



THE IMPORTANCE OF LIBERALIZATION OF THE POSTAL SERVICES MARKET

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Summary

The postal services market plays a central role in the economic and social development of many countries, with its efficiency being crucial for the overall functioning of the economy. Postal services are essential for maintaining an efficient and dynamic single market in the EU and are critical for both citizens and businesses. The postal services market, both in the Republic of Croatia and globally, is undergoing significant transformations driven by the increasing use of electronic communication and the substitution of traditional postal services. Despite the full liberalization achieved by most EU member states, this has not significantly boosted competition in domestic letter mail markets. Inadequate regulation of access to certain elements of postal infrastructure, adversely affecting consumer surplus and social welfare. While postal and courier services are traditional communication means, they remain vital for economic and social development in today's information society with its rapidly evolving communication technologies. In most EU member countries, after liberalization, prices for services under the universal service obligation have increased. However, liberalization has also driven the growth of e-commerce and improved the business models of leading companies on courier, express and parcel market. It has compelled former monopolies to modernize

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their facilities and shift their business models towards the expanding parcel market. Given the establishment of full liberalization in the postal services market in most EU member states and the dynamic changes brought by technological advancements, this paper focuses on analyzing the implications of liberalization in the postal services market.

Keywords: *e-commerce; innovations; liberalization; postal services.*

1. INTRODUCTION

The postal services market, both in the Republic of Croatia and in most other countries worldwide, is undergoing significant changes due to the increasing use of electronic communication and the substitution of postal services (Accenture Consulting, 2021). As a result, there is a decline in the volume of letter mail while the demand for parcel delivery services is growing (Pilinkienė et al., 2016). The postal services market plays an important role in the economic and social development of many countries, and its efficiency unquestionably determines the functioning of the entire economy (Pilinkienė et al., 2016). It is crucial to highlight that most countries have developed this market through national postal company or national postal administrations. Gradual changes in this market began back in 1994 with the initiative to establish a single postal services market in the European Union (Kollara, 2017: 10), and their continuous implementation continued through the adoption of the First, Second, and Third Postal Directives aimed at ensuring the conditions for the establishment of a fully liberalized postal services market in the European Union. Despite the fact that most EU member states have achieved full liberalization in the postal services market, it is observed that this has not significantly contributed to the growth of competition in the domestic markets for letter mail services (Pilinkienė et al., 2016). Inadequate regulation of access to certain elements of postal infrastructure or services within the scope of the universal postal service, such as the postcode system, address database, post office boxes, delivery boxes, re-direction, and return to sender service, can generate switching costs and thus limit competition, negatively affecting consumer surplus and social welfare (Pateiro-Rodriguez et al., 2024). Postal services play a crucial role in the functioning of an efficient and dynamic single market in the European Union and are of utmost importance to both citizens and companies within the European Union (European Commission, n.d.). The availability of postal services in rural areas is extremely important for their development (Milutinović, 2023), as well as for ensuring equal conditions for all residents regardless of their location. Although postal and courier services are traditional means of communication, they remain crucial for a country's economic and social development, even in today's information society with its continually emerging communication

technologies (Zhang, 2011). Given that full liberalization in the postal services market has been established in most EU member states, and considering the dynamic changes occurring in this market due to technological advancements, the focus of this paper is on analyzing the implications of liberalization of the postal services market.

The paper is structured into five chapters and the base for conducted analysis is secondary data collected from extensive literature overview. Following the introduction, the second chapter provides a general overview of the postal services market, while the third chapter focuses on the liberalization of the postal services market. The fourth chapter discusses possible strategies that could enable companies on the postal market to continue successful operations despite pressures from a dynamic environment.

2. GENERAL OVERVIEW OF THE POSTAL SERVICES MARKET

The postal services industry is very similar to the telecommunications industry, with key players in this market being national postal companies and private companies. The primary goal of a company providing services in this market is to deliver a shipment or package as quickly as possible and at minimal cost, ensuring that all participants in the process are satisfied. The sender and recipient will be more satisfied with faster delivery, while other participants in this distribution process will be content with the compensation for their services (Kollara, 2017: 36). Efficient and reliable postal services are crucial for communication in the EU, impacting citizens and various business sectors such as e-commerce, publishing, banking, and advertising. These services range from letters to parcels and value-added services. Competition policy in this sector aims to ensure that high-quality postal services are accessible to all at affordable prices (European Commission, n.d.).

For decades, the postal industry provided postal services while enjoying a monopolistic position through national postal companies. Due to the pressures from the European Union to establish a liberalized postal services market, conditions were created for the entry of new companies, and postal services were harmonized within member countries. The rest of Europe can also boast of implementing partial or complete liberalization in the postal services market. Liberalization was driven by several factors (Kollara, 2017):

- inefficiency of national postal companies,
- questionable regulations protecting the monopolistic position of national companies,
- competitive pressure, and changes in consumer behavior.

Following the liberalization process, the postal industry has faced significant challenges posed by digitalization in recent years. Digitalization has led to a substantial reduction in the volume of letters being distributed, forcing postal companies to adapt to the rapidly changing environment to survive and prevent further revenue decline. Consequently, they have begun developing digital postal services supported by appropriate Internet infrastructure and a combination of hardware and software activities (Kollara, 2017).

Postal companies face an increasingly demanding environment. Entrepreneurs must cope with rapid changes resulting from the exponential advancement of technology. However, companies can also benefit from this by embracing innovation. Technological progress affects changes in user behavior and their expectations regarding the quality and speed of service (Accenture Consulting, 2017).

The postal and delivery sector generated around EUR 110 billion in revenue in 2021 (0.8% of total GDP) and employed approximately 1.5 million people (0.7% of total employment) across the EU-27 Member States. The sector faces two opposing dynamics (Copenhagen Economics, 2022):

1. **Declining letter mail volumes.** This pressures postal operators to increase prices for universal services and cut costs by closing post offices and reducing delivery frequency.
2. **Increasing parcel volumes.** Driven by the e-commerce boom during the COVID-19 pandemic, this has attracted new operators, particularly in last-mile delivery. More parcels are now delivered to parcel lockers, pick-up and drop-off locations, and consumers' doorsteps by non-universal service providers.

The shift from letter mail to electronic alternatives continues to decrease letter mail volumes. Between 2017 and 2021, letter mail volumes declined by an average of 6.1% per year (Copenhagen Economics, 2022). The Europe Domestic Courier Market is projected to be valued at USD 88.49 billion in 2024 and is anticipated to grow to USD 110.46 billion by 2030, with a compound annual growth rate (CAGR) of 3.76% over the forecast period from 2024 to 2030 (Mordor Intelligence, 2024). Domestic courier services are gaining significance in the e-commerce sector as consumers increasingly demand fast and convenient delivery of their orders. The pandemic has significantly altered shopping behaviors in recent years, accelerating the shift towards online shopping. In response, e-commerce companies are broadening their networks across Europe to enhance customer service. For example, the Spanish retailer DIA is extending its delivery services to cover all towns along the Spanish coast, from Girona to Huelva, reaching over 5 million additional customers. The Europe Domestic Courier Market is highly fragmented, with the top five companies (DHL Group, International Distributions Services (which includes

GLS), La Poste Group, PostNL, United Parcel Service of America Inc.) holding a combined market share of 36.18% (Mordor Intelligence, 2024).

Morganti et al (2014: 188) remarked that delivery services are one of the most important concerns for both e-buyers and e-sellers within the European Union. One of the major challenges faced by e-sellers is same-day delivery (Rofin and Mahanty, 2021). The implementation of this form of delivery will have a direct impact on the transport market. The negotiating power of e-sellers is increasing as they demand delivery for a growing volume of goods (Morganti et al., 2014). When consumers shop in physical stores, they simply take the goods home after paying. In the case of e-shopping, the situation is significantly different since the seller and buyer are not in the same place at the time of purchase. Therefore, there is a need for a delivery service to transport the goods from the seller to the buyer. This presents a great opportunity for service providers in this market, as the quantity of products purchased online is rapidly increasing (Hussein and Kais, 2021; Jaag and Maegli, 2014), raising the question of which delivery option is the most appropriate or desirable for the consumer (Luttermann et al., 2021).

3. LIBERALIZATION IN THE POSTAL SERVICES MARKET

The evolution of the postal services market began in 1994 with the European Union's initiative to establish a single postal services market. The liberalization of postal services began gradually in 1997 with the First Postal Directive (Directive 97/67/EC), which was later amended by Directive 2002/39, and culminated in 2008 with the Third Postal Directive (Directive 2008/6/EC). These directives ensured that postal services would remain universally accessible under the same conditions for everyone. To support this, universal service providers can be compensated for the net cost of providing these services when it poses a burden for the operator. Full liberalization of this market facilitates the entry of new operators and the development of innovative services, thereby enhancing competition in terms of quality and price of postal services (European Commission, n.d.). Full liberalization officially eliminated the exclusive right to provide reserved universal postal services, effectively ending the monopoly in the provision of these services (Paler & Sardelić, 2013).

Postal companies are facing an increasingly demanding environment due to the globalization of liberalization and privatization on one hand, and the growth of electronic commerce on the other (Kosovac, Muharemović, and Trubint, 2020). Entrepreneurs must cope with rapid changes resulting from market liberalization as well as the exponential advancement of technology (Stucki, 2009). Complete liberalization implies the application of market competition, establishing a mechanism to create equal conditions

for all market participants (Morton, 2011), while partial liberalization means that the state guarantees preferential conditions for certain services to the national operator (International Post Corporation, 2020).

One of the main sources of evolution in the postal and courier services market is the change in consumer behavior due to the development of e-commerce. The growth in the volume of e-commerce has led to a decrease in the volume of letter mail and an increase in the volume of parcels within the total postal traffic (Heitz and Beziat, 2016). Today, more and more business operations within the logistics industry are being outsourced to specialized players, leading to the externalization of certain activities (Prataiviera et al., 2021) due to the increasing complexity of supply chains and the search for optimal shipping solutions (Aguzezoul, 2014). In recent years, an increasing number of companies in the logistics industry have decided to externalize certain activities. The scope of externalized activities is expanding from performing individual services to more demanding value-added services (Mathauer and Hofmann, 2019; Selviaridis and Norrman, 2015). Different models of externalization enable companies to successfully respond to changes resulting from the establishment of complete liberalization of the postal and courier services market, as well as the increasing volume of e-commerce (Kosovac, Muharemović, and Trubint, 2020). If logistics companies decide to externalize postal and courier services, this affects the financial aspects of their business and increases the volume of work for companies registered to provide postal and courier services, reflecting positively on their business success (Khalili, Azizzadeh, and Adhami, 2014: 8). In Brazil, there is a clear tendency to externalize these activities as much as possible, while in the Netherlands externalization is used for specific sorting processes, and in the United States, typically for delivery services (Kalbermatter et al., 2021: 16).

Opening the postal and courier services market to all interested companies in many countries encourages the development of new products and services, raising the quality of service (Stucki, 2009; Ministarstvo mora, prometa i infrastrukture, January 2008: 66). The development of innovations allows companies to improve internal functionality and optimize certain business processes (Capgemini, 2010). To grow and establish a sustainable competitive advantage, companies in the postal and courier services market can turn to investing in innovations (Crew and Kleindorfer, 2008). An innovative product or service allows a company to achieve the necessary efficiency and meet the growing expectations of consumers in today's digital age (Sund, 2008: 3-6). Implementing an innovation strategy can significantly impact the establishment of a competitive advantage and business efficiency (Jaag, Moyano, and Trinker, 2016). After establishing market liberalization, companies aim to survive and increase efficiency by restructuring and fully relying on new technologies and innovations. Among other things, their goal is to optimize delivery routes, improve parcel tracking systems, fully automate

sorting centers, and through the introduction of innovative solutions, increase service quality and end-user satisfaction, which will positively reflect on business success (Lagou and Vekiaris, 2011). The application of technology for the development of innovative products can enable companies in the postal and courier services market to successfully position themselves (Ankrah, 2015: 128; Jaag, Moyano, and Trinker, 2016).

It is evident that liberalization should not lead to a decline in service standards or a reduction in service coverage, especially in sparsely populated areas. To prevent this, universal service requirements were introduced to uphold guarantees for high-quality universal service, such as the density of post offices and letterboxes. These obligations are fully maintained and closely monitored by national authorities. They were established to ensure that all Member States continue to provide comprehensive and affordable postal services (European Commission, n.d.). In most of Member countries, after liberalization, prices for services under the universal service obligation (USO) have increased, with some experiencing rises as high as 80%. But on the other side liberalization has fueled the growth of e-commerce and enhanced the business models of top CEP (Courier – Express – Parcel) market integrators and other parcel operators. It has also compelled former monopolies to modernize their facilities and shift their business models towards the expanding parcel market (Jakubowski et al., 2019).

4. BUSINESS STRATEGIES FOR POSTAL COMPANIES IN A DYNAMIC ENVIRONMENT

The postal services market, and consequently the business operations of all entities within this market, has undergone significant changes in recent years due to the influence of two forces: technological advancements and changes in the regulatory framework resulting from the liberalization process. Under the influence of globalization processes and as a consequence of advanced technological solutions, the distribution process has been significantly simplified (Yeop Ali and Hock, 2021; Jaag, 2015: 34). About twenty years ago, distribution orders were given by phone, whereas today, most orders are made online. In Europe, consumer purchasing habits have rapidly changed over the past ten years, with a growing share of consumers shopping online, compelling parcel distribution service providers to change their business models (Zhen et al., 2021; Morganti et al., 2014). Bendeković and Batarelo (2009: 85) highlight that in the future, senders will directly contact drivers to collect parcels, which will be a consequence of the rapid development of mobile technologies and their contribution to improving communication.

There are numerous business models in this market, varying both within individual countries and, for example, among EU member states. A common factor for all private operators' business models is that they differ significantly from those of national postal operators. The strategies of national postal operators are influenced by various factors, the most important being (van der Lijn et al., 2005: 18):

1. The traditional revenue base is continuously declining. Increased competition reduces the volume of mail handled by national postal operators.
2. The financial results of national postal operators show a rather unsatisfactory return on sales.
3. The EU regulatory framework prohibits continuous state support for national operators.
4. Competitive pressures demand the continuous development of new products and processes.

These factors create pressure on the existing models of national postal operators, who must improve their efficiency in providing postal services and expand their current offerings to survive in the market without relying on continued state subsidies. It is important to note that national postal operators' strategies vary significantly from country to country (Glass, Nicita, and Gori, 2021). For example, in 2009, the national postal operator in Luxembourg generated only 20% of its revenue from traditional activities, while the rest came from additional financial and logistics services in its portfolio. On the other hand, the national postal operator in Cyprus generated 97.5% of its revenue from traditional activities. The share of revenue from traditional activities in total revenue indicates the business model chosen by a particular company (Okholm et al., 2010: 33). Additionally, the decline in letter mail volume implies the need to redesign existing models (Bruno et al., 2021), i.e., to seek new business models. E-commerce presents a significant opportunity for postal service providers as consumers increasingly turn to online shopping and become more adept at navigating the digital environment (Jaag, 2021; Vella and Burlando, 2021). As e-commerce rapidly grows, so do the needs of businesses selling their services and/or products online. The increased demand for parcel distribution represents an opportunity for companies providing these services. However, it is important to note that this requires a change in the business model. Adopting digital technologies is crucial to quickly respond to market demands. To adopt this business model, companies need to undergo a digital transformation. However, they must not neglect their traditional activities, which should be modernized and their operational efficiency improved (Saggia, 2018). Investments in digital technology support operational efficiency and the development of programs that will enable further cost reduction and profitability improvement (Mokgohloa, Kanakana-Katumba, and

Maladzhi, 2020). Postal and parcel distribution companies are just beginning to realize the advantages of digitalization and the fact that these investments are the foundation for achieving successful business operations in the future (Jaag, 2021; Accenture Consulting, 2017).

In recent years, many postal service providers have changed their business models to adapt to rapid environmental changes (O'Reilly and Post, 2021). The approach varies from innovatively optimizing existing business models to creating entirely new postal services and diversifying portfolios by entering other economic sectors (Ministarstvo pomorstva, prometa i infrastrukture, 2014: 66). As early as 2009, postal service providers began facing negative growth rates, partly due to the financial crisis and largely due to the increasing use of the Internet by consumers and the lack of adequate innovations. Although postal operators launched more than 3,000 innovations between 2000 and 2010, only a small part of them became known to the public. The primary reason for this is that the majority of operators (75%) focused on developing innovations to improve internal functionality and optimize certain business processes, while only 25% focused on developing new products and new business models (Capgemini, 2010). Incorporating artificial intelligence and data analytics, alongside technologies that enhance collaboration, will make the postal services market more adaptable to future challenges. Improving service quality is both a technical and collaborative effort. Investments should be directed towards creating hyper-collaborative networks to deliver more reliable and higher-quality postal services (Universal Postal Union, October 2023).

5. CONCLUSION

The postal services market, both in the Republic of Croatia and globally, is undergoing significant changes driven by the increasing use of electronic communication and the substitution of traditional postal services. This transformation has led to a decline in letter mail volumes and a corresponding rise in the demand for parcel delivery services. The efficiency of the postal services market is crucial for the overall functioning of the economy and plays a vital role in both economic and social development. Despite the full liberalization achieved by most EU member states, competition in domestic letter mail markets has not significantly increased, highlighting the complexity of effectively implementing liberalization in this sector.

Liberalization has brought about both opportunities and challenges. On one hand, it has spurred the growth of e-commerce and enhanced the business models of top companies on courier, express and parcel market. This shift has driven former monopolies to modernize their facilities and adapt their business models to cater to the growing parcel market. On the other hand, inadequate regulation of access to certain

elements of postal infrastructure has created barriers, limiting competition and negatively affecting consumer surplus and social welfare. The increased prices for services under the universal service obligation in many countries post-liberalization have added to these challenges, though they reflect the need to maintain service standards and coverage.

While postal and courier services are traditional means of communication, they remain essential for a country's economic and social development, even in today's rapidly evolving information society. The ongoing transformation driven by technological advancements and regulatory changes requires a delicate balance to ensure that the benefits of liberalization, such as enhanced e-commerce growth and improved service quality, are realized without compromising accessibility and affordability. The focus should be on fostering innovation, improving regulatory frameworks, and ensuring that universal service obligations are met, thereby supporting a dynamic and efficient postal services market that can adapt to future challenges.

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VAŽNOST LIBERALIZACIJE NA TRŽIŠTU POŠTANSKIH USLUGA

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Sažetak

Tržište poštanskih usluga igra ključnu ulogu u gospodarskom i društvenom razvoju mnogih država, a njegova učinkovitost je presudna za učinkovito funkcioniranje gospodarstva. Poštanske usluge su neophodne za održavanje učinkovitog i dinamičnog jedinstvenog tržišta u Uniji, ali su i od vitalnog značaja za građane i poduzeća. Tržište poštanskih usluga, kako u Republici Hrvatskoj tako i globalno, prolazi kroz značajne transformacije potaknute sve većom upotrebom elektroničke komunikacije i zamjenom tradicionalnih poštanskih usluga. Unatoč potpunoj liberalizaciji koju je postigla većina država članica Unije, to nije značajno povećalo konkurenciju na domaćim tržištima pismovnih pošiljaka. Neadekvatna regulacija pristupa određenim elementima poštanske infrastrukture negativno utječe na potrošače i društvenu dobrobit. Iako su poštanske i kurirske usluge tradicionalni načini komunikacije, one ostaju vitalne za gospodarski i društveni razvoj u današnjem informacijskom društvu s njegovim brzo razvijajućim komunikacijskim tehnologijama.. U većini država članica Unije, nakon liberalizacije, cijene usluga univerzalne poštanske usluge su rasle. Međutim, liberalizacija je također potaknula rast e-trgovine i unaprjeđenje poslovnih modela vodećih poduzeća na tržištu kurirskih, ekspresnih i paketnih usluga. Također je natjerala poduzeća koja su ranije uživala monoposlu poziciju da moderniziraju svoje objekte i preusmjere svoje poslovne modele prema rastućem tržištu paketa. S obzirom na uspostavu potpune liberalizacije na tržištu poštanskih usluga u većini država članica Unije i dinamične promjene koje donose tehnološki napredak, ovaj rad se fokusira na analizu implikacija liberalizacije na tržištu poštanskih usluga.

Ključne riječi: e-trgovina; inovacije; liberalizacija; poštanske usluge.