



STUDY ON MAIN DEVELOPMENTS IN THE POSTAL SECTOR 2013-2016

Prepared for the European Commission

This year, the European Commission will publish its 6th monitoring study on the progress of the application of the Postal Directive. Copenhagen Economics has been selected to assist the European Commission in this effort.

Objectives of the study

- Assisting the Commission in the process of evaluating the effectiveness of the existing regulatory framework.
- Highlighting issues of concern and recommendations on possible ways forward.
- Providing input for future regulation.

What's in it for you?

- Access to information about developments in other countries.
- Benchmarking of own country against others.
- Insights on future challenges/opportunities.
- Guidance regarding possible ways to act.

Who is engaged?

We are conducting interviews, public workshops, and surveys in 32 countries:

- USPs & NRAs
- Non-USO postal operators
- Ministries
- Trade unions, associations and SDC
- Consumer associations
- Industry associations

Report structure

The study will provide an evidence based assessment of the **key changes in the letter and parcel delivery sector across the EU**, including the growth of e-commerce and the role of new technologies and business models and their effects on competition and employment and the impact of increasing digitalisation, letter volume decline and changing user needs on the **sustainability of the universal service obligation (USO)**, and the **implications for the current legal framework (the PSD)**.

Chapter 1

Important market developments

Chapter 2

The competitive landscape

Chapter 3

Employment and environmental developments

Chapter 4

The universal postal service

Chapter 5

Potential scenarios for the future provision of the USO