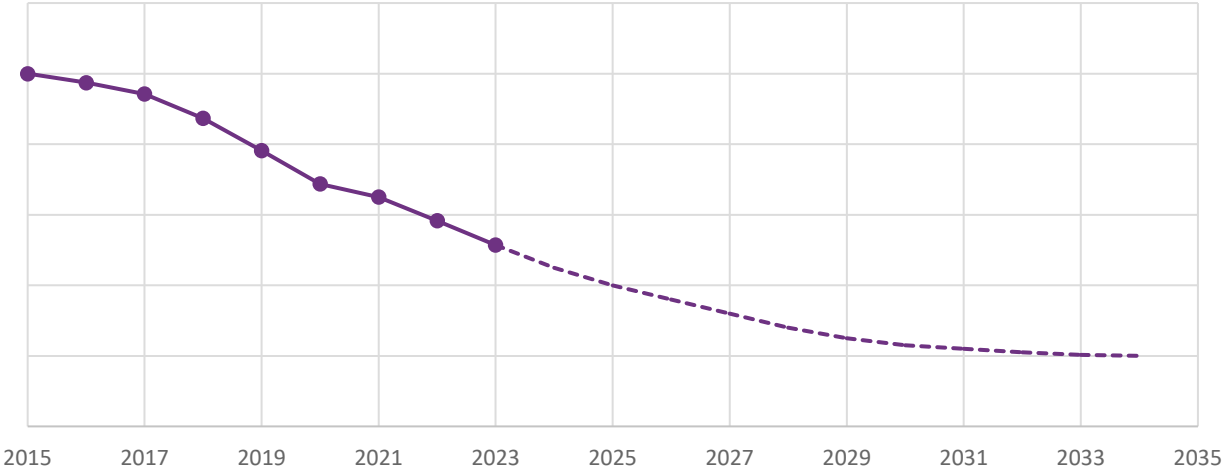


# The future EU postal market in a digitalized world

Dan Sjöblom, Swedish Post and Telecom Authority (PTS)  
*2024 ERGP Chair*

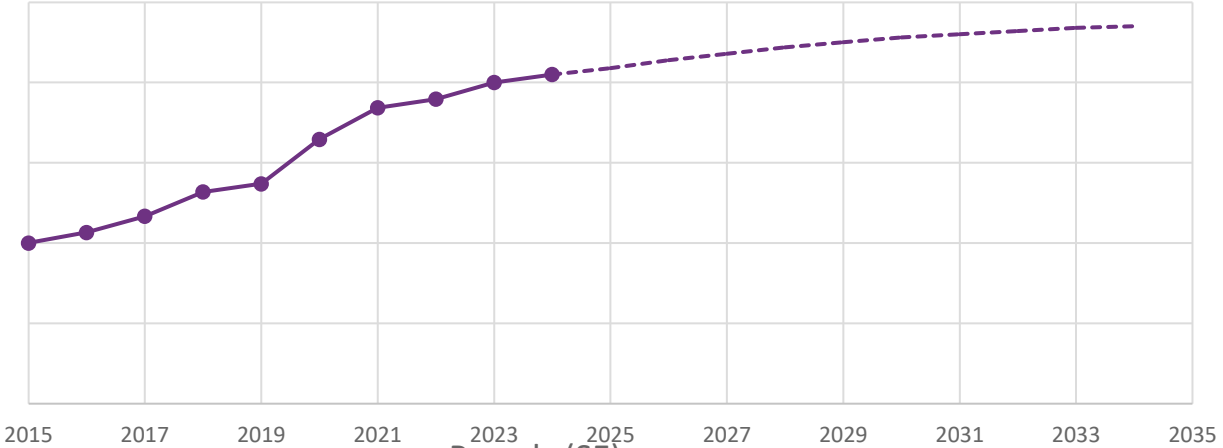
# The future postal market in a digitalized world

Letters (SE)



Convergence of networks like in New Zealand?

Parcels (SE)



# The ERGP looking ahead towards a new/revised regulatory framework

- Revisiting the postal sector and its regulatory framework in the light of **environmental sustainability** and **digitalization**.
  - ERGP Report on the outline of the future postal regulatory framework
  - ERGP Report on exploring the possibilities to support environmental sustainability within the Postal Regulatory Framework
- Promotion of a competitive single EU postal market in the context of **rising e-commerce** deliveries
  - ERGP Report on access to the infrastructure for delivery of parcels
- Empowering **end-users** and ensuring **user-oriented** Universal Service
  - Open Workshop (20 June, Vienna) and ERGP Report on the **needs of postal services for vulnerable users**

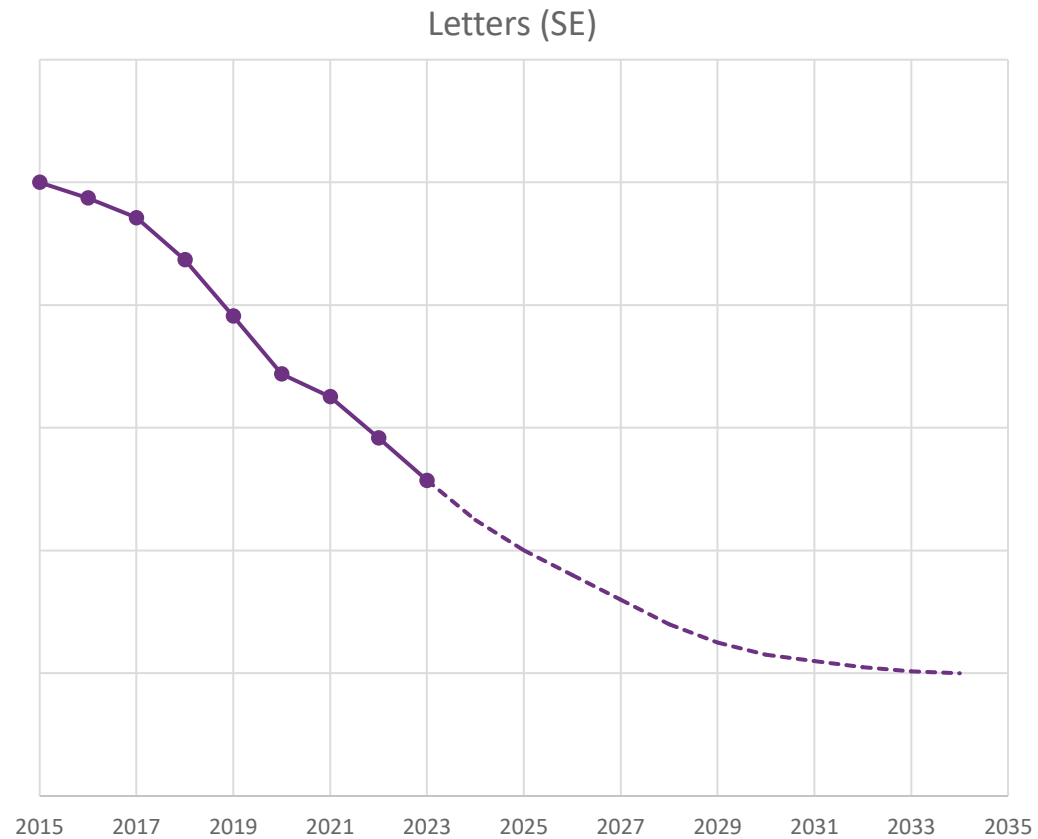


# ERGP Report on the outline of the future postal regulatory framework

- Inventory of all the aspects that need to be dealt with in the new framework
  - Scope and boundaries of the postal regulatory framework, including crucial definitions
  - the scope of the universal service
  - how obligations to provide the universal service should be determined
- Public consultation (launched preliminary January 2025)



# The Swedish Case



- 2015-2023: 49% decrease in letter volumes
- 2020-2023: compound average yearly decline of 9,8%
- 2023: decline of 12%

## The Swedish Case (2) – changes to Universal service

- 2018: change of delivery speed from D+1 to D+2
  - 2019: more flexible price cap for stamped letters adjusting for declining demand (rising unit costs)
  - 2021-2022: XY-delivery (delivery each second day) introduced for standard letter products (within existing regulation)
  - Universal Service Provider now claims:
    - No more room for cost reductions without changes in regulatory framework
    - Increase delivery speed to D+3, D+4 or even D+5
    - Reduce quality target from 95% to 85% (delivered on time)
- OR
- Substantial need for financing of USO