

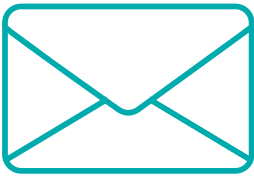
Mastering european postal regulation

A two-day training course



INTERNATIONAL

regulation made simple



Mastering european postal regulation

The training will provide attendees with:

The class will cover the key regulatory issues affecting the sector, including:

- a historical perspective 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 the traditional postal operators and how they are reacting in different ways to these challenges;
- how the concept of universal service has been predominant in postal regulation and how this concept has developed over time, reflecting changing market realities;
- as mail volumes fall significantly, a review of the growing parcel delivery sector and the implications for regulation;
- the growing relevance of horizontal forms of regulation, particularly those governing e-commerce;
- new and continuing challenges for operators and regulators arising from environmental concerns, cross-border delivery (including terminal dues), automated forms of delivery (including drones), and possible changes in the scope and definition of universal service;
- the importance of employee-related issues and labour regulation in the postal sector; and
- the application of competition law in the sector, including state aid and abuse cases

Who should attend and why?

This two-day master class 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; or
- individuals who have recently moved into a regulatory position and wish to acquire a rapid grasp of the key debates; or
- 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.



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The training organiser

For over thirty years, Cullen International has been tracking, reporting on and benchmarking developments in telecommunications, postal, media and digital economy regulation across Europe and beyond. Our service portfolio now includes the Americas, the Middle East and North Africa.

We provide comprehensive, neutral, unbiased, timely information that is used by the whole industry. We are widely recognised as the leading regulatory support service provider in the field.

Our services consist of a unique range of alerts, reports, benchmarks and enquiry services that are complemented by our training and consulting services. Our outstanding regulatory database contains over twenty-five years of source documents linked to expert analysis of events.

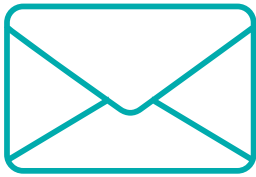
We are also regularly selected to carry out important research and studies for the European Commission and other organisations and we are frequently sought out to chair or make presentations at industry events.



Course timings

Starting at 9:00 am on the first day,
and ending at 4:30 pm on the second day.

For future course dates, please visit our website:
www.cullen-international.com



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Presenters

Lead trainer

Peter Dunn, Director of client services, is responsible for our portfolio of regulatory intelligence and training services for clients, ensuring that our services meet clients' current and future needs. Peter also leads the postal regulatory intelligence service. 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.

Guest speaker

Alexandre de Streel (University of Namur) is a Professor of EU Regulation and Competition Law and Director of the Research Centre Information, Law and Society (CRIDS). Alexandre is also a part-time member of the Belgian Competition Authority and a regular trainer for executive courses on EU regulation and policies. Previously, he worked in the cabinet of the Belgian Deputy Prime Minister, at the Permanent Representation of Belgium to the EU and at the European Commission (DG Connect).

Team of trainers

All Cullen International trainers are seasoned regulatory affairs professionals with specialist knowledge of the relevant areas. Very few have less than 10 years experience in their field of expertise.

Virginie Alloo, Senior Analyst, focuses on e-commerce, privacy and content issues, following regulatory developments at the EU level and across Western European countries.

Armen Ghalumyan is a lead author of Cullen's Postal Cross-Country Analysis covering eleven EU countries. Armen has contributed as an expert to World Bank and EBRD projects providing training and capacity building for ministries and regulatory authorities.

Tomasz Kulinski follows postal regulatory developments in the United Kingdom and Ireland. Tomasz joined Cullen International in 2016, having worked for over 12 years for the regulatory authorities in Poland as an expert in the postal and electronic communications markets.

Martin Schraa, EU Analyst, covers the Brussels beat reporting daily on the European Commission, Parliament and Council.



The venue

The training course will be held in Brussels, Belgium, usually in a 4-star hotel near the EU district and/or the city centre. Delegates at the training benefit from special accommodation prices at the course venue when booking in advance. A hotel booking form will be sent to you together with the confirmation of your registration at the training course.



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TRAINING SESSIONS

LIBERALISATION AND THE POSTAL MARKET

EU level regulation has had a prominent role in 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.

- Overview of EU postal market in statistics
- Postal economics
- Development of EU regulation
- The role of national ministries, national regulators and European bodies

COMPETITIVE LANDSCAPE

Market liberalisation has led to the authorisation or licensing of many alternative postal operators. However, there are two main different models for competition in the postal sector, end to end and access competition. For each model, the commercial possibilities for competition can vary significantly depending not least on the regulatory approach adopted at a national level.

- End to end competition
- Access competition
- Economics (level playing field)
- Downstream access
- Worksharing
- Access to postal infrastructures

DIMENSIONS OF UNIVERSAL SERVICE

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).

- Scope of the USO
- Frequency of collection and delivery
- Coverage requirements
- Quality transit times
- Price (cost orientation)
- Access points (including post offices)



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UNIVERSAL SERVICE MANAGEMENT

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 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.

- USP selection
- Calculating the net cost of providing the universal service
- How to finance the universal service
- Quality controls
- Price controls

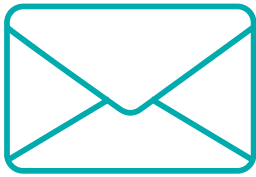
THE FUTURE OF THE UNIVERSAL SERVICE

The decline in postal volumes and changing communication 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. However, consumer groups and the European Parliament are reluctant to allow member states to exceed the flexibility allowed by the Directive in defining the USO scope and the minimum frequency of deliveries. Nevertheless, there is a trend towards narrowing the scope of the USO at the national level.

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.

- Overview of labour-related issues
- Case studies, looking at selected national markets



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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.

The European Commission's 2016 proposal for a Regulation on cross-border parcel services aims to boost European e-commerce and to encourage competition by making cross-border parcel delivery more affordable. The proposal does not include any price-control mechanisms but is seeking to achieve its goal through:

- increased transparency concerning the availability and price of different cross-border delivery services;
- cross-border access regulation; and
- improved and more effective regulatory oversight.

LAST MILE DELIVERY OPTIONS

The high costs and underlying economics of parcels delivery require operators to focus on ways to improve the efficiency of delivery and to avoid failed delivery attempts, while at the same time providing a high quality convenient service for end users. At the same time, the specificities of parcel delivery, competition in the sector, and customer demands have given rise to concerns over environmental impacts, particularly over congestion and carbon emissions. Taking these factors into account, operators have implemented or are experimenting with new ways to resolve the challenges of last mile delivery. This session explores these options, including:

- Separating letters and parcels delivery
- End user selection of delivery times
- Setting and meeting environmental goals
- Parcel lockers
- Delivery by drones and other unmanned vehicles

COMPETITION LAW IN THE POSTAL SECTOR STATE AID AND ABUSE CASES

While sector specific regulation plays a key role in shaping many aspects of the relations both among postal operators and between operators and customers, the role of competition law has continued to be important. These sessions explore:

- the extent to which competition law has governed the relationship between governments and national postal operators, particularly in terms of public financing and when it is found to violate the rules governing State Aid; and
- the abuse of dominance by postal operators, focusing on antitrust cases in the postal sector and what lessons can be learnt.



For more information

On the programme, contact

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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 (VAT excluded*) per delegate

Early bird fee (up until 2 months before the training date)	€ 1,260
Standard fee	€ 1,400

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 accommodation.

Payments can be made by credit card or by bank transfer. In both cases, an invoice will be sent to you shortly after your registration.

* No VAT chargeable on bookings by participants from the European Union who are subject to VAT in their country or by non EU participants. Belgian VAT (21%) is chargeable on bookings by European participants who are not subject to VAT.

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 / substitutions

Cancellations must be made in writing. Full refunds will be paid only if cancellations are received by Cullen International 14 days before the start of the training/conference course.

For trainings, in case of cancellations within 14 days before the start of the training course, a refund will also take place but an amount of 300€ will be charged for administrative costs.

If the delegate registers to a subsequent training course that takes places within one year from the date of the training for which the registration was cancelled, the amount of 300€ will be deducted from the cost of that subsequent 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

Cullen International reserves the right to make changes to the programme, the venue and the presenters. Cullen International also reserves the right to cancel or reschedule 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.

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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