



Postal world...under a perfect storm?

1. Trends
2. Multidimensional regulatory framework
3. Forward looking approach to the sector
4. Triple positive impact
5. Conclusions

1. Trends

Megatrends

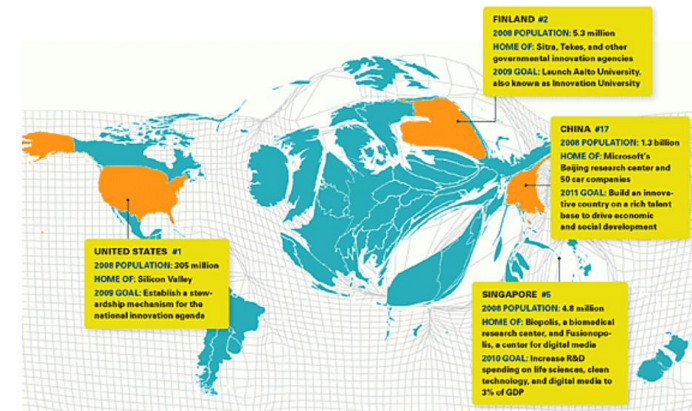
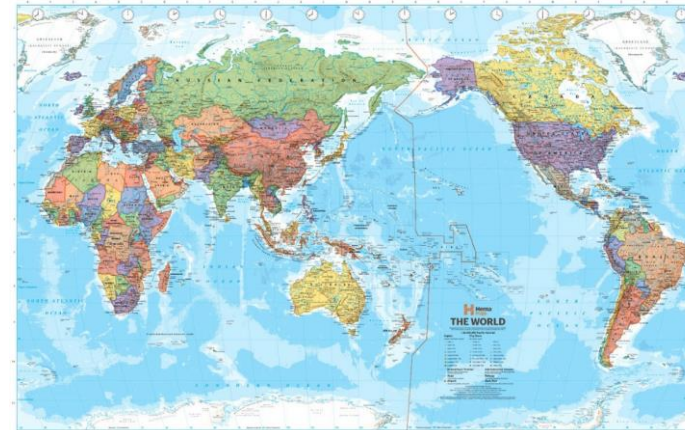
-  **Rapid urbanisation**
-  **Demographic and social change**
-  **Climate change and resource scarcity**
-  **Shift in global economic power**
-  **Technological breakthroughs**

Fuente: PWC 2020 + Blair Sheppard 2022



- Crisis**
- Prosperity**
- Leadership**
- Institutional legitimacy**
- Technological**
- Energy**
- Climate & Biodiversity**

World new visions

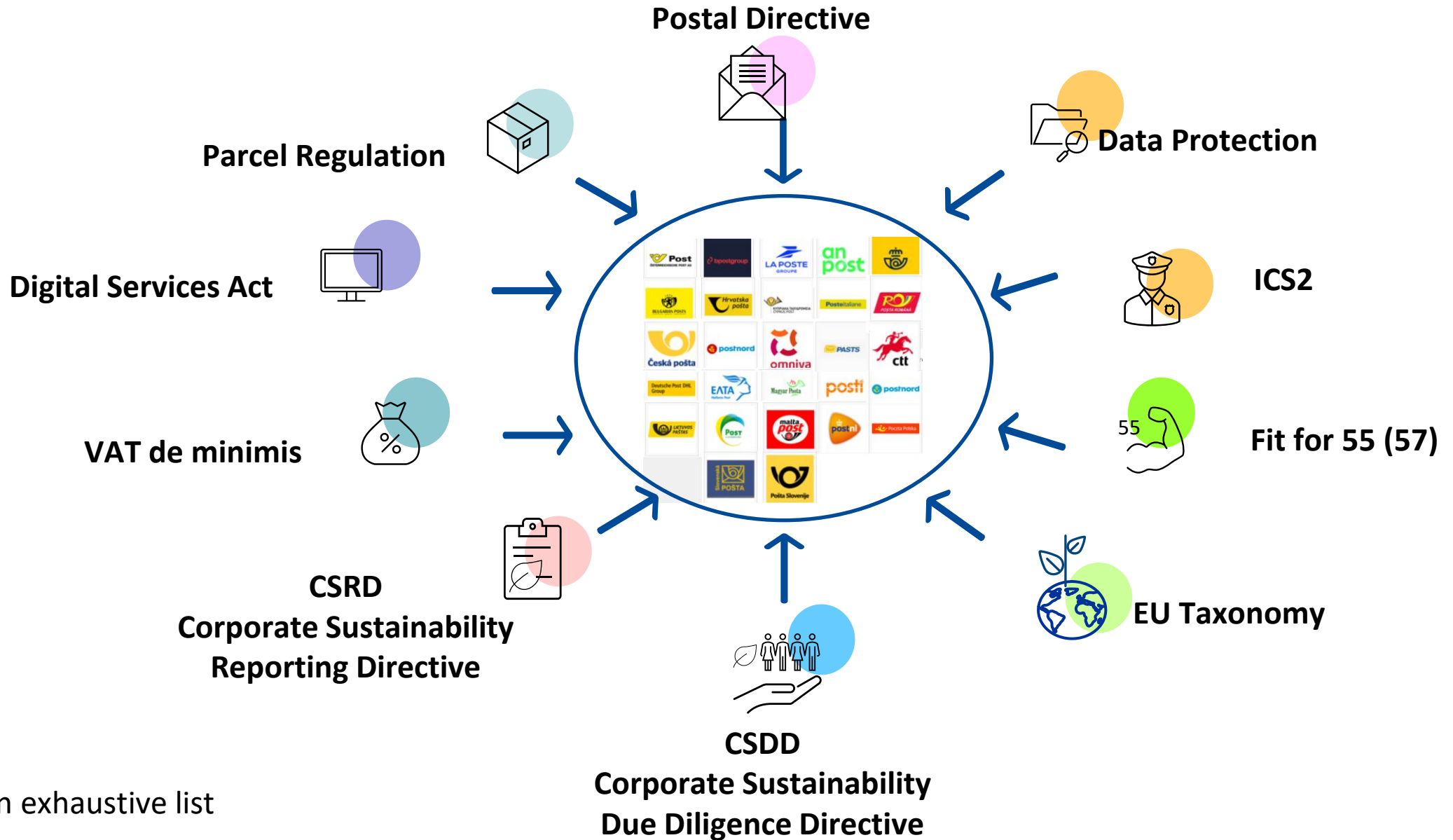


Fuente: Tapping the World Innovation Hot spots HBR 2022

Megatrends impacting the postal sector

-  **Growing consumption** – increasing e-commerce
-  **Hyperconnectivity** – universalizing broadband access and speed, connected sensors
-  **Climate change and environmental degradation** – ecological awareness and responsibility
-  **Continuing urbanization** – concentrated demand, congestion, inequalities
-  **Increasing demographic imbalances** – uneven growth, ageing population
-  **Changing nature of work** – different skills are needed
-  **New governing systems** – governments go digital
-  **Other** – please specify
Regulatory Tsunami

2. Multidimensional regulatory framework *



*Non exhaustive list

3. Forward looking approach to the sector

What might happen?

-  **Growing consumption** – increasing e-commerce
-  **Hyperconnectivity** – universalizing broadband access and speed, connected sensors
-  **Climate change and environmental degradation** – ecological awareness and responsibility
-  **Continuing urbanization** – concentrated demand, congestion, inequalities
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What is happening ?

- Letter mail decline trend due to E-substitution
- COVID pandemic
- Key regulatory changes affecting cross-border ecommerce
- War in Ukraine
- Inflation
- Demanding market environment & new business models
- Increased regulatory pressure
- Sustainability “by default”

What is needed?

- ✓ *To maintain the **universal postal service***
- ✓ *Special focus on **vulnerable groups**, at least for the next decade*
- ✓ *Guarantee the **sustainability of the USO**.*
- ✓ ***Principle of subsidiarity**.*
- ✓ ***Parcel** : no additional regulation needed*

4. Triple positive impact

PostEurop

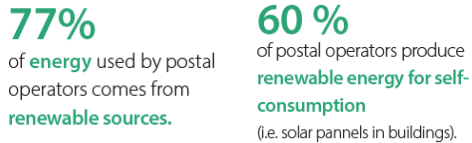
SUSTAINABILITY VISION

ENVIRONMENTAL

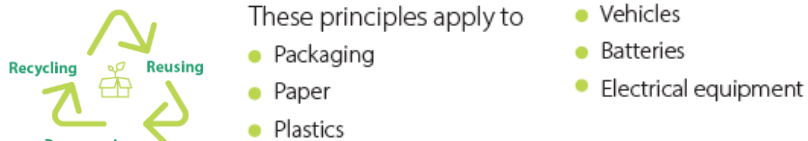
Fleet decarbonisation



Energy efficiency



Circular economy



Zero-waste strategies

Sustainable products



SOCIAL²

The postal sector is a **people-led and labour-intensive industry, with around 2 million workers across all 55 operators members of PostEurop.**



Employment has remained relatively **stable** between 2018-2020.

>60% of workforce dedicated to **Delivery**.

~50% of employees are **women**.

The **average age** of employees is **45 years**.

And **40%** are over 50 years old.

ECONOMIC

Postal operators play an **essential role** in the single market by promoting economic growth, social cohesion and inclusion as well as enhancing rural areas development, keeping all territories connected.



5. Conclusion

Within an extremely challenging context for the postal sector and an increasing regulatory pressure...

- ✓ **USO** would remain essential
- ✓ The **sustainability** of the USO needs to be guaranteed
- ✓ **Flexibility** would be crucial

...postal operators aims at assuring a triple positive impact...

- ✓ **Economic**
- ✓ **Social**
- ✓ **Environmental**

...but

- ✓ Reaching **vulnerable & rural areas** is economically challenging
- ✓ Assuring **fair employment** conditions implies higher costs
- ✓ Becoming **Net Zero and Climate Positive** require investment and infrastructure

