	
Share of post offices operated by USP	74%	61%						
Employment								
		2016		Average annual change 2013-2016				
Headcount, total in the sector		39.000		-3,57%				
Headcount, total at USP*		51.619		-0,15%				
Share of civil servants		0%		-				
*The headcount total at USP is for 2015. The trend is also the change from 2013 to 2016								

REGULATION			
Institutional framework			
Ministry for postal policy	Federal Office of Communications		
Ministry for ownership of PPO	Secretariat General for the Department of the Environment, Transport, Energy and Communication (DETEC), in conjunction with the Federal Finance Administration (FFA)		
National regulatory authority	Federal Postal Services Commission (PostCom)		
Authority of NRA concerning quality of service			
NRA authority to levy fines	No	Measures quality of service annually	No
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	--	Quality measurement method	Panel with RFID technology
National competition authority			
NRA is the primary enforcer of competition		No	
NRA/NCA cooperation		Share data: Yes	Regularly consult: ---
Competition cases since 2013		Capri: Quickmail vs Swiss Post	
State aid cases since 2013		Car Postal France	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: --	Post Codes: No	Addr. database: Yes
	Public letter-post collection boxes: No	Post office boxes: Yes	Letter delivery boxes: No
	Parcel lockers: No	Sorting centers: No	Return services: --
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		No	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	Not required by law nor verified in practice	--	Not required by law nor verified in practice
Special tariffs are available to consolidators?	Not required by law nor verified in practice	--	Not required by law nor verified in practice
VAT rate for postal products not exempt		8%	
VAT exemption is applied		--	
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+3, domestic)	Yes
Basic letter post (D+1, cross-border)	No	Basic parcel post (domestic)	No
Bulk letters	Yes	Basic parcel post (cross-border)	No
Registered mail	Yes	Bulk parcels	No
Insured mail	Yes	Express letter service	No
Direct mail	No	Express parcel service	No
Publications	No		
Protection of users			
Protection of users by law	Yes Postal laws and/or regulations include user protection provisions		
Implementing authority(ies)	Both NRA and NCPA enforce user protection provisions for postal services		
Postal operators required to provide reimbursement and/or compensation where warranted	No		
Publication of annual complaint statistics	By USP: Yes	By NRA: --	

UNITED KINGDOM

COUNTRY FACTS

Total population (million)	2016	65,38
Population density (per sqkm)	2015	268,6
GDP growth rate	2014	3,10%
	2015	2,30%
	2016	1,90%
GDP per capita in PPS (in % EU-28 average)	2016	31.700 (107)

ICT indicators,
% of individuals
aged 16-74
(2016)

92%

83%

Broadband

95%

82%

Internet usage

64%

49%

Internet banking

53%

48%

e-government

83%

55%

e-commerce

23%

18%

e-commerce, cross
border intra EU

■ UK

■ EU-28

Source: European Commission

MARKET FACTS

Market size and demand (2016)

Letter post items per capita, domestic	179	Parcel & express items per capita	27
--	-----	-----------------------------------	----

Volume, 2016 (million items)

11.672

Domestic letter post

Confidential

Outbound cross-border letter post

1.973

Domestic and inbound cross-border parcel & express

165

Outbound cross-border parcel & express

Volume index (2013=100%)

1,4

1,2

1

0,8

0,6

2013

2014

2015

2016

— Letters (domestic)

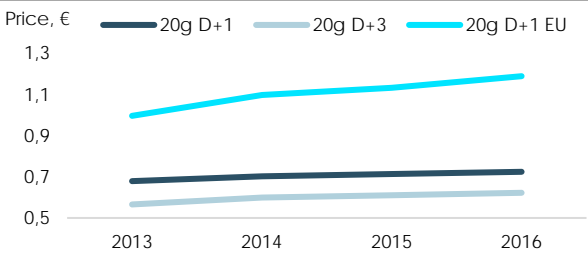
— Parcels (domestic)

Market structure and key market players

	Market share of incumbent	Type of competition	Perceived level of competition by NRA
Domestic letter post	99,9%*	Downstream competition	—
SP letters	--	--	—
Bulk mail	--	Upstream competition	—
Direct mail	--	Upstream competition	—
Publications	--	Upstream competition	—
Domestic parcel & express	--	End-to-end competition	—
B2C	--	End-to-end competition	—
B2B	--	End-to-end competition	—
C2C	--	End-to-end competition	—
Outbound cross-border letter post	--	--	—
Outbound cross-border parcel & express	--	End-to-end competition	—

* This figure refers to delivered post. Access operators handle circa 60% of addressed inland letters and over 70% of addressed mail posted by large businesses (Royal Mail response to Ofcom's May 2016 Fundamental Review of the Regulation of Royal Mail).

	Market Entries since 2013	Type of competition	Market Exits since 2013	Type of competition
Letter post	--	--	1	End-to-end competition
Parcels	--	--	1	End-to-end competition

UNIVERSAL SERVICE						
Designated universal service provider						
Name of the universal service provider	Royal Mail Group Limited		<div>Revenue structure (2016)</div> <div><div><div></div><div></div></div><div>Letter post; 56%</div><div>Parcels; 44%</div></div>			
Legal status	Private company					
State ownership	0%					
Total revenue, 2016 (mEUR)	8.661					
EBIT, 2016 (mEUR)	464,8					
EBIT margin, 2016 (EBIT/Revenue)	5,4%					
The numbers quoted are for the UK business in total, and not the Reported Business. Ofcom has defined the Reported Business as a reporting entity that contains the universal service network and all the products provided through or in relation to that network.						
Ensuring Universal Service						
Percentage of the population that does not receive delivery of priority letter post items at the standard frequency			~ 0,008%			
Percentage of the population that does not receive delivery of parcels at the standard frequency			~ 0,008%			
NRA has prepared a study that identifies where there is a significant risk that a minimum level of universal services will not be provided by market forces			--			
Authorization procedure within the universal service area			General authorisation			
Net cost study			No			
Existence of compensation fund to compensate USP for USO net costs			Authorized but not established			
Other methods of compensation			--			
Scope of universal service						
Service	Ensured	Price regulated		Service standards set		
Single piece letter post (D+1)	Yes	No price regulation		Yes		
Bulk letters	No	No price regulation (USP: Some margin squeeze)		No		
Direct mail	No	No price regulation (USP: Some margin squeeze)		No		
Publications	No	No price regulation		No		
Single piece letter post (D+3)	Yes	Price cap where dominant, otherwise ex post		Yes		
Basic parcel post (domestic)	Yes	Price cap where dominant, otherwise ex post		Yes		
Bulk parcels	No	No price regulation		No		
Delivery frequency for letter post	6 days per week		Legally required	Letters must be delivered to the door of an addressee*		
Delivery frequency for parcels	5 days per week		delivery point			
* (i) delivered or attempted to be delivered to the address given on the postal packet; (ii) delivered to a person named as the addressee on the postal packet; or (iii) delivered to an alternative delivery point approved by OFCOM.						
Universal service indicators						
Price trend (EUR)	2013	2016	<div>Price, €</div> <div><div></div><div></div><div></div></div> <div>20g D+1 20g D+3 20g D+1 EU</div> 			
20g D+1, domestic	0,68	0,72				
20g D+3, domestic	0,57	0,62				
50g D+3, domestic	0,57	0,62				
20g D+1, EU	1,00	1,19				
5kg parcel, domestic	17,08	17,93				
5kg parcel, cross-border (lowest tariff)	44,86	47,78				
Quality of service	2013	2016	Number of user complaints sent to NRA		Number of user complaints sent to USP*	
Domestic target (D+1)	93,0%	93,0%	2013	--	2013	878.000
Actual performance (D+1)	93,2%	93,1%	2014	--	2014	850.000
Postal offices (total)	11.696	11.659	2015	--	2015	920.000
Postal offices per 10,000 inhabitants	1,8	1,8	2016	--	2016	947.000
Share of post offices operated by USP	0%	0%	* Includes non-USO complaints			
Employment						
	2016		Average annual change 2013-2016			
Headcount, total in the sector	339.200		2,25%			
Headcount, total at USP	142.000		-1,63%			
Share of civil servants	0%					

REGULATION			
Institutional framework			
Ministry for postal policy	Department for Business, Energy & Industrial Strategy (BEIS)		
Ministry for ownership of PPO	--		
National regulatory authority	The Office of Communications		
Authority of NRA concerning quality of service			
NRA authority to levy fines	Yes	Measures quality of service annually	--
NRA authority to order remedies	Yes	Publishes quality of service results annually	Yes
NRA sets monitoring standards	Yes, quality targets and minimum requirements	Quality measurement method	Panel with RFID technology
National competition authority			
NRA is the primary enforcer of competition		Yes	
NRA/NCA cooperation		Share data: No	Regularly consult: --
Competition cases since 2013		CW/01122/01/14	
State aid cases since 2013		--	
Access to postal infrastructure by competitors			
Types of access to USP infrastructure required by Law	Downstream access to USP: Yes	Post Codes: No	Addr. database: Yes
	Public letter-post collection boxes: No	Post office boxes: No	Letter delivery boxes: No
	Parcel lockers: No	Sorting centers: No	Return services: --
Regulation of cross-border services			
Is the NRA authorised by law to ensure compliance with obligations arising from the Postal Directive with respect to intra-Community postal services and extra-Community postal services?		Yes	
Regulation of prices			
	Bulk letters	Direct mail	Bulk parcels
Special tariffs are transparent and non-discriminatory?	--	--	--
Special tariffs are available to consolidators?	--	--	--
VAT rate for postal products not exempt		20%	
VAT exemption is applied		On universal services provided by USP	
	VAT Exempt		VAT Exempt
Basic letter post (D+1, domestic)	Yes	Basic letter post (D+3, domestic)	Yes
Basic letter post (D+1, cross-border)	Yes	Basic parcel post (domestic)	Yes
Bulk letters	No	Basic parcel post (cross-border)	Yes
Registered mail	--	Bulk parcels	No
Insured mail	--	Express letter service	--
Direct mail	No	Express parcel service	--
Publications	No		
Protection of users			
Protection of users by law		Yes Both postal and consumer protection laws apply to postal users	
Implementing authority(ies)		Postal NRA enforces user protection provisions for postal services	
Postal operators required to provide reimbursement and/or compensation where warranted		Yes	
Publication of annual complaint statistics		By USP: Yes	By NRA: --

