



Ministry of Economic Affairs

The Dutch Postal Market and the Postal Directive

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Mail volume developments

	Forecast WIK (2011)	Actual
	2010-2020	2003-2014
Total USO mail decline (volume)	3.8 – 6.5% per year 32% - 49% in total <i>(Range based on 3 scenarios)</i>	2003 /2009: 3% - 4% 2010 /2014: 8% - 10%



Impact and consumer preference

- (Strong) unit cost increase
- USO users **value the price of USO services the highest**. Less important characteristics of USO services are QoS and distance to letter box and/or postal agencies.



USO requirements

Current situation

USO requirements (< 2014):

- 6 days/week collection and delivery
- Specific requirements result in 19,000 letter boxes.
- Specific requirements result in 2,500 postal agencies.

Modernisation

- January 1st 2014: 5 days/week collection and delivery.
- Proposal: changes in requirements allow for reduction to app. 8,700 letter boxes.
- Proposal: changes in requirements for reduction to app. 1,000 postal agencies.



Future changes?

- Main cost drivers USO: letter boxes, postal agencies and QoS
- Postal Directive requirement for 5 days/week collection and delivery is an important limitation for future USO modernisation.
- Support call in WIK Report 2013 for more flexible definition of universal service.



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Questions?

Thank you!

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