

Is digital a strong enough substitute for letter mail?



Landmark case:
Dutch Trade and Industry Appeals Tribunal



Market trends

- Changes in users' and senders' preferences
- Emergence of digital alternatives for communication
- Declining letter volumes

Market definition

- Definition based on the looks
→ Letter post only
- Definition based on the function
→ letters and digital alternatives?

State intervention affecting postal strategy

- Network access regulation
- Price caps
- Margin squeeze
- Provision of future public services
- Role of retail networks and delivery staff on digital solutions & digital divide

Sustainability of the postal industry

- Commercial, operational and pricing flexibility
- Retail diversification strategies
- Funding lines from the State
 - for public services
 - for network coverage
 - for regulatory burdens