



Listening to the Future

PostEurop Plenary Assembly in Liechtenstein

PostEurop's plenary assembly hosted by Liechtensteinsche Post in Vaduz/Schaan, Liechtenstein this year kicked off with an internal forum 'Listening to the Future'. During the forum, members had the opportunity to listen and experience a panel discussion amongst key stakeholders for the European postal operators coming from the UPU, CERP and Print Power campaign.



Dialogue for the future

Members also had the opportunity to participate in workshops and crucial discussions around proposed developments to the association. As outcome of these discussions, it was agreed that a focus group would be formed to further investigate a new base for member contributions linked closely to the strategic objectives and activities of PostEurop and its members.

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Photo Gallery

- With compliments from Liechtensteinsche Post, photos of the plenary have been distributed to all participants
- To view selected photos of the event, please go to www.posteurop.org/pavaduz1

Save the Date

- The next PostEurop Plenary Assembly will be held in Istanbul, Turkey on 12-13 October 2011
- Hosted by the Turkish Post.
- For more information please contact administration@posteurop.org

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UPCOMING MEETINGS



- **11 JAN** - EMIP Task Force, Brussels, Belgium
- **6-8 FEB** - World Mail & Express Americas, Mexico City, Mexico
- **7-8 FEB** - Future Trends of Parcel Management & Distribution, Egerkingen, Switzerland
- **14-16 MAR** - PosTech, New Delhi, India
- **29-31 MAR** - European Postal Services Conference, London, UK
- **6-7 APR** - Terminal Dues Forum, Reykjavik, Iceland
- **7 APR** - The Mail & Express Delivery Show, London, UK

Info & Subscription on: www.posteurop.org

From The Editor



Dear Members and Colleagues,

It is amazing how time flies and we are again drawing close another year-end.

2010 was an exceptionally busy year as we saw 11 European postal operators prepare for full market opening.

This year it is all about looking forward into our future. As change is happening all around us the most significant learning is to adapt quickly.

We have included in this issue highlights of various events including the Plenary Assembly held in Vaduz/Schaan, Liechtenstein.

We also had the pleasure of interviewing Mr. Bernard Damiens on his 'last mile' as Chairman of the PostEurop Management Board.

In response to our successful Quality of Service program offered to members, we received feedback from the Latvijas Pasts and the Serbian Post.

Lastly, we are happy to have some Market 'buzz' thanks to our new Market Manager, Sébastien Houzé.

We hope that you enjoy this issue and looking forward to your feedback and contributions.

Here is wishing you a Happy Holiday!

Cynthia Wee
Communications Manager
cynthia.wee@posteurop.org

NEWS IN BRIEF

- **bpostbusiness develops the first fully personalised 'aquarelmailing' together with Dioss Print solutions and the Belgian Direct Marketing Association (BDMA).** This innovative mailing carries personalised messages which can only be seen when the mailing is submerged in water.
- **Poste Italiane MD Massimo Sarmi and the General Manager of Russian Post, Alexander Kiselev,** signed an agreement in Sochi earlier this month, in the presence of the Italian Prime Minister, Silvio Berlusconi, and the President of the Russian Federation, Dmitri Medvedev. Under the terms of this commercial agreement, signed during the Italy-Russia bilateral summit, Poste Italiane Group will provide Russian Post with the skills and know-how required to modernise the network of 40 thousand post offices, optimise the logistics network and introduce online financial services and mobile phone services.
- **TNT announced their vision 2015 separation proposal on 2 December 2010,** to separate Mail and Express into two companies as part of their demerger plans. Peter Bakker will remain CEO of TNT until completion of the demerger.
- **Itella has reformed its group structure.** As of the 1st of January, 2011, Itella will transfer its operations from the parent company, Itella Corporation to its subsidiaries Itella Posti Oy and Itella Logistics Oy. The aim of the reform is to harmonize the structure of Itella Corporation in Finland.
- **Forceville the next Chairman of PostEurop Management Board** for the term 2011-2013. PostEurop announced the appointment of Jean-Paul Forceville as the next Chairman of PostEurop management board for the term 2011 - 2013, following the recent board elections at the annual plenary assembly in Schaan/Vaduz Liechtenstein.



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A futurologist view

The forum concluded with a two-part presentation and discussion on the latest global business trends and innovation from our guest futurologist speaker, Dr. James Bellini. The discussion saw many ideas and subsequently opportunities which the postal sector can continue to explore in the near future.

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INTERVIEW WITH BERNARD DAMIENS

Without a doubt, it takes a special person to assume and carry out the duties as Chairman of the PostEurop management board. Bernard Damiens is more than special to serve for two consecutive mandates in this distinguished and demanding position from 2005 – 2010, beyond his normal duties. After the election of the new

board we took the time to conduct a special interview with Bernard.

Q Bernard, 2010 has marked the final of six years in your role as Chairman of the PostEurop management board. You have often mentioned about the 'evolution of PostEurop'. What would you consider are the main milestones of PostEurop during this period of evolution?

Undoubtedly, the adoption of the Vilamoura strategy in 2005 has marked a significant step in this evolution, as the roles and objectives of the Association have been included in a clear vision and a well defined strategy, supported by a new, more active structure. It encompassed the whole scope of areas critical to the survival

of the postal industry.

One of its main elements, probably innovative at this moment, was the recognition that we cannot do business anymore as we did before. Our responsibility on our environment (nature, social, societal) has to be taken into account. This was the base of the creation of the Corporate Social Responsibility pillar.

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Gala dinner

To conclude the forum, a special gala dinner was organized and hosted by Liechtensteinische Post that evening accompanied by a string of music and dance entertainment. During the dinner, PostEurop also announced and celebrated the winners of the 2010 EUROPA Stamp competition.



Election time

The second day of the plenary was dedicated to PostEurop internal

matters including the election of the next management board. The newly elected management board will start their term on the 1st January 2011.

Welcoming Kazpost

The PostEurop community officially welcomed a new member, Kazpost with a speech from Mr. Salavat Cheryazdanov, Chief Executive of Kazpost and the signing of a memorandum of agreement between PostEurop and Kazpost. Kazpost will be an official member of the PostEurop community as of 1st January 2011

A special thank you

As host, Liechtensteinische Post team warmly welcomed all delegates at the charming and beautiful principality of Liechtenstein. Each delegate was received personally by the gracious Mr. Herbert Ruddiser, CEO of Liechtensteinische Post.

The plenary received much attention including a welcome address by Dr. Martin Meyer, Deputy Prime Minister of Liechtenstein and delegates were also invited for a special audience with his serene highness Prince Hans-Adam II at the Liechtenstein castle.



The generosity, hospitality and efficiency of Liechtensteinische Post ensured a successful plenary.

Photos on the next page



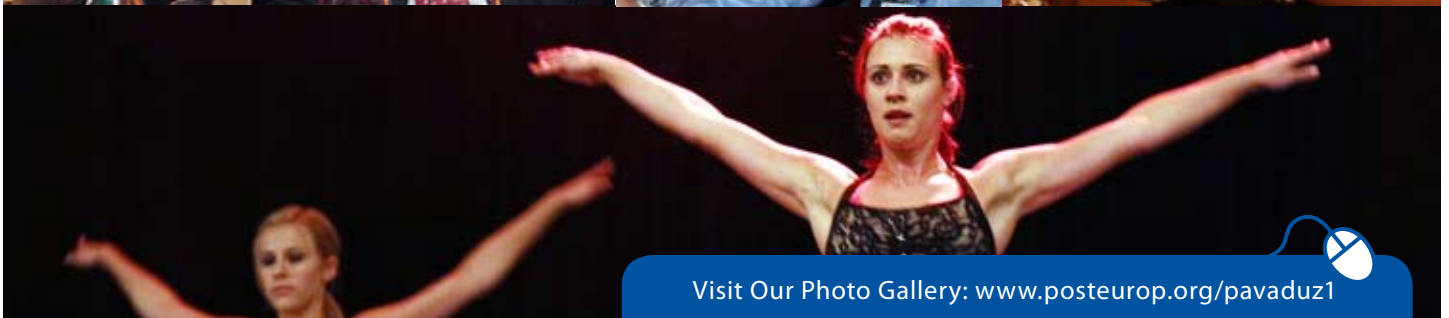
Clockwise: Herbert Rüdissler (Liechtensteinische Post) greeting Dr. Martin Meyer, Dep. Prime Minister of Liechtenstein, Osman Tural (Turkish Post), Frank Leerkotte (Print Power) and Botond Szebeny (PostEurop), Kristin Bergum (Posten Norge).



Top: Information Points at the plenary.

Right: Elena Fernandez (Correos)

Below from left to right: Daniela Metelli (Poste Italiane), Francesca Coratella (Poste Italiane) and Antonino Scribellito (PostEurop), Joost Vantomme (bpost) and Troels Thomsen (Post Danmark)



Visit Our Photo Gallery: www.posteurop.org/pavaduz1

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A third element is the launch of the cooperation with industry stakeholders through the European Mailing Industry Platform (EMIP). Though the achievements are modest so far (the most important one being the publication of a joint brochure on the truth about the impact of paper on the environment), this is a step towards the opening of the works of the Association to our colleagues in the industry. They share the same concerns and fight also for their future. Together we will be stronger.

I also would like to mention the CEO's forum for the Central and Eastern European operators. Its first edition in spring 2010 proved a success and demonstrated it was responding to a real need of the CEO's to meet and exchange their views in all trust and discretion.

Q What do you feel were the biggest achievements attributed to your capacity as Chairman?

The biggest achievements of the Association during this period are not linked to my capacity as chairman but to the dedication of the experts of our Members, specially the chairs of the different working groups, to the members of the two Management boards I had the honour and the pleasure to chair, and to the staff members of the headquarters. The three Secretary Generals I had the pleasure to work with have been (one still is) true driving forces. All I did was to encourage them and remind them regularly our objectives and commitments.

Q What were your best memories as Chairman of PostEurop?

I really enjoyed the member's visits. Having together with the Secretary General the opportunity to meet with the executive committees of our members, but also visiting their sorting centres and distribution and retail offices gave me a far better understanding of their true day-to-

day life and of their real challenges. Far better than reading annual reports...

I have been impressed by the enthusiasm of their young managers for the European Union (for those whose countries are member of) and for the opportunities offered by the Association to meet with their peers. This enthusiasm is certainly part of the transfers from East to West and an example to follow!

Q What were some of the biggest challenges for you?

During those six years I have had to recruit and coach two new Secretary Generals after Marc Pouw had decided to re-orientate his career. It is always a challenge for the continuity to replace the leading figure and maintain the course of the strategy, but it proved successful!

The main challenge however is to roll out the strategic decisions with a very restricted budget. There is always a choice to make between adjusting the ambition to the means, or doing the opposite. During the first three years, the Management Board could increase significantly the budget (in percentage... in absolute value, it remains modest), during the last three years, because of the economic crisis, the budget remained flat despite the inflation. Doing more with less is not an easy task...

Q What were the key learnings that you feel were most important for you as Chairman personally?

Being in weekly contact with the headquarters gives you a deep understanding of the challenges of the Association and of the new opportunities we can propose to our Members. But I realize that this understanding is not at the same level for those who deal with PostEurop matters only from time to time. This becomes visible when important decisions have to be taken for the future of the Association.

We will need to make a serious effort in terms of information and communication to increase the awareness of the existence of untapped opportunities throughout the organisations of our Members.

The key learning for me is that it is useless to know and understand if you don't share this knowledge or understanding...

Q Based on your experience and achievements, what would be some of the key-learnings which you would like to impart to the next board?

The first one, I just mentioned here above. The second one is that the concept of PostEurop as a platform of exchange of experience and best practices in all the disciplines useful for a company is one of the main assets of the Association. This should be further developed.

I see that PostEurop is more and more demanded to speak in International Conferences. Most of the time about Corporate Social Responsibility. Our achievements so far also have to be seen as an asset.

Finally, we should look at how we could respond to the demand of some of our Members to help them in new fields of interest to them. And let us be creative as regards their financing...

Thank you Bernard for your time and valuable insights.

INTERNATIONAL AFFAIRS COMMITTEE (IAC)

A position paper featuring the contribution of PostEurop to the Universal Postal Union (UPU) Doha Strategy Plan 2013-2016 was one of the outcomes of the 15th International Affairs Committee (IAC) plenary meeting, which was held on 17 June 2010 in Brussels and gathered together 22 participants from 15 PostEurop member postal operators.

The document was drafted by the Co-Chair of the Strategy and Reform working group, Mr. Luc Hillewaert (bpost), and was finalised at the meeting. After the voting process involving the entire PostEurop membership and the final endorsement by the Management Board, the document, which had received all votes, was promoted in Nairobi during the UPU Strategic Conference which took place on 22-24 September 2010, as well the next UPU Council Administration meeting, last November in Berne. It will also be sent to the other UPU Restricted Unions.

The Committee also discussed a recurrent problem at UPU International Bureau level – the delay in distributing the POC proposals and documents during the POC and CA sessions. Following the discussion, a letter was signed by the Chair of the Management Board and the Secretary General of PostEurop, and was sent to the UPU Director General, the POC and the CA Chairs alerting for this serious problem and offering support.

Another important issue discussed and decided upon at the meeting of June was the creation of a Postal Financial Services Working Group to analyse UPU proposals on the Postal Payment Services. Addressed mainly at the Eastern European operators that are the most interested in the

subject, the group will report to the UPU & RUs WG in a similar way as the

Chairs will be in close contact to coordinate this issue.



Letters and Parcels Groups do, giving their expert opinions on the subjects they focus upon.

In coordination with the European Affairs Committee (EAC), the IAC also debated the Study on the External Dimension of EU Postal Policy, which touches upon aspects such as the relationship between the European Commission and the UPU. Mr. Sture Wallander (Posten AB) made a thorough presentation on this study undertaken by WIK/Campbell consultants at the request of the European Commission (DG MARKT). IAC members were invited to send their individual comments on the study directly to the WIK/Campbell consultants and the IAC and EAC

The Customs working group has also been very active lately in different fronts at European Union level, mainly negotiating with DG TAXUD the Modernised Customs Code and its Implementing Provisions. The Chairman of the WG, Mr. Reinhard Fischer (Deutsche Post) made an enlightening presentation of the multiple lobbying activities performed within different EC bodies to make them more aware of the postal aspects. Such activities culminated with the production of an informal PostEurop opinion paper which was sent to Mr. Walter Deffaa, Director General of DG TAXUD, with the comments of PostEurop members on the Modernised Customs Code.



International Affairs Committee (IAC)

UPU AND RESTRICTED UNIONS WORKING GROUP MEETING IN SCHAAN

The following meeting of UPU and Restricted Unions Working Group took place last October in Schaan. The meeting received high participation with a total of 26 delegates representing 20 postal operators, PostEurop and UPU.

The focus of the meeting was on preparation towards the 2010 UPU Council of Administration (CA) session in November. Participants discussed what had been done by the different UPU groups between the POC and CA sessions and had an opportunity to listen and share update on developments within Joint CA/POC Committees and POC Committees, especially those referred to the reform

of the Union, works on the new postal strategy and proposals to amend the UPU acts.

Participants were also informed about the outcome from UPU Strategic Conference which was organized last September in Nairobi. At the Strategic Conference PostEurop Secretary General had the opportunity to convey main ideas of the position paper prepared by International Affairs Committee (IAC) giving input to the World Postal Strategy 2013-2016.

Recently, a small team was created within the UPU and Restricted Unions working group specially to analyse UPU Postal Payment Services Agreement and Regulations proposals

for the UPU Congress.

A new group

The Postal Financial Services group will work similar to Letters and Parcels working group but will be devoted to financial services proposals. Last

June all PostEurop members were informed about setting up of this group and were invited to participate. Out of the ten responses, Hungary, Germany, Russia, Greece, Turkey, Croatia (Mostar) and Poland had expressed their willingness to participate in the

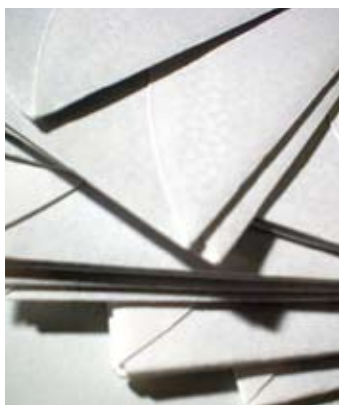
working group. During the meeting two additional members – Serbia and Swiss Posts, expressed their interest in joining the group. Hence, we await further developments on this new group.



European Affairs Committee (EAC)

NEW REGULATION ON INVOICING

The Council of the European Union has adopted a directive amending the VAT directive as regards the rules on invoicing.



The new regulation, which needs to be implemented by member states by 31 December 2012 at the latest, guarantees the acceptance of electronic invoices under the same conditions as for paper invoices. To certify the legibility of the invoice, the authenticity of origin and the integrity of the content shall be ensured. These requirements can be achieved in case of electronic invoices e.g. by the use of advanced electronic signature or electronic data interchange (EDI). By 31 December 2016 at the latest, the European Commission shall present

an overall assessment report on the impact of the new invoicing rules.

According to estimates around **30 billion invoices** are sent in Europe every year that gives big work to postal operators. To facilitate the use of electronic invoices some Member States have made e-invoices mandatory in the public sector.

The decision making procedure was monitored by Magyar Posta within the framework of Monitoring Legislation on Financial Services of the European Affairs Committee

For more information please contact Matyási Koppány (Matyasi.Koppany@posta.hu) from Magyar Posta

European Affairs Committee (EAC)

EAC MEETING IN BRUSSELS

The European Affairs Committee (EAC) met again for the second time this year in Brussels, Belgium. This time the meeting entered into several discussions including the European Commission's e-commerce directive and data protection. Members of the EAC had the opportunity to welcome Mr. Tonnie De Koster from the Secretariat General, European Commission, Mr. Jan-Willem Verheijden, Policy Officer at the European Commission DG Internal Market and Mr. Goetz Brandau, Government Affairs Manager from the Federation of European Direct and Interactive

Marketing (FEDMA) as guest speakers on these the key regulatory agendas issues.

Mr De Koster, explained the overarching European Commission's Europe 2020 strategy which is supported by 7 flagship initiatives to support the commission's key priorities. It was important participants understood the fundamentals behind subsequent policies.

Later in the day, the group had the pleasure to listen to Mr. Jan-Willem Verheijden. His presentation focussed on the push for e-commerce. The directive 2000/31/EC, created the basic legal framework for electronic commerce in the context of Internal Markets. A question and answer session follow suit.

Data protection is an issue which the European Commission has been rigorously pursuing. Mr. Brandau gave a presentation on current regulatory framework for data protection which is realized by a series of directives. The



commission is under increasing pressure to increase data protection when considering how fast new technologies developed.

The meeting concluded with a summary on various key issues for the EAC to follow-up on in coming months.

Social Responsibility

SOCIETAL PERSPECTIVE ON SUSTAINABLE DIRECT MAIL

The Societal working group launched a series of thematic conference calls to promote debate and discussions on societal related topics. The first call was dedicated to 'Sustainable Direct Mail'

Matthew Neilson from the Royal Mail, kicked-off the call on Sustainable Direct Mail and the discussed PAS 2020 specifications for Direct Marketing in the UK as case study.

"In UK, Direct Mail has a negative image amongst consumers."

To add further pressure on direct marketers, 2010 sees the EU Landfill Directive come into force. Currently, the UK disposes of 11.55 million tonnes of biodegradable municipal waste in landfill sites.

The EU Landfill Directive requires this figure to be reduced to 11.2m tonnes by 2010, 7.5 million tonnes by 2013 and

5.2 million tonnes by the year 2020. Missing these targets could result in millions of pounds of punitive fines from the EU.

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ENVIRONMENTAL WORKING GROUP SEMINAR

UPDATE ON CO2 REPORTING CAMPAIGN

Last October, environmental experts met to discuss the outcome of the 3rd GHG Reduction Programme CO2 data collection. Overall, 16 out of 27 postal operators participants in the programme reported 4.27 million tonnes emissions showing a significant reduction compared to the previous years, thanks

to increase in green practices such as green power purchase and fuel consumption efficiency improvements.

Ernst & Young, our environmental experts reported on the audit process to verify the data reliability. They welcome progress of members in order to achieve a consistent reporting methodology and recommend actions to set a credible reduction target.



The assurance statement of the consultant and more detail about the data collection will be published in the PostEurop 2010 CO2 Data Collection Final Report.

For more information on the CO2 Reporting Campaign for the European Postal Sector, contact Michele Menghini (michele.menghini@posteurop.org)

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This has brought on some strong initiatives for direct marketing industry to take on a more responsible and sustainable approach to its activities when it comes to the environment.



The challenge for Royal Mail and the sector was to find a way to retain their clients and to improve their image for the customers.

The key actors in the UK Direct Marketing sector includes advertisers, paper

producers, direct marketing association, BSI British Standards and Royal Mail...TNT (for unaddressed mail), DHL, consumer groups local and national.

PAS 2020:2009 requirements were developed to help the industry respond to this Environmental Performance pressure. The specification focused on establishing a set of environmental objectives, performance levels and indicators for different environmental aspects of a direct marketing campaign. The following environmental benefits were identified:

- Greater consistency and improvement in ways of working
- Improved operational efficiency
- Improved environmental performance of campaigns as a result of better supplier management
- Improved campaigns through better planning
- Better prepared for legislation by improving the environmental performance of your campaigns
- Protection of reputation through better targeting

On implementing the specifications, the Royal Mail saw the following results after 9 months:

- 110 million items produced
- Improved perception
- Direct Mail remain a preferred choice by clients
- corporate responsibility practice introduced



THE ADVANCED ELECTRONIC SOLUTIONS FORUM

The new Advanced Electronic Solutions (AES) forum was launched in Tallin, Estonia last September. The aim of this working group is to go beyond technical aspects and embrace ICT powered business/postal solutions, services and products and ultimately, increases the competitive aspects of what each Postal Operator offers.

As a result of a survey sent out to all members earlier this year, the group was able to identify key topics of interest which includes Hybrid Mail and GIS based solutions.

This year's AESForum, kindly hosted by Estonian Post in Tallinn (23 & 24 September), participant had the opportunity to deepen their knowledge on Hybrid Mail through case studies of how Russia Post deals with Hybrid Mail as well as conclusions to an in-depth research and analysis on this new product conducted by Triangle Research Corporation.

Siemens AG gave a presentation on features of their solutions: Trust Ebox (Siemens AG), an internet service whereby the receivers can decide what, when and where they would like to receive their mail. Beyond Europe, Israeli Post shared on their web based innovative mailbox, which is able to supplement or replace the traditional physical home mailbox.

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NEW FACES IN THE OAC



Finn Kristiansen, Operations and Network Manager at Posten Norge AS is the new Chairperson for the Quality of Service working group replacing

Lars Vesterlund.

finn.kristiansen@posten.no



Bruno Sattler, Senior Expert Retail Outlets at Deutsche Post AG is the new Vice Chairperson for the Retail Network working group.

Bruno.Sattler@DeutschePost.de



Toomas Türk, Head of Information Logistics at AS Eesti Post is the new Vice Chairperson for the Advanced Electronic Forum (AES) working

group.

toomas.turk@post.ee

Back in Europe, Deutsche Post DHL (DP / DHL) shared on their GIS based solutions involving their geo-activities which are believed to be technology postal organisations are in a privileged position to profit from, due to their natural extensive geographic network and coverage.

There was also from Portugal an interesting presentation about how InfoPortugal SA, a private Portuguese company, has been working with Portuguese Post (CTT) in setting up solutions for the maintenance and upgrade of CTT Geographic database and, from Estonia, AS Regio, a GIS born company, described how the partnership with Estonian Post, helped them create and improve services to its customers.



Finally, as a glimpse towards other advanced solutions, Estonian Post also presented NAPS (New Age Postal Services), a case study on information logistics, and Universal Postal Union (UPU) unveiled how ".post" internet domain can be a platform where innovative business models can be developed by Postal Operators.

"In 2011, AESForum will continue to provide PostEurop members with

current information on the latest ICT based innovative solutions, which is something that postal organisations - now, more than ever, due to a crisis that spares no one - are intensively looking for" concludes Joao Melo, Chair of the AES Forum.



For more information on the new AES Forum contact Joao Melo
[\(joao.m.melo@ctt.pt\)](mailto:joao.m.melo@ctt.pt)

TERMINAL DUES FORUM

Terminal Dues Forum was invited by Liechtensteinische Post to hold its meeting in Schaan the day before PostEurop's Plenary Assembly.

Over 40 delegates from 28 designated operators participated in the meeting together with Ms Marinela Lita from the International Bureau of UPU, and Ms Maire Lodi and Mr

Lars Vesterlund from PostEurop. The meeting was chaired by Mr Jan-Erik Leistedt from Posten Meddelande (Sweden Post).

The CEO of Liechtensteinische Post, Mr Herbert Rüdiger, welcomed the delegates to Schaan and personally wished the group a successful meeting

With the next Universal Postal Union (UPU) Congress coming soon, the main focus of the forum was on the future UPU Terminal Dues system. Within POC, Committee 1 handles all letter related tasks, in which Terminal Dues is one of

them. Ms Lita presented, on behalf of Mr Paul Epiney, Chairman of Committee 1, with regards to work done to date.

The UPU Terminal Dues Group (TDG) is responsible for the creation of the new system. TDG is chaired by Mr Marc Paingt from bpost, Belgium. At the forum, Mr Paingt gave a broad overview of the work

and how it will proceed. To secure the progress, the work has been forwarded to ad hoc groups with participation from experts from the DOs. Mr Tobias from Royal Mail

and Mr Jongens from TNT presented the ideas created by the "Terminal Dues Model" ad hoc group and Mr Gribling from La Poste, France, presented the ongoing work within the "Quality of Service Link" ad hoc group.

It is also important to follow what is happening in other parts of the postal world. Mr Argente from Correos, Spain, Chairman of PUASP's Terminal Dues Group, presented the concept in the Americas, Spain and Portugal. Mr Paingt presented the ideas coming from the Asian-Pacific area having participated in the Terminal Dues Group of APPU.

One key element of the work is to keep and rise the quality of the letter service, which is an important tool to survive on the market. To have a brief overview of the quality work within PostEurop, the Chairman of the Quality of Service Working Group, Mr Lars Vesterlund, was invited to give a presentation.

All presentations have been uploaded and can be found on PostEurop's Extranet.

Terminal Dues matters are becoming increasingly important amongst PostEurop's members. More than 100 delegates from 39 member DOs have participated in the TD Forum meetings during the last two years. Thanks to the close cooperation with the chairs of the different working groups, PostEurop members have had a great possibility both to be updated about the work, and also to influence the new system.

To have time for discussions and proposals, the next Forum meeting will be a two day meeting. The meeting will be held in Reykjavik, Iceland, on 6-7 April 2011. The meeting after that will be the day before 2011 PostEurop Plenary, on 27 September, in Istanbul, Turkey."



QUALITY OF SERVICE

Under the Quality of Service working group, various process reviews and process assessments were carried out throughout the year by a team of experts, dedicated to quality improvements at an operational level. Here are some of the feedback we had received from members



Letter from Latvijas Pasts - PostEurop Process Review strengthening Nordic and Baltic cooperation



Last summer, PostEurop Quality of Service experts held a process review in Latvia with Latvian postal operator - Latvijas Pasts. The process review team comprised of experts from Nordic and Baltic countries. Hence, this event became significant not only as part of cooperation between Latvijas Pasts and PostEurop, but in addition another important step in the regional cooperation in the field of quality.

Since 2003, Baltic and Nordic cooperation have become significantly closer when a Baltic-Nordic Quality Fulfilment Committee was created with the initial goal to share with the Baltic countries experience of Nordic postal operators in the area of quality fulfilment. Since the beginning of this cooperation quality has significantly

improved in all Baltic countries.

In a speech delivered at the Baltic-Nordic QFC meeting on in Stockholm Chairman of the Board of Latvijas Pasts Mr.Aivars Veiss stated that, "the process reviews

organised by PostEurop remain an

important area of cooperation for all Baltic countries. Latvijas Pasts has had the great pleasure to welcome

in the Process Review team of experts from Nordic and Baltic countries.

Without a doubt, the expertise from our Baltic and Nordic colleagues will greatly contribute to optimisation of operational processes and upgrading of quality. As a result, we are now working on evaluation of concrete proposals made by these experts and are searching for the best solutions to implement them."



Latvijas Pasts eventually submitted to PostEurop, information on the projects chosen and further activities. Currently Latvijas Pasts is working on analysing ways of optimising these projects further during the implementation. Management of the Latvijas Pasts has given their approval and support on all major projects proposed by the experts

and the work on implementation may begin.

Major tasks identified to date includes the reorganisation of mail flow in

sorting centre, improvement of quality management system, reorganisation of mail flow from business customers. In addition, Latvijas Pasts is looking into possibilities of implementing mail collection control system and improvements in the delivery process – delivery lists for subscribed newspapers and campaign with customers who do not have appropriate mail boxes.



Letter from Serbian Post - Serbian Post Qual- ity leaps forward

In recent years Serbian Post has done much in upgrading our quality of service in domestic and international postal traffic. This was done through realization of several small and mid-size projects. Ones that were of most importance were done in cooperation with PostEurop.

Based on a process review in 2008, a list of several small projects or actions were made to Serbian Post that when implemented led to higher efficiency of postal processes and quality of service offered to customers.

Obviously PostEurop has done quite a few of these projects thru former East European countries with success depending on the commitment of local postal people in raising quality and eventually becoming the trusted postal partner in International postal traffic.



Left to Right: Marko Kontić, Nebojša Savić and Vladan Djurić, - the core of Serbian Post Quality Team

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Serbian Post management together with its own postal workers decided to take this matter seriously. And in period of just a few years have successfully raised quality of its crossborder mail. Best example is if we look at Serbian post figures from UPU (Universal Postal Union) Continues Testing project from year 2007, the average of outbound crossborder mail was 86 % in J+5 and the average of inbound crossborder mail was 76 % in J+5 and compared it to the results from last year average of outbound crossborder mail was 94 % in J+5 and the average of inbound crossborder mail was 93 % in J+5. The results are better by 8-17 % depending if we are referring to inbound or outbound mail. Also if we look at results from 2007 for J+3 standard and

compare it to results from 2009 we see the same picture, results are better 17 % (from 48% in 2007 to 65% in 2009) for outbound and by 23 % (from 45% in 2007 to 68% in 2009) for inbound crossborder mail. This positive trend continues up to today.

Also just recently in June follow-up of this project named Process Assessment was realised and we can expect even more good news in future. Serbian Post is continuing its cooperation with PostEurop on the road to higher performance (quality) not only thru these projects but also thru its active involvement in PostEurop Quality of service WG (QSWG).

Besides this work done with PostEurop Serbian Post has realized several other projects in regard to improving quality of service performance, from which one

called "Domestic AMQM" is of great importance. For the first time RF – ID equipment was installed on greater scale in facilities of Serbian Post. In period from 2007 to 2009 domestic quality in regard of standard J+1 has improved by 35 % (from 35% in 2007 to 70% in 2009) and in regard of standard J+2 has improved by 25 % (from 67% in 2007 to 92% in 2009).

Also Serbian Post has been evolved together with International Postal Corporation (IPC) in making plans for joining UNEX measurement system and if everything turns out as planned it will start pilot by the end of year. So for Serbian Post and its experts, the quality is in the top of agenda and it will continue to be at this place until the EU postal operators quality performance levels are reached.

WINNERS OF THE 2010 EUROPA STAMP COMPETITION REVEALED

This year, PostEurop announced Magyar Posta (Hungary), Posta Slovenije (Slovenia) and Hrvatska posta (Croatia) as winners of the 2010 EUROPA Stamp Competition at the plenary Gala dinner hosted by Liechtensteinische Post AG in Liechtenstein.

In its 18th consecutive year and around the theme "Children's Books", over fifty creative entries were received from all-over Europe.

PostEurop announced the winning stamp to be the entry from Magyar Posta, postal operator for Hungary which featured the storybook illustrations of the Hungarian Kossuth Prize winning graphic designer Károly Reich (1922-88). The designs of the stamps, the border and the first day cover captured moments from the infamous story of a little bear much loved by Hungarian readers, Vackor.



The close first-runner up of the competition went to Posta Slovenije, postal operator from Slovenia and finally, the second-runner up of the EUROPA Stamp competition went to Hrvatska posta, postal operator for Croatia.

Philatelic Forum

A similar ceremony was held at the Philatelic Forum on 20 October 2010 in Istanbul, Turkey amongst philately enthusiasts whilst celebrating Turkish Posts 175th Anniversary.

34 participants from 16 countries participated at the PostEurop Stamp and Philately working group met during the Philatelic Forum chaired by Mr. Markku Pertinen from Itella Post. During

Left to Right: Jan Sertons (TNT), Vesna Trup (Posta Slovenije), Zdravko Fajl (Croatia), Sébastien Houzé (PostEurop), Anna Varga Bótos (Magyar Posta), Bernard Damiens (bpost), Botond Szebeny (PostEurop)

the working group meeting, thematic proposals for 2013 and 2014 were received and discussed amongst members of the working group. It was agreed that the theme for 2013 will be 'Van of the Postman' in celebration of PostEurop's 20th anniversary and in the following year, 2014 the theme will be 'National Musical Instruments'.

Next year's EUROPA Stamp Competition theme will be on 'Forest' as 2011 will be the "International Year of the Forests" (<http://www.un.org/en/events/iyof2011/>) and we are looking forward again to another year or spectacular entries.

INTERVIEW WITH POSTEUROP MARKET MANAGER

The PostEurop board had agreed to appoint a Market Manager who will help build activities within the pillar to its full potential. Sébastien joined PostEurop in June this year from bpost and before that had dedicated most of his career to the paper industry. We thought it might be worthwhile to interview Sébastien to get to know him in the context of his new role.

Q Can you tell us a bit about yourself and your professional background?

I am 41 years old and I have 4 children. I am a passionate and a dreamer with a creative mind, a dreamer who has learned over the years to keep both feet on the ground. I am an obstinate, a fighter, I am keen on new technologies and also a great lover of paper. I have 15 years of experience working in marketing and in the world of paper and graphics, whilst working for paper manufacturers and printers in Belgium and France. Having evolved within the world from paper to graphics, much like in the EMIP in fact, I logically wanted to approach the last mile of the value chain, i.e. the postal world. So I joined bpost marketing team as a senior product manager for added value services... My time spent at bpost took me to the conclusion that the postal world is exciting and sometimes very far from the perception the market may have about it.

Q What brought you to PostEurop?

I noticed that the business in general was becoming more and more European, that competition was internationally active. Therefore, I felt that working together on a larger scale would help us move faster and further. And I wanted to meet the challenge of facing a profession with declining figures, in a changing environment while I remain convinced

that the post is a true choice and reliable partner, a partner for the future.

Q Market Manager is a brand new role within the PostEurop community. What inspired you most about this role?

Marketing, by definition, is about listening to the market and understanding customer needs.

The world is changing fast, just like our customers and their needs. As we are all aware of, our industry must evolve; we need to reinvent our business models and if we want them to be effective, they must match the market reality. We must learn to observe, to listen to the market in real-time, the field, customers... and to circulate the results of these studies among us.

Q During a time of economic crisis, what do you believe are the value-add elements which the PostEurop Market pillar brings to our members?

Several trends are observed. One is the globalisation of the business, a constant overtaking of borders. E-commerce is a good example. We no longer speak of national or local trade but of global trade... therefore PostEurop has got a role to play as a platform for exchange and communication to facilitate meetings and collaboration at all levels.

Another trend is the centralisation of decisions and future orientations, within the European Commission for instance, or with Think tanks. These decisions also become increasingly international and then are implemented at the national level. Again, in our position, we can represent and voice at the same time the interest of a large number of Members.

We often speak of a digital breakthrough, a technology wave, but we must realise that the resulting technology and marketing are global. And we often struggle with a national strategy, sometimes without knowing exactly what



the situation is in neighbouring countries. This information and this synergy are, according to me, essential to better position our business facing electronics, with a common approach built on a platform of communication and exchange of experiences, etc.

Q Since coming onboard in June, what were some of your biggest focus?

Mainly two things, Print Power which is an interesting initiative that aims at defending and promoting communication on paper by demonstrating its advantages and its value on the one hand, and at bringing added value to traditional paper by using new and particularly innovative technologies on the other hand.

Secondly, the Europa Stamp: first of all because I am passionate about philately, but also because it is a wonderful project which defends the postal tradition while leaving some space for a perpetual evolution, all in a European context full of creativity and local and cultural differences around a common theme. Stamps are an important value of our business. A value to defend and promote.

Continued on the next page

USEFUL LINKS

MARKET

Digital Buzz Blog
www.digitalbuzzblog.com

CEPI
www.cepi.org

The DMA
www.the-dma.org

Eurostat
epp.eurostat.ec.europa.eu

Postcom
www.postcom.org

Print Power
www.printpower.eu

Trendwatching
www.trendwatching.com

Tuvie
www.tuvie.com

Two Sides
www.twosides.info

UNEP
www.unep.org

ANNOUNCEMENTS

New top management of Slovenská pošta, a. s. 2010.
 Mrs. Paulína Štefaničová was appointed as the new Chairwoman of the Board and Chief Executive Officer for Slovenská pošta on 15 October 2010. Prior to her appointment Mrs. Štefaničová has held management positions at Slovenská pošta, a. s.



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Q What are some of the biggest challenges you have faced?

Paradoxically, one of the biggest challenges for me was to convince of the interest and the added-value of a market approach. We are a conservative business, which makes sense since it arises from traditions. But this business is shaken up by technology and fast competition. We must therefore protect the core of our profession, promote the positive aspects of it as well as develop and explore all the growth and diversification options.

Ultimately, it is the market that will dictate its law. The biggest challenge is to show that the decline is not inevitable and that we can recover some growth and some positive momentum. Paper communication and physical mail -both transactional and direct- have good arguments. This, associated with an electronic stream managed by a trusted

partner such as the post, paves the way for a real potential once we use the paper or the electronic where it is most appropriate, depending on the purpose that is being aimed at.

Q Where do you see the immediate developments of the Market pillar for 2011 and beyond?

Through the carrying out of studies on the true value of paper communication and through the drafting of a reasoned approach on multi-channelling and on the real possibilities of hybrid communication. The challenge for many businesses will be the reorganisation of the documents flow and the management of the resulting internal processes. Current trends like cloud computing, m-commerce or social commerce are good opportunities for us to show our know-how and our documentary and logistic expertise... because the more you dematerialise, the more you will need to turn to reliable, close and effective partners...

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Written, edited and produced by PostEurop
 Editor-in-Chief: Cynthia Wee
 Translator: Noella Thibaut
 Contributors: Bernard Damiens, Nathalie Ganzel, Sébastien Houzé, Gunars Kirins, Marko Kontić, Matyási Koppány, Jan-Erik Leistedt, Maire Lodi, Joao Melo, Wiesława Mazarska, Michele Mengini, Joost Vantomme, Isabel Tavares

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