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**European Commission**  
**Directorate General GROW – Internal Market, Industry, Entrepreneurship and SMEs**

**Workshop**  
**Delivering for the future III – Developments in the postal sector**

**Brussels, 29.01.2019**



The workshop was organised to give presentations of the final results of the study “Development of Cross-border E-commerce through Parcel Delivery” and the first steps of the new study “User needs in the postal sector”, both studies carried out by WIK-Consult.

The workshop was attended by Bert Van Caelenberg, Secretary General of Eurofedop.

Regarding the first, already completed study, it was indicated that consumers are increasingly buying products online, both within and across countries. 40 % of e-commerce enterprises are active in selling and delivering products across borders. This activity is still increasing in Western and Northern countries of the European Union and, although it has been less developed in Southern and Eastern Union countries, these countries are catching up.

Most e-retailers are micro or SMEs. In France, more than 75 % of e-retailers account for 2.5 % of e-commerce revenues, whereas in Germany, the top 3 e-retailers account for 40 % of e-commerce revenues.

As regards barriers for cross-border online sales (intra-EU), fraud and tax regulation are more important than transport and delivery costs.

The UK, France and Germany represent 3/4 of parcel delivery services in the EU. Competition is growing and is pushing innovation in delivery and return services.

Big consumers may get discounts, for example DHL granting up to 33 %.

New technologies are transforming operations and last mile delivery services. For example, instant/same day delivery services, parcel drop-off and pick-up in locker services, especially in urban areas.

Subcontracting cascades are a challenge for working conditions (payment below minimum wage, unlimited working hours, illegal employment of workers from foreign countries-not in accordance with domestic labour legislation). Which leads to the question as regards practices of subcontracting in the delivery industry, flexibility or exploitation?

The second study, which will focus on the needs of users and the impact on the postal sector, will be performed throughout the year 2019 and the Commission plans its publication in autumn.

The study will focus on the question if the Postal Services Directive (PSD) needs to be revised, considering today's developments in the postal markets and user needs (e-commerce, postal delivery innovations, substitution of letters, digitisation, social media, e-government) and the USO provisions dating back to more than twenty years ago (1997).



The Member States seek flexibility to adapt USO to market developments and user needs.

Art. 5 of the PSD provides that the universal service “shall evolve in response to the technical, economic and social environment and to the needs of users”.

An important part of the study will consist in interviewing the stakeholders (ministries, national regulatory authorities, national competition authorities, national consumer bodies, universal service providers, postal carriers, business associations, ...). Considering the importance of USO for vulnerable groups in society (disabled, people living in remote areas, low income, old age, ...), interviews of charitable organisations and non-profit organisations will also take place.

Nevertheless, no explicit reference is made to consultation of the trade unions.

EUROFEDOP will put this item on the agenda of the Trade Council Post on 07.06.2019 in Podgorica (Montenegro).

Bert Van Caelenberg,  
Secretary-General