



PostEurop[•]

MANIFESTO
2024
2029

MANIFESTO 2024-2029

PostEurop is the trade association that has been representing European universal postal service providers (USPs) since 1993.

The postal and parcel industry has experienced a phenomenal transformation in the past few years. The rapid digitalisation of our society and economy, and the accompanying changing consumer needs, have triggered a profound evolution in the social and economic roles of postal operators. With the sharp decline of letter mail volumes and the increase of parcels due to the growth of e-commerce, European postal operators embrace these developments through investment in our people, continued innovation and constant calibration of our market-specific services. As a result, the European postal sector has evolved to become a dynamic and diverse sector that is closely linked to the different thriving local eco-systems.

Our people are our best asset. By investing in our workforce, we are able to fulfil our role in helping citizens and businesses meet the challenges of a dynamic global economy.

In times of crises, European postal operators continue to carry out their unique and essential services by responding and adapting to the circumstances, be it war, pandemic or natural disaster. When faced with such adversities, **our industry's resilience is a pillar of strength for Europe's society and economy.**

Today, more so than ever, we harness the latest technologies to accelerate growth for our customers and to lead the industry worldwide in sustainability goals. By building on the backbone of a Europe-wide universal network, we have successfully diversified our offerings beyond basic postal services in some markets based on the specificities of each country and region.

Yet past experiences have taught us the importance of resilience: with an increasingly turbulent world economy and the rapid ascent of new technologies, PostEurop and its members understand their crucial role in **delivering the EU's Single Market for citizens and businesses alike**, and therefore enhance the **global competitiveness** of the continent.

*To do so, we set out our vision and commitment in three areas in the following pages: **Citizens, Businesses and Planet.***

Strong European postal operators are crucial elements in the bedrock of the EU's resilient social fabric, thriving business environment, and global sustainability leadership.

For the EU to reach its objectives as an attractive global market and lead in the twin green and digital transition, it can rely on PostEurop and its members as a **key European industry to deliver results.**

55
MEMBERS

53
COUNTRIES AND
TERRITORIES

1%
NATIONAL
GDP

USPs and USO

A **Universal Service Provider** is a public or private postal service provider upon whom a Member State places **Universal Service Obligations** to provide postal services throughout a specified geographical area.

PostEurop^o

Postal services handle billions of items a year. In 2022, this includes an estimate of:



72 BILLION
LETTERS



5.5 BILLION
PARCELS

FOR CITIZENS



WE DELIVER TO

356 MILLION
HOMES

WE OPERATE

294,757

SERVICE AND PICK-UP POINTS:



88%

259,377
POSTAL POINTS

12%

35,380
PARCEL LOCKERS

FOR OUR PLANET



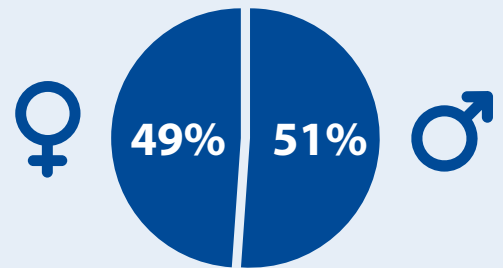
77%
ELECTRICITY FROM
RENEWABLE SOURCES



***109,000**
ELECTRIC VEHICLES



***14,000**
VEHICLES POWERED
BY ALTERNATIVE FUELS



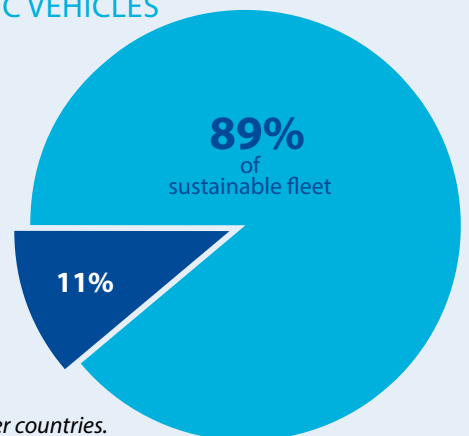
2 MILLION
EMPLOYEES

FOR BUSINESSES



WE SERVICE

51 MILLION
COMPANIES EVERY YEAR



**These fleet figures date from 2022, from 32 PostEurop member countries.*

WE DELIVER FOR CITIZENS

"Underpin the European value of welfare for all citizens, by fulfilling their economic and social needs through the diversification of services and continuous innovation."

WHAT CITIZENS NEED

Citizens require accessible, affordable and adaptable **Services of General Economic Interest (SGEIs)** across all EU regions. To exercise their **freedom to stay** (cf. Letta 2024, 14)¹, they need reliable providers who offer **diverse, innovative and sustainable solutions**.

Like businesses and governments, citizens benefit from reliable, accessible, high quality postal services, through the **Universal Service Obligation (USO)**, taking into account national socio-economic, cultural and geographical differences. Postal services are essential to contributing to the economic and social cohesion of the **EU's Single Market**.

Trust, convenience and proximity are the cornerstones for the Universal Service Providers (USPs). Offering this service requires a well-maintained, functioning, interconnected postal network to ensure citizens can easily make use of postal and other services offered by postal operators.

¹ Letta, Enrico. 2024. "Much more than a market – Speed, Security, Solidarity."

OUR COMMITMENT

The long-term provision, widespread knowledge and reliability of postal services make us European postal operators the **preferred partner to offer also other SGEIs** to all citizens.

We continuously adapt to the changing society needs and habits to remain close to our customers and physically present in local communities. This is possible through our **network of postal contact points and delivery workforce**, which represents around 60% of the total workforce of PostEurop members.

We ensure the fulfilment of the **Single Market** by giving consumers access to goods that may not be available in local retail shops through e-commerce parcel deliveries.

We contribute to the competitiveness, continuity and dynamism in the market through **innovation in delivery and collection of letter and parcel items**, so that citizens enjoy a **convenient and trusted service offering** provided by postal operators.





Priorities for the EU

To maintain the value we offer to citizens, PostEurop advocates for the following:

EU policies that reflect the vital economic and social dimensions of postal operators in improving citizens' wellbeing through our function as USPs and our high-quality offering of SGEIs. Facilitate Member States to **rely on USPs as SGEI providers** with the aim of ensuring **citizens' convenient access to postal points**.

A flexible **EU regulatory framework in the field of universal service** through maintaining a stable role for postal operators in order to ensure that the needs of citizens are effectively met now and in the future. Ensure that Member States continue to benefit from enough **flexibility to adapt the USO** to their specific circumstances and social needs.

Keep the **USO at the core of the EU legislative framework** on postal services, with the main objective of ensuring postal operators can fulfil the USO in an economically sustainable way. To this end, the scope of the USO should consider the evolving user demands, and its **net costs need to be compensated in an efficient and timely manner**. A simplified and balanced State Aid framework is necessary to guarantee this.

Any regulation should allow the development of **future innovations on delivery methods and locations**, so that citizens can continue to benefit from collection and delivery options available to their convenience.

Any future regulation needs to **avoid increasing further administrative burden** for postal operators: any additional reporting obligations, mandatory market needs tests or other prescriptive new rules should be carefully balanced between adding value for users and market players and increasing the financial and administrative burden for postal operators.

WE DELIVER FOR BUSINESSES

"Support the EU's goal in strengthening the Single Market by fostering businesses' growth through our interconnected networks, by supporting pan-European e-commerce every single day and by driving innovation for businesses of all sizes, especially SMEs."

WHAT BUSINESSES NEED

Businesses, **especially SMEs (small and medium enterprises), startups and micro-enterprises**, need reliable and innovative postal and parcel delivery services across the EU to meet its goals.

For Europe to thrive in an increasingly competitive global environment, more businesses need to take part in the Single Market to increase the attractiveness of the EU for investors. Therefore, **new and innovative business models** need to be supported by equally flexible and innovative partners. European postal operators team up with startups and scale-ups to offer creative and **diverse solutions that create value** for all kinds of businesses.

For businesses within the Single Market to grow, they depend on a **trustworthy EU-wide interconnected network of service providers** who understand and cater to their needs.

Businesses partner with postal operators to achieve the **simplification, acceleration and digitalisation** of their business processes.

To achieve higher levels of customer satisfaction and growth, **e-commerce businesses require convenient, dependable and creative logistics solution providers like postal operators** to meet the end-customer needs.

OUR COMMITMENT

The European postal network is the **backbone of the EU's e-commerce market**. We facilitate the work of all businesses, especially SMEs and micro-enterprises, to reach their customers efficiently and reliably. Together, we contribute significantly to the growth and prosperity of the EU's Single Market and international trade.

With the continuous innovations from businesses and the multiplication of e-commerce platforms, **e-commerce-related parcel volumes will continue to grow**. To meet current and future challenges, European postal operators are committed to continue their **large investments** to bring state-of-the-art, sustainable delivery solutions in an **ever-changing and highly competitive environment**.

We **leverage our knowledge and assets available** to continue to innovate and diversify, to meet the **new emerging business models** across a wide range of sectors. For example, some of our members offer digital, financial, insurance, or mobile services; others offer integrated logistics through their large networks, or partnerships with alternative delivery points.

As one of the largest employers in the EU, PostEurop members are committed to the continuous improvement of a **quality workforce to meet customer demands**, setting examples for others to follow.



Priorities for the EU

To increase the benefits we offer to businesses, PostEurop advocates for:

EU policies must take into consideration the **vital role played by European postal operators in servicing businesses, especially SMEs, in the Single Market** through their innovative, diverse, sustainable and value-creating solutions.

Trust the **high competitiveness of the European e-commerce market**. This ensures the natural differentiation of national and regional markets driven by different local consumer preferences, for example, in how they receive parcels.

The highly competitive EU parcel market including cross-border is a key source of economic growth for EU businesses. Therefore, to further support its development, the EU should **avoid its over-regulation** without imposing unjustified burdens.

Ensure a **global level playing field** for European postal operators to enhance further **economic growth for the EU**.

PostEurop fully supports the European Commission's efforts to reform the current customs legislation in the coming years. This requires **modern procedures, including automated customs processes, that reflect the specific requirements of postal traffic**, taking into account the UPU legislation.

Support the necessary forthcoming investments in new technologies, such as artificial intelligence and cybersecurity, by European postal operators to further enhance their service offerings to European businesses to heighten the EU's competitiveness.

Ensure that network security obligations of the postal industry are **clear, workable and harmonised**.

In view of the importance of postal services to European citizens, businesses and economy, the forthcoming discussions on open data and any future revision of the GDPR **should reinforce and protect the position of the postal industry**.



WE DELIVER FOR OUR PLANET

“Be a catalyst for the EU’s 2050 climate-neutrality goal.”

WHAT OUR PLANET NEEDS

Climate change is everyone’s responsibility. European postal operators share a public vocation and are committed to delivering a positive impact for both business and society.

Europe’s green transition needs risk-taking early adopters. PostEurop members are **frontrunners in the stride towards lowering the industry’s carbon footprint** by investing in and prioritising sustainable solutions.



OUR COMMITMENT

PostEurop and its members **place sustainability at the core of their activities** and are fully aligned with the EU’s objectives of reducing net greenhouse gas emissions by at least 55% by 2030 and to become the first climate-neutral continent by 2050.

Over the years, PostEurop is grateful for the experiences, skills and knowledge gained in our journey towards sustainability. This has enriched our sector and our people, making us **sustainability champions** in our industry, and we are committed to continuing our efforts.

European postal operators have begun to further decarbonise their operations to keep in pace with the EU’s climate ambition in two key action fields: currently we have one of the largest low-emission fleets which includes **over 109,000 electric vehicles and 14,000 vehicles powered by alternative fuels**. **77% of our electricity use comes from renewable sources** and we have put in place various circular economy and waste reduction initiatives.

Priorities for the EU

To actively contribute to the implementation of the **EU's ambitious sustainability goals**, European postal operators need supporting policies and incentives. Below are some challenges that need to be addressed:

In view of the great strides made in the last mandate with the Green Deal, the EU should now **focus on implementing the broad horizontal legislations** to ensure it can reach its climate goals. The added value of any sector-specific regulations should first be carefully assessed.

Ensure that legislation is supportive, not restrictive. With our knowhow and expertise, we are best placed to decide on the optimal fleet mix and the most suitable technologies for the decarbonisation of their operations based on the local geographical and business conditions.

Call for **an equal and harmonised access to the energy grid for all postal operators.** Currently the transition to decarbonising the fleet is being slowed down by the lack of access to the energy grid in some Member States. PostEurop requests the EU to work with our members, national authorities and national grid operators to facilitate postal operators' path towards decarbonisation.

Put in place **enabling conditions for decarbonising our fleets.** For example, a major obstacle for postal operators in their decarbonisation path is the **insufficient capacity on national electricity networks** to allow for **adequate charging infrastructures and facilities.** Within the EU's upcoming work on the energy union, it should prioritise such **enabling conditions for alternative or electric fleets** for postal operators, especially in view of our vital economic and social services towards citizens and businesses.

Lower green energy costs and recognise the role of alternative fuels in the transition phase towards full decarbonisation, especially for heavy duty vehicles. High green energy costs and lack of access have so far prevented larger upfront investment in decarbonised fleets by some postal operators.

Ensure the availability of financial support and incentives to foster the decarbonisation of postal operations through subsidies, funds and fiscal incentives, ultimately benefitting citizens and businesses especially SMEs with lower emission deliveries.

Give guidance to Member States to avoid regulatory restrictions that might hinder the deployment of smaller electric vehicles (EVs) to deliver mail and parcels.

Avoid disproportionate administrative burden for postal operators. The transparency and reporting obligations from the last mandate first need to be implemented. The reporting framework imposes a significant compliance cost for businesses including postal operators. By applying the principle of Better Regulation, a reduction or simplification of the reporting requirements where appropriate should be considered.

Consider the **postal industry as a sector with relevant technical screening criteria** under the EU's Green Taxonomy.

Postal operators support the circular economy goals of the EU, notably those laid down in the Packaging and Package Waste Regulation. Given the complexity of the legislative framework, the EU should actively engage with the postal industry in the work on all necessary secondary legislation, in addition to providing clear guidelines to support implementation and ensure compliance.



OUR MEMBERS

AUSTRIA

Österreichische Post

BELGIUM

bpost

BULGARIA

Bulgarian Posts

CROATIA

Hrvatska pošta

CYPRUS

Cyprus Post

CZECHIA

Česká pošta

DENMARK

PostNord Danmark

ESTONIA

Omniva

FINLAND

Posti
Åland Post

FRANCE

La Poste Groupe

GERMANY

Deutsche Post / DHL Group

GREECE

ELTA (Hellenic Post)

HUNGARY

Magyar Posta

ICELAND

Íslandspóstur

IRELAND

An Post

ITALY

Poste Italiane

LATVIA

Latvijas Pasts

LIECHTENSTEIN

Liechtensteinische Post

LITHUANIA

Lietuvos paštas

LUXEMBOURG

POST Luxembourg

MALTA

MaltaPost

NETHERLANDS

PostNL

NORWAY

Posten Bring

POLAND

Poczta Polska

PORTUGAL

CTT Correios de Portugal

ROMANIA

Poșta Română

SLOVAKIA

Slovenská pošta

SLOVENIA

Pošta Slovenije

SPAIN

Correos

SWEDEN

PostNord Sverige

SWITZERLAND

Swiss Post

*The above are PostEurop members from EU, EEA and EFTA member states.
For our full membership list, consult posteurop.org.*

PostEurop is the trade association that has been representing European universal postal service providers (USPs) since 1993. It is an officially recognised Restricted Union of the Universal Postal Union (UPU). We promote greater cooperation, sustainable growth and continuous innovation for the postal industry in Europe and beyond.

OUR LEADERSHIP



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Board of Directors



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Secretary General



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WE DELIVER FOR EUROPE

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