

Mastering European postal and delivery regulation

A TWO-DAY TRAINING COURSE



INTERNATIONAL



regulation made simple

Mastering European postal and delivery regulation



TRAINING

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The training covers the key regulatory issues affecting the sector, including:

- a historical perspective and the aims of European postal regulation;
- a clear overview of regulatory concepts, issues, and developments in the postal and parcel delivery sector;
- a review of the challenges facing traditional postal operators and how they are reacting in different ways to these challenges;
- how the concept of universal service has been predominant in European postal regulation and how this concept has developed over time, reflecting changing market realities;
- the challenges arising for the postal sector as a result of the significant decline in mail volumes;
- a review of the growing parcel delivery sector and its regulation;
- the growing relevance of horizontal forms of regulation, particularly those governing e-commerce;
- new and continuing challenges for operators and regulators arising from associated issues, such as environmental concerns, employment changes and cross-border delivery (including terminal dues);
- possible changes in the scope and definition of universal service.

Who should attend and why?

This masterclass will be of particular interest to:

- seasoned regulatory experts who have become specialised in a specific regulatory area but who wish to refresh their understanding of the broader range of regulatory issues;
- individuals who have recently moved into a regulatory position and wish to acquire a rapid grasp of the key debates;
- people who are not in a regulatory position but whose work often involves a regulatory context and who wish to gain a better understanding of these issues.

Furthermore, the programme will:

- offer a clear insight into the main issues of the EU regulatory framework affecting the postal and parcel delivery sectors, and other relevant EU legislation;
- explain how these issues affect participants' own national regulatory environment; and
- provide a forum for participants to learn and exchange views on the emerging questions faced by the postal and parcel delivery industry

The training organiser

Cullen International provides regulatory, competition and sustainability intelligence in telecoms, media, postal and the digital economy - covering developments across Europe, Americas, the Middle East and North Africa, as well as key trends across the globe.

For almost 40 years, we have been providing comprehensive, neutral, unbiased, timely information that is trusted by industry and official institutions alike. We are widely recognised as the leading regulatory intelligence provider in the field.

Our subscription services consist of a unique range of alerts, reports, benchmarks and enquiry services that are complemented by our topical conferences and regulatory training offer.

We are also regularly selected to carry out important research and studies for the European Commission and other organisations and we are frequently sought out to chair and make presentations at industry events.

COURSE TIMINGS

For future course dates, please visit our website:

www.cullen-international.com



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Armen Ghalumyan, *Head of Postal*,

leads our research on postal regulation in Europe, ensuring the timely delivery and continuous improvement of high-quality content. Armen re-joined Cullen International in 2023 after working on regulation and market access in the satellite communications sector.



Peter Dunn, *Director of European Relations*,

is responsible for developing and maintaining close relations with Cullen's clients and other contacts in Europe. He regularly presents Cullen's research in industry conferences and training courses. Peter also leads the regulatory intelligence service covering sustainability. Before joining Cullen International in 2010, he worked in the UK and continental Europe for Orange and for Colt, and for Digicel Group in the Caribbean.



Martin Schraa, *Principal Analyst*,

follows postal regulation in the Netherlands. His main responsibility is to cover telecoms regulation at the EU level, covering the European Commission, Parliament, Council and BEREC. Martin joined Cullen International in 2007 after an internship at the European Telecommunications Network Operators' association (ETNO).



Céline Senay, *Analyst*,

follows postal regulation in France and Luxembourg. Céline holds a master's degree in economic law from the Université Libre de Bruxelles (ULB) and an advanced master's in Information and Communication Technology Law (ICT) from Université de Namur, Belgium.



Michael van Maris van Dijk, *Analyst*,

follows postal regulation in Austria and Belgium, as well as telecoms regulation in Cyprus. He also follows European developments in sustainability regulation. He holds a BA in Law with Law Studies in Europe from the University of Oxford.



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Postal markets

EU level regulation has strongly influenced the development of European postal markets in the past twenty years. The main goals of customer protection (by means of the definition of a postal universal service) and market liberalisation were pursued by a series of step changes – from the first Postal Directive in 1997 to the Third Directive in 2008, setting out the current regulatory framework.

At the same time, postal operators have faced significant declines in mail volumes, driven largely by changes in consumer behaviour, particularly through electronic substitution.

The session will cover the definition of postal services and postal items, explaining the postal value chain. The session will then provide an overview of the development of EU regulation, how the postal market has changed since the first directive, postal economics and the role of national ministries, national regulators and relevant European bodies.

Universal service - scope

The Third Postal Directive guarantees users in the EU the right to enjoy a universal service involving the permanent provision of a postal service of a specified quality at all points in their territory at affordable prices. The universal service is therefore the keystone to regulation both for postal users and as a driver of the operations and costs for the national postal providers (the universal service provider).

The session will include:

- scope of the USO
- frequency of collection and delivery
- coverage requirements
- quality transit times
- price regulation and cost orientation
- access points, including post offices

Universal service – management and funding

With the focus of postal regulation falling squarely on universal service, the selection of the universal service provider and the regulatory treatment of the USP are critical factors in the economic sustainability and future possible development of national markets. In particular, national authorities face a challenge to strike the appropriate balance between ensuring appropriate levels of consumer protection and allowing the USP a reasonable opportunity to achieve and maintain a profitable commercial position.

The session will give a better understanding of different methods of USP selection, how the net cost of providing the universal service is calculated and different models for financing the universal service (including state aid).

Digitisation

Growing levels of digitisation create conflicting trends for the postal sector.

While digitisation has led to a huge growth in e-commerce transactions and associated parcel deliveries, digital substitution has had a markedly negative effect on the volume of correspondence mail being sent in physical format. In most countries, personal communications have become almost exclusively digital. Moreover, business communications are also moving rapidly to digital format, and e-government policies are driving the further substitution of physical communications.

Nevertheless, there may still be an important role for postal operators in this new era of digital communications. Postal providers can and do offer digital communications services, such as hybrid mail, and also hosting e-government mailboxes.

In addition, postal universal service providers are increasingly being considered as valuable partners for public authorities in improving digital inclusion for European citizens. Such services could even potentially become part of the postal operators' public service obligations in the future.

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Labour costs and regulation

Delivery of mail and parcels is a highly labour-intensive activity and national postal operators are often one of the largest employers in the country. As a result, any discussion of the postal sector or its future development tends also to involve the consideration of labour costs and labour-related regulation. As an additional factor, the introduction of competition has opened the door to new entrant organisations with workforces that are more reliant on casual and part-time workers, giving rise to concerns about the social cost of market liberalisation.

The session will give an overview of labour-related issues in the postal sector, with a particular look at selected national markets.

UPU

The Universal Postal Union (UPU) is a special agency of the United Nations, aiming to promote social and economic development in the global postal sector.

The UPU is the primary international forum for cooperation between postal sector players and is responsible for developing standards and setting remuneration rates for cross-border postal items.

This session will provide an overview of the main bodies of UPU, its main tasks, and the outcome of the fourth Extraordinary Congress, which is focused on the potential opening up of UPU membership.

Environmental and climate challenges

The postal and delivery sector is transport intensive and contributes to the emission of greenhouse gases. Although the Postal Directive does not explicitly refer to environmental and climate measures, many postal operators have already taken actions to mitigate their emissions, and postal regulators are considering whether they can and should take actions in this area.

This session explores how the existing European environmental regulatory framework is applicable to the postal sector and investigates how the postal sector has adapted to these requirements. The session also considers how postal operational practices and regulation may in the future address sustainability concerns.

Regulating parcel delivery and e-commerce

The trend of increasing parcels volumes driven by e-commerce is celebrated as one of the few growth areas for postal providers. Nevertheless, postal networks and the postal universal service regulation are only applicable to a small part of the parcel delivery market, which involves a range of (generally non-regulated) delivery operators.

This session will explore the market for parcel services, as well as how and which parcel services are regulated.

The future of the universal service

The decline in postal volumes and changing communications behaviours are putting at risk the long-term sustainability of the universal service requirements imposed by the Postal Directive.

Some member states have accordingly taken steps to reconsider the scope and features of the postal universal service in their countries. Until recently, consumer groups and national authorities have generally been reluctant to redefine and reduce the USO scope and the minimum frequency of deliveries. However, there is now a growing trend towards narrowing the scope of the USO at the national level.

This session will explore possible future changes in the EU regulatory framework for postal services.



For more information



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How to register?

Please register by filling in the respective registration form on our website:

www.cullen-international.com

Fees

Fee per delegate

Early-bird fee € 1,400 VAT excluded (€1,694 VAT included)

Standard fee € 1,600 VAT excluded (€1,936 VAT included)

21% Belgian VAT applies on ALL bookings.

10% discount for multiple registrations from the same organisation.

The fees include the course materials, refreshments, lunches on the two days and dinner on the first evening. They do not include travel costs nor accommodation.

Payments can be made by credit card or by bank transfer and should be made before the training starts. Registrations will only be confirmed after the payment is received.

Trainings and conferences general terms and conditions

A. Limited number of delegates

To ensure a high-quality training/conference experience, the number of participants in the training/conference programme will be limited. Cullen International reserves the right to refuse registrations once the maximum number of participants is reached.

B. Cancellations and substitutions

Cancellations must be made in writing. Full refunds will be paid only if cancellations are received by Cullen International 30 days before the start of the training/conference course. There will be no refund in case of cancellations within 30 days before the start of the training course. Delegate substitutions can be made at any time. They must be communicated to Cullen International before the start of the course.

C. Non-attendance

In the event of non-attendance, full training/conference fees will remain payable, and no refunds will be paid.

D. Changes to programme, venue or date or format

Cullen International reserves the right to make changes to the programme, the venue, the presenters and the training format. Cullen International also reserves the right to can-

cel or re-schedule the training/conference if there are insufficient participants. Delegates will be notified in good time and will be entitled to a refund of the fee if the training/conference is cancelled or is changed to a date which is not convenient for the delegate. In case the training course cannot be organised onsite, because of any event preventing the training organisation in a classroom format, Cullen International reserves the right to change the course format to an online course. Participants will be notified in due time. If the course is changed to an online format, Cullen International will not reimburse any travel or accommodation costs. It is strongly recommended that participants include a cancellation insurance when booking travels and accommodation.

E. Invoicing and payment conditions

Registrations will only be effective after payment receipt and payment must be done before the event takes place. Cullen International reserves the right to refuse attendance of a participant whose invoice has not been paid prior to the event. Cullen International also reserves the right to refuse registrations to members of organisations who had registered participants to previous events and not paid their invoices. The delegate shall provide, while registering to attend an event, all

requested information necessary for the issue of the invoices. All invoices are payable in total, for the amount invoiced including the taxes stated on each invoice (VAT). No withholding for tax or administrative reasons will be accepted.

F. Data protection

Your personal data will be used for the purpose of organising the training or conference. Cullen International will also subsequently use such data to inform you of its future training programmes and other activities or services, unless you opt out by sending us an email. Your personal data will not be communicated to any third parties.

G. Confidentiality and copyright

All Cullen International training/conference material is subject to normal copyright conditions. Any copy is subject to prior written authorisation from Cullen International. The training/conference material is for the delegate's own use and may not be disclosed to any third party. It shall be treated with a high level of confidentiality, in the same way as the delegate protects its own confidential information.



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