Statistics in focus

ECONOMY AND FINANCE

THEME 2 – 9/2000

BALANCE OF PAYMENTS

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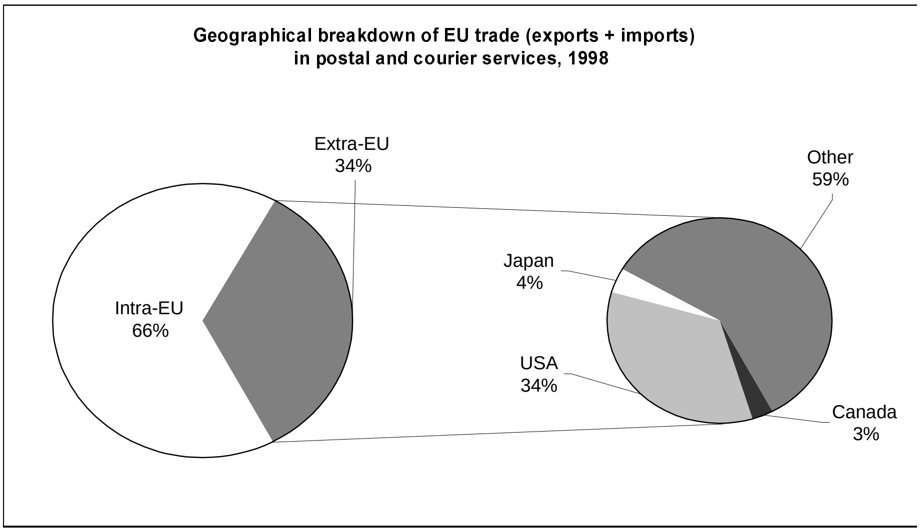
Manuscript completed on: 31.01.2000
ISSN 1024-4298
Catalogue number: CA-NJ-00-009-EN-I
Price in Luxembourg per single copy (excl. VAT): EUR 6

Postal and courier services remained a significant mean of EU external communications in 1998

Maria-Helena FIGUEIRA

As shown by a statistic available for the first time in 1998, EU postal and courier services transactions recorded a deficit of ECU -0.2 bn with the rest of the world. The total of these transactions amounted to ECU 3.4 bn of which more than one third were with extra-EU partners. They represented 12% of EU communications services transactions with the rest of the world (17% of total EU exchanges if intra-EU transactions are included). Despite an apparent increase in exchanges in postal and courier services since 1994, this share seems to have narrowed alongside the noticeable expansion of communications services since 1992. In most countries, postal services are offered by a single state monopoly whereas competition rules the market for courier services. EU international exchanges of both postal and courier services seem to have expanded during these last years. The growth seems most pronounced for courier services, that make up the largest part of international postal and courier services.



At EU level, the item *communications services* has been broken down into *postal and courier services* and *telecommunication services*. This statistic was available for the first time on 1998 data.

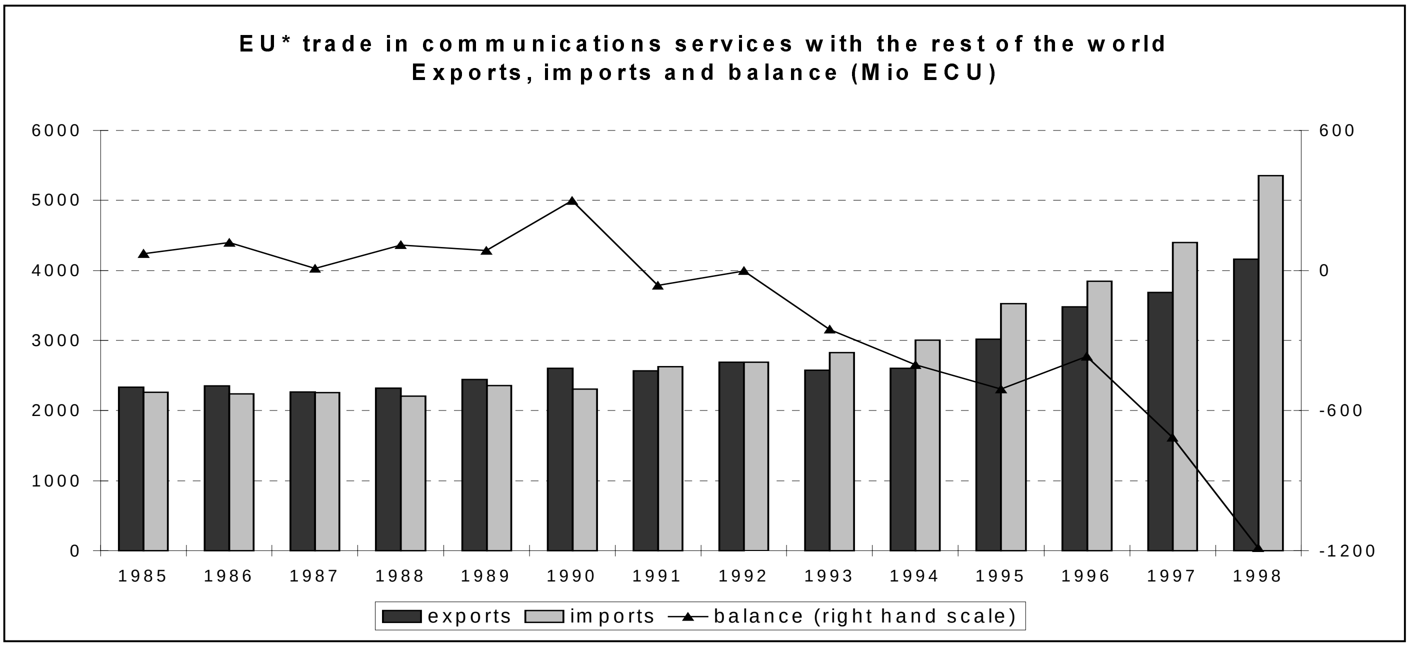
In fact, in 1998, the balance of *postal and courier services* between the European Union and the rest of the world registered a deficit of ECU -0.2 bn. Total transactions (exports + imports) amounted to ECU 1.2 bn of which 34% were carried out with the USA. *Postal and courier services* made up 12% of EU *communications services* exchanges with extra-EU partners.

When intra-EU flows are taken into account, this share rises to 17% for 1998. Total transactions in *postal and courier services* reached ECU 3.4 bn - of which 66% took place among EU Member States - and the balance revealed a deficit of ECU -0.6 bn.

From 1992 to 1998, total EU exchanges (exports + imports) in *communications services* with the rest of the world almost doubled, reaching ECU 9.5 bn. This considerable intensification - following years of stability (2.1% average annual growth rate from 1985 to 1991) - reflects the increasingly crucial role of international communications set in a context of rapid globalisation of business.

When intra-EU transactions are taken into account, *communications services* followed the same trends, growing at an annual average rate of 2.1% from 1985 to 1991 and increasing from ECU 9.5 bn in 1992 to ECU 20.1 bn in 1998.

Postal services and *telecommunications* - formerly provided by a single state monopoly - now are two markedly different types of *communications services*.



** From 1985 to 1991, data refer to EU-12 and from 1992 onwards, data refer to EU-15*

To what extent have *postal and courier services* contributed to the development of international exchanges in *communications services*?

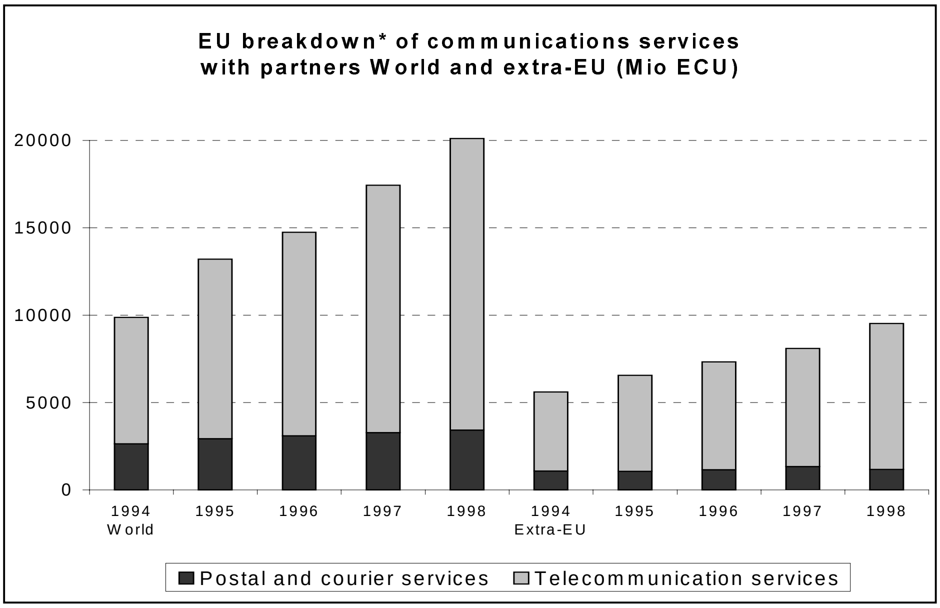
Postal and courier services are subject to increasing competition from other *communications services* such as facsimile, electronic mail and data networks, particularly in the business-to-business market segment. According to the WTO, the number of international messages sent by fax assumed a larger share of the market than those conveyed by post in the early 90's. According to the same source, the volume of electronic mail in the United States exceeded the number of letters delivered by the postal service for the first time in 1996. To a lesser extent, such a changeover is also deemed to take place in the business-to-private and private-to-private market segments.

A priori, one would therefore expect the share of EU *postal and courier services* in *communications services* to have significantly decreased over the last years. This point apparently finds confirmation in Eurostat estimates[1]. An evaluation of EU transactions including intra-EU flows, suggests that the share has fallen from 27% in 1994 to 22% in 1995 then regularly decreasing to reach 17% in 1998.

Due to a shortage of data concerning geographical breakdown, estimates on extra-EU flows may be less reliable. They indicate that between 1994 and 1995, *postal and courier services'* share decreased from 19% to a stable 16% then dropping further from 16% in 1997 to 12% in 1998.

Yet in both cases, the fact that *telecommunications* are increasingly preferred to *postal and courier* services is quite apparent.

[1] *Based on the available information on postal and courier services reported by Member States for years prior to 1998*



Eurostat estimates from 1994 to 1997

In spite of this substitution effect however, it seems that *postal and courier services* played a significant role in the expansion of *communications services*, especially when intra-EU exchanges are taken into account. Indeed, total EU flows of *postal and courier services* seem to have risen at an average annual rate of 6.7%[2] since 1994 to reach ECU 3.4 bn in 1998.

This growth appears to be a natural consequence of the increased demand for communications in today's globalised economy.

Furthermore, the boom in *telecommunications* has probably had a positive influence on the recent development of *postal and courier services*. For instance, the growing popularity of home shopping offered over communications services such as television and Internet may have fuelled parcel deliveries. Moreover, as stated by the WTO, some market segments of *postal and courier services* benefit from new communications technologies, such as electronic data interchange, now considered an essential tool in the express mail industry.

As regards EU external exchanges, Eurostat estimates indicate stability in *postal and courier services* whose volume has ranged between ECU 1.1 and ECU 1.3 bn since 1994. To the extent these estimates can be relied upon, they probably reflect offsetting changes in prices and volume flows, most likely a decrease in prices and an increase in the volume of items conveyed.

The two sides of international *postal and courier services*

The sector of *postal and courier services* is characterised by the fact that a sizeable part of it is usually run under monopolistic conditions. This is due to the need for a universal service. In most of the world's countries, the so-called universal service provider holds monopoly rights on mail items up to a certain weight and/or price level (the "reserved area"). This case also applies in most EU Member States, except Finland and Sweden that have fully ended monopoly rights in their market for the supply of *postal services*.

In the non-reserved area, a number of private companies operate in competition with each other and with the universal service provider for the provision of *courier services*.

For two major reasons, the differentiation between cross-border *postal* and *courier services* is blurred. The first is that the criteria used for the definition of the "reserved area" have not been internationally harmonised.

Secondly, private operators tend to offer *postal services* in the form of remailing (posting of mail in a country other than the country in which it was prepared). National post offices also offer international express services, with a number of them co-operating in EMS (Express Mail Service), a significant player on the international express market.

The European Commission Green Paper on postal services (1991), reported that, in 1988, the EU-12 market for all mail services amounted to an estimated annual turnover of ECU 46 bn. Private operators accounted for 43% of this market. In cross-border transactions, the postal authorities seemingly dominated the **letter traffic** with a share of 87.5% in 1990. However, they apparently only held 10% of the cross-border **express** market originating in their countries, the bulk being carried by the four private integrated express operators (see section on *courier services*). Postal administrations apparently held a 38% share of the overall EU-12 **parcel** market (domestic flows included).

[2] *Eurostat estimate*

Postal services: apparent growth since 1995

International *postal services* form a substantial part of EU total postal traffic. According to Eurostat estimates based on UPU (Universal Postal Union) statistics, 6% of total letter post items[3] handled by EU post offices were posted internationally in 1996, 1997 and 1998. This is a much larger share than the World average, which was barely above 2% in 1997 according to the UPU.

As regards cross-border transactions effected by national post offices, the item *postal and courier services* consists of terminal dues, defined as the remuneration of the universal service providers for the distribution of incoming cross-border mail. These are subject to international agreements.

Figures provided by the Member States to Eurostat are still too restricted to estimate the contribution of *postal services* to the total cross-border trade in *postal and courier services* for the EU. The shares[4] that can be calculated from data of three Member States are quite dissimilar. The same ratio for their aggregate, at 20% in 1996 and 21% in 1997 can not be considered to be representative of the European Union as a whole.

Postal services apparently contributed to the general growth in *postal and courier services* flows, which seems to be in line with "*Post 2005*" - a UPU study on postal traffic trends covering the period 1995-2005. It forecasts growth in international mail ranging between 3.4 and 5.2% depending on the region.

According to data available in Eurostat's database New Cronos[5] for the years 1995 to 1997, remunerations both received from and paid abroad by EU postal administrations appear to have grown perceptibly at the aggregate level[6]. This partial aggregate does not comprise Germany, France and UK data, but UPU statistics show noticeable increases in the number of letter post items sent and received by each of these Member States. This may also mean growth in international payments and receipts for *postal services* for these countries.

For most EU universal service providers remunerations received from foreign postal administration are usually higher than those paid. The aggregation of all available Member States' data also indicates a surplus, but this can not be considered to be representative of the EU as Germany and UK data are absent from the sum. Indeed, according to UPU statistics, the number of items sent abroad from the UK is significantly larger (almost twice in 1998) than the number of items received from foreign countries. This might imply a foreign "deficit" on the part of the UK's postal administration that may override the other Member States' apparent surplus (see graph below).

The geographical breakdown of *postal services* into intra and extra-EU is not feasible for the time being, but the European Commission Green Paper on postal services suggests that, in 1990, extra and intra-EU-12 cross-border letter traffics were of identical magnitude.

Source: UPU

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[3] *Letter-post items (items of correspondence) basically consist of letters, postcards, printed papers (newspapers, periodicals, advertising, etc), small packets, literature for the blind and, as applicable in the domestic service, commercial papers, samples of merchandise, "Phonopost" items, postal packets, etc.*

[4] *Obtained by calculating the ratio of payments received from and remuneration paid to foreign postal administrations (figures from New Cronos theme IV - Communications) to international transactions in postal and courier services*

[5] *Theme IV: Industry, trade and services - Communications - Economic information - Postal services*

[6] *Based on data of Belgium, Greece, Spain, Ireland, Italy, Luxembourg and Finland*

Courier services: four companies responsible for most EU exchanges with the rest of the world

The private providers of *courier services* like to stress that, compared to ordinary mail/parcel delivery by the public services, they provide a value added service i.e. fast, reliable, on demand, door to door express transport. The sender can access information on the progress of shipment and gets proof of delivery. In comparison to more classical transportation services, express services are mainly characterised by their speed and efficient customs clearance for cross-border items.

As stated in the Eurostat / ESIF research paper on courier and express delivery services, the express industry consists of a very large number of mostly small local and regional operators and of a few large express carriers with significant international volumes. Four "integrated" express service providers with specialised air and ground distribution networks operate on a world scale. They generally have their own airlines, fleets of vans and even telecom facilities (radio channels). These companies, which are prominent in the cross-border European market, are DHL (Dalsey Hillblom Lynn) Worldwide Express, UPS (United Parcel Services), Federal Express and TNT (Thomas Nationwide Transport). The latter is a partner in Global Delivery Express Worldwide, a partnership grouping public and private companies active in the express service sector. A number of national postal operators are also present in the international express market through their co-operation in the EMS.

According to the 1992 research paper, DHL had over one quarter, TNT about 22% and UPS close to 10% of the European cross-border market at that time. Federal Express had just taken its decision (March 1992) to withdraw largely from domestic European delivery services and to concentrate on intercontinental connections only. Its market share was not shown.

At that time, all the main cross-border express operators, both private and public, were confident of strong revenue growth in the EU-12 with growth predictions in the range of 15 to 25% per annum.

Since that period, the EU market for *courier services* has apparently grown markedly. As quoted by the WTO in 1998, DHL's operations in Europe were reportedly increasing by about 17% annually. A recent study for the AEEC (Association of European Express Carriers) and EEO (European Express Organisation) stated that "Over the five years period from 1993 to 1998, based on information provided by some of the integrators, (...) the growth of document shipments has still been exceptionally healthy - at around 8 to 10% per year (...) - but the growth in the shipment of goods has continued to be dramatic, at around 25% per year."

According to the same source, the total number of express shipments (including domestic destinations) collected from consignors in the EU-15 by the four integrators is estimated as being 158.3 mio and their market share of the European express industry is estimated at about 47% for 1998. This study contains international figures provided to the European Commission by the integrators for 1996. They are summarised in the table below.

International figures provided by the four integrators to the European commission for 1996:

	Intra EU	*Outbound from EU*
Turnover (Mio US Dollars)	1 275.709408	1 858.616360
Eurostat conversion (Mio ECU)	1 005	1 464
Number of shipments (thousands)	27 667.639	30 287.824
Number of items (thousands)	33 602.707	34 556.797
Estimate of market share	70-75%	70-75%

Source: AEEC EEO study on the express industry in Europe.

The use of the caption "Outbound from EU" suggests that the second column only covers flows from the EU towards the extra-EU (that can be linked with extra-EU debits). Column "intra EU" apparently contains flows between Member States (recorded unilaterally[7]) and flows from extra-EU countries to EU Member States (i.e. intra-EU unilateral flows + extra-EU credits).

The integrators' "Intra EU" operations (turnover of ECU 1 bn) are smaller than operations "outbound from EU" (ECU 1.5 bn). This is not surprising given that their size enables them to be largely prominent on the intercontinental market, but this fact is apparently not reflected in the balance of payments where intra-EU flows of *postal and courier services* were almost twice as large as extra-EU exchanges in 1998. A reason for this discrepancy could be that smaller international companies in the EU, disposing of lesser means, might concentrate their activities on the intra-EU ground and compensate the relatively larger external operations of the integrators. One must also bear in mind that the four integrators' market shares presented in the table above are estimates and are possibly overvalued as they do not take account of EMS members.

The 1992 research paper on courier and express delivery services suggests an estimate of the intra-EU share in total cross-border express shipments for the twelve Member States of some 60%.

The central impact of express services on EU cross-border trade in *postal and courier services*

The relative importance of *postal* and *courier services* as regards international exchanges could not be assessed precisely. However, the attempt made in estimating the contribution of *postal services* to EU cross-border exchanges in *postal and courier services* suggests that *courier services* make up the bulk of the latter flows. This is confirmed by the comparison of the total EU turnover reported by the integrators for 1996 (ECU 2.5 bn) with total EU exchanges of *postal and courier services* (ECU 3.4 bn in 1998). This comparison is feasible given that *postal and courier services* have apparently grown slightly since 1996, as is apparent in the graph "*EU breakdown of communications services with partners World and extra-EU*".

National postal operators tend to be reducing their "reserved area", thus allowing for more competition in *postal and courier services*. This is markedly the case in the EU where, among others, Sweden and Finland have completely liberalised their postal sector and the Netherlands have noticeably reduced the size of the "reserved area". In addition, at the end of 1997, the EU adopted the Postal Directive and the Postal Notice[8] that define a universal postal service harmonised across Member States and a "reservable" area, and that set up a time schedule for further liberalisation.

Growth rates could not be estimated individually for international *postal* and *courier services*, but the trend towards liberalisation enables one to forecast the increasing role of private players in the provision of these services. This will probably take the form of a stronger growth of *courier services* than that of *postal services*.

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[7] *This principle yields results different from those of the balance of payments of the EU with partner intra-EU, where all exchanges between Member States are theoretically counted twice (once as an export from MS1 to MS2 and once as an import by MS2 from MS1)*

[8] *"Directive 97/67/EC of the European Parliament and of the Council of 15th December 1997 on Common Rules for the Development of the Internal Market for Community Postal Services and the Improvement of Quality of Service" and "Notice from the Commission on the application of the Competition Rules to the postal sector and on the assessment of certain State measures relating to Postal Services", 98/C/39/02*

➢ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The data used in this issue of Statistics in Focus are from the Balance of Payments statistics.

The balance of payments (BOP) of the European Union is compiled as the sum of the harmonised balance of payments accounts of the fifteen Member States. The balance of payments of the EU Institutions is added to the EU aggregate.

The methodological framework is that of the fifth edition of the *International Monetary Fund (IMF) Balance of Payments Manual*.

Postal and courier services is one of the two sub-items of *communications services* the other being *telecommunication services*. This breakdown is available for the first time at EU level for 1998 data.

Both *postal services* and *courier services* cover the pick-up, transport and delivery of letters, newspapers, periodicals, brochures, other printed matter, parcels, and packages, including post office counter and mailbox rental services. The main difference between the two lies in the institutions which perform these services. *Postal services* are supplied by the national postal administrations, while *courier services* are provided by specific courier operators (including affiliates of national postal administrations) that concentrate on express and door-to-door delivery. Excluded are international transport services contracted by couriers, such as courier services for mail performed by air transportation enterprises, the storage of goods and related services, and specific mailing services.

Postal services also include *"poste restante"* services, telegram services and post office counter services such as sales of stamps, money orders and the like. Excluded are financial services rendered by post offices such as *postal giro*, banking and savings accounts services and mail preparation services. *Postal services* are subject to international agreements, and the flows between operators of different economies should be recorded on a gross basis.

Courier services are produced by operators that differ from the national postal administration in that the focus is on express and door-to-door delivery, although they may be related to the national postal administration. Couriers may use self-owned, privately shared or public transportation to carry out these services. Included are express delivery services which might include, for example, on-demand pickup or time-definite delivery. Excluded are, for example, the movement of mail carried by air transportation enterprises, storage of goods and mail preparation services.

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Eurostat and ESIF (European Services Industries Forum) - *Research paper on courier and express delivery services* (July 1992). All the information concerning the *European Commission Green Paper on the development of the single market for postal services* (1991) has been taken from this research paper;

Speech by H. Ungerer *Postal services, Liberalisation and EC Competition Law; Preparing for a new era in postal services* (June 1998); European Commission - Directorate-General Competition - Information, communication and multimedia;

WTO (World Trade Organisation) - *Postal and courier services - background note by the secretariat* (June 1998);

EEO (European Express Organisation) and AEEC (Association of European Express Carriers) - *The Importance and impact of the express industry in Europe* (July 1999);

OECD Committee on competition law and policy - *Promoting competition in postal services* (October 1999);

New Cronos theme 4: Industry, trade and services - Communications - Economic information - Postal services;

UPU (Universal Postal Union) database: web site www.upu.int.

Further information:

➢ **Reference publications**

Title "International trade in services – EU 1989-1998" edition 2000
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Card No: ________________________ Expires on: ____/____

Please confirm your intra-Community VAT number:
If no number is entered, VAT will be automatically applied. Subsequent reimbursement will not be possible.

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