



Development of Cross-border E-commerce through Parcel Delivery

Appendix A Country Fact Sheets

Study for the European Commission,
Directorate-General for Internal Market, Industry,
Entrepreneurship and SMEs

Final Report

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EUROPEAN COMMISSION

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Directorate E — Modernisation of the Single Market
Unit GROW E2 — Public Interest Services

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Appendix A Country Fact Sheets

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Entrepreneurship and SMEs

Final Report

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Contents

Austria (AT)	3	Italy (IT)	48
Belgium (BE)	6	Latvia (LV)	51
Bulgaria (BG)	9	Lithuania (LT)	54
Croatia (HR)	12	Luxembourg (LU)	57
Cyprus (CY).....	15	Malta (MT)	60
Czech Republic (CZ)	18	Norway (NO)	63
Denmark (DK)	21	Poland (PL)	66
Estonia (EE)	24	Portugal (PT)	69
Finland (FI)	27	Romania (RO)	72
France (FR)	30	Slovakia (SK)	75
Germany (DE)	33	Slovenia (SI)	78
Greece (EL)	36	Spain (ES)	81
Hungary (HU)	39	Sweden (SE)	84
Iceland (IS)	42	The Netherlands (NL)	87
Ireland (IE)	45	United Kingdom (UK)	90
		Definitions.....	93

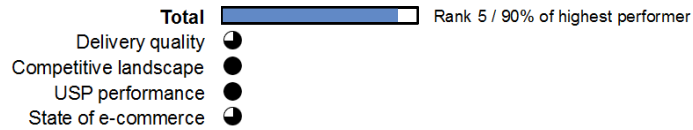
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Country Fact Sheet - Austria



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

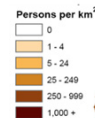
1. Country facts



Population (2017)	8.8 m
Country size	83 944 sqkm

GDP development (CAGR 2013-2017)	3.3%
GDP per capita (2017, Purchasing Power Standard)	37 648 (EU-28: 29 218)

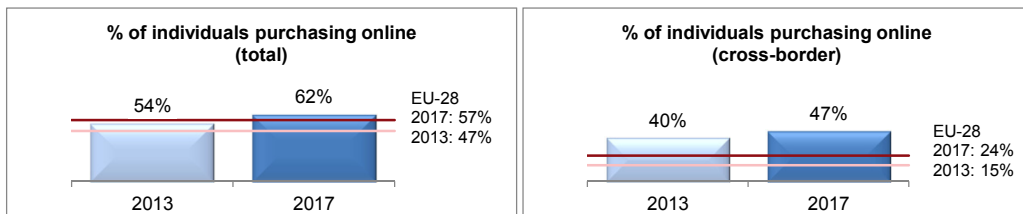
Digital Economy and Society Index (2018)	
Connectivity	63.7 (EU-28: 62.6) (79% of highest performer)
Use of Internet	47.6 (EU-28: 50.5) (63% of highest performer)
Integration of Digital Services	44.1 (EU-28: 40.1) (72% of highest performer)



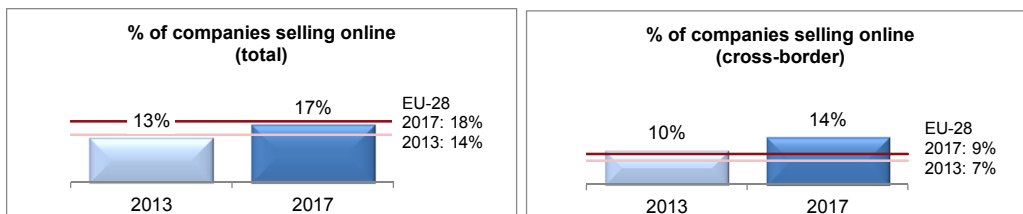
2. E-Commerce



Revenues B2C e-commerce	9 080 m€
Revenue per capita	1 035 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	11.2%
% of GDP	2.5%

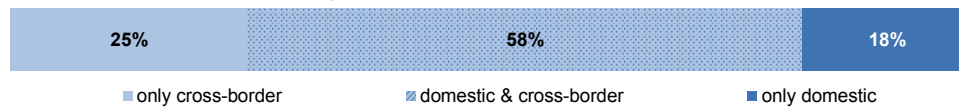
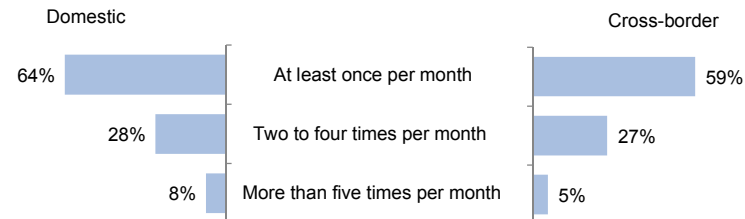


TOP3 countries ordered from	Germany	China	United Kingdom
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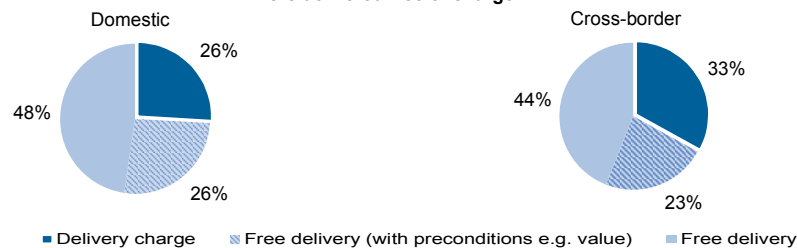


TOP3 countries in Europe sold to	Germany	Italy	Czech Republic
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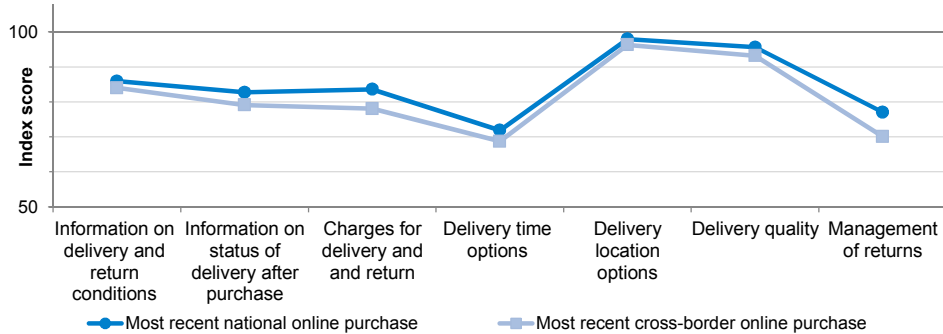
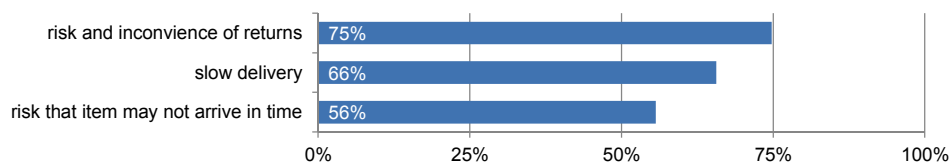
TOP 3 E-retailers (by revenue)	amazon.at	zalando.at	universal.at
TOP 3 Payment methods	Invoice	Visa/Master card	Bank transfer


Highlights of WIK consumer survey
82% of online shoppers purchased goods in other countries

36% of online shoppers bought twice or more times a month from domestic online stores and 32% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Books, DVDs, CDs or video games	Furniture or homeware
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

74% of the most recent domestic and 67% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	75.2 (EU/EEA 30: 72.0)
cross-border	72.1 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

45% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery



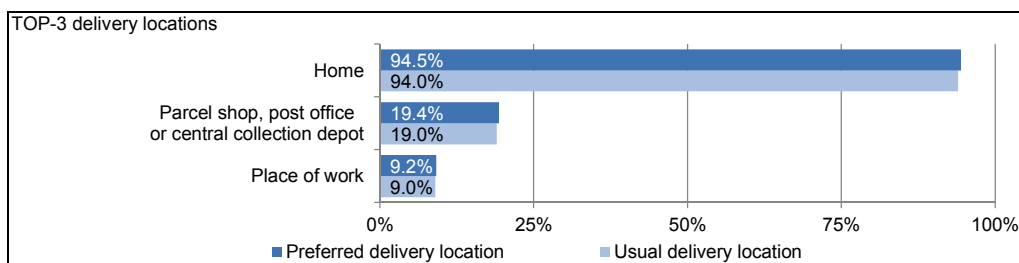
World Bank Logistics Performance Index (2018)	4.03 of 5 (95% of highest performer)
CEP market size	Revenues (2017) 646 m€
	Volume (2017) 188 m
Volume development (CAGR 2013-2017)	10.4%

21.4 items per capita (2017)*

* domestic and cross-border inbound parcel and express items

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> Österreichische Post DHL Paket DPD	85%-95%
<u>Cross-border</u> Österreichische Post DHL Paket DPD	> 90%



Cross-border parcel services included in universal service	Yes, up to 10 kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	No
Contribution to NRA financing for exporting parcel carriers	Yes



Unemployment rate 2017 (% of population)	AT 5.5%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	No generally applicable minimum wage	
Unionisation (country)	28%	
Collective Labour Agreement coverage (country-wide share of employees)	95%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	26 300 (2017)	-3.8% (CAGR 2013-2017)
Universal Service Provider	17 463 (FTE, 2017)	-2.6% (CAGR 2013-2017)

4. Market developments



- Austria is a gateway to Eastern European countries (Hungary, Czech Republic, Slovakia etc) for Austrian Post, DPD and GLS.
- Amazon Logistics starts own parcel delivery in Vienna in October 2018.
- DPD launches parcel management platform enabling private customers in Austria to manage their parcels individually (myDPD.at) in summer 2018.
- Austrian Post launched new parcel products for packets up to 2kg (letter box packet and medium) and parcel products with three different speeds PRIO (E+1), ECO (E+2-3) and ECO Business (E+4-5).
- DHL Parcel launched established a new parcel delivery carrier in Austria in 2015/16 as delivery partner for the DHL Parcel Connect network.

Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Belgium



Assessment of market performance - WIK Delivery Market Performance Index

Total	<div style="width: 100%;"></div>	Rank 2 / 95% of highest performer
Delivery quality	●	
Competitive landscape	●	
USP performance	●	
State of e-commerce	●	

○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ● = 5

1. Country facts



Population (2017)	11.4 m
Country size	30 668 sqkm

GDP development (CAGR 2013-2017)	2.7%
GDP per capita (2017, Purchasing Power Standard)	34 383 (EU-28: 29 218)

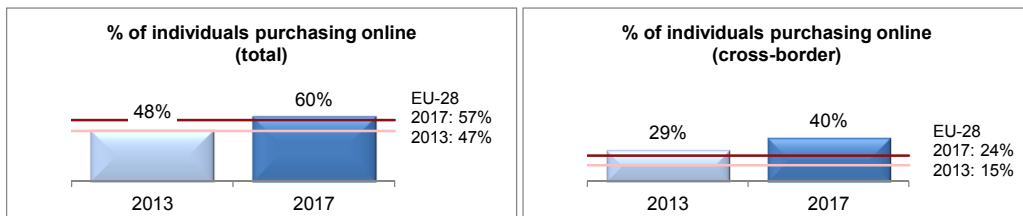
Digital Economy and Society Index (2018)	
Connectivity	75.1 (EU-28: 62.6) (93% of highest performer)
Use of Internet	53.3 (EU-28: 50.5) (71% of highest performer)
Integration of Digital Services	54.6 (EU-28: 40.1) (89% of highest performer)

Persons per km²

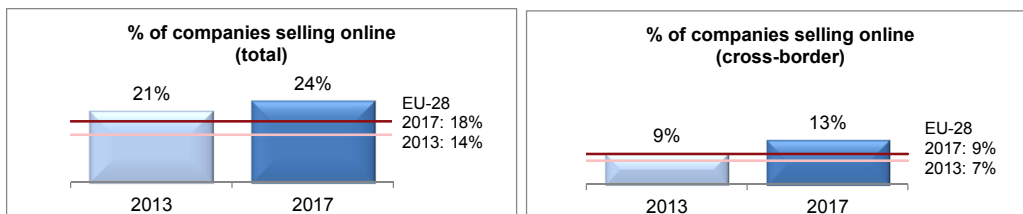
2. E-Commerce



Revenues B2C e-commerce	10 520 m€
Revenue per capita	927 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	18.1%
% of GDP	2.4%

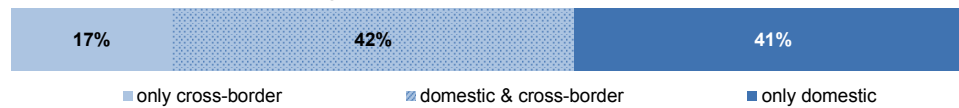
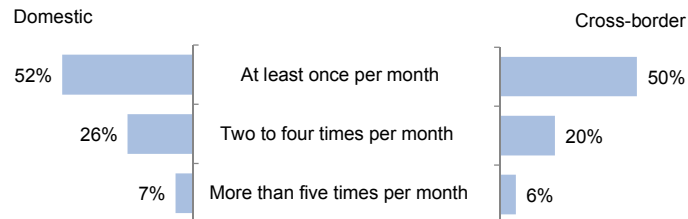


TOP3 countries ordered from	France	China	Netherlands
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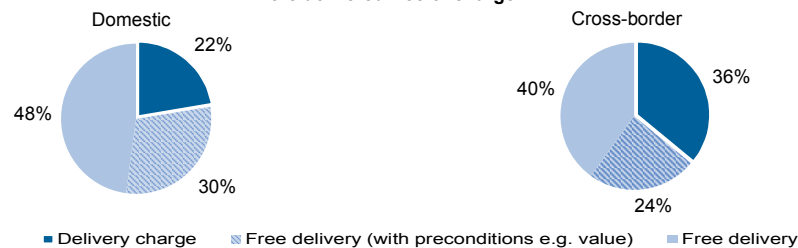


TOP3 countries in Europe sold to	France	Netherlands	Germany
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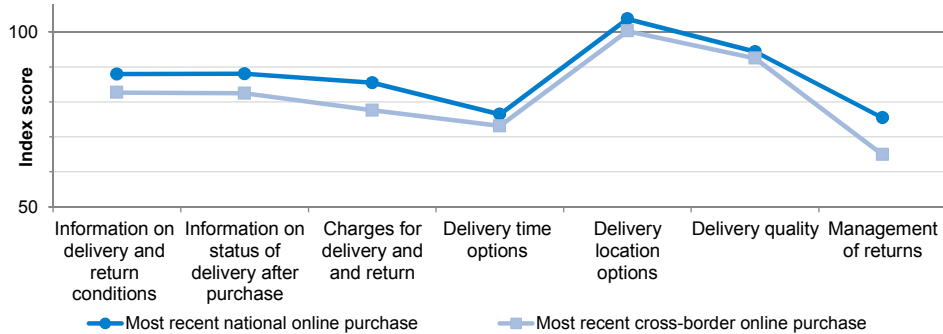
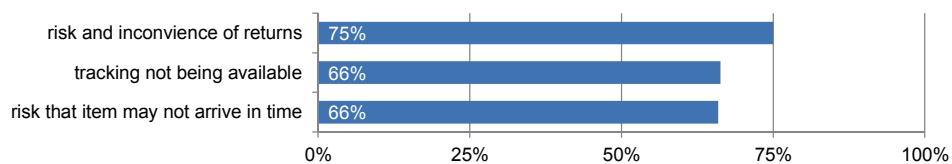
TOP 3 E-retailers (by revenue)	coolblue.be	bol.com	amazon.fr
TOP 3 Payment methods	Visa/Master card	Mistercash	Digital wallet (paypal, Alipay)


Highlights of WIK consumer survey
59% of online shoppers purchased goods in other countries

33% of online shoppers bought twice or more times a month from domestic online stores and 26% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Books, DVDs, CDs or video games	Consumer electronics or other high-tech equipment
Popular product categories (cross-border)	Clothes and shoes	Books, DVDs, CDs or video games	Consumer electronics or other high-tech equipment

78% of the most recent domestic and 64% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	75.3 (EU/EEA 30: 72.0)
cross-border	71.8 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

50% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




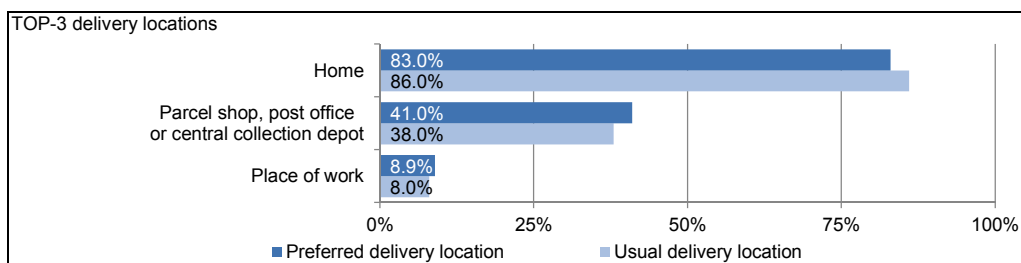
3. Parcel delivery



World Bank Logistics Performance Index (2018)	4.04 of 5 (95% of highest performer)
CEP market size	Revenues (2017) 1 294 m€ Volume (2017) 205 m
Volume development (CAGR 2013-2017)	17.1%
<p>18.1 items per capita (2017)*</p>	
* domestic and cross-border parcel and express items	

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> bpost DPD DHL	75%-85%
<u>Cross-border</u> bpost DPD DHL	70%-80%



Cross-border parcel services included in universal service	Yes, up to 10kg
Authorisation required for exporting parcel carriers?	No
Contribution to compensation fund for exporting parcel carriers?	No compensation fund
Contribution to NRA financing for exporting parcel carriers	No financing from carriers



Unemployment rate 2017 (% of population)	BE 7.1% EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	1 411
Unionisation (country)	50%
Collective Labour Agreement coverage (country-wide share of employees)	96%

	Number of employees	Development of employment
Sector (Postal and courier activities)	34 800 (2017)	-0.4% (CAGR 2013-2017)
Universal Service Provider	25 323 (FTE, 2017)	3.0% (CAGR 2015-2017)

4. Market developments



- Belgian and Dutch delivery markets are growing together, with PostNL active in both countries as well as bpost in cooperation with DHL Parcel.
- bpost-owned Cubee parcel terminals and Kariboo! parcel shops have been opened to all carriers. Cubee cooperates with GLS, and Kariboo! with Relais Colis, PostNL and DHL Express.
- Alibaba/Cainiao plans to open a European logistics hub at Liège Airport as one of five global hubs worldwide.
- bpost sees its future as an international e-commerce logistics player offering parcel services in/to/from Europe after M&A wave.
- Belgian regulator BIPT published a comprehensive study on e-commerce delivery services in Belgium (Étude relative au marché belge de la livraison de colis dans le cadre d'activités d'e-commerce) in May 2017.

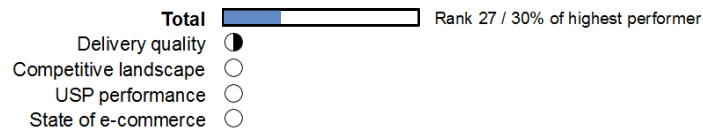
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Bulgaria



Assessment of market performance - WIK Delivery Market Performance Index

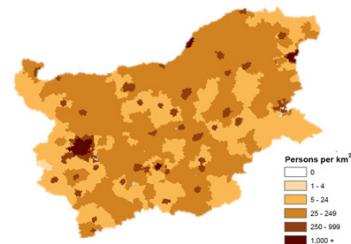


○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

1. Country facts



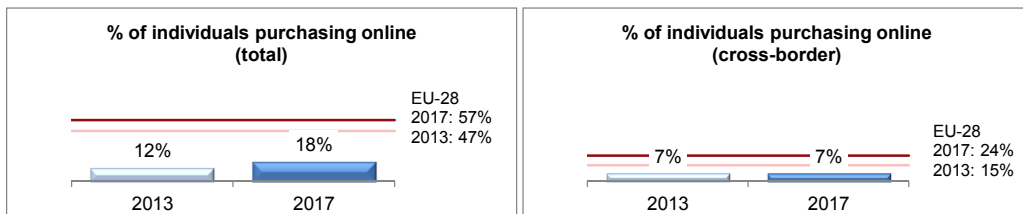
Population (2017)	7.1 m
Country size	110 995 sqkm
GDP development (CAGR 2013-2017)	4.7%
GDP per capita (2017, Purchasing Power Standard)	14 111 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	54.9 (EU-28: 62.6) (68% of highest performer)
Use of Internet	41.7 (EU-28: 50.5) (56% of highest performer)
Integration of Digital Services	24.4 (EU-28: 40.1) (40% of highest performer)



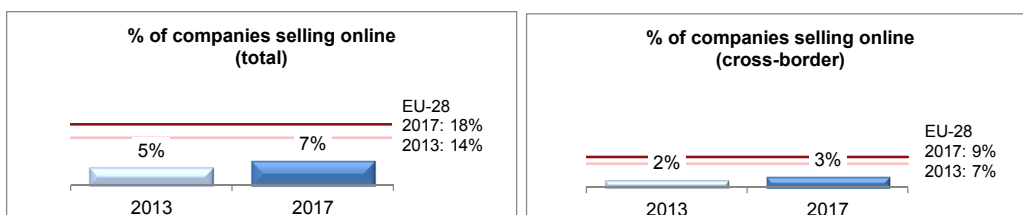
2. E-Commerce



Revenues B2C e-commerce	511 m€
Revenue per capita	72 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	26.4%
% of GDP	1.0%

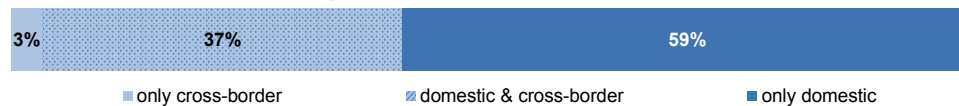
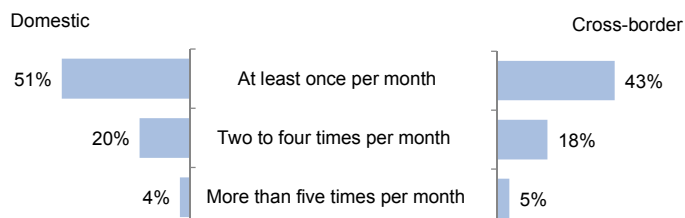


TOP3 countries ordered from	China	United Kingdom	Germany
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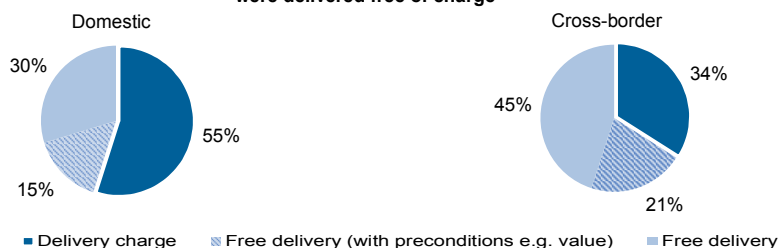


TOP3 countries in Europe sold to	Germany	Greece	Romania
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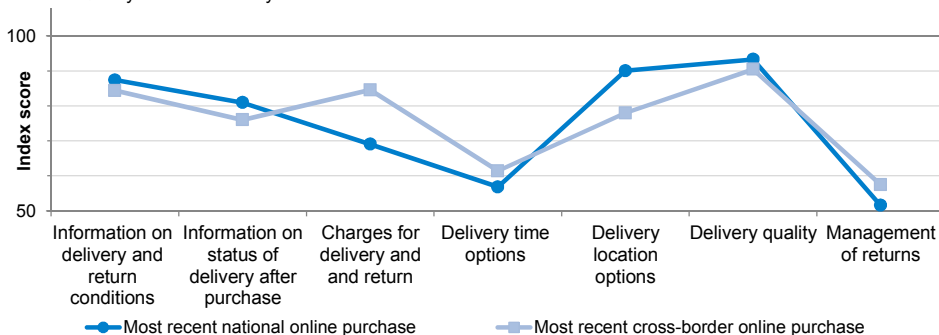
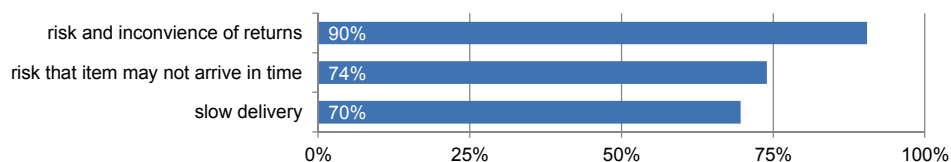
TOP 3 E-retailers (by site-visits)	olx.bg	bezar.bg	aliexpress.com
TOP 3 Payment methods	n.a.		


Highlights of WIK consumer survey
41% of online shoppers purchased goods in other countries

24% of online shoppers bought twice or more times a month from domestic online stores and 23% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

45% of the most recent domestic and 66% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	68.0 (EU/EEA 30: 72.0)
cross-border	66.3 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

72% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




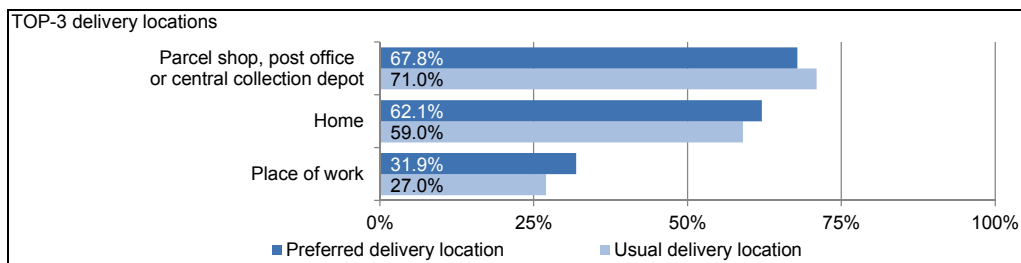
3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.03 of 5 (64% of highest performer)
CEP market size	Revenues (2017) 163 m€
	Volume (2017) 12.0 m
Volume development (CAGR 2013-2017)	42.6%
<p>1.7 items per capita (2017)</p>	

Universal service provider's volume share in X2C parcel deliveries: <20%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u>	
Econt Express	85%-95%
Speedy	
Rapido	
<u>Cross-border</u>	
Bulgarian Posts	75%-85%
DHL	
Speedy	



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	No compensation fund
Contribution to NRA financing for exporting parcel carriers	Yes, within USO



<p>Unemployment rate 2017 (% of population)</p>	Minimum wage (per month in Purchasing Power Standard)	539
	Unionisation (country)	20%
	Collective Labour Agreement coverage (country-wide share of employees)	30%

	Number of employees	Development of employment
Sector (Postal and courier activities)	24 500 (2017)	3.1% (CAGR 2013-2017)
Universal Service Provider	n.a.	n.a.

4. Market developments



- Consolidation in the Bulgarian parcel & express market: DPD Bulgarian franchisee Speedy acquired DHL Parcel partner Rapido in May 2018. Rapido merged with D&D Express in February 2018.
- Bulgarian consumers experience improving B2C e-commerce deliveries according to the national regulatory authority.

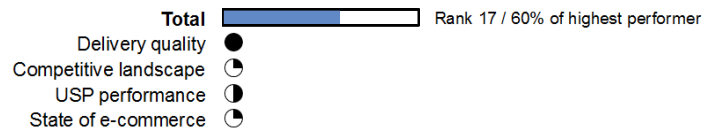
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Croatia



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ○ = 2, ○ = 3, ○ = 4, ● = 5

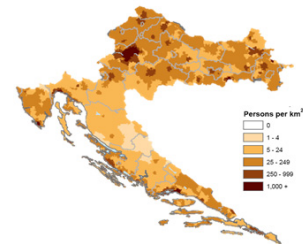
1. Country facts



Population (2017)	4.2 m
Country size	56 539 sqkm

GDP development (CAGR 2013-2017)	2.7%
GDP per capita (2017, Purchasing Power Standard)	17 479 (EU-28: 29 218)

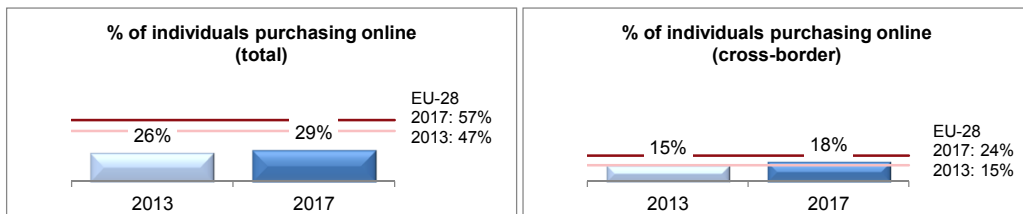
Digital Economy and Society Index (2018)	
Connectivity	49.4 (EU-28: 62.6) (61% of highest performer)
Use of Internet	54.1 (EU-28: 50.5) (72% of highest performer)
Integration of Digital Services	35.4 (EU-28: 40.1) (58% of highest performer)



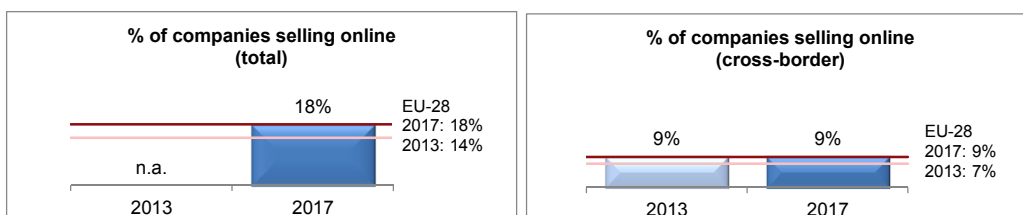
2. E-Commerce



Revenues B2C e-commerce	384 m€
Revenue per capita	92 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	12.5%
% of GDP	0.8%

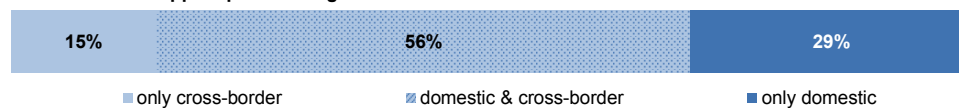
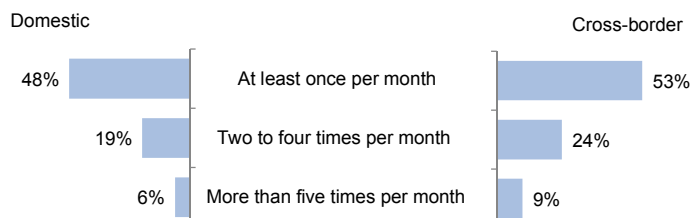


TOP3 countries ordered from	China	United Kingdom	USA
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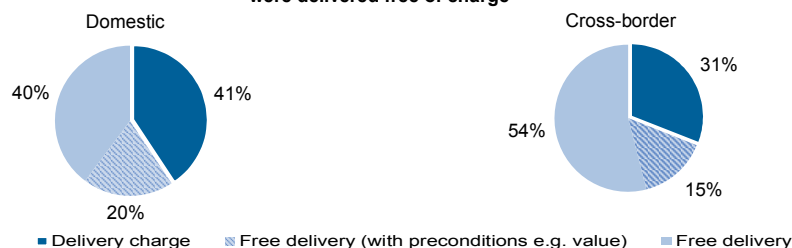


TOP3 countries in Europe sold to	Germany	Slovenia	Austria
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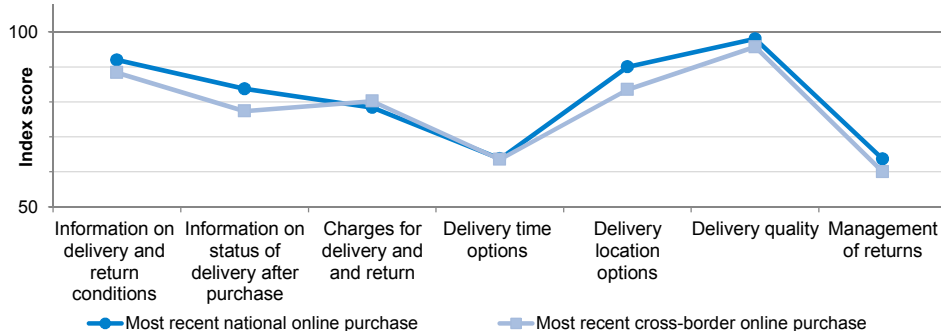
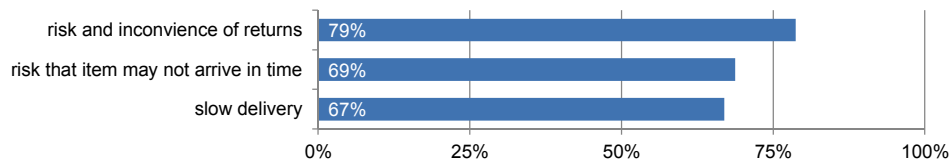
TOP 3 E-retailers (by site-visits)	njuskalo.hr	ebay.com	aliexpress.com
TOP 3 Payment methods	Digital wallet (paypal, Alipay)	Cash-on-delivery	Visa/Master card


Highlights of WIK consumer survey
71% of online shoppers purchased goods in other countries

25% of online shoppers bought twice or more times a month from domestic online stores and 33% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Furniture or homeware
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Furniture or homeware

59% of the most recent domestic and 69% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	74.6 (EU/EEA 30: 72.0)
cross-border	72.7 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

53% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery

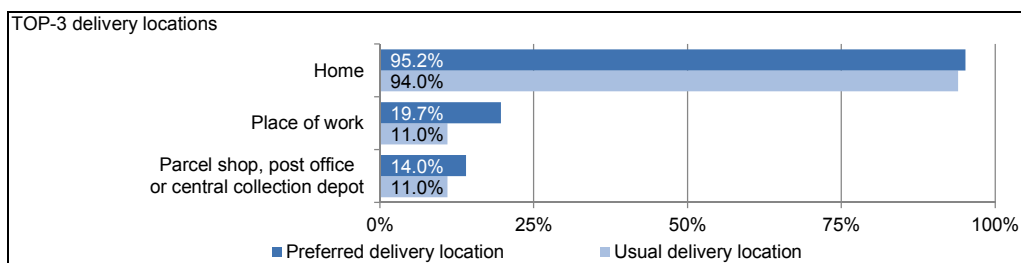


World Bank Logistics Performance Index (2018)	3.1 of 5 (66% of highest performer)
CEP market size	Revenues (2015) 56 m€
	Volume (2017) 18.6 m
Volume development (CAGR 2013-2017)	11.4%

4.5 items per capita (2017)

Universal service provider's volume share in X2C parcel deliveries: 20-50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u>	
Hrvatska pošta	80%-90%
GLS	
DPD	
<u>Cross-border</u>	
Hrvatska pošta	85%-95%
GLS	
DHL Express	



Cross-border parcel services included in universal service	Yes, up to 10kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	No compensation fund
Contribution to NRA financing for exporting parcel carriers	Yes



Unemployment rate 2017 (% of population)	HR 11.1%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	688	
Unionisation (country)	35%	
Collective Labour Agreement coverage (country-wide share of employees)	61%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	16 400 (2017)	8.8% (CAGR 2013-2017)
Universal Service Provider	n.a.	n.a.

4. Market developments



- Hrvatska Posta became partner of the DHL Parcel network in 2017. The partnership drives the company to improve B2C delivery services to comply with the DHL Parcel Connect standard.
- The DHL Parcel Connect standard includes Saturday delivery and standardized processes to shorten delivery and return times as well as services informing recipients on expected delivery time and date of their orders, and a

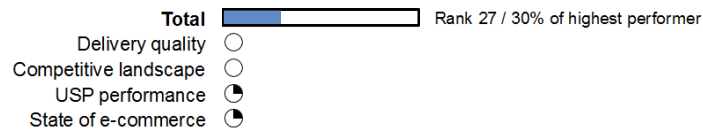
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Cyprus



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

1. Country facts



Population (2017)	0.9 m
Country size	9 249 sqkm

GDP development (CAGR 2013-2017)	1.4%
GDP per capita (2017, Purchasing Power Standard)	24 654 (EU-28: 29 218)

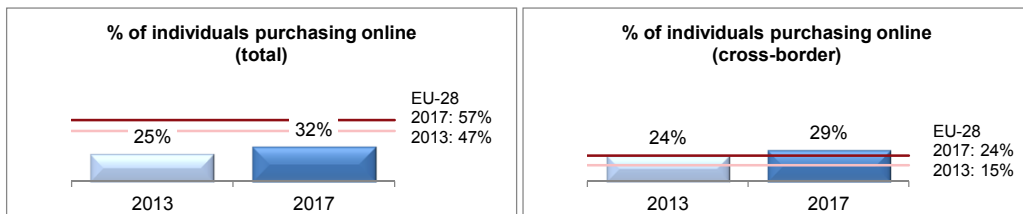


Digital Economy and Society Index (2018)	
Connectivity	60.6 (EU-28: 62.6) (75% of highest performer)
Use of Internet	51.1 (EU-28: 50.5) (68% of highest performer)
Integration of Digital Services	37.7 (EU-28: 40.1) (61% of highest performer)

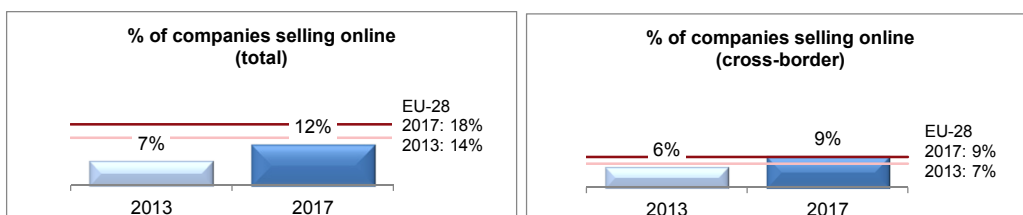
2. E-Commerce



Revenues B2C e-commerce	250 m€
Revenue per capita	292 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	15.6%
% of GDP	1.3%



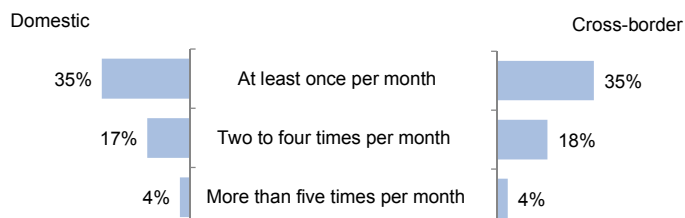
TOP3 countries ordered from	United Kingdom	China	Greece
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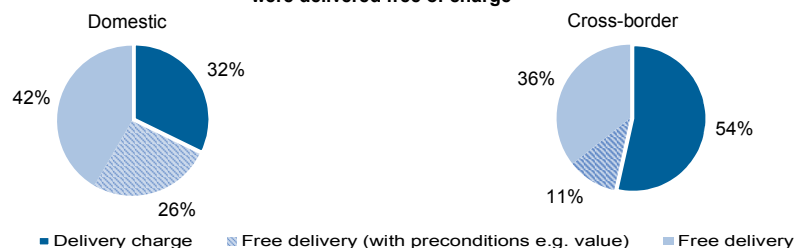
TOP3 countries in Europe sold to	Greece	United Kingdom	Germany
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TOP 3 E-retailers (by site-visits)	amazon.co.uk	bazaraki.com	amazon.com
TOP 3 Payment methods	n.a.		

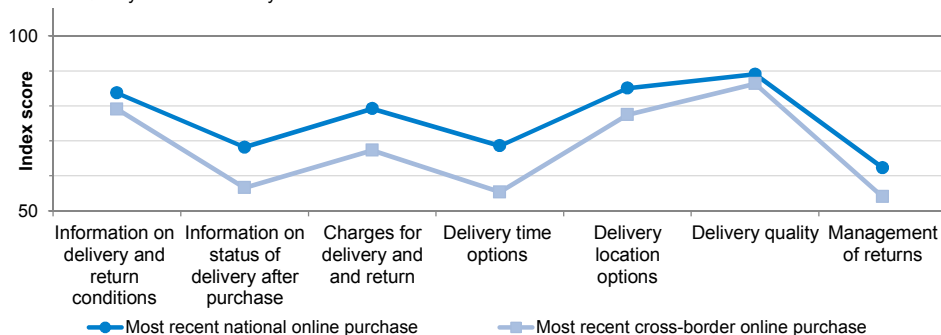
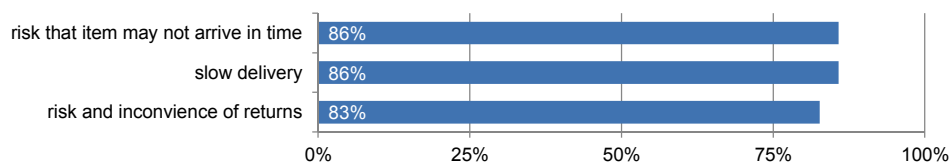

Highlights of WIK consumer survey
71% of online shoppers purchased goods in other countries

21% of online shoppers bought twice or more times a month from domestic online stores and 22% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Groceries, food or beverages
Popular product categories (cross-border)	Consumer electronics or other high-tech equipment	Clothes and shoes	Books, DVDs, CDs or video games

68% of the most recent domestic and 47% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	74.6 (EU/EEA 30: 72.0)
cross-border	59.0 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

69% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery



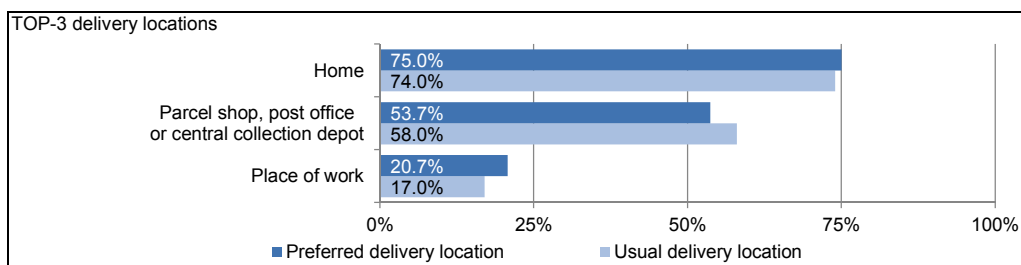
World Bank Logistics Performance Index (2018)	3.15 of 5 (67% of highest performer)
CEP market size	Revenues (2016) 35 m€
	Volume (2017) 6.0 m
Volume development (CAGR 2013-2017)	7.5%

7.0 items per capita (2017)

2C&2B

Universal service provider's volume share in X2C parcel deliveries: <20%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u>	
ACS - Air Courier Services	
Cyprus Post	> 90%
DHL Express	
<u>Cross-border</u>	
Cyprus Post	
ACS - Air Courier Services	> 90%
DHL Express	



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	Yes



Unemployment rate 2017 (% of population)	CY 11.1%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	No generally applicable minimum wage	
Unionisation (country)	55%	
Collective Labour Agreement coverage (country-wide share of employees)	52%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	1 100 (2017)	-4.1% (CAGR 2013-2017)
Universal Service Provider	n.a.	n.a.

4. Market developments



- ACS Courier launched regular delivery and return services between Greece and Cyprus.

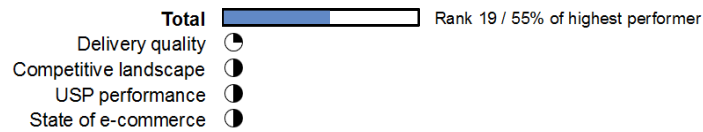
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Czech Republic



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

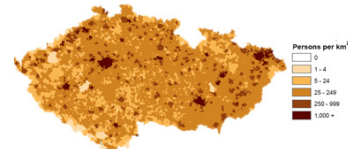
1. Country facts



Population (2017)	10.6 m
Country size	78 874 sqkm

GDP development (CAGR 2013-2017)	5.0%
GDP per capita (2017, Purchasing Power Standard)	25 576 (EU-28: 29 218)

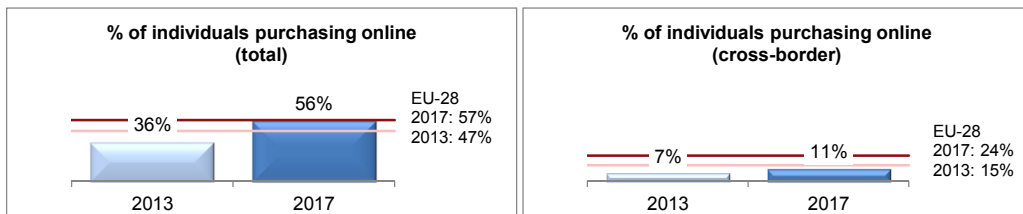
Digital Economy and Society Index (2018)	
Connectivity	63.9 (EU-28: 62.6) (79% of highest performer)
Use of Internet	46.5 (EU-28: 50.5) (62% of highest performer)
Integration of Digital Services	40.4 (EU-28: 40.1) (66% of highest performer)



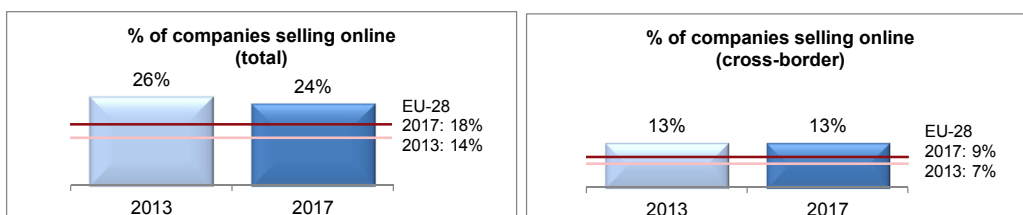
2. E-Commerce



Revenues B2C e-commerce	4 100 m€
Revenue per capita	388 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	17.2%
% of GDP	2.1%



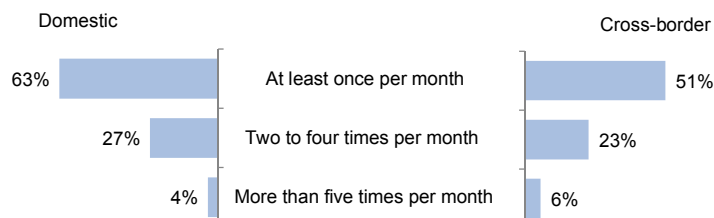
TOP3 countries ordered from	China	United Kingdom	Germany
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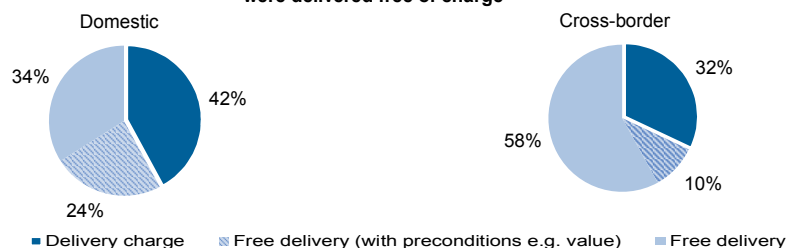
TOP3 countries in Europe sold to	Slovakia	Germany	Poland
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TOP 3 E-retailers (by site-visits)	heureka.cz	bazos.cz	alza.cz
TOP 3 Payment methods	Bank transfer	Visa/Master card	Cash-on-delivery

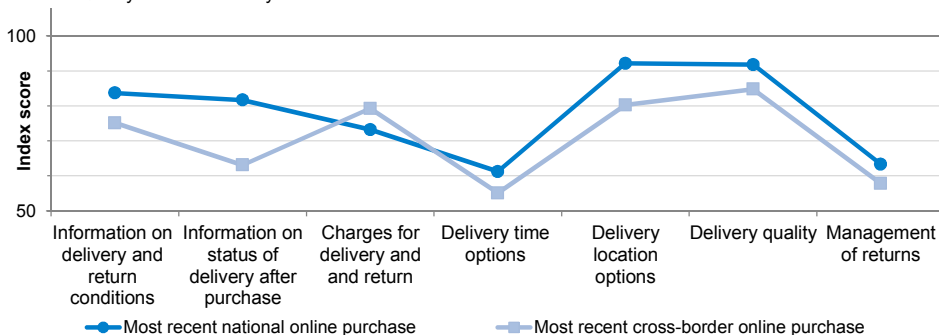
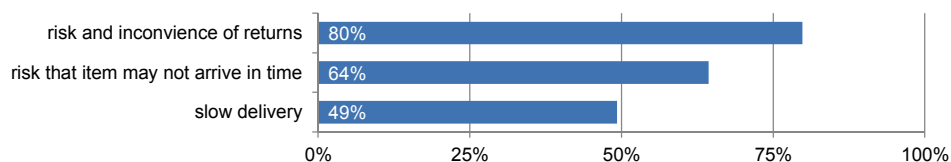

Highlights of WIK consumer survey
50% of online shoppers purchased goods in other countries

31% of online shoppers bought twice or more times a month from domestic online stores and 29% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Furniture or homeware
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Furniture or homeware

58% of the most recent domestic and 68% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	68.5 (EU/EEA 30: 72.0)
cross-border	61.8 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

65% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




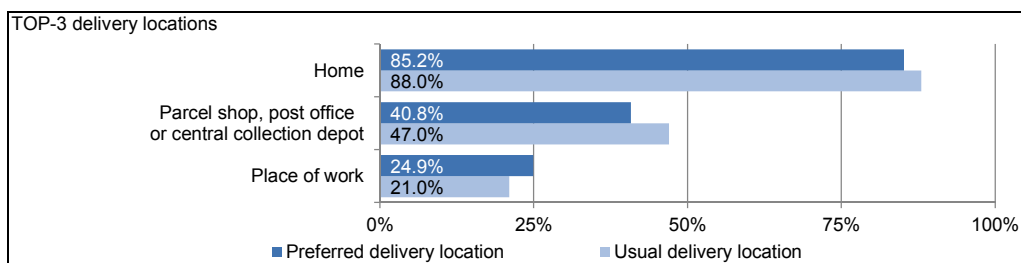
3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.68 of 5 (84% of highest performer)
CEP market size	Revenues n.a.
	Volume (2015) 67 m
Volume development (CAGR 2013-2015)	27.4%
<p>6.4 items per capita (2015)</p>	

Universal service provider's volume share in X2C parcel deliveries: 20-50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> Česká pošta PPL CZ Zásilkovna	80%-90%
<u>Cross-border</u> Česká pošta DPD PPL CZ	80%-90%



Cross-border parcel services included in universal service	Yes, up to 10kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	No compensation fund
Contribution to NRA financing for exporting parcel carriers	No financing from carriers



Unemployment rate 2017 (% of population)		Minimum wage (per month in Purchasing Power Standard)	672
		Unionisation (country)	17%
		Collective Labour Agreement coverage (country-wide share of employees)	38%

	Number of employees	Development of employment
Sector (Postal and courier activities)	48 100 (2017)	-0.2% (CAGR 2013-2017)
Universal Service Provider	23 132 (2017)	-0.9% (CAGR 2014-2017)

4. Market developments



- Alza.cz is the number one e-commerce player in the Czech Republic. To facilitate delivery they installed 24/7 parcel terminals, called 'AlzaBox', launched an own delivery service ('AlzaExpres') and offers parcel boxes for home delivery
- Zásilkovna, founded in 2010, has developed to one of the most important B2C delivery services (via parcel shops) in the Czech Republic and Slovakia and expanded its services to Hungary, Romania and Poland.
- Notino.cz, an important internationally active e-retailer for cosmetics, acquired a 20% stake in Zásilkovna.

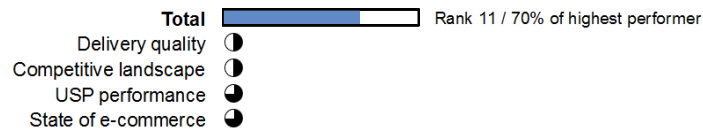
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Denmark



Assessment of market performance - WIK Delivery Market Performance Index

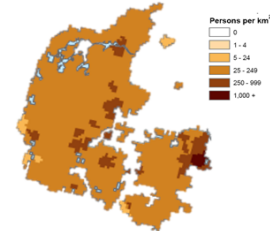


○ = 1, ● = 2, ◐ = 3, ◑ = 4, ● = 5

1. Country facts



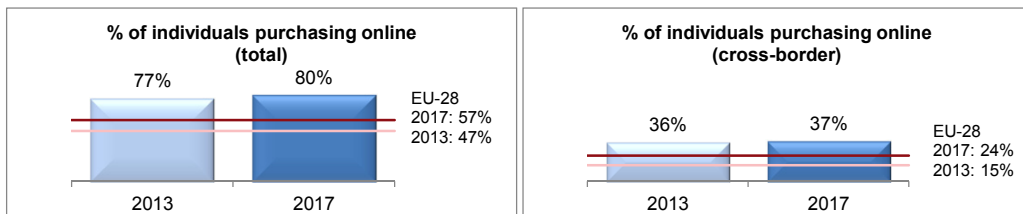
Population (2017)	5.7 m
Country size	43 162 sqkm
GDP development (CAGR 2013-2017)	2.7%
GDP per capita (2017, Purchasing Power Standard)	36 215 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	78.5 (EU-28: 62.6) (97% of highest performer)
Use of Internet	75.1 (EU-28: 50.5) (100% of highest performer)
Integration of Digital Services	61.3 (EU-28: 40.1) (100% of highest performer)



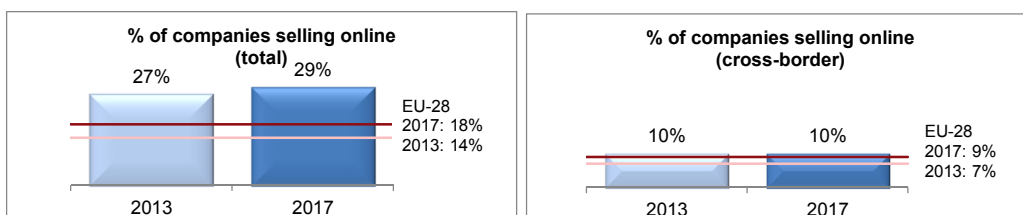
2. E-Commerce



Revenues B2C e-commerce	9 170 m€
Revenue per capita	1 595 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	17.6%
% of GDP	3.2%



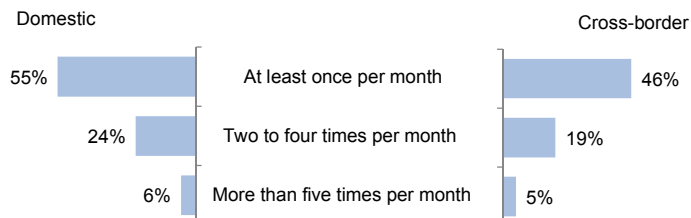
TOP3 countries ordered from	Germany	China	United Kingdom
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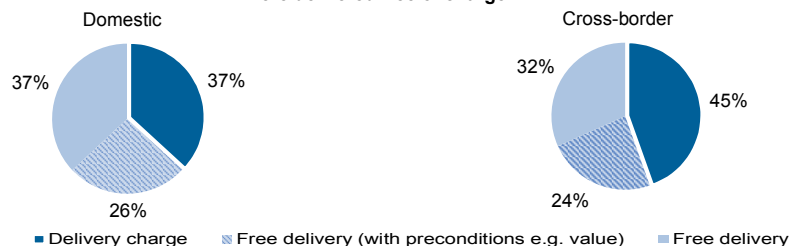
TOP3 countries in Europe sold to	Sweden	Germany	United Kingdom
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TOP 3 E-retailers (by revenue)	elgiganten.dk	saxo.com	apple.com
TOP 3 Payment methods	n.a.		

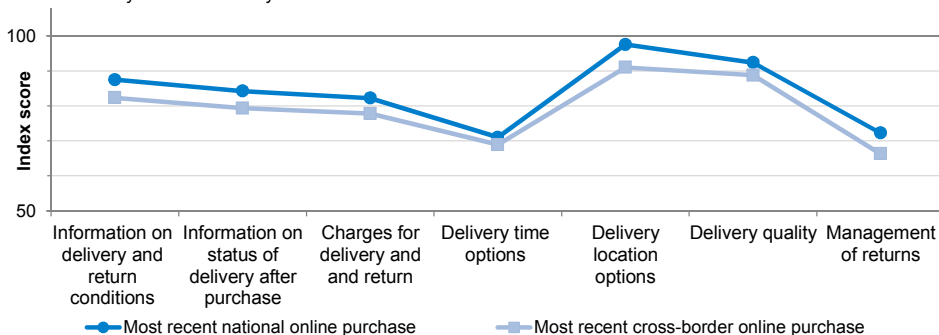
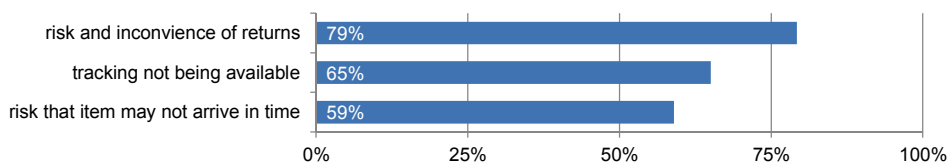

Highlights of WIK consumer survey
52% of online shoppers purchased goods in other countries

30% of online shoppers bought twice or more times a month from domestic online stores and 24% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Furniture or homeware
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

63% of the most recent domestic and 56% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	75.3 (EU/EEA 30: 72.0)
cross-border	69.5 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

52% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...


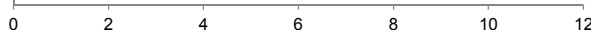


3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.99 of 5 (93% of highest performer)
CEP market size	Revenues n.a.
	Volume (2017) 65 m
Volume development	n.a.

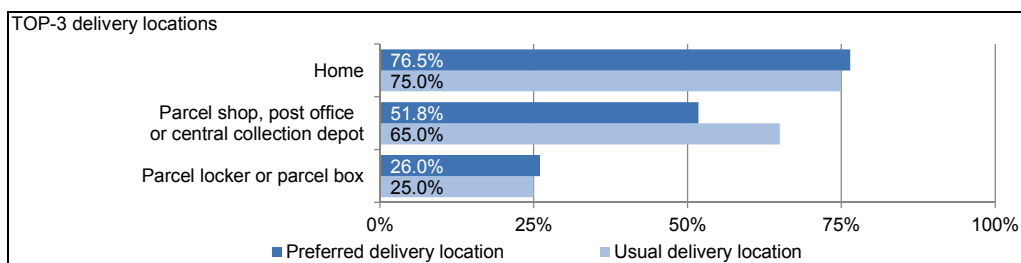
11.3 items
per capita
(2017)



2C&2B

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> GLS Denmark Post Danmark DHL Express	85%-95%
<u>Cross-border</u> Post Danmark GLS Denmark UPS	80%-90%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	Yes, within USO



Unemployment rate 2017 (% of population)	DK 5.7%	Minimum wage (per month in Purchasing Power Standard)	No generally applicable minimum wage
	A horizontal bar chart with a blue bar. A vertical line is drawn through the bar. The text 'DK 5.7%' is above the bar and 'EU-28 7.6%' is below the bar.	Unionisation (country)	67%
		Collective Labour Agreement coverage (country-wide share of employees)	80%
		EU-28 7.6%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	19 700 (2017)	-3.2% (CAGR 2013-2017)
Universal Service Provider	8 645 (FTE, 2017)	-9.7% (CAGR 2013-2017)

4. Market developments



- The Danish Ministry of Foreign Affairs, Google and the e-commerce association FDIH launched an initiative to promote exports of Danish e-retailers in August 2018
- DAO365 delivers newspapers, letters, magazines and tracked parcels on 365 days a year and offers dedicated next day delivery & return services for e-retailers with at least 10,000 shipments / year.
- Danish consumers prefer buying abroad which resulted in a DKK 30 billion deficit in e-commerce revenues in 2017.
- Danish software company SwipBox is very successful in the distribution of carrier-agnostic parcel locker systems.
- The European Commission approved a compensation of DKK 1.192 billion granted by Denmark to Post Danmark for the provision of the universal postal service during the period 2017-2019.

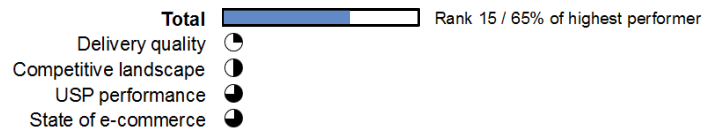
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Estonia



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

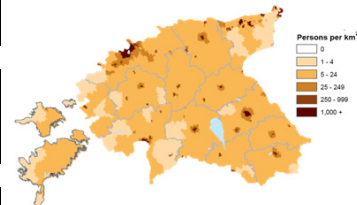
1. Country facts



Population (2017)	1.3 m
Country size	45 347 sqkm

GDP development (CAGR 2013-2017)	5.0%
GDP per capita (2017, Purchasing Power Standard)	22 494 (EU-28: 29 218)

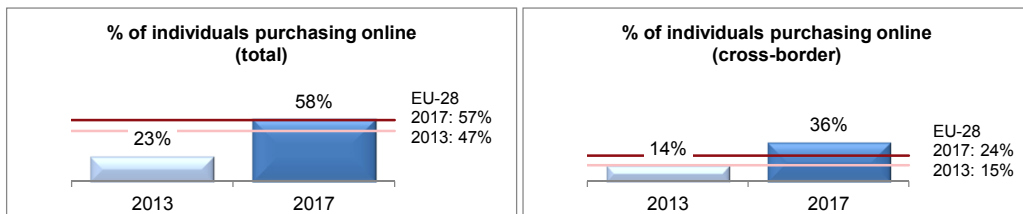
Digital Economy and Society Index (2018)	
Connectivity	64.1 (EU-28: 62.6) (79% of highest performer)
Use of Internet	61.6 (EU-28: 50.5) (82% of highest performer)
Integration of Digital Services	37.1 (EU-28: 40.1) (60% of highest performer)



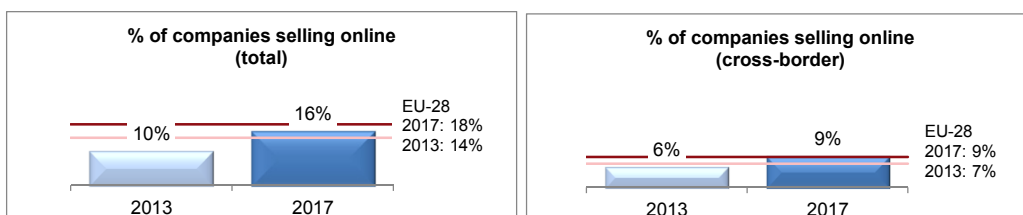
2. E-Commerce



Revenues B2C e-commerce	204 m€
Revenue per capita	155 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	19.2%
% of GDP	0.9%



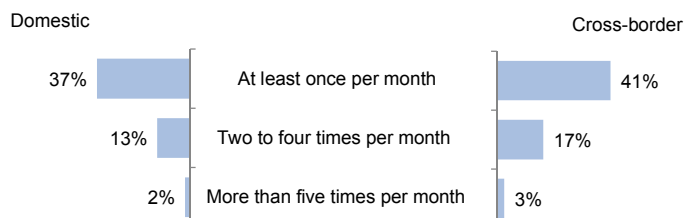
TOP3 countries ordered from	China	United Kingdom	Germany
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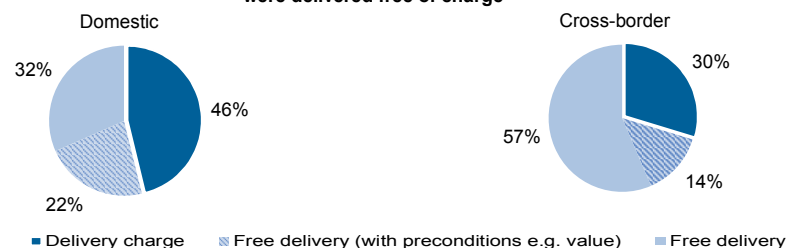
TOP3 countries in Europe sold to	Finland	Latvia	Lithuania
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TOP 3 E-retailers (by site-visits)	aliexpress.com	okidoki.ee	online.ee
TOP 3 Payment methods	Bank transfer	Visa/Master card	Domestic bank credit card / debit card

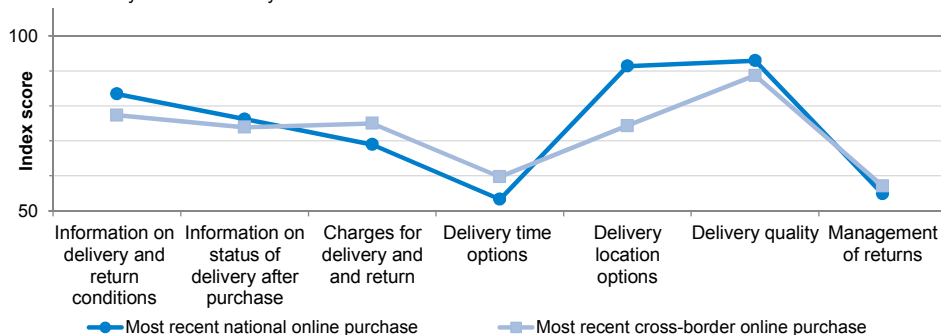
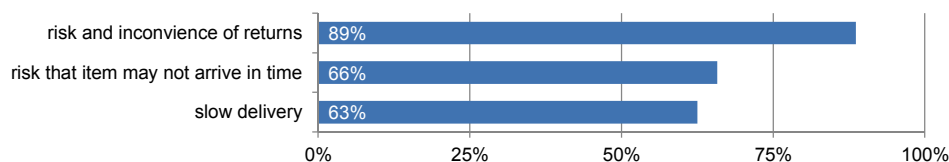

Highlights of WIK consumer survey
60% of online shoppers purchased goods in other countries

15% of online shoppers bought twice or more times a month from domestic online stores and 20% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Furniture or homeware
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

54% of the most recent domestic and 71% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	63.6 (EU/EEA 30: 72.0)
cross-border	61.0 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

62% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




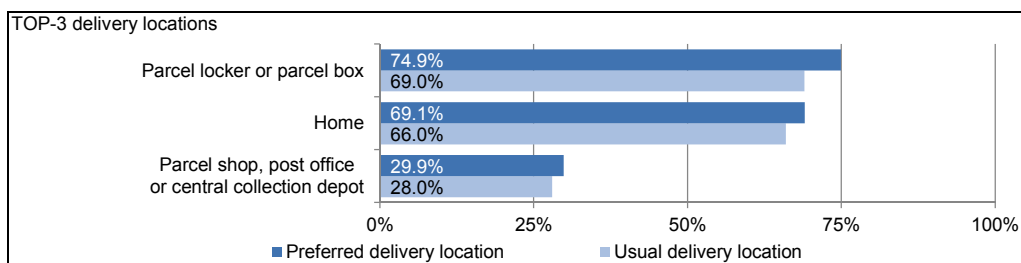
3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.31 of 5 (72% of highest performer)
CEP market size	Revenues (2017) 74 m€
	Volume (2017) 9.8 m
Volume development (CAGR 2013-2017)	13.6%
<p>7.4 items per capita (2017)*</p>	
* domestic and cross-border inbound parcel and express items	

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u>	
Eesti Post	> 90%
DPD	
Itella	
<u>Cross-border</u>	
Eesti Post	> 90%
DPD	
Itella	



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	No financing from carriers



Unemployment rate 2017 (% of population)	EE 5.8%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	637	
Unionisation (country)	10%	
Collective Labour Agreement coverage (country-wide share of employees)	33%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	4 700 (2017)	9.2% (CAGR 2013-2017)
Universal Service Provider	2 239 (FTE, 2017)	-2.9% (CAGR 2013-2017)

4. Market developments



- DPD and DHL Express closed cooperations with the innovative Estonian carrier-agnostic locker system Collect.Net of Cleveron in 2017.
- Parcel lockers are the preferred delivery option in Estonia. Experts estimate that some 80% of parcels go to automated parcel machines or PUDOs.
- Omniva (Estonia) is a leading provider of parcel lockers in the Baltic countries. In 2015, Omniva has launched a joint venture with Chinese SF Express (Post 11).
- In 2018, a pilot project funded by the EU was initiated which includes international parcel delivery by drones between Helsinki and Tallinn.

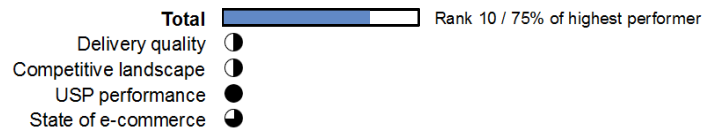
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Finland



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ● = 5

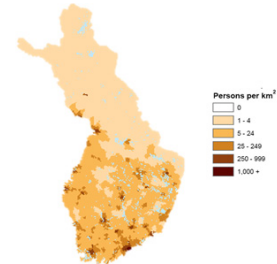
1. Country facts



Population (2017)	5.5 m
Country size	337 547 sqkm

GDP development (CAGR 2013-2017)	2.4%
GDP per capita (2017, Purchasing Power Standard)	32 022 (EU-28: 29 218)

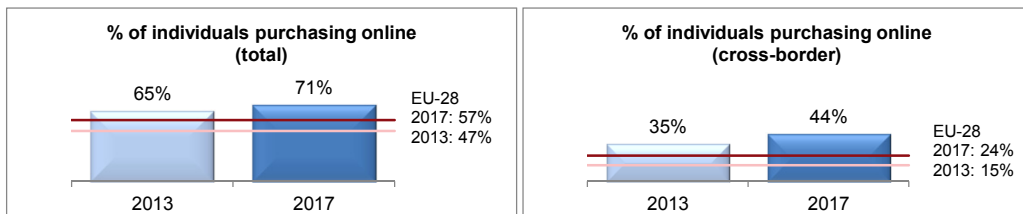
Digital Economy and Society Index (2018)	
Connectivity	66.1 (EU-28: 62.6) (81% of highest performer)
Use of Internet	65.4 (EU-28: 50.5) (87% of highest performer)
Integration of Digital Services	60.9 (EU-28: 40.1) (99% of highest performer)



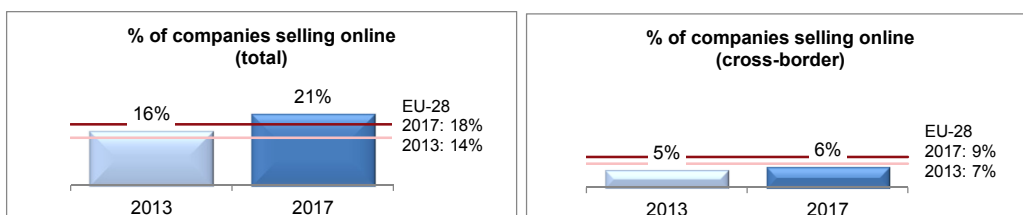
2. E-Commerce



Revenues B2C e-commerce	9 230 m€
Revenue per capita	1 677 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	12.5%
% of GDP	4.1%



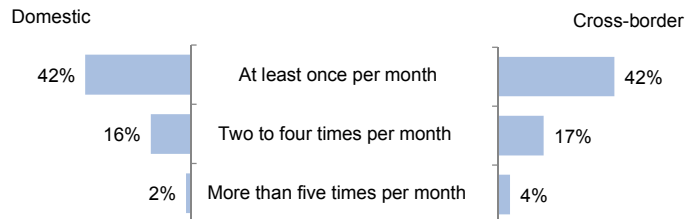
TOP3 countries ordered from	China	Germany	United Kingdom
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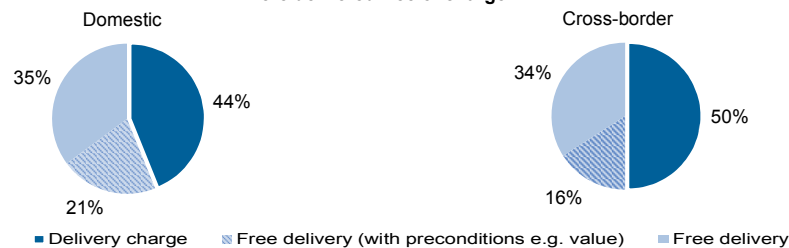
TOP3 countries in Europe sold to	Sweden	Estonia	Germany
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TOP 3 E-retailers (by revenue)	verkkokauppa.com	gigantti.fi	zalando.fi
TOP 3 Payment methods	n.a.		

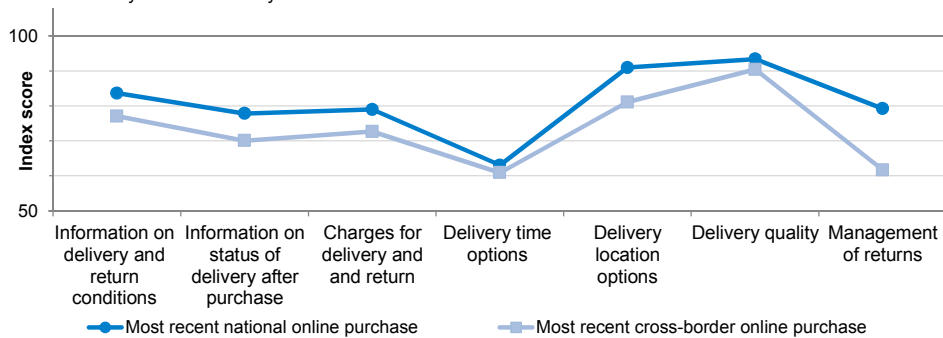
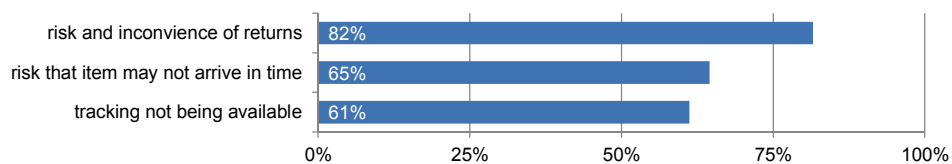

Highlights of WIK consumer survey
50% of online shoppers purchased goods in other countries

18% of online shoppers bought twice or more times a month from domestic online stores and 21% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

56% of the most recent domestic and 50% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	77.5 (EU/EEA 30: 72.0)
cross-border	63.7 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

64% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




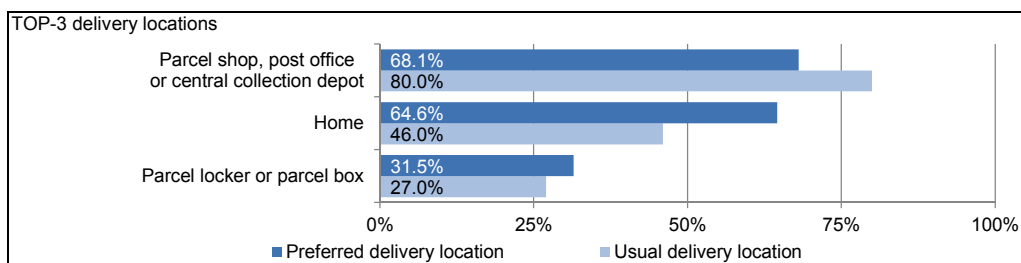
3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.97 of 5 (93% of highest performer)
CEP market size	Revenues n.a.
	Volume (2017) 72 m
Volume development (CAGR 2013-2017)	6.0%
<p>13.1 items per capita (2017)</p>	

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> Posti Matkahuolto Oy DB Schenker	80%-90%
<u>Cross-border</u> Posti DHL Express PostNord	85%-95%



Cross-border parcel services included in universal service	Yes, up to 10kg
Authorisation required for exporting parcel carriers?	n.a.
Contribution to compensation fund for exporting parcel carriers?	n.a.
Contribution to NRA financing for exporting parcel carriers	n.a.



<p>Unemployment rate 2017 (% of population)</p>	Minimum wage (per month in Purchasing Power Standard)	No generally applicable minimum wage
	Unionisation (country)	74%
	Collective Labour Agreement coverage (country-wide share of employees)	91%

	Number of employees	Development of employment
Sector (Postal and courier activities)	21 700 (2017)	0.7% (CAGR 2013-2017)
Universal Service Provider	16 595 (FTE, 2017)	-4.9% (CAGR 2013-2017)

4. Market developments



- Posti, the national postal operator in Finland, is well established in the Finnish and in the Baltic countries.
- Posti/tella cooperates with the European parcel networks DHL Parcel and GLS in Finland and in the Baltic countries.
- Danish software company SwipBox secures a multi-million contract to supply parcel lockers in cooperation with Lehtipiste Oy, a Finnish retail distributor.
- In 2018, a pilot project funded by the EU was initiated which includes international parcel delivery by drones between Helsinki and Tallinn.

Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - France



Assessment of market performance - WIK Delivery Market Performance Index

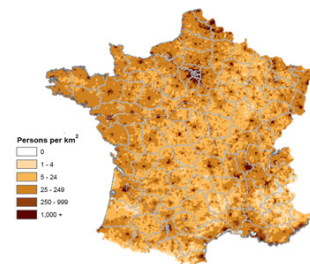
Total		Rank 8 / 80% of highest performer
Delivery quality		
Competitive landscape		
USP performance		
State of e-commerce		

○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

1. Country facts



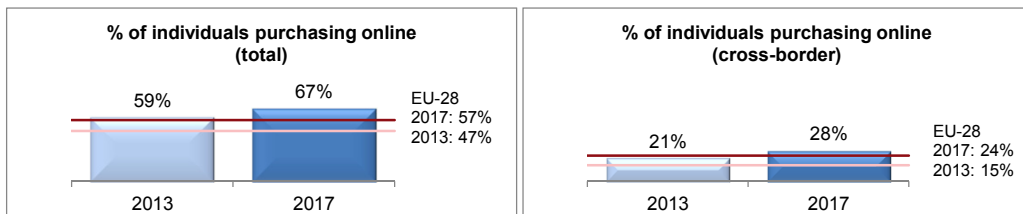
Population (2017)	67.0 m
Country size	549 060 sqkm
GDP development (CAGR 2013-2017)	2.0%
GDP per capita (2017, Purchasing Power Standard)	30 497 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	56.4 (EU-28: 62.6) (70% of highest performer)
Use of Internet	42.2 (EU-28: 50.5) (56% of highest performer)
Integration of Digital Services	37.8 (EU-28: 40.1) (62% of highest performer)



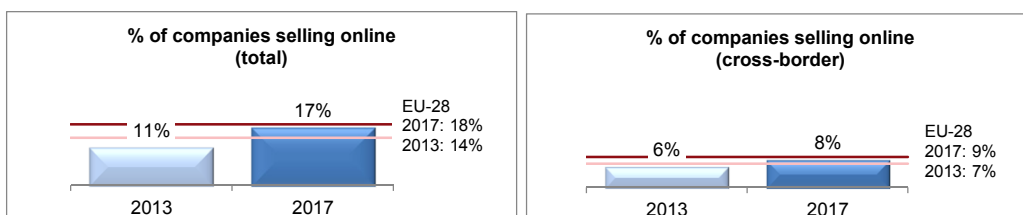
2. E-Commerce



Revenues B2C e-commerce	81 700 m€
Revenue per capita	1 220 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	13.3%
% of GDP	3.6%

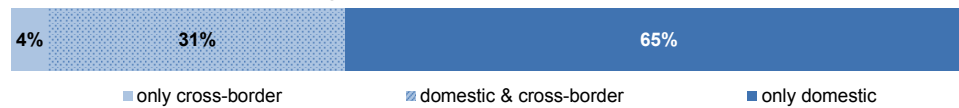
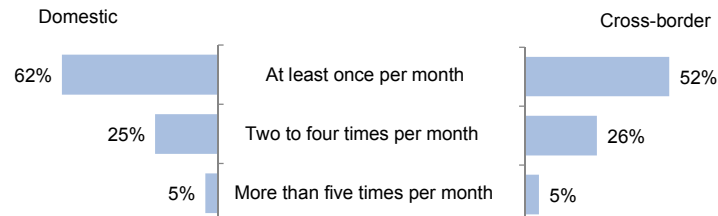


TOP3 countries ordered from	China	Germany	United Kingdom
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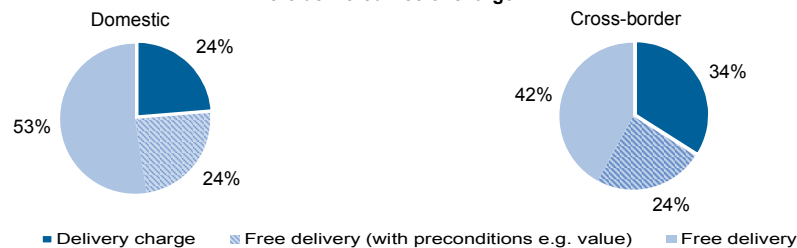


TOP3 countries in Europe sold to	Belgium	Germany	United Kingdom
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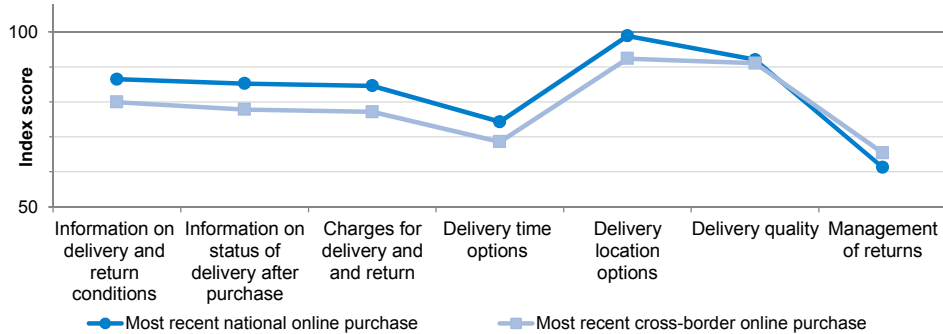
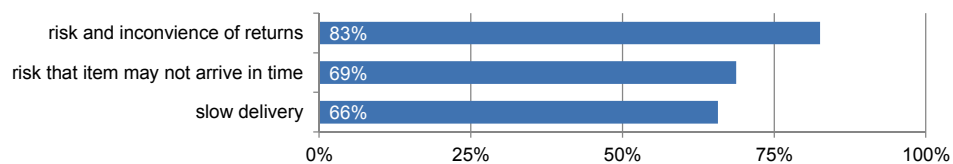
TOP 3 E-retailers (by revenue)	vente-privee.com	amazon.fr	cdiscout.com
TOP 3 Payment methods	Visa/Master card	Digital wallet (paypal, Alipay)	Domestic bank credit card / debit card


Highlights of WIK consumer survey
35% of online shoppers purchased goods in other countries

30% of online shoppers bought twice or more times a month from domestic online stores and 31% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Books, DVDs, CDs or video games	Consumer electronics or other high-tech equipment
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

76% of the most recent domestic and 66% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	73.1 (EU/EEA 30: 72.0)
cross-border	68.7 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

58% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery



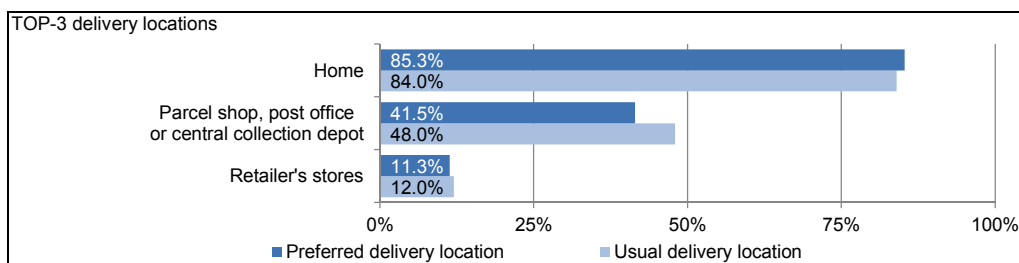
World Bank Logistics Performance Index (2018)	3.84 of 5 (89% of highest performer)
CEP market size	Revenues (2017) 1 909 m€
	Volume (2017) 1 200 m
Volume development (CAGR 2013-2017)	11.2%

17.9 items per capita (2017)*

* domestic and cross-border parcel and express items

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> La Poste Mondial Relay Relais Colis	75%-85%
<u>Cross-border</u> La Poste / Chronoposte DHL Express UPS / UPS Access Point	75%-85%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	No
Contribution to compensation fund for exporting parcel carriers?	No
Contribution to NRA financing for exporting parcel carriers	No financing from carriers



Unemployment rate 2017 (% of population)	FR 9.4%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	1 377	
Unionisation (country)	8%	
Collective Labour Agreement coverage (country-wide share of employees)	98%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	235 200 (2017)	-0.5% (CAGR 2013-2017)
Universal Service Provider	191 889 (FTE, 2017)	-2.9% (CAGR 2013-2017)

4. Market developments



- The French parcel sector is still highly concentrated with a strong position of the French La Poste Group in the parcel (Colissimo) and in the express segments (Chronopost and DPD).
- B2C delivery specialist Mondial Relay has announced a co-operation agreement with French counterpart Colis Privé, in which Amazon holds a 25% stake in July 2017.
- Amazon Logistics started launching Amazon lockers in all 980 SNCF train stations across France and offers Prime Now in Paris and its metropolitan area.
- UPS and DHL Express heavily invest in additional sorting and delivery capacities in France.
- French regulator ARCEP published a comprehensive study on export e-commerce delivery services (Le marché du colis transfrontalier) in June 2017.

Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Germany



Assessment of market performance - WIK Delivery Market Performance Index

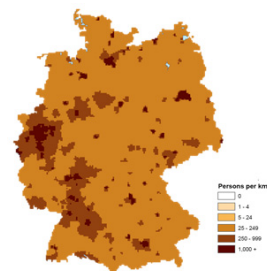
Total		Rank 2 / 95% of highest performer
Delivery quality		
Competitive landscape		
USP performance		
State of e-commerce		

○ = 1, ● = 2, ◐ = 3, ◑ = 4, ● = 5

1. Country facts



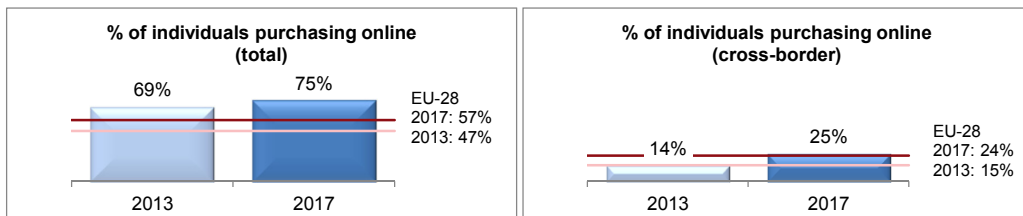
Population (2017)	82.5 m
Country size	358 327 sqkm
GDP development (CAGR 2013-2017)	3.7%
GDP per capita (2017, Purchasing Power Standard)	36 277 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	64.7 (EU-28: 62.6) (80% of highest performer)
Use of Internet	52.7 (EU-28: 50.5) (70% of highest performer)
Integration of Digital Services	41.3 (EU-28: 40.1) (67% of highest performer)



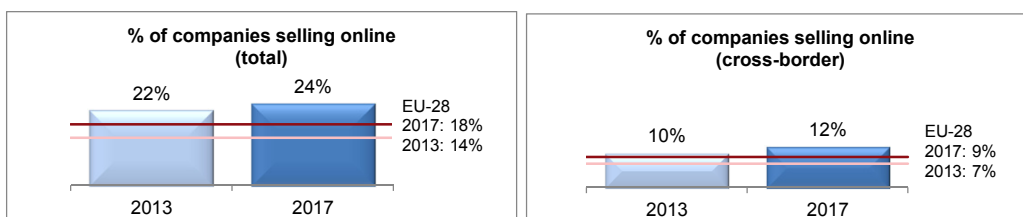
2. E-Commerce



Revenues B2C e-commerce	78 140 m€
Revenue per capita	947 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	7.3%
% of GDP	2.4%

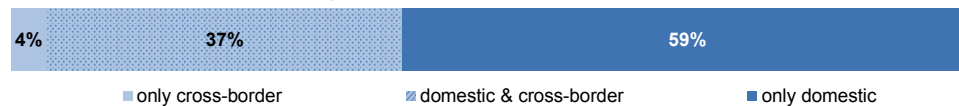
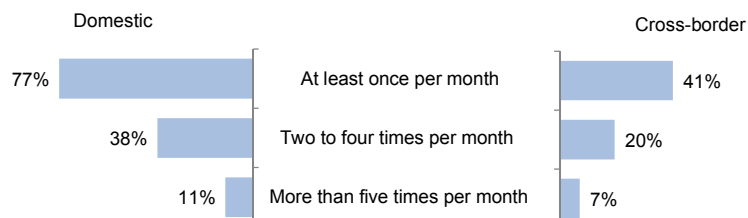


TOP3 countries ordered from	China	United Kingdom	Austria
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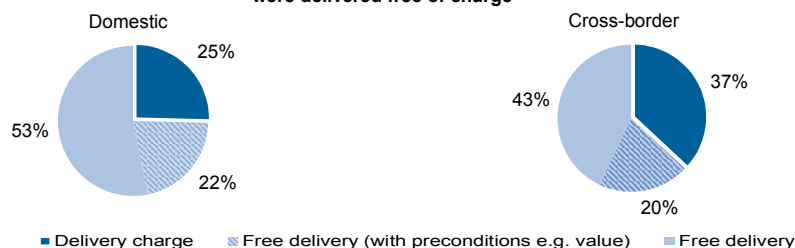


TOP3 countries in Europe sold to	Austria	France	Netherlands
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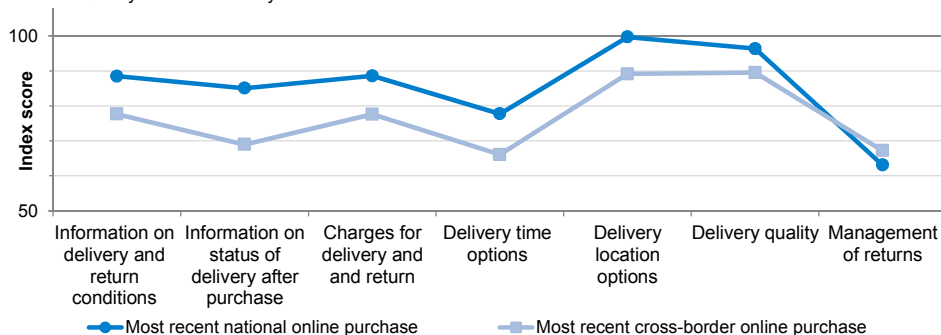
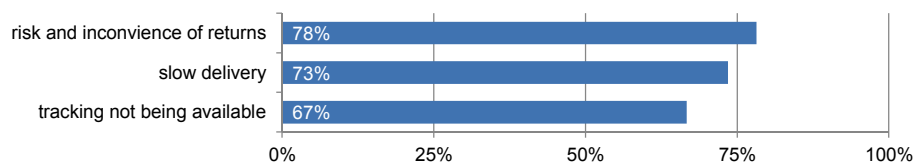
TOP 3 E-retailers (by revenue)	amazon.de	otto.de	zalando.de
TOP 3 Payment methods	Digital wallet (paypal, Alipay)	Invoice	Bank transfer


Highlights of WIK consumer survey
41% of online shoppers purchased goods in other countries

49% of online shoppers bought twice or more times a month from domestic online stores and 27% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Books, DVDs, CDs or video games	Consumer electronics or other high-tech equipment
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

75% of the most recent domestic and 63% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	68.7 (EU/EEA 30: 72.0)
cross-border	67.4 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

48% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...


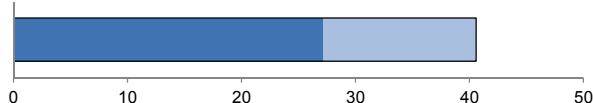


3. Parcel delivery



World Bank Logistics Performance Index (2018)	4.2 of 5 (100% of highest performer)
CEP market size	Revenues (2017) 19 400 m€
	Volume (2017) 3 350 m
Volume development (CAGR 2013-2017)	5.9%

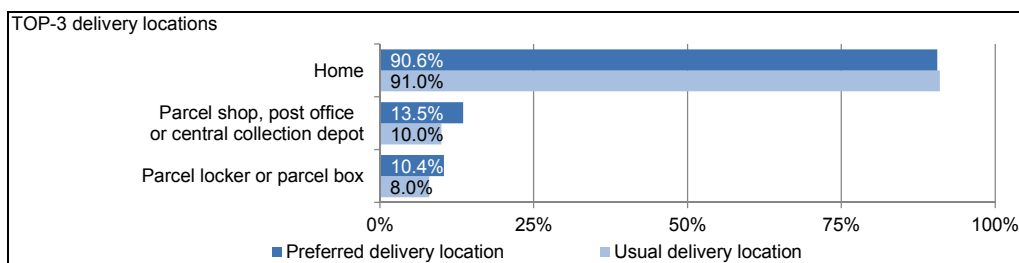
40.6 items
per capita
(2017)*



* domestic and cross-border parcel and express items

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> Deutsche Post / DHL Hermes DPD	> 90%
<u>Cross-border</u> Deutsche Post / DHL DPD Hermes	75%-85%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	No
Contribution to NRA financing for exporting parcel carriers	No financing from carriers



Unemployment rate 2017 (% of population)	DE 3.8%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	1 427	
Unionisation (country)	18%	
Collective Labour Agreement coverage (country-wide share of employees)	62%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	359 500 (2017)	4.0% (CAGR 2013-2017)
Universal Service Provider	183 679 (FTE, 2017)	3.4% (CAGR 2014-2017)

4. Market developments



- Major parcel & express carriers DPD, GLS, Hermes and DHL Parcel announced significant 2019 price increases for parcel delivery. All but DHL Parcel introduced peak season surcharges.
- German carriers heavily invest in sorting and delivery capacities (in 2017, for example, DPD invested 90 million EUR, Hermes around 130 million EUR).
- Deutsche Post DHL sold its online marketplace 'Allyouneed' and looks for an investor for Streetscooter.
- All carriers are challenged by labour and logistics shortages.
- First carrier-agnostic parcel shop opened in Hamburg.

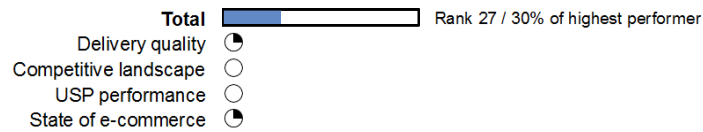
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Greece



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ● = 2, ◐ = 3, ◑ = 4, ● = 5

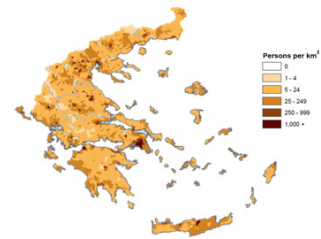
1. Country facts



Population (2017)	10.8 m
Country size	131 912 sqkm

GDP development (CAGR 2013-2017)	-0.4%
GDP per capita (2017, Purchasing Power Standard)	19 943 (EU-28: 29 218)

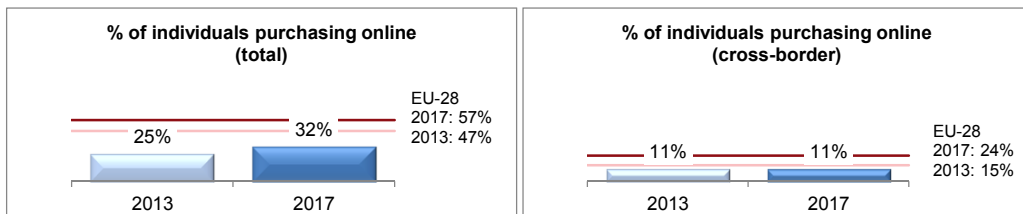
Digital Economy and Society Index (2018)	
Connectivity	43.1 (EU-28: 62.6) (53% of highest performer)
Use of Internet	45.2 (EU-28: 50.5) (60% of highest performer)
Integration of Digital Services	26.9 (EU-28: 40.1) (44% of highest performer)



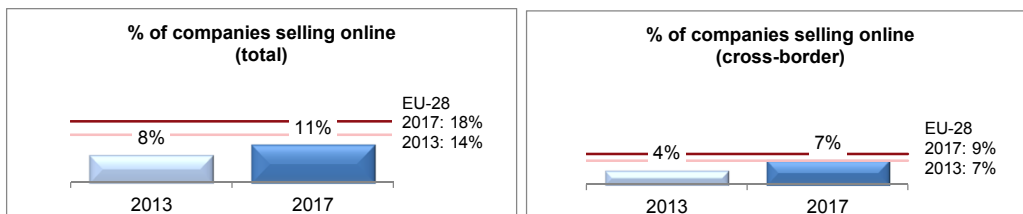
2. E-Commerce



Revenues B2C e-commerce	4 430 m€
Revenue per capita	411 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	13.6%
% of GDP	2.5%



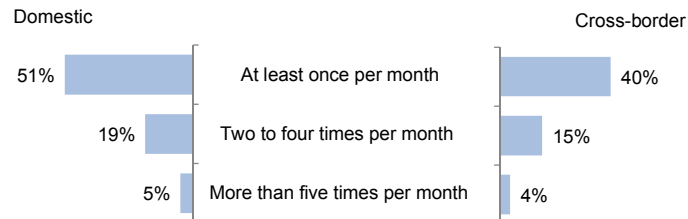
TOP3 countries ordered from	China	United Kingdom	Germany
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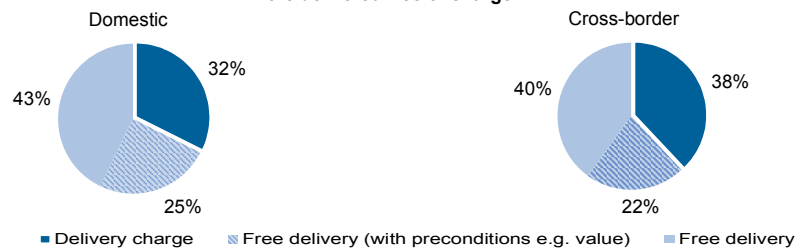
TOP3 countries in Europe sold to	Germany	United Kingdom	France
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TOP 3 E-retailers (by site-visits)	skroutz.gr	ebay.com	xe.gr
TOP 3 Payment methods	n.a.		

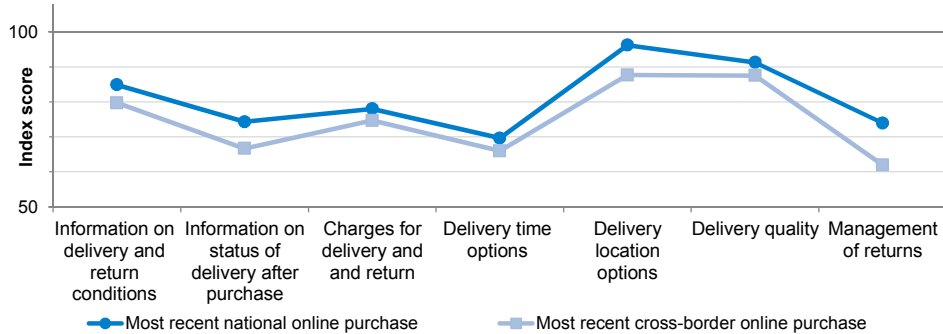
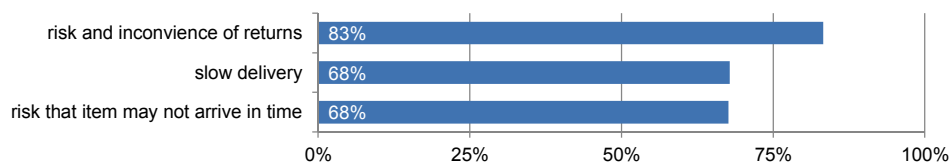

Highlights of WIK consumer survey
53% of online shoppers purchased goods in other countries

24% of online shoppers bought twice or more times a month from domestic online stores and 19% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

68% of the most recent domestic and 62% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	69.3 (EU/EEA 30: 72.0)
cross-border	68.9 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

62% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery



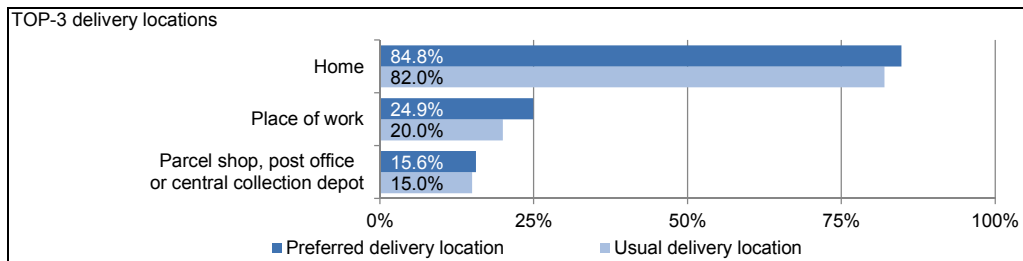
World Bank Logistics Performance Index (2018)	3.2 of 5 (69% of highest performer)
CEP market size	Revenues n.a.
	Volume (2017) 45.1 m
Volume development (CAGR 2013-2017)	18.3%

4.2 items per capita (2017)*

* domestic and cross-border inbound parcel and express items

Universal service provider's volume share in X2C parcel deliveries: <20%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> ACS Courier Geniki Taxydromiki ELTA Hellenic Post	80%-90%
<u>Cross-border</u> ELTA Hellenic Post DHL Express Geniki Taxydromiki	70%-80%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	Yes



Unemployment rate 2017 (% of population)	EL 21.5%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	811	
Unionisation (country)	25%	
Collective Labour Agreement coverage (country-wide share of employees)	65%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	14 400 (2017)	1.1% (CAGR 2013-2017)
Universal Service Provider	8 118 (2016)	n.a.

4. Market developments



- In Spring 2018, ACS launched two cross-border services particularly for e-retailers: EU Economy and Cyprus Economy.
- For the EU Economy product which is much cheaper than the alternatives of express carriers. DPD and GLS cooperate with ACS to deliver parcels in Greece.
- ACS has expanded its network of pick up points

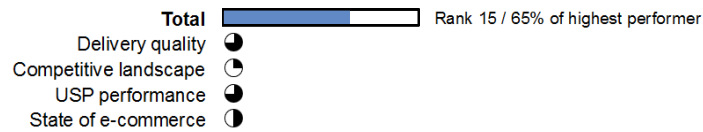
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Hungary



Assessment of market performance - WIK Delivery Market Performance Index

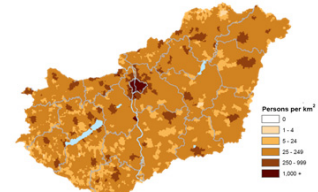


○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

1. Country facts



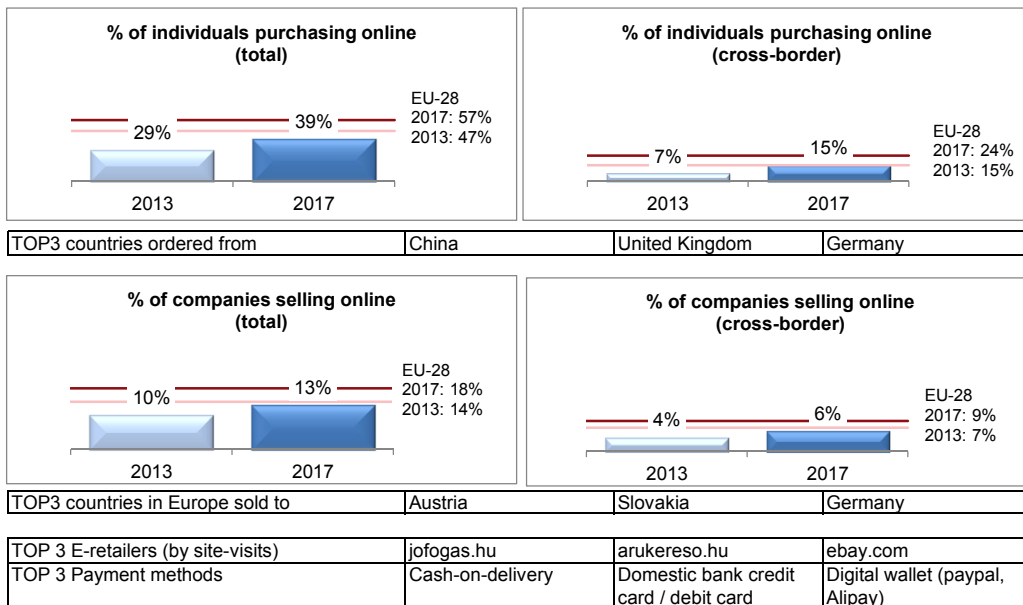
Population (2017)	9.8 m
Country size	93 013 sqkm
GDP development (CAGR 2013-2017)	4.9%
GDP per capita (2017, Purchasing Power Standard)	19 648 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	61.7 (EU-28: 62.6) (76% of highest performer)
Use of Internet	53.6 (EU-28: 50.5) (71% of highest performer)
Integration of Digital Services	25.1 (EU-28: 40.1) (41% of highest performer)



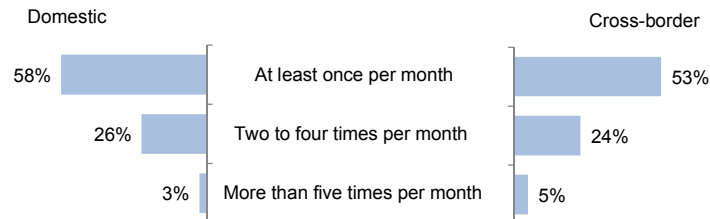
2. E-Commerce



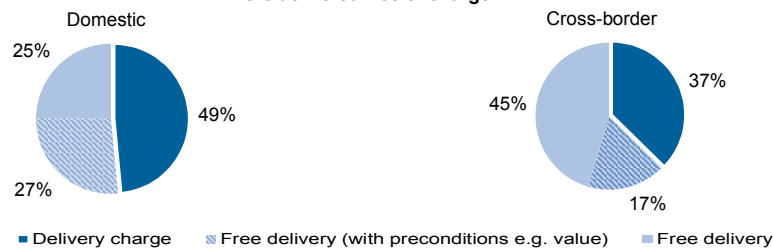
Revenues B2C e-commerce	1 470 m€
Revenue per capita	150 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	34.4%
% of GDP	1.2%



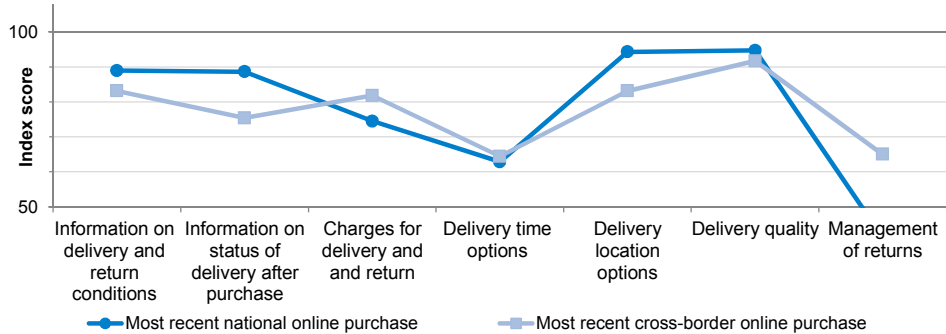
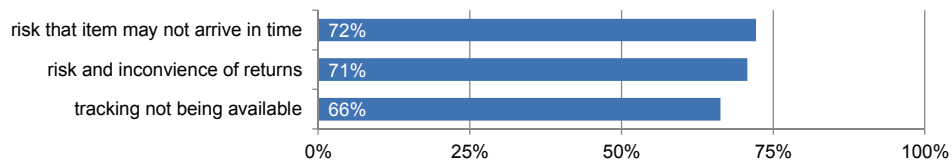

Highlights of WIK consumer survey
59% of online shoppers purchased goods in other countries

29% of online shoppers bought twice or more times a month from domestic online stores and 29% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Consumer electronics or other high-tech equipment	Clothes and shoes	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

52% of the most recent domestic and 62% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	59.6 (EU/EEA 30: 72.0)
cross-border	71.5 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

67% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery



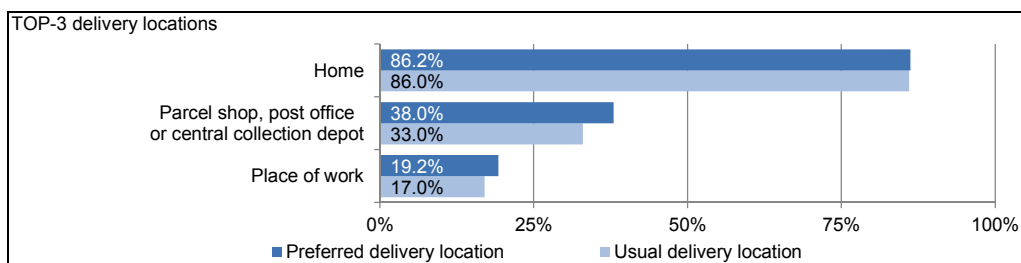
World Bank Logistics Performance Index (2018)	3.42 of 5 (76% of highest performer)
CEP market size	Revenues (2017) 297 m€
	Volume (2017) 69 m
Volume development (CAGR 2013-2017)	21.2%

7.0 items per capita (2017)

2C&2B

Universal service provider's volume share in X2C parcel deliveries: 20-50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> GLS Magyar Posta DPD	85%-95%
<u>Cross-border</u> Magyar Posta GLS DHL Express	80%-90%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	n.a.
Contribution to NRA financing for exporting parcel carriers	Yes



Unemployment rate 2017 (% of population)	HU 4.2%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	720	
Unionisation (country)	12%	
Collective Labour Agreement coverage (country-wide share of employees)	33%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	47 700 (2017)	2.3% (CAGR 2013-2017)
Universal Service Provider	28 273 (FTE, 2016)	n.a.

4. Market developments



- The Hungarian delivery market attracts investments from international carriers like UPS, DHL Express and GLS.
- Magyar Post became partner of the DHL Parcel network in 2016. The partnership drives the company to improve B2C delivery services to comply with the DHL Parcel Connect standard.
- The DHL Parcel Connect standard includes Saturday delivery and standardized processes to shorten delivery and return times as well as services informing recipients on expected delivery time and date of their orders, and a
- GLS expanded its GLS FlexDelivery Solution to Hungary that allows flexible delivery options (home delivery, parcel locker, parcel shops) not only for domestic but also for cross-border deliveries.

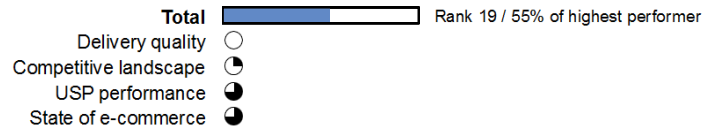
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Iceland



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ● = 2, ◐ = 3, ◑ = 4, ● = 5

1. Country facts



Population (2017)	0.3 m
Country size	102 775 sqkm

GDP development (CAGR 2013-2017)	16.0%
GDP per capita (2017, Purchasing Power Standard)	38 438 (EU-28: 29 218)

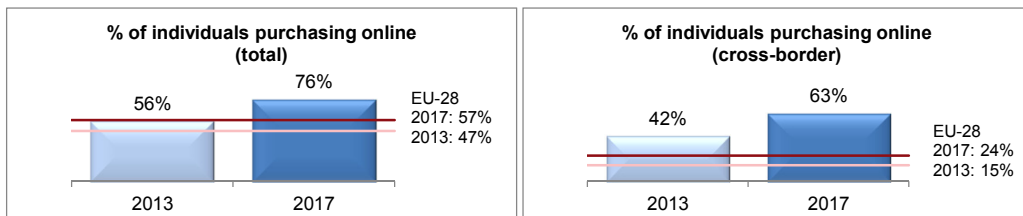
Digital Economy and Society Index (2018)	
Connectivity	n.a.
Use of Internet	n.a.
Integration of Digital Services	n.a.



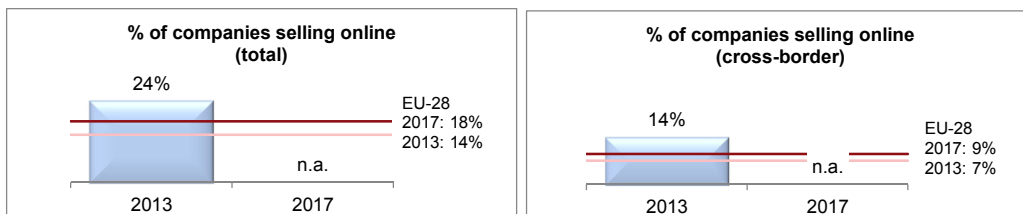
2. E-Commerce



Revenues B2C e-commerce	312 m€
Revenue per capita	922 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	7.9%
% of GDP	1.5%

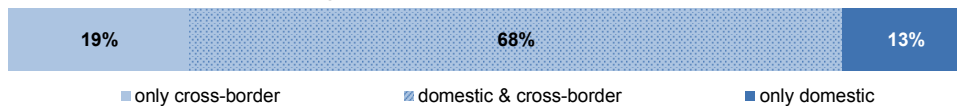
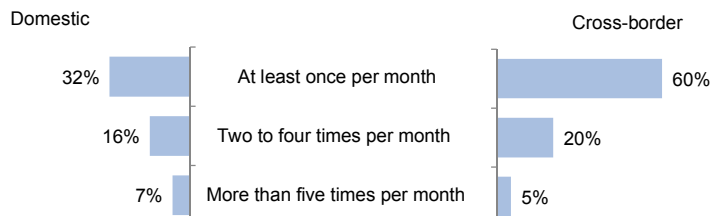


TOP3 countries ordered from	China	United Kingdom	USA
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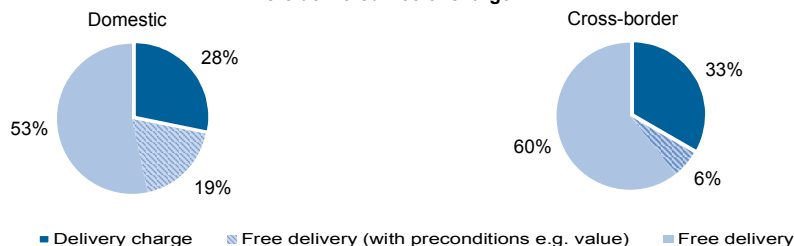


TOP3 countries in Europe sold to	Germany	United Kingdom	Denmark
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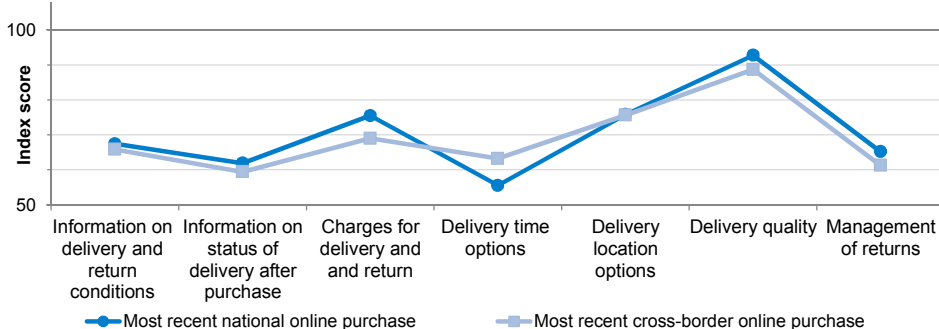
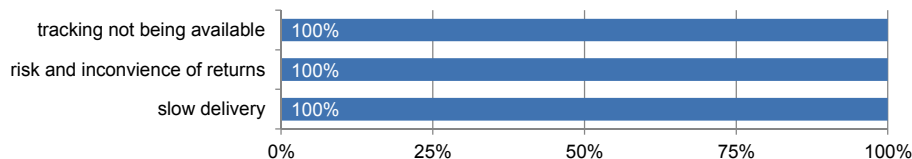
TOP 3 E-retailers (by site-visits)	amazon.com	aliexpress.com	ebay.com
TOP 3 Payment methods	n.a.		


Highlights of WIK consumer survey
87% of online shoppers purchased goods in other countries

23% of online shoppers bought twice or more times a month from domestic online stores and 26% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Consumer electronics or other high-tech equipment	Clothes and shoes	Furniture or homeware
Popular product categories (cross-border)	Consumer electronics or other high-tech equipment	Clothes and shoes	Books, DVDs, CDs or video games

72% of the most recent domestic and 66% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	72.6 (EU/EEA 30: 72.0)
cross-border	66.8 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

39% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery



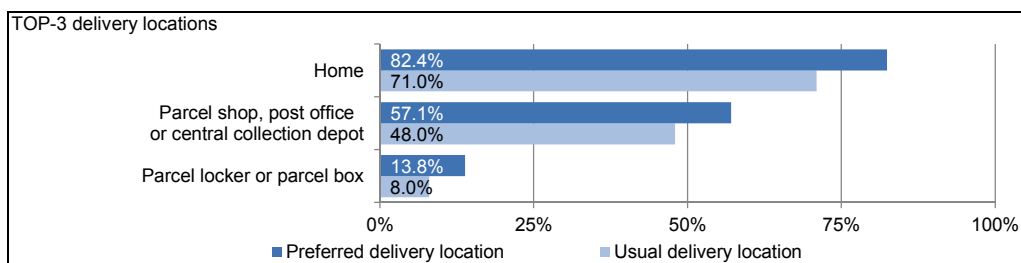
World Bank Logistics Performance Index (2018)	3.23 of 5 (70% of highest performer)
CEP market size	Revenues (2016) 2 m€
	Volume (2017) 1.2 m
Volume development (CAGR 2013-2017)	16.3%

3.5 items per capita (2017)

2C&2B

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u>	
Pósturinn	
DHL Express	> 90%
Express ehf	
<u>Cross-border</u>	
Pósturinn	
DHL Express	> 90%
IceTransport ehf	



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	n.a.
Contribution to compensation fund for exporting parcel carriers?	n.a.
Contribution to NRA financing for exporting parcel carriers	n.a.



Unemployment rate 2017 (% of population)	IS 2.8%	Minimum wage (per month in Purchasing Power Standard)	No generally applicable minimum wage
	EU-28 7.6%	Unionisation (country)	n.a.
		Collective Labour Agreement coverage (country-wide share of employees)	n.a.

	Number of employees	Development of employment
Sector (Postal and courier activities)	1 500 (2017)	5.7% (CAGR 2013-2017)
Universal Service Provider	n.a.	n.a.

4. Market developments



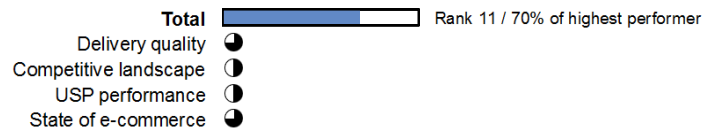
- Iceland's national postal operator (Posturinn) is under financial pressure due to growing loss-making Chinese e-commerce imports.



Country Fact Sheet - Ireland



Assessment of market performance - WIK Delivery Market Performance Index

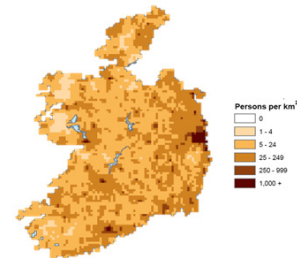


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1. Country facts



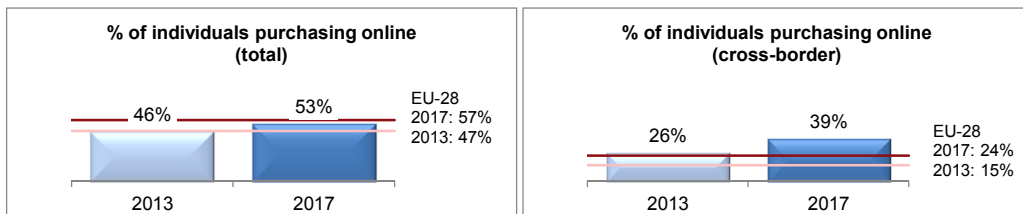
Population (2017)	4.8 m
Country size	70 601 sqkm
GDP development (CAGR 2013-2017)	13.2%
GDP per capita (2017, Purchasing Power Standard)	52 416 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	65.1 (EU-28: 62.6) (80% of highest performer)
Use of Internet	52.3 (EU-28: 50.5) (70% of highest performer)
Integration of Digital Services	60.0 (EU-28: 40.1) (98% of highest performer)



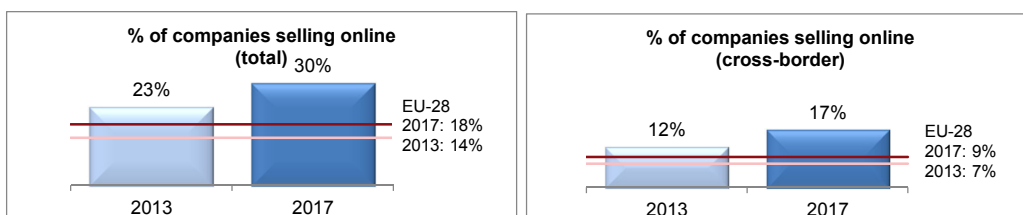
2. E-Commerce



Revenues B2C e-commerce	6 760 m€
Revenue per capita	1 413 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	10.1%
% of GDP	2.3%

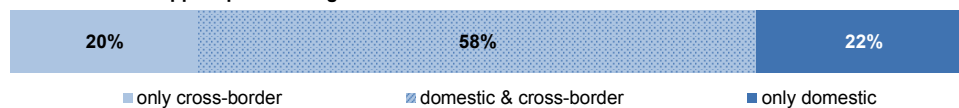
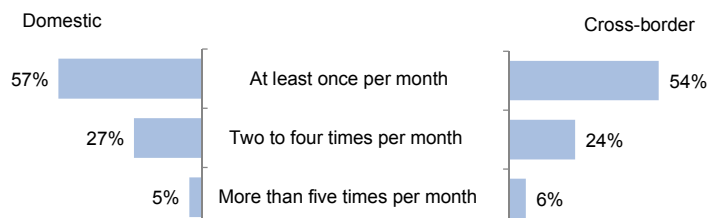


TOP3 countries ordered from	United Kingdom	China	USA
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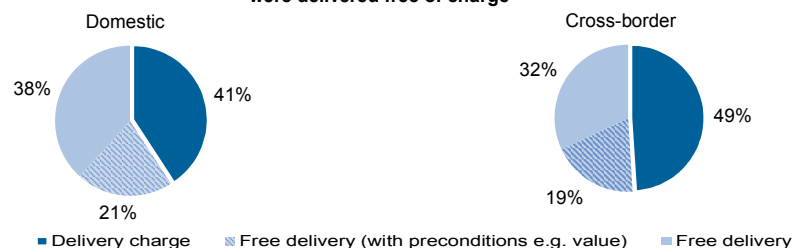


TOP3 countries in Europe sold to	United Kingdom	Germany	France
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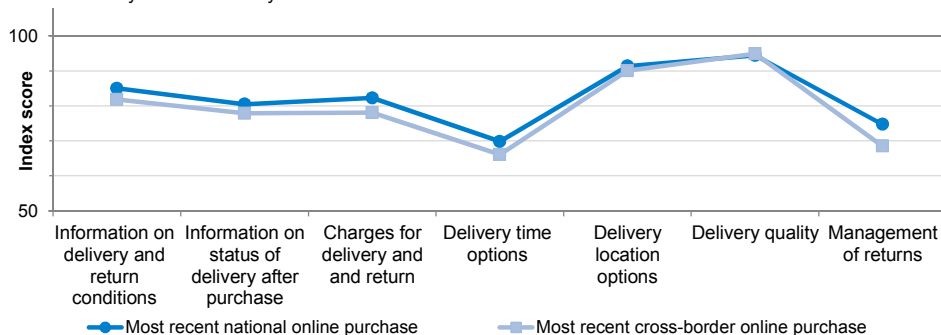
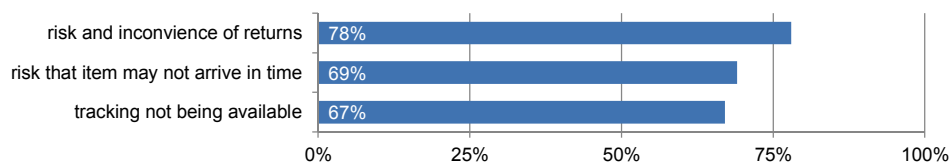
TOP 3 E-retailers (by revenue)	argos.ie	amazon.co.uk	tesco.ie
TOP 3 Payment methods	Digital wallet (paypal, Alipay)	Visa/Master card	Domestic bank credit card / debit card


Highlights of WIK consumer survey
78% of online shoppers purchased goods in other countries

32% of online shoppers bought twice or more times a month from domestic online stores and 30% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Books, DVDs, CDs or video games	Consumer electronics or other high-tech equipment

59% of the most recent domestic and 51% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	73.6 (EU/EEA 30: 72.0)
cross-border	70.4 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

61% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.51 of 5 (78% of highest performer)
CEP market size	Revenues (2016) 600 m€
	Volume (2015) 99 m
Volume development (CAGR 2013-2015)	5.5%

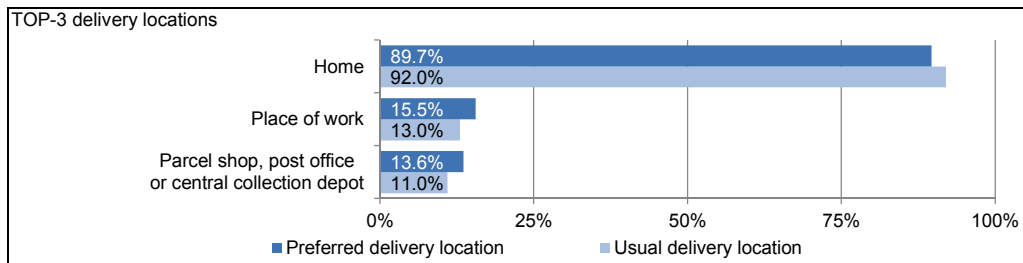
21.2 items per capita (2015)

0 5 10 15 20 25

■ 2C ■ 2B

Universal service provider's volume share in X2C parcel deliveries: 20-50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> An Post Fastway DPD	75%-85%
<u>Cross-border</u> An Post DPD Fastway	75%-85%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	n.a.
Contribution to compensation fund for exporting parcel carriers?	n.a.
Contribution to NRA financing for exporting parcel carriers	Yes, within USO



Unemployment rate 2017 (% of population)	IE 6.7%	EU-28 7.6%
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Minimum wage (per month in Purchasing Power Standard)	1 287
Unionisation (country)	31%
Collective Labour Agreement coverage (country-wide share of employees)	44%

	Number of employees	Development of employment
Sector (Postal and courier activities)	14 800 (2017)	-1.1% (CAGR 2013-2017)
Universal Service Provider	11 779 (2016)	n.a.

4. Market developments



- Ireland is key e-commerce export market for British retailers and highly affected by the Brexit.
- Consolidation in the Irish parcel & express market: UPS acquired Irish logistics firm Nightline (including its Parcel Motel service)
- An Post improved its market position by extending the delivery service to Saturdays in 2017 and introducing late-night cut-offs.
- An Post became partner of the DHL Parcel network in 2017. The partnership drives the company to improve B2C delivery services to comply with the DHL Parcel Connect standard.

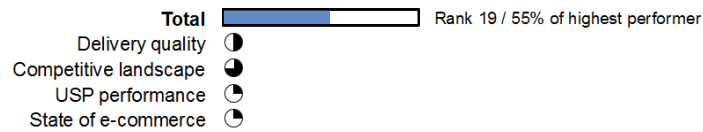
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Italy



Assessment of market performance - WIK Delivery Market Performance Index

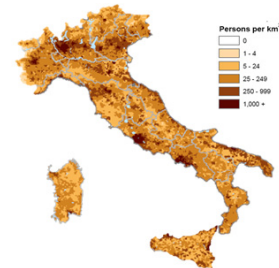


○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

1. Country facts



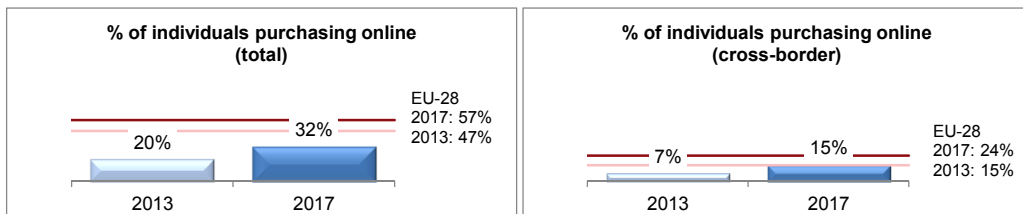
Population (2017)	60.6 m
Country size	301 291 sqkm
GDP development (CAGR 2013-2017)	1.7%
GDP per capita (2017, Purchasing Power Standard)	28 377 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	52.8 (EU-28: 62.6) (65% of highest performer)
Use of Internet	37.4 (EU-28: 50.5) (50% of highest performer)
Integration of Digital Services	36.8 (EU-28: 40.1) (60% of highest performer)



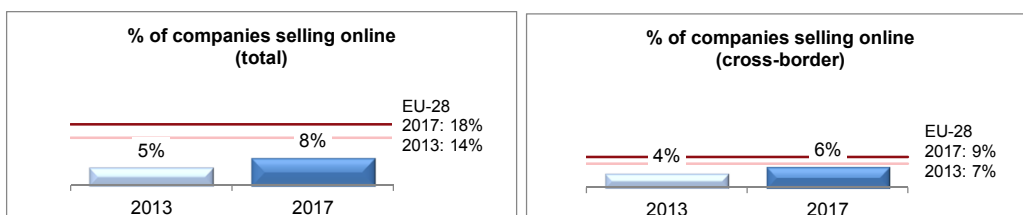
2. E-Commerce



Revenues B2C e-commerce	21 200 m€
Revenue per capita	350 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	16.9%
% of GDP	1.2%



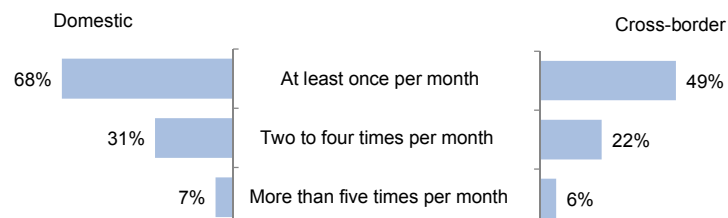
TOP3 countries ordered from	China	United Kingdom	Germany
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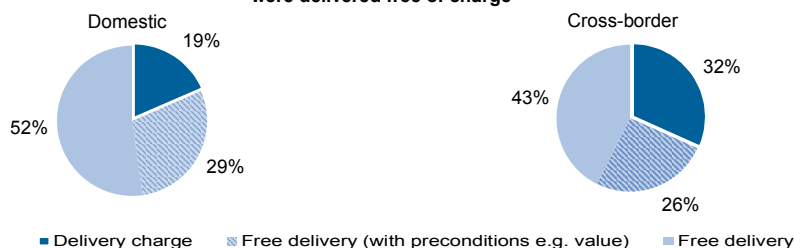
TOP3 countries in Europe sold to	Germany	France	Netherlands
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TOP 3 E-retailers (by revenue)	amazon.it	zalando.it	apple.com
TOP 3 Payment methods	Digital wallet (paypal, Alipay)	Visa/Master card	Stored value cards / Virtual cards / e-money

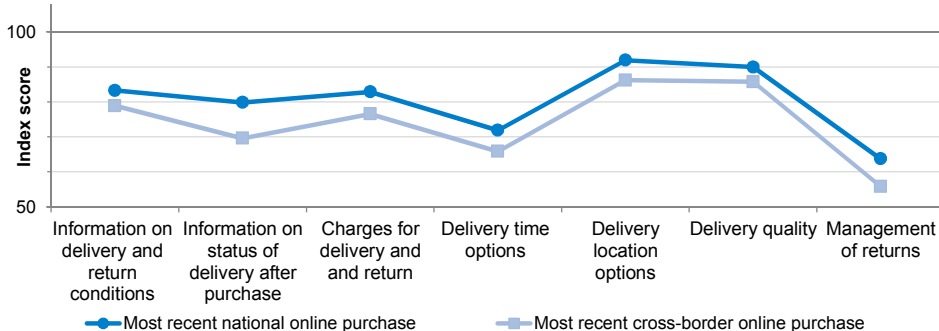
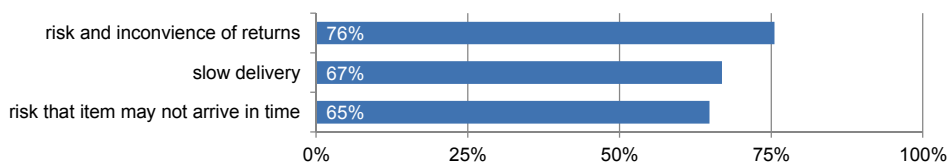

Highlights of WIK consumer survey
44% of online shoppers purchased goods in other countries

38% of online shoppers bought twice or more times a month from domestic online stores and 28% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Consumer electronics or other high-tech equipment	Clothes and shoes	Books, DVDs, CDs or video games

82% of the most recent domestic and 69% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	70.2 (EU/EEA 30: 72.0)
cross-border	62.0 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

48% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




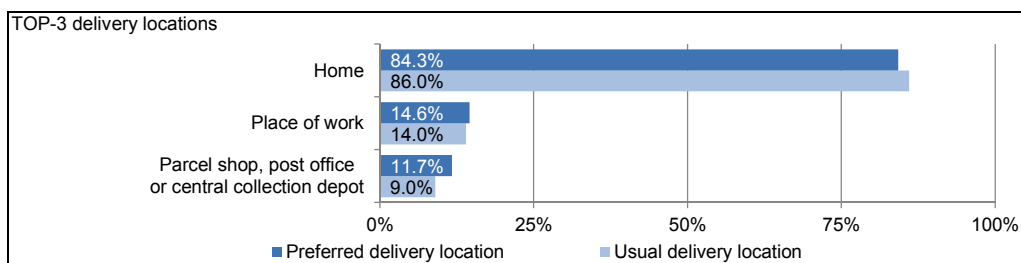
3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.74 of 5 (86% of highest performer)
CEP market size	Revenues (2017) 3 122 m€
	Volume (2017) 360 m
Volume development (CAGR 2013-2017)	10.6%
<p>5.9 items per capita (2017)*</p>	
* domestic and cross-border inbound parcel and express items	

Universal service provider's volume share in X2C parcel deliveries: 20-50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> BRT Corriere Espresso Poste Italiane GLS	70%-80%
<u>Cross-border</u> Poste Italiane DHL Express BRT Corriere Espresso	60%-70%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	Yes



Unemployment rate 2017 (% of population)	IT 11.2%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	No generally applicable minimum wage	
Unionisation (country)	35%	
Collective Labour Agreement coverage (country-wide share of employees)	80%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	200 400 (2017)	2.8% (CAGR 2013-2017)
Universal Service Provider	138 000 (2017)	-2.1% (CAGR 2015-2017)

4. Market developments



- The Italian delivery market is highly fragmented with many carriers and well-developed parcel delivery services in the Northern part of Italy and significant service gaps in Southern Italy.
- Poste Italiane signed a contract with Amazon in June 2018 that drives the parcel volume delivered by Poste Italiane and its express subsidiary SDA and promotes the roll-out of the 'Joint Delivery Model' in less populated areas.
- Amazon expands logistics network in Italy and offers Prime Now in Milan (Amazon Flex) and drives the Italian delivery market to improve B2C e-commerce deliveries.

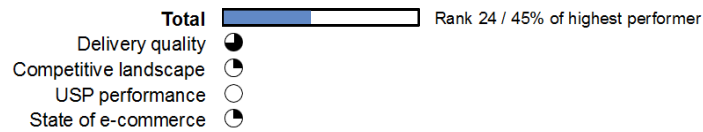
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Latvia



Assessment of market performance - WIK Delivery Market Performance Index



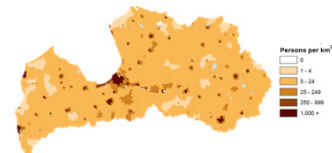
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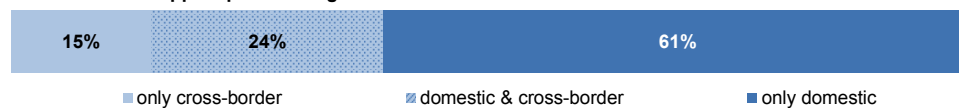
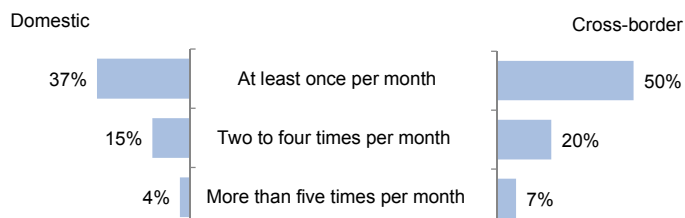
1. Country facts



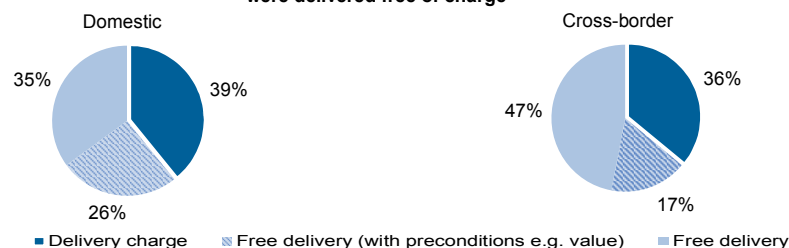
Population (2017)	2.0 m
Country size	65 519 sqkm

GDP development (CAGR 2013-2017)	4.1%
GDP per capita (2017, Purchasing Power Standard)	18 825 (EU-28: 29 218)

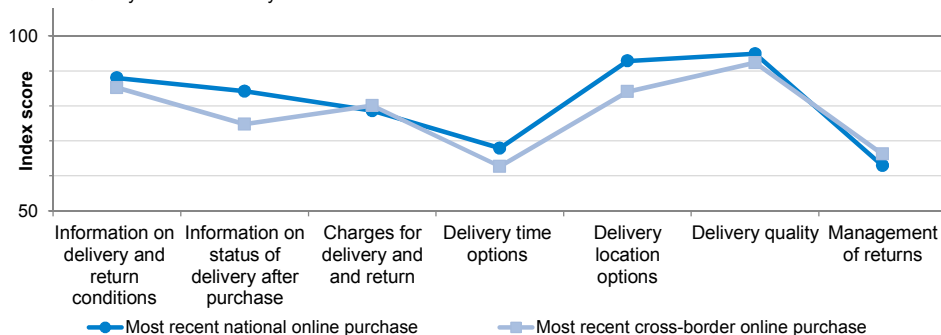
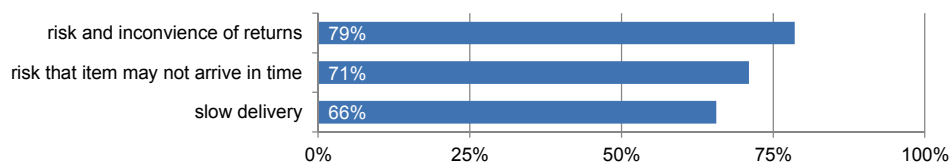



Highlights of WIK consumer survey
39% of online shoppers purchased goods in other countries

19% of online shoppers bought twice or more times a month from domestic online stores and 27% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Consumer electronics or other high-tech equipment	Clothes and shoes	Furniture or homeware
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Furniture or homeware

61% of the most recent domestic and 64% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	69.3 (EU/EEA 30: 72.0)
cross-border	69.7 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

66% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




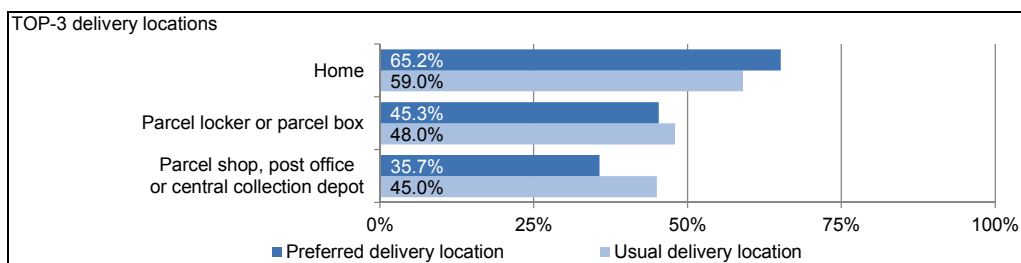
3. Parcel delivery



World Bank Logistics Performance Index (2018)	2.81 of 5 (57% of highest performer)
CEP market size	Revenues n.a.
	Volume (2017) 9.0 m
Volume development (CAGR 2013-2017)	16.4%
<p>4.6 items per capita (2017)</p>	

Universal service provider's volume share in X2C parcel deliveries: <20%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> Omniva Latvijas Pastu DHL Express	> 90%
<u>Cross-border</u> Latvijas Pastu DHL Express Omniva	85%-95%



Cross-border parcel services included in universal service	Yes, up to 10kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	Yes



<p>Unemployment rate 2017 (% of population)</p>	Minimum wage (per month in Purchasing Power Standard)	594
	Unionisation (country)	13%
	Collective Labour Agreement coverage (country-wide share of employees)	34%

	Number of employees	Development of employment
Sector (Postal and courier activities)	5 700 (2017)	8.6% (CAGR 2013-2017)
Universal Service Provider	n.a.	n.a.

4. Market developments



- Omniva (Estonia) is a leading provider of parcel lockers in the Baltic countries.
- Posti/tella cooperates with the European parcel networks DHL Parcel and GLS in the Baltic countries.

Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Lithuania



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

1. Country facts



Population (2017)	2.8 m
Country size	65 412 sqkm

GDP development (CAGR 2013-2017)	4.6%
GDP per capita (2017, Purchasing Power Standard)	21 925 (EU-28: 29 218)

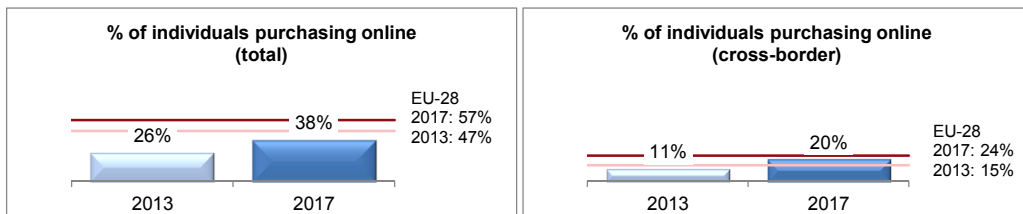
Digital Economy and Society Index (2018)	
Connectivity	64.9 (EU-28: 62.6) (80% of highest performer)
Use of Internet	56.8 (EU-28: 50.5) (76% of highest performer)
Integration of Digital Services	47.5 (EU-28: 40.1) (77% of highest performer)



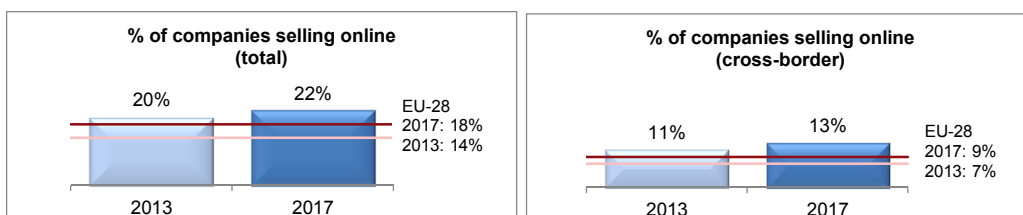
2. E-Commerce



Revenues B2C e-commerce	461 m€
Revenue per capita	162 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	12.5%
% of GDP	1.1%



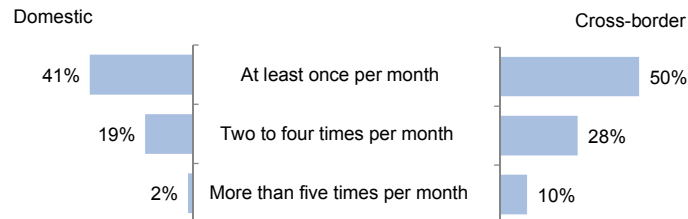
TOP3 countries ordered from	China	United Kingdom	Germany
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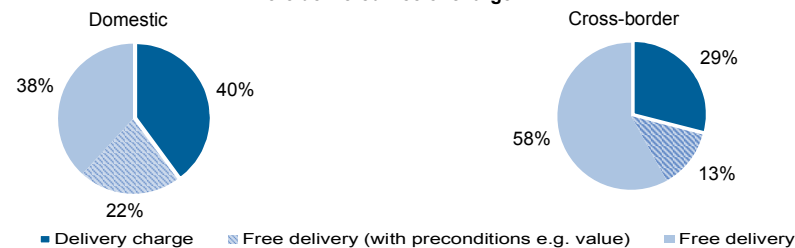
TOP3 countries in Europe sold to	Latvia	Germany	Poland
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TOP 3 E-retailers (by site-visits)	skelbiu.lt	aliexpress.com	pigu.lt
TOP 3 Payment methods	BankLink (local payment method)	Visa/Master card	Cash-on-delivery

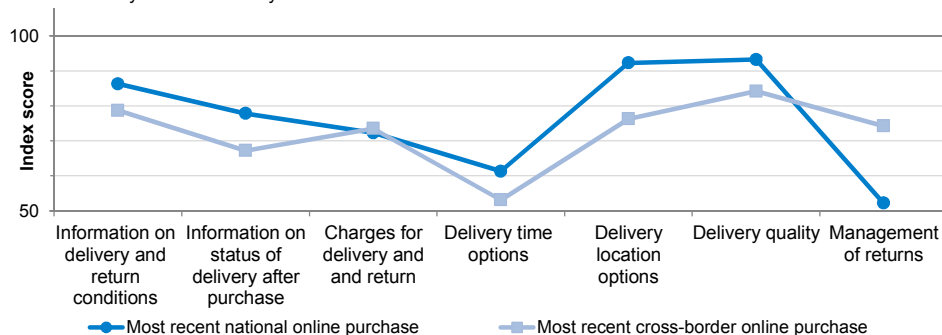
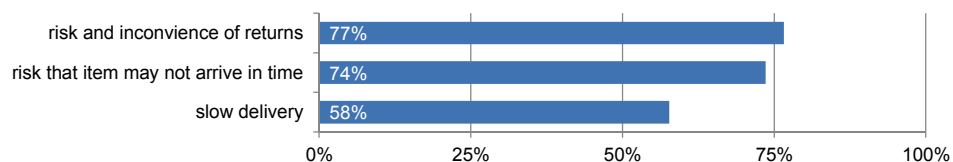

Highlights of WIK consumer survey
47% of online shoppers purchased goods in other countries

21% of online shoppers bought twice or more times a month from domestic online stores and 38% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Consumer electronics or other high-tech equipment	Clothes and shoes	Furniture or homeware
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

60% of the most recent domestic and 71% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	69.4 (EU/EEA 30: 72.0)
cross-border	75.2 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

66% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery



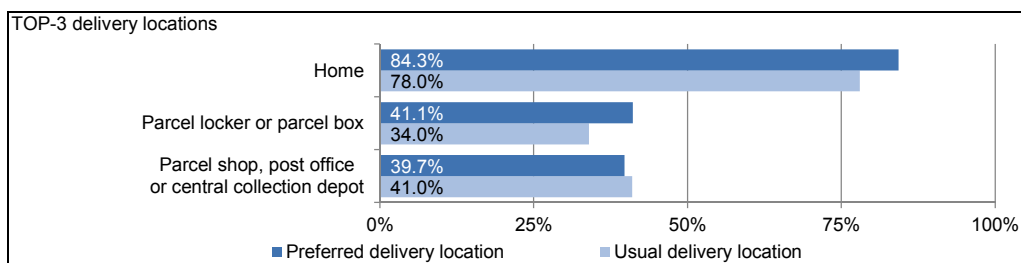
World Bank Logistics Performance Index (2018)	3.02 of 5 (63% of highest performer)
CEP market size	Revenues (2017) 83 m€
	Volume (2017) 13.5 m
Volume development (CAGR 2013-2017)	14.4%

4.7 items per capita (2017)

2C&2B

Universal service provider's volume share in X2C parcel deliveries: <20%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u>	
DPD	
Lietuvos paštas	75%-85%
Omniva	
<u>Cross-border</u>	
Lietuvos paštas	
DPD	80%-90%
DHL Express	



Cross-border parcel services included in universal service	Yes, up to 10kg
Authorisation required for exporting parcel carriers?	n.a.
Contribution to compensation fund for exporting parcel carriers?	n.a.
Contribution to NRA financing for exporting parcel carriers	Yes



Unemployment rate 2017 (% of population)	LT 7.1%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	619	
Unionisation (country)	10%	
Collective Labour Agreement coverage (country-wide share of employees)	15%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	5 800 (2017)	-9.4% (CAGR 2013-2017)
Universal Service Provider	4 737 (FTE, 2016)	2.0% (CAGR 2014-2016)

4. Market developments



- Omniva (Estonia) is a leading provider of parcel lockers in the Baltic countries.
- Posti/Iltella cooperates with the European parcel networks DHL Parcel and GLS in the Baltic countries.

Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Luxembourg



Assessment of market performance - WIK Delivery Market Performance Index

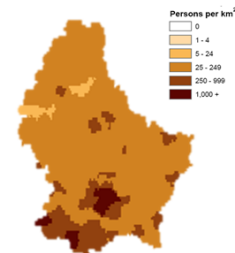
Total	<div><div></div></div>	Rank 6 / 85% of highest performer
Delivery quality	●	
Competitive landscape	●	
USP performance	●	
State of e-commerce	●	

○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ● = 5

1. Country facts



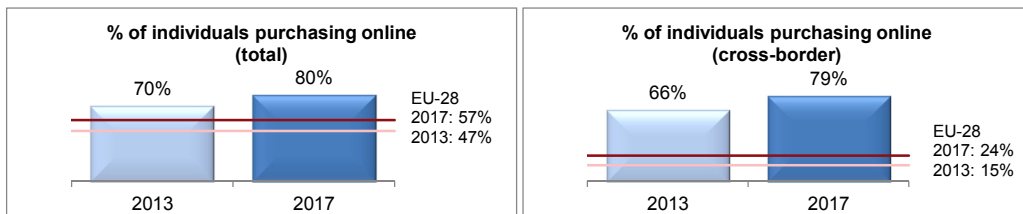
Population (2017)	0.6 m
Country size	2 595 sqkm
GDP development (CAGR 2013-2017)	4.5%
GDP per capita (2017, Purchasing Power Standard)	76 538 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	80.1 (EU-28: 62.6) (99% of highest performer)
Use of Internet	65.9 (EU-28: 50.5) (88% of highest performer)
Integration of Digital Services	33.2 (EU-28: 40.1) (54% of highest performer)



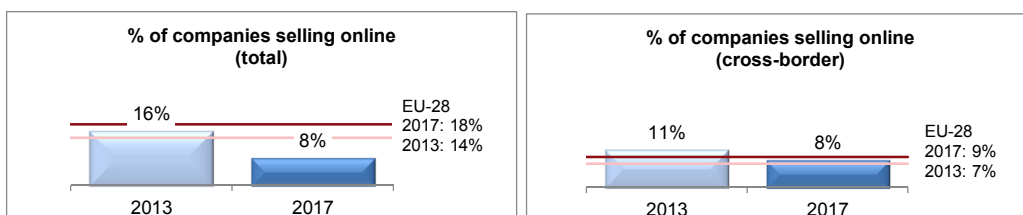
2. E-Commerce



Revenues B2C e-commerce	730 m€
Revenue per capita	1 236 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	12.2%
% of GDP	1.3%



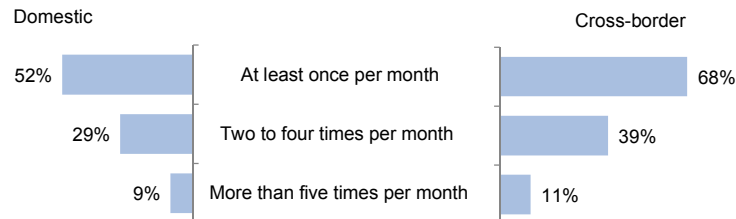
TOP3 countries ordered from	Germany	France	United Kingdom
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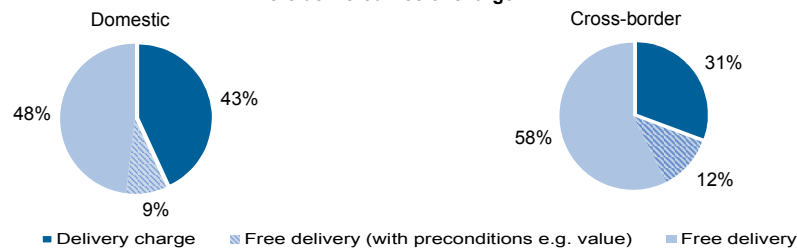
TOP3 countries in Europe sold to	Belgium	France	Germany
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TOP 3 E-retailers (by site-visits)	amazon.de	amazon.fr	ebay.de
TOP 3 Payment methods	n.a.		

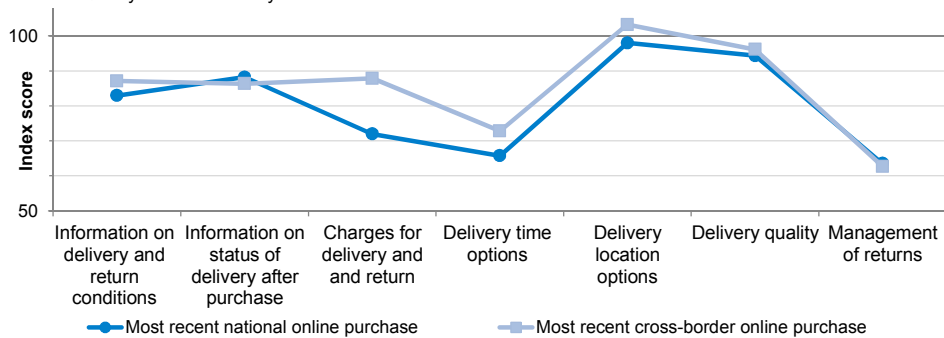
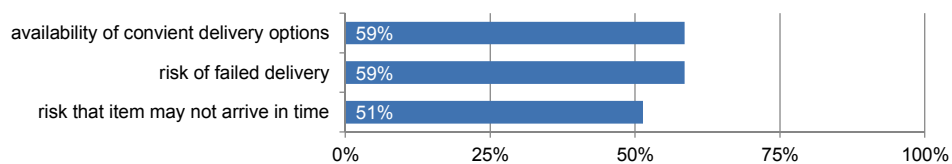

Highlights of WIK consumer survey
84% of online shoppers purchased goods in other countries

38% of online shoppers bought twice or more times a month from domestic online stores and 50% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Books, DVDs, CDs or video games	Consumer electronics or other high-tech equipment
Popular product categories (cross-border)	Clothes and shoes	Books, DVDs, CDs or video games	Consumer electronics or other high-tech equipment

57% of the most recent domestic and 70% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	70.8 (EU/EEA 30: 72.0)
cross-border	65.4 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

28% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




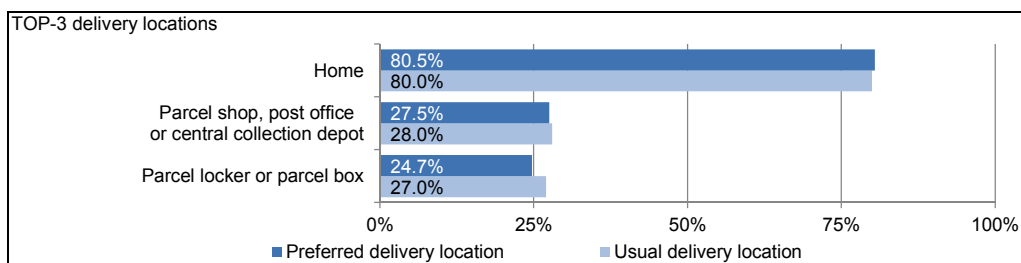
3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.63 of 5 (82% of highest performer)
CEP market size	Revenues n.a.
	Volume (2017) 7.2 m
Volume development (CAGR 2016-2017)	12.0%
<p>12.2 items per capita (2017)</p>	

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u>	
POST Luxembourg	> 90%
DPD	
DHL	
<u>Cross-border</u>	
DHL	> 90%
POST Luxembourg	
DPD	



Cross-border parcel services included in universal service	Yes, up to 10kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	Yes



<p>Unemployment rate 2017 (% of population)</p>	Minimum wage (per month in Purchasing Power Standard)	1 575
	Unionisation (country)	41%
	Collective Labour Agreement coverage (country-wide share of employees)	50%

	Number of employees	Development of employment
Sector (Postal and courier activities)	1 300 (2013)	n.a.
Universal Service Provider	4 371 (2017)	2.5% (CAGR 2013-2017)

4. Market developments



- Post Luxembourg benefits from e-commerce-driven growth in parcel deliveries and joins DHL Parcel European network in 2018.
- Parcel growth is also driven by Post Luxembourg's strategy to become a logistics partner for Asian e-commerce companies ("gateway for parcel delivery in Europe").
- Post Luxembourg has successfully launched a collection service for parcels from a German office in Trier ('PackUp Import').

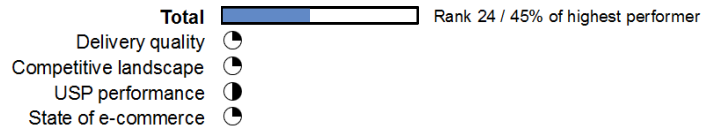
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Malta



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

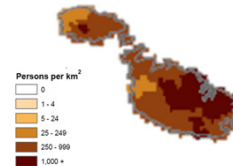
1. Country facts



Population (2017)	0.5 m
Country size	315 sqkm

GDP development (CAGR 2013-2017)	9.8%
GDP per capita (2017, Purchasing Power Standard)	27 755 (EU-28: 29 218)

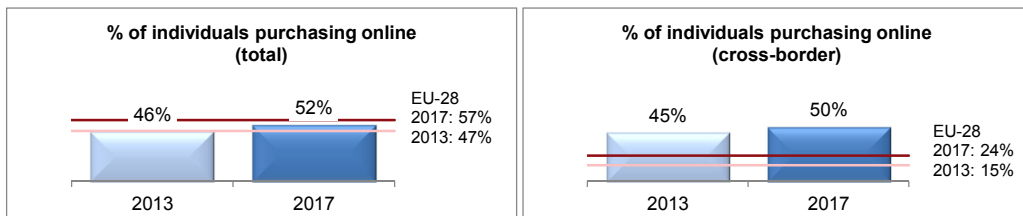
Digital Economy and Society Index (2018)	
Connectivity	73.1 (EU-28: 62.6) (90% of highest performer)
Use of Internet	63.3 (EU-28: 50.5) (84% of highest performer)
Integration of Digital Services	38.9 (EU-28: 40.1) (63% of highest performer)



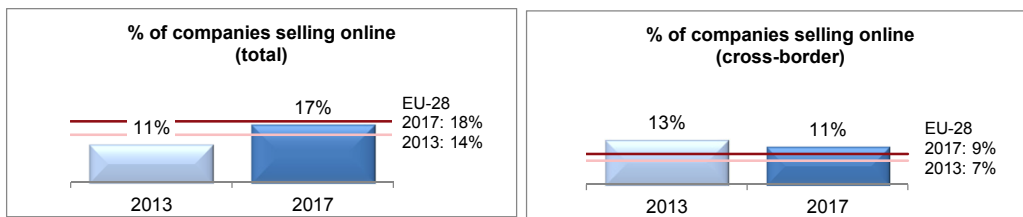
2. E-Commerce



Revenues B2C e-commerce	40 m€
Revenue per capita	86 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	12.2%
% of GDP	0.4%



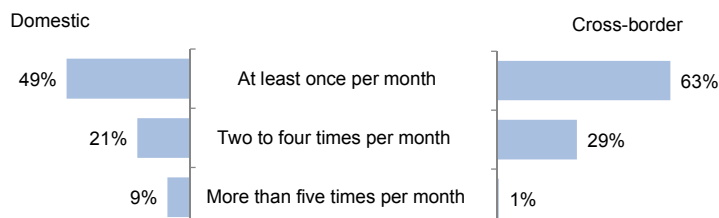
TOP3 countries ordered from	United Kingdom	China	Germany
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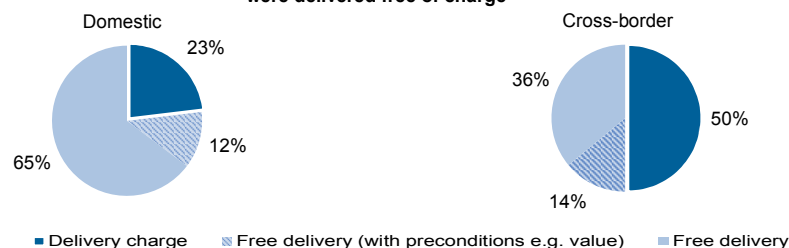
TOP3 countries in Europe sold to	United Kingdom	Italy	Germany
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TOP 3 E-retailers (by site-visits)	ebay.co.uk	ebay.com	amazon.co.uk
TOP 3 Payment methods	n.a.		

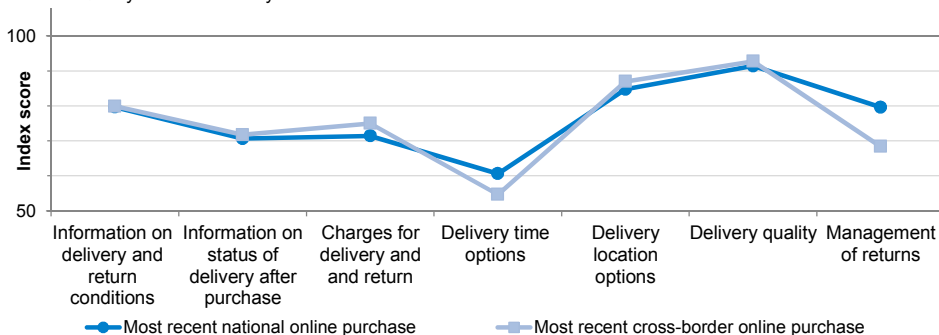
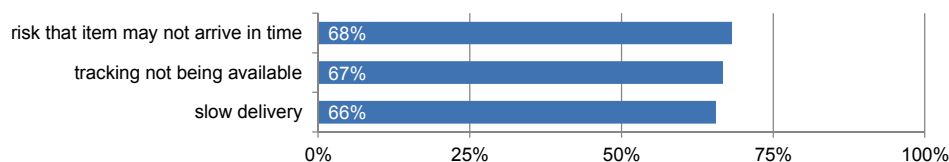

Highlights of WIK consumer survey
75% of online shoppers purchased goods in other countries

30% of online shoppers bought twice or more times a month from domestic online stores and 30% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

77% of the most recent domestic and 50% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	80.7 (EU/EEA 30: 72.0)
cross-border	74.3 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

42% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




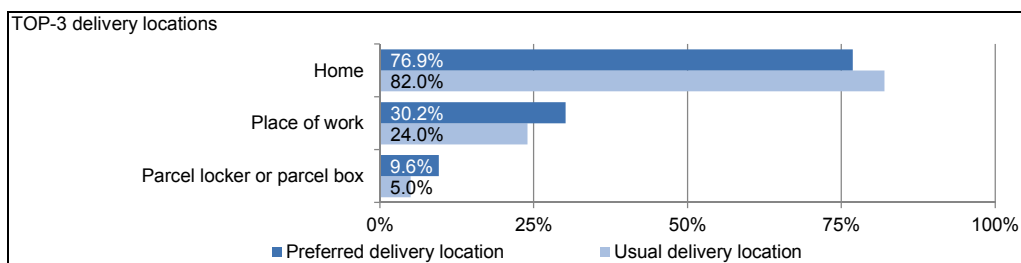
3. Parcel delivery



World Bank Logistics Performance Index (2018)	2.81 of 5 (57% of highest performer)
CEP market size	Revenues n.a.
	Volume (2017) 0.5 m
Volume development (CAGR 2013-2017)	10.3%
<p>1.1 items per capita (2017)</p> <p>2C&2B</p>	

Universal service provider's volume share in X2C parcel deliveries: 20-50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> Malta Post DHL Premiere Post	> 90%
<u>Cross-border</u> Malta Post DHL	> 90%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	No compensation fund
Contribution to NRA financing for exporting parcel carriers	Yes



<p>Unemployment rate 2017 (% of population)</p> <p>MT 4.0%</p> <p>EU-28 7.6%</p>	Minimum wage (per month in Purchasing Power Standard)	909
	Unionisation (country)	51%
	Collective Labour Agreement coverage (country-wide share of employees)	61%

	Number of employees	Development of employment
Sector (Postal and courier activities)	900 (2017)	0.0% (CAGR 2013-2017)
Universal Service Provider	n.a.	n.a.

4. Market developments



- In 2016 and 2017 Malta Post set up hubs in Germany, Italy, UK as well as in China and USA to facilitate cross-border shopping of Maltese consumers under the brand 'SendOn'.
- 'SendOn' allows Maltese consumers to purchase from e-retailers that do not ship to Malta (provision of an alternative local delivery address).
- Malta Post extends 'Easipik' parcel locker delivery service to all customers 24/7 (not only to customers using the 'SendOn' service).

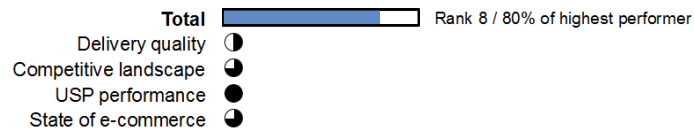
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Norway



Assessment of market performance - WIK Delivery Market Performance Index

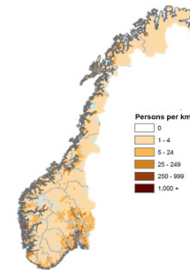


○ = 1, ● = 2, ◐ = 3, ◑ = 4, ● = 5

1. Country facts



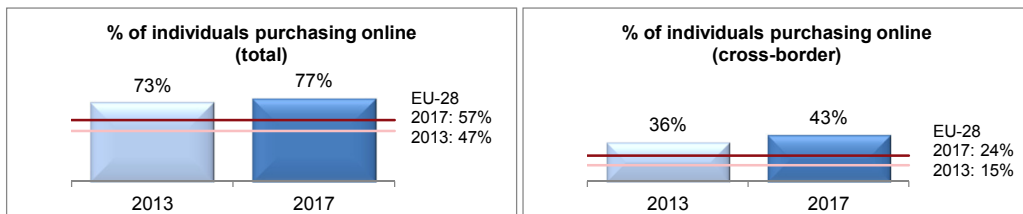
Population (2017)	5.3 m
Country size	385 203 sqkm
GDP development (CAGR 2013-2017)	-2.8%
GDP per capita (2017, Purchasing Power Standard)	43 483 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	n.a.
Use of Internet	n.a.
Integration of Digital Services	n.a.



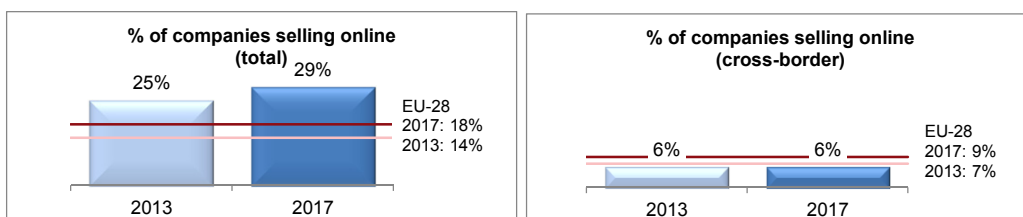
2. E-Commerce



Revenues B2C e-commerce	10 480 m€
Revenue per capita	1 993 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	11.6%
% of GDP	3.0%



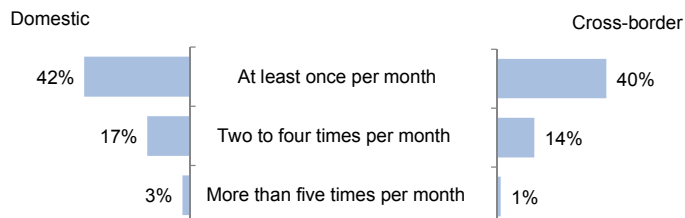
TOP3 countries ordered from	China	United Kingdom	USA
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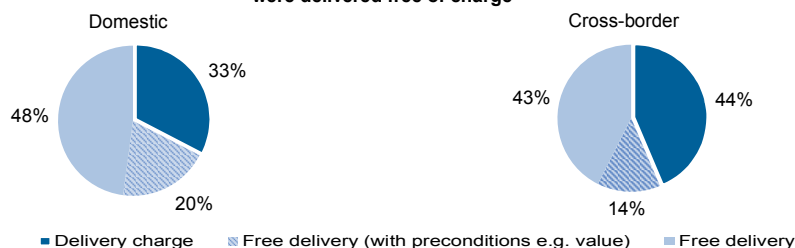
TOP3 countries in Europe sold to	Sweden	United Kingdom	Germany
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TOP 3 E-retailers (by revenue)	komplett.no	kolonial.no	coop.no
TOP 3 Payment methods	n.a.		

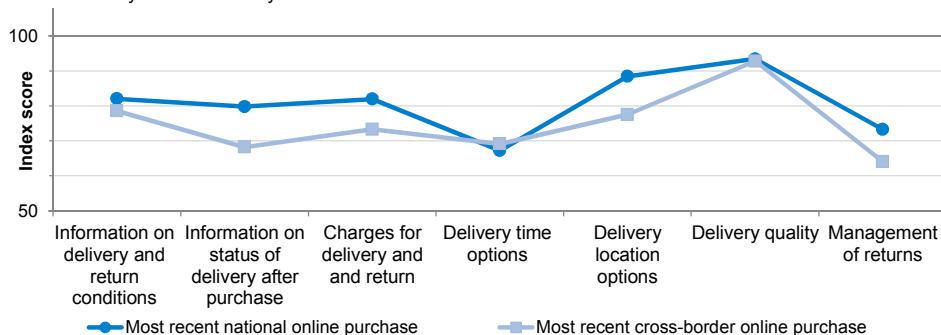
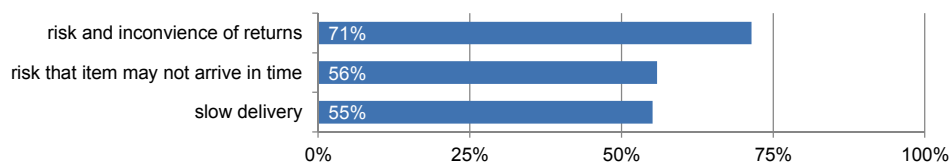

Highlights of WIK consumer survey
52% of online shoppers purchased goods in other countries

20% of online shoppers bought twice or more times a month from domestic online stores and 15% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

67% of the most recent domestic and 57% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	73.5 (EU/EEA 30: 72.0)
cross-border	72.6 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

45% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




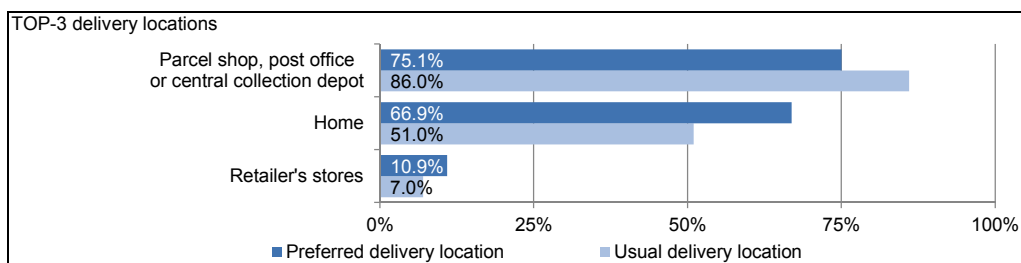
3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.7 of 5 (84% of highest performer)
CEP market size	Revenues n.a.
	Volume (2017) 56 m
Volume development (CAGR 2016-2017)	-1.1%
<p>10.6 items per capita (2017)</p>	

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> PostNord Posten Norge Bring	> 90%
<u>Cross-border</u> Posten Norge PostNord DHL Express	75%-85%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	No
Contribution to compensation fund for exporting parcel carriers?	No compensation fund
Contribution to NRA financing for exporting parcel carriers	Yes, within USO



<p>Unemployment rate 2017 (% of population)</p>	Minimum wage (per month in Purchasing Power Standard)	No generally applicable minimum wage
	Unionisation (country)	52%
	Collective Labour Agreement coverage (country-wide share of employees)	70%

	Number of employees	Development of employment
Sector (Postal and courier activities)	18 500 (2017)	-0.3% (CAGR 2013-2017)
Universal Service Provider	17 674 (FTE, 2017)	-1.8% (CAGR 2013-2017)

4. Market developments



- Posten / Bring joined the DHL Parcel European network for deliveries in Norway and Denmark in 2016.
- There is emerging competition in B2C parcel delivery from press distribution services (e.g. Helthjem in Norway).
- The Nordics are famous for their development of postal pick-up/drop-off (PUDO) points and the move away from 'to door' deliveries.

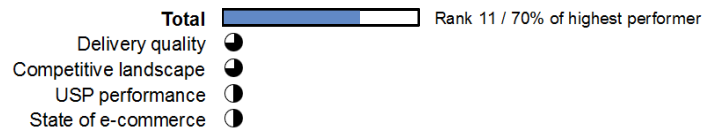
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Poland



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

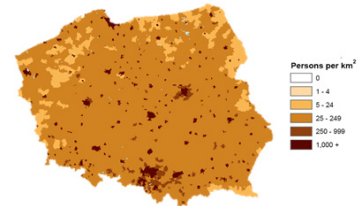
1. Country facts



Population (2017)	38.0 m
Country size	313 851 sqkm

GDP development (CAGR 2013-2017)	4.2%
GDP per capita (2017, Purchasing Power Standard)	20 182 (EU-28: 29 218)

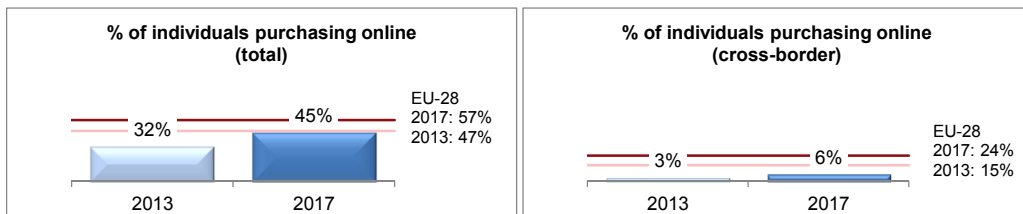
Digital Economy and Society Index (2018)	
Connectivity	58.8 (EU-28: 62.6) (72% of highest performer)
Use of Internet	42.1 (EU-28: 50.5) (56% of highest performer)
Integration of Digital Services	23.5 (EU-28: 40.1) (38% of highest performer)



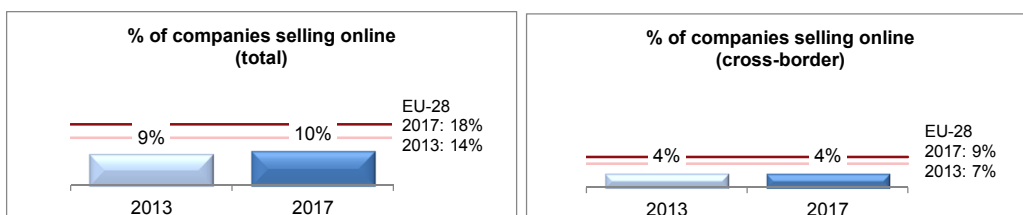
2. E-Commerce



Revenues B2C e-commerce	6 670 m€
Revenue per capita	176 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	13.8%
% of GDP	1.4%

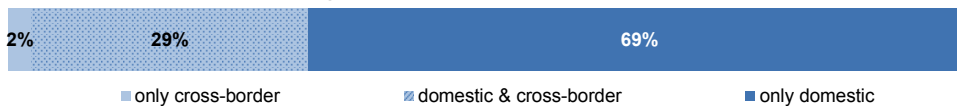
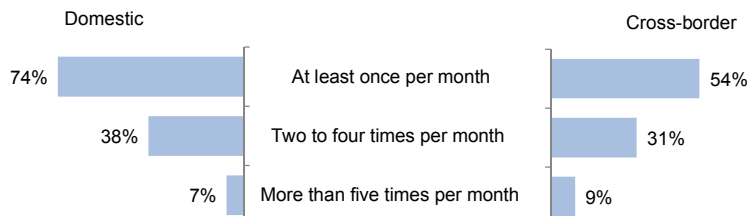


TOP3 countries ordered from	China	Germany	United Kingdom
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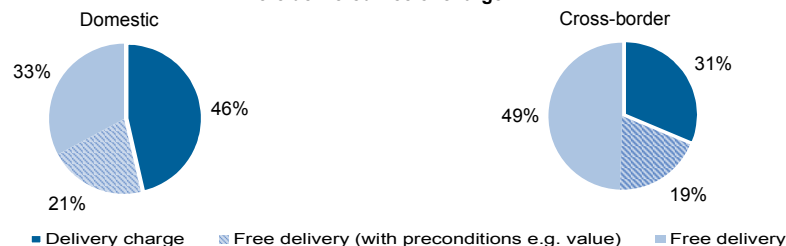


TOP3 countries in Europe sold to	Germany	Czech Republic	France
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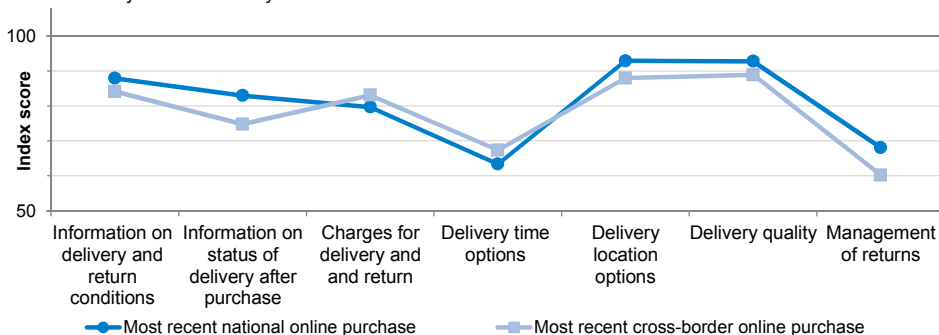
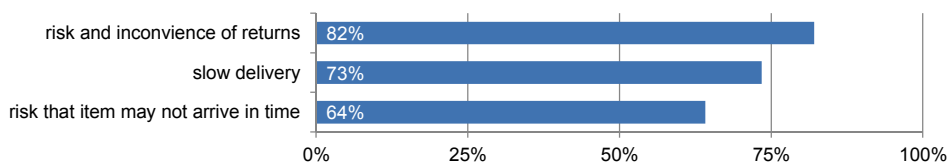
TOP 3 E-retailers (by site-visits)	allegro.pl	olx.pl	ceneo.pl
TOP 3 Payment methods	Bank transfer	Payu (local payment method)	Przelewy24 (local payment method)


Highlights of WIK consumer survey
31% of online shoppers purchased goods in other countries

45% of online shoppers bought twice or more times a month from domestic online stores and 40% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

54% of the most recent domestic and 68% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	74.9 (EU/EEA 30: 72.0)
cross-border	68.9 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

62% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery



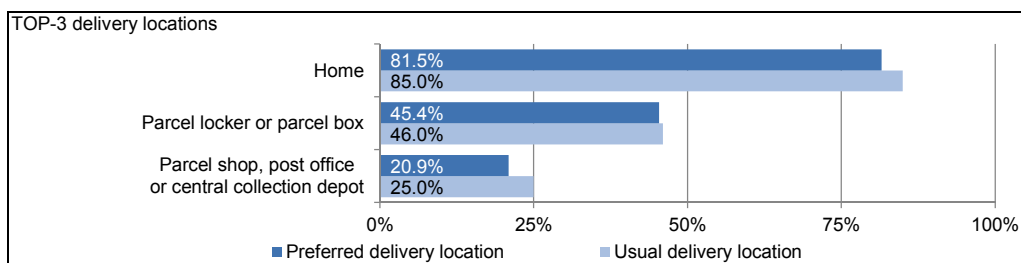
World Bank Logistics Performance Index (2018)	3.54 of 5 (79% of highest performer)
CEP market size	Revenues (2017) 1 012 m€
	Volume (2017) 334 m
Volume development (CAGR 2013-2017)	14.7%

8.8 items per capita (2017)

2C&2B

Universal service provider's volume share in X2C parcel deliveries: <20%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u>	
InPost	
Poczta Polska / Pocztex	55%-65%
DPD Poland	
<u>Cross-border</u>	
Poczta Polska / Pocztex	
UPS	60%-70%
FedEx	



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	No financing from carriers



Unemployment rate 2017 (% of population)	PL 4.9%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	878	
Unionisation (country)	15%	
Collective Labour Agreement coverage (country-wide share of employees)	10-15%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	110 400 (2017)	-5.0% (CAGR 2013-2017)
Universal Service Provider	n.a.	n.a.

4. Market developments



- The Polish delivery market is very competitive with many carriers, parcel brokers and specific shipping platforms that offer dedicated delivery and return services for e-retailers.
- The Polish e-commerce market is relatively 'closed'. Cross-border e-commerce purchases and sales play a very small role in the Polish e-commerce market.
- Allegro, the most important Polish online marketplace has launched Allegro Smart!, a subscription service for free deliveries and returns to PUDOs for eligible products and a minimum basket value of PLN 40.
- InPost started the roll-out of parcel lockers in Poland in 2009. Today, InPost operates its lockers in over 20 countries (incl. France and the UK) and InPost's lockers have been installed by postal operators (e.g. in Italy).

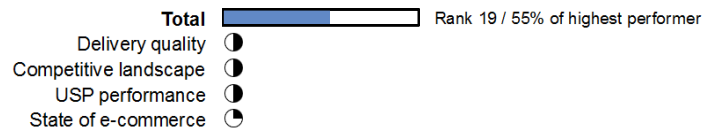
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Portugal



Assessment of market performance - WIK Delivery Market Performance Index

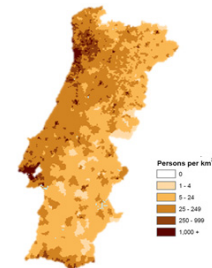


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1. Country facts



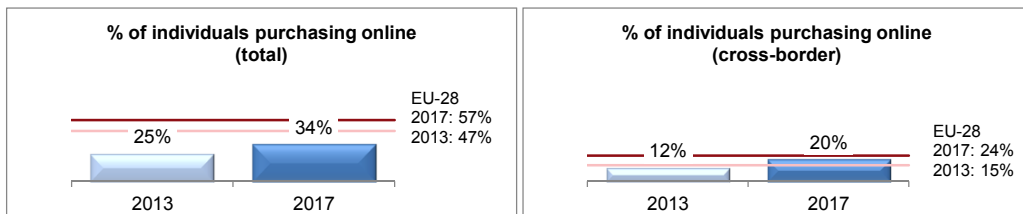
Population (2017)	10.3 m
Country size	88 847 sqkm
GDP development (CAGR 2013-2017)	3.2%
GDP per capita (2017, Purchasing Power Standard)	22 649 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	67.4 (EU-28: 62.6) (83% of highest performer)
Use of Internet	46.3 (EU-28: 50.5) (62% of highest performer)
Integration of Digital Services	41.9 (EU-28: 40.1) (68% of highest performer)



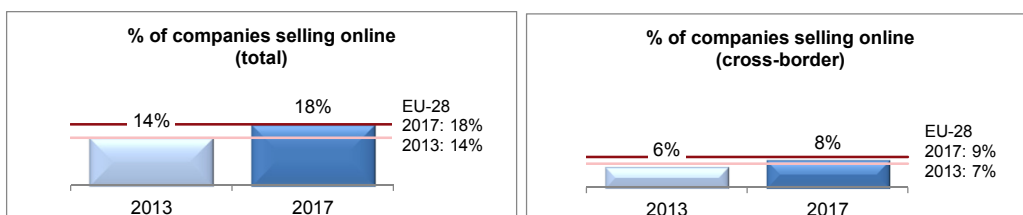
2. E-Commerce



Revenues B2C e-commerce	4 600 m€
Revenue per capita	446 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	15.0%
% of GDP	2.4%



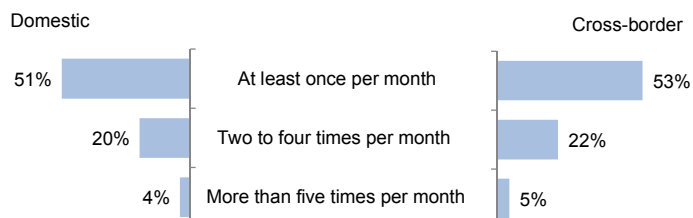
TOP3 countries ordered from	China	Spain	United Kingdom
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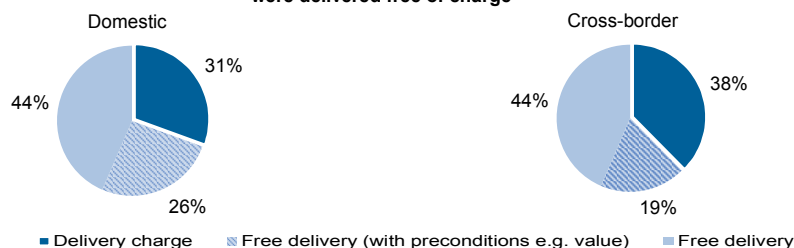
TOP3 countries in Europe sold to	Spain	France	Germany
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TOP 3 E-retailers (by revenue)	amazon.com	worten.pt	laredoute.pt
TOP 3 Payment methods	Digital wallet (paypal, Alipay)	Multibanco (local payment method)	Cash-on-delivery

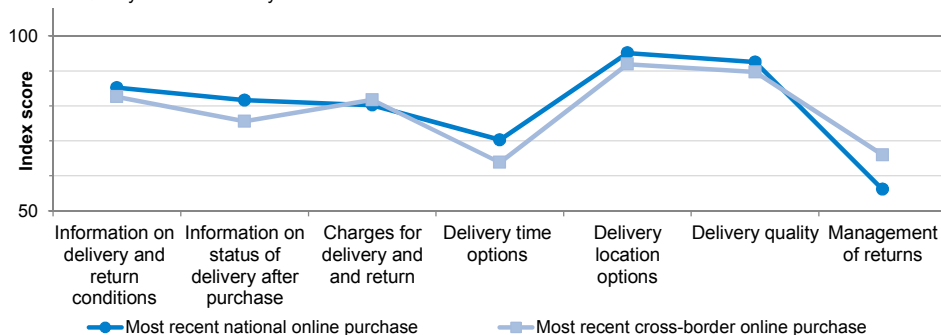
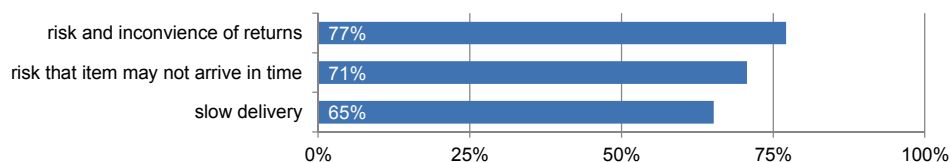

Highlights of WIK consumer survey
58% of online shoppers purchased goods in other countries

24% of online shoppers bought twice or more times a month from domestic online stores and 27% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Consumer electronics or other high-tech equipment	Clothes and shoes	Books, DVDs, CDs or video games

69% of the most recent domestic and 63% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	72.4 (EU/EEA 30: 72.0)
cross-border	66.3 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

61% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




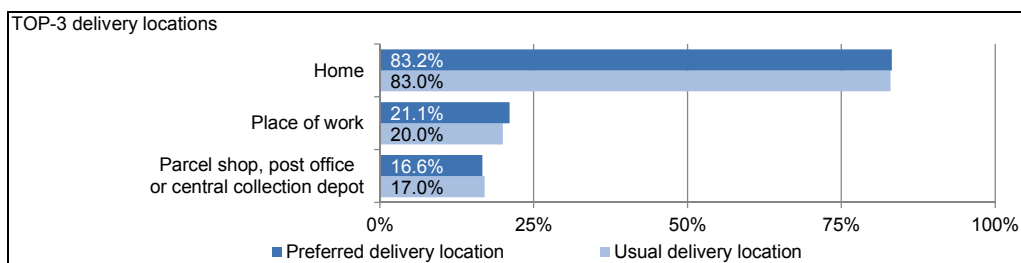
3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.64 of 5 (83% of highest performer)
CEP market size	Revenues (2016) 161 m€
	Volume (2017) 40.1 m
Volume development (CAGR 2013-2017)	-0.4%
<p>3.9 items per capita (2017)</p>	

Universal service provider's volume share in X2C parcel deliveries: 20-50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> CTT Correios Chronopost CTT Expresso	85%-95%
<u>Cross-border</u> CTT Correios / CTT Express DHL Seur	80%-90%



Cross-border parcel services included in universal service	Yes, up to 10kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	Yes



<p>Unemployment rate 2017 (% of population)</p>	<table> <tr> <td>Minimum wage (per month in Purchasing Power Standard)</td><td>795</td></tr> <tr> <td>Unionisation (country)</td><td>19%</td></tr> <tr> <td>Collective Labour Agreement coverage (country-wide share of employees)</td><td>92%</td></tr> </table>	Minimum wage (per month in Purchasing Power Standard)	795	Unionisation (country)	19%	Collective Labour Agreement coverage (country-wide share of employees)	92%
Minimum wage (per month in Purchasing Power Standard)	795						
Unionisation (country)	19%						
Collective Labour Agreement coverage (country-wide share of employees)	92%						

	Number of employees	Development of employment
Sector (Postal and courier activities)	16 600 (2017)	-2.1% (CAGR 2013-2017)
Universal Service Provider	11 708 (2017)	0.9% (CAGR 2013-2017)

4. Market developments



- The Spanish and the Portuguese delivery markets are closely related to each other with the same carriers active in both markets (e.g. MRW, SEUR, DHL Parcel Iberia)
- In 2017, DHL Parcel Iberia has been launched by splitting DHL Express Iberia into two roughly equally-sized businesses. DHL Parcel Iberia focuses on B2C e-commerce deliveries in Spain and Portugal.

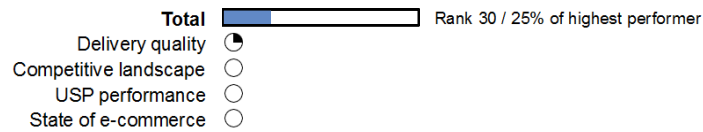
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Romania



Assessment of market performance - WIK Delivery Market Performance Index

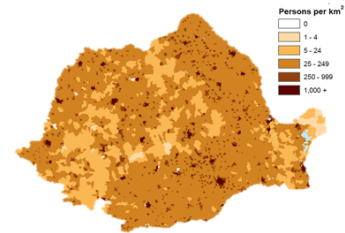


○ = 1, ● = 2, ◐ = 3, ◑ = 4, ● = 5

1. Country facts



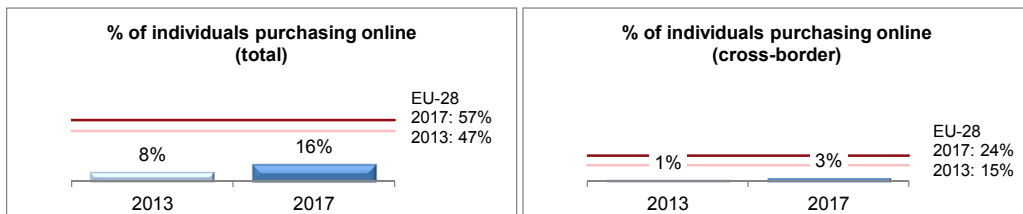
Population (2017)	19.6 m
Country size	239 068 sqkm
GDP development (CAGR 2013-2017)	6.8%
GDP per capita (2017, Purchasing Power Standard)	16 976 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	58.1 (EU-28: 62.6) (72% of highest performer)
Use of Internet	35.0 (EU-28: 50.5) (47% of highest performer)
Integration of Digital Services	17.8 (EU-28: 40.1) (29% of highest performer)



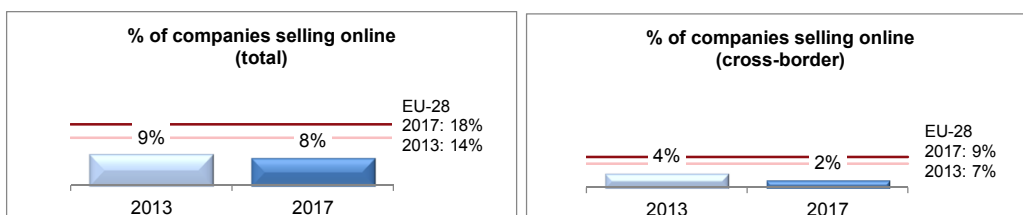
2. E-Commerce



Revenues B2C e-commerce	2 800 m€
Revenue per capita	143 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	28.1%
% of GDP	1.5%

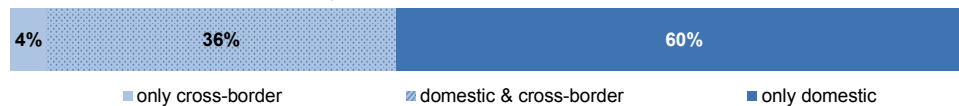
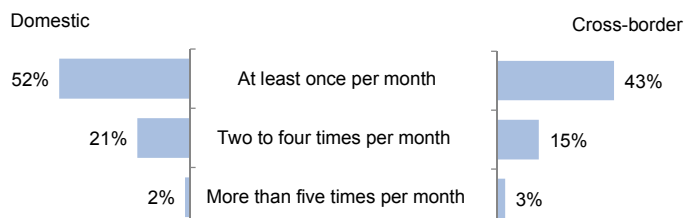


TOP3 countries ordered from	China	United Kingdom	Germany
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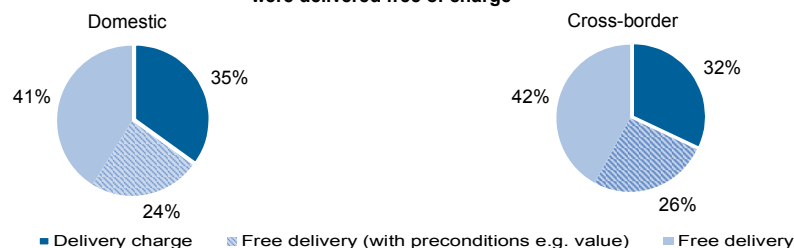


TOP3 countries in Europe sold to	Germany	Italy	France
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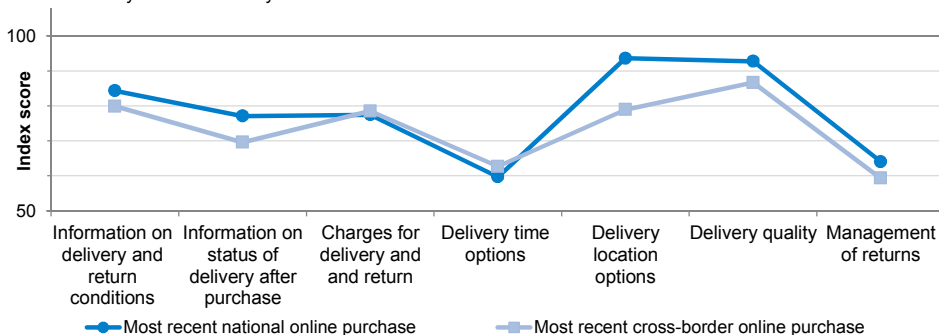
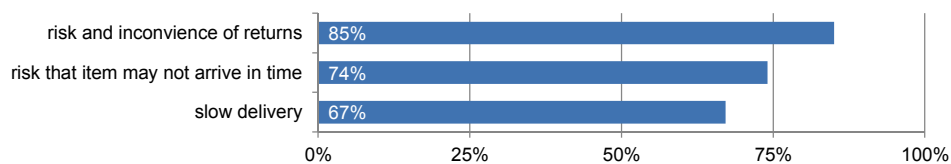
TOP 3 E-retailers (by site-visits)	olx.ro	emag.ro	aliexpress.com
TOP 3 Payment methods	Cash-on-delivery	Visa/Master card	Domestic bank credit card / debit card


Highlights of WIK consumer survey
40% of online shoppers purchased goods in other countries

23% of online shoppers bought twice or more times a month from domestic online stores and 18% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Furniture or homeware

65% of the most recent domestic and 68% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	71.1 (EU/EEA 30: 72.0)
cross-border	68.2 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

71% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery

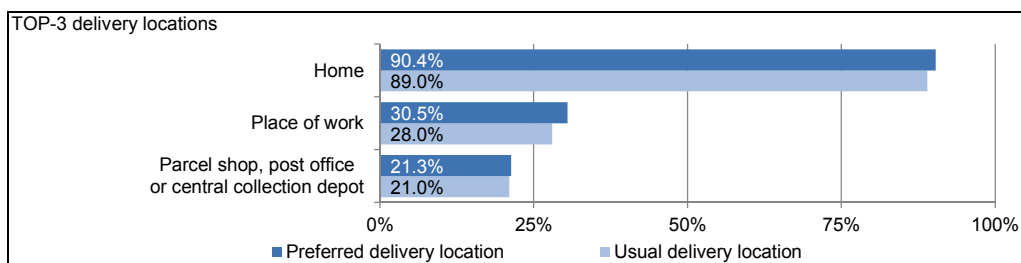


World Bank Logistics Performance Index (2018)	3.12 of 5 (66% of highest performer)
CEP market size	Revenues (2017) 450 m€
	Volume (2017) 79 m
Volume development (CAGR 2014-2017)	8.4%

4.0 items per capita (2017)

Universal service provider's volume share in X2C parcel deliveries: <20%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> GLS Poșta Română DPD Română	70%-80%
<u>Cross-border</u> Poșta Română DHL Express GLS	75%-85%



Cross-border parcel services included in universal service	Yes, up to 10kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	Yes, within USO



Unemployment rate 2017 (% of population)	RO 4.9%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	796	
Unionisation (country)	33%	
Collective Labour Agreement coverage (country-wide share of employees)	36%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	40 800 (2017)	-3.0% (CAGR 2013-2017)
Universal Service Provider	25 270 (2016)	-2.7% (CAGR 2013-2016)

4. Market developments



- The Romanian parcel market is dynamically growing. The biggest player in the Romanian parcel market, FAN Courier is heavily investing in its network and has recently launched parcel lockers (eBOX) in cooperation with KEBA.
- DPD Romania introduced a new international service called "DPD Express Regional" for better and quicker delivery services from Romania to Bulgaria, Hungary and Greece.

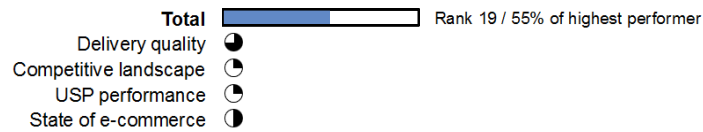
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Slovakia



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

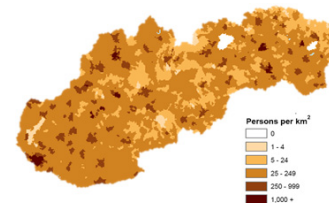
1. Country facts



Population (2017)	5.4 m
Country size	49 035 sqkm

GDP development (CAGR 2013-2017)	3.5%
GDP per capita (2017, Purchasing Power Standard)	22 457 (EU-28: 29 218)

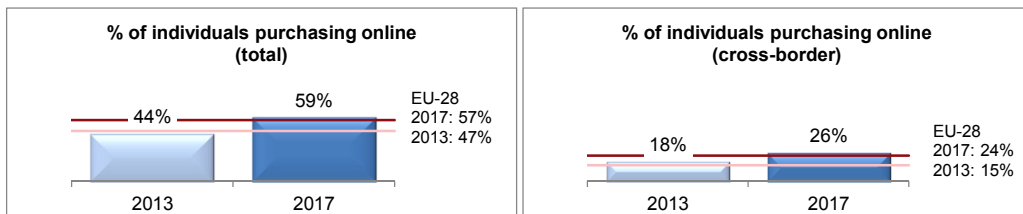
Digital Economy and Society Index (2018)	
Connectivity	55.1 (EU-28: 62.6) (68% of highest performer)
Use of Internet	51.3 (EU-28: 50.5) (68% of highest performer)
Integration of Digital Services	37.4 (EU-28: 40.1) (61% of highest performer)



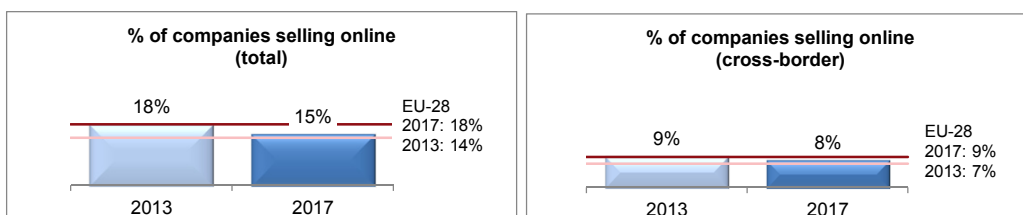
2. E-Commerce



Revenues B2C e-commerce	676 m€
Revenue per capita	124 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	12.5%
% of GDP	0.8%



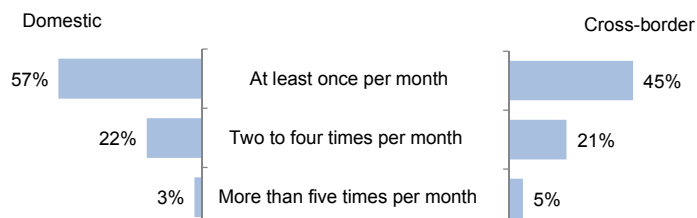
TOP3 countries ordered from	China	Czech Republic	United Kingdom
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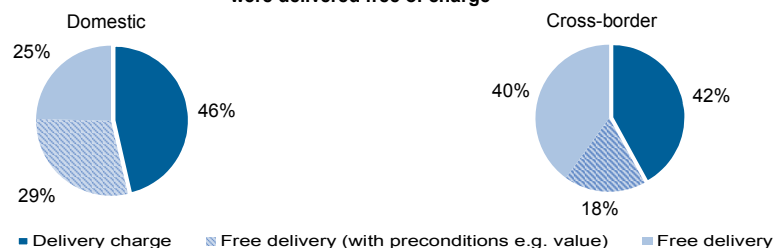
TOP3 countries in Europe sold to	Czech Republic	Austria	Germany
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TOP 3 E-retailers (by site-visits)	bazos.sk	heureka.sk	alza.sk
TOP 3 Payment methods	Cash-on-delivery	Bank transfer	Visa/Master card

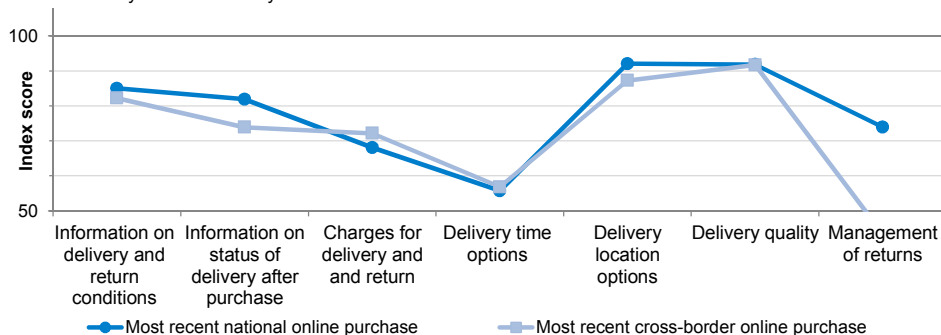
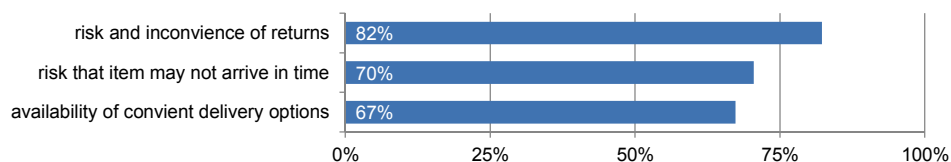

Highlights of WIK consumer survey
45% of online shoppers purchased goods in other countries

25% of online shoppers bought twice or more times a month from domestic online stores and 26% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

54% of the most recent domestic and 58% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	74.1 (EU/EEA 30: 72.0)
cross-border	57.9 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

68% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




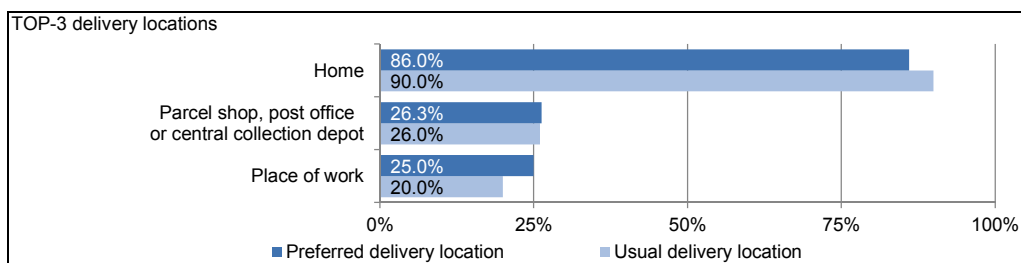
3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.03 of 5 (63% of highest performer)
CEP market size	Revenues n.a.
	Volume (2017) 51 m
Volume development (CAGR 2013-2017)	14.2%
<p>9.4 items per capita (2017)</p>	

Universal service provider's volume share in X2C parcel deliveries: 20-50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> Slovenská pošta DPD DHL Express	70%-80%
<u>Cross-border</u> Slovenská pošta DHL Express DPD	80%-90%



Cross-border parcel services included in universal service	Yes, up to 10kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	No financing from carriers



Unemployment rate 2017 (% of population)	SK 8.1%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	694	
Unionisation (country)	17%	
Collective Labour Agreement coverage (country-wide share of employees)	35%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	25 500 (2017)	4.1% (CAGR 2013-2017)
Universal Service Provider	13 446 (2016)	-0.5% (CAGR 2013-2016)

4. Market developments



- Czechia's and Slovakia's delivery markets are closely connected as well as both e-commerce markets.
- DHL Parcel launched a new parcel carrier in Slovakia as delivery partner for the DHL Parcel Connect.

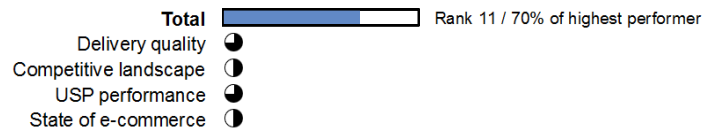
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Slovenia



Assessment of market performance - WIK Delivery Market Performance Index

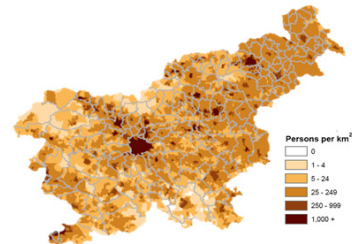


○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

1. Country facts



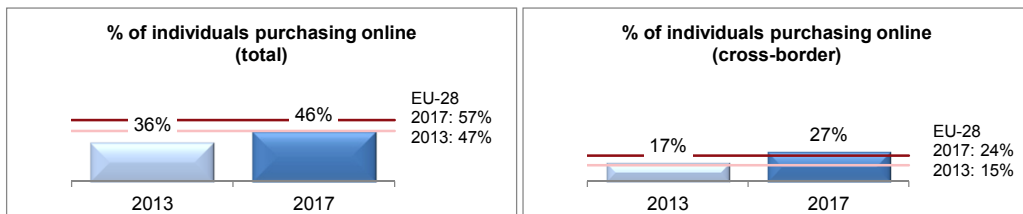
Population (2017)	2.1 m
Country size	20 277 sqkm
GDP development (CAGR 2013-2017)	4.5%
GDP per capita (2017, Purchasing Power Standard)	24 057 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	60.3 (EU-28: 62.6) (74% of highest performer)
Use of Internet	44.9 (EU-28: 50.5) (60% of highest performer)
Integration of Digital Services	47.9 (EU-28: 40.1) (78% of highest performer)



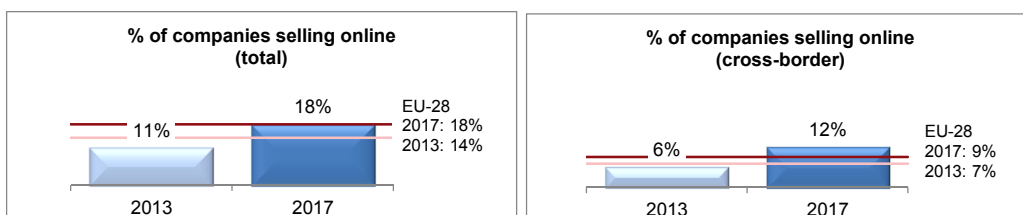
2. E-Commerce



Revenues B2C e-commerce	266 m€
Revenue per capita	129 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	13.7%
% of GDP	0.6%

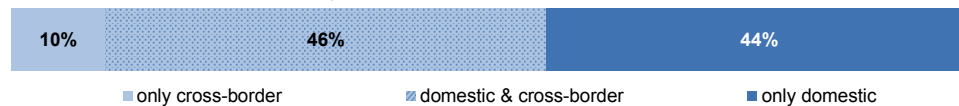
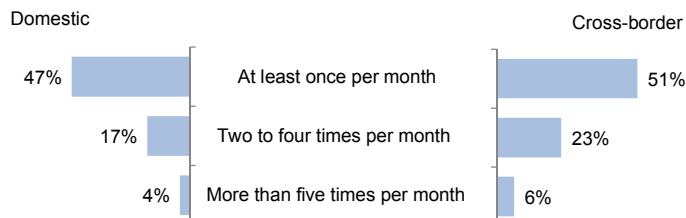


TOP3 countries ordered from	China	Germany	United Kingdom
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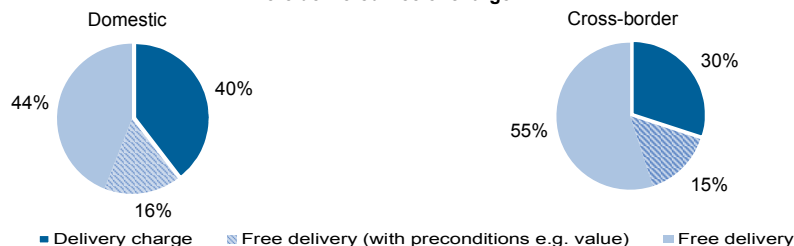


TOP3 countries in Europe sold to	Austria	Croatia	Germany
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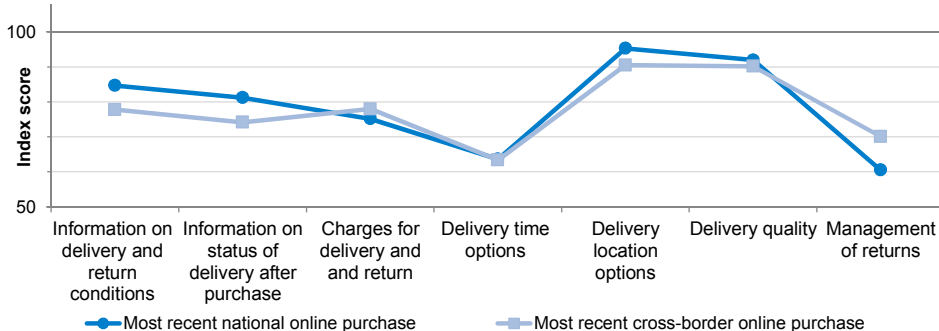
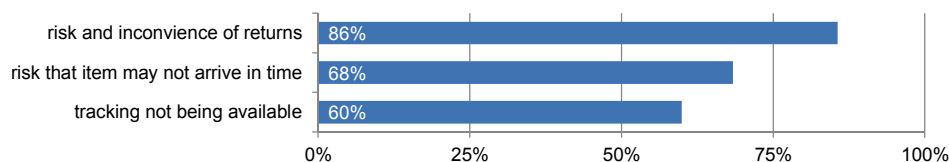
TOP 3 E-retailers (by site-visits)	bolha.com	mimovrste.com	aliexpress.com
TOP 3 Payment methods	Cash-on-delivery	Visa/Master card	Digital wallet (paypal, Alipay)


Highlights of WIK consumer survey
56% of online shoppers purchased goods in other countries

21% of online shoppers bought twice or more times a month from domestic online stores and 30% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Consumer electronics or other high-tech equipment	Clothes and shoes	Furniture or homeware
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Furniture or homeware

60% of the most recent domestic and 70% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	72.4 (EU/EEA 30: 72.0)
cross-border	71.1 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

58% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




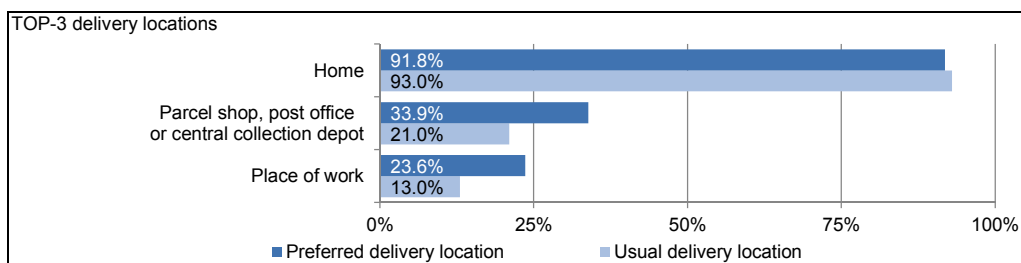
3. Parcel delivery



World Bank Logistics Performance Index (2018)	3.31 of 5 (72% of highest performer)
CEP market size	Revenues n.a.
	Volume (2016) 17.2 m
Volume development (CAGR 2013-2016)	11.8%
<p>8.3 items per capita (2016)</p>	

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> Pošta Slovenije GLS DPD	> 90%
<u>Cross-border</u> Pošta Slovenije DPD GLS	80%-90%



Cross-border parcel services included in universal service	Yes, up to 10kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	n.a.
Contribution to NRA financing for exporting parcel carriers	Yes, within USO



Unemployment rate 2017 (% of population)	SI 6.6%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	988	
Unionisation (country)	27%	
Collective Labour Agreement coverage (country-wide share of employees)	90%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	7 600 (2017)	0.0% (CAGR 2013-2017)
Universal Service Provider	5 822 (FTE, 2017)	-0.5% (CAGR 2013-2017)

4. Market developments



- Posta Slovenije joined the DHL Parcel network in 2016. The partnership drives the company to improve B2C delivery services to comply with the DHL Parcel Connect standard.
- DPD and GLS, both, are very active carriers in B2C delivery services in Slovenia with a dedicated network of parcel lockers (GLS) and parcel shops.

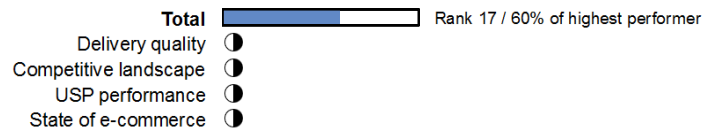
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Spain



Assessment of market performance - WIK Delivery Market Performance Index

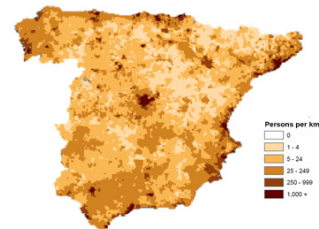


○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ◓ = 5

1. Country facts



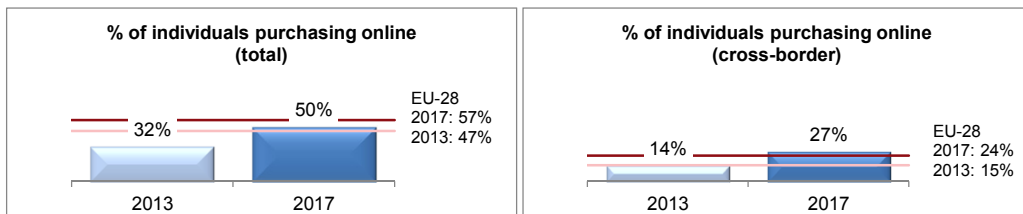
Population (2017)	46.5 m
Country size	498 504 sqkm
GDP development (CAGR 2013-2017)	3.2%
GDP per capita (2017, Purchasing Power Standard)	26 750 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	64.7 (EU-28: 62.6) (80% of highest performer)
Use of Internet	49.4 (EU-28: 50.5) (66% of highest performer)
Integration of Digital Services	49.8 (EU-28: 40.1) (81% of highest performer)



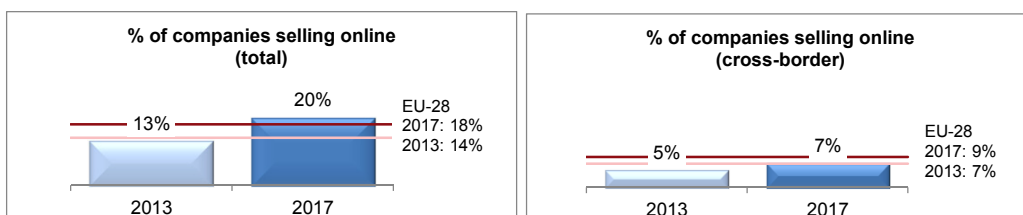
2. E-Commerce



Revenues B2C e-commerce	23 910 m€
Revenue per capita	514 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	17.8%
% of GDP	2.1%



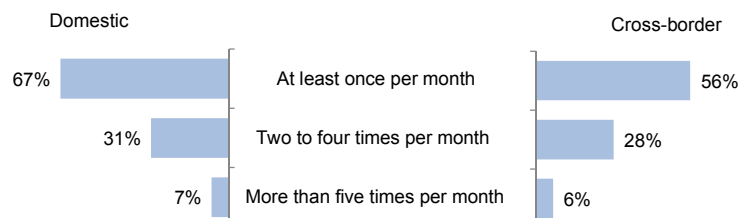
TOP3 countries ordered from	China	United Kingdom	Germany
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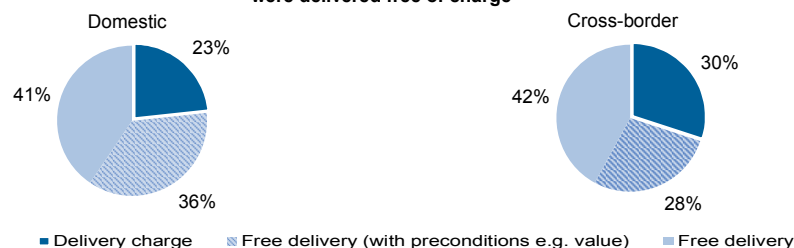
TOP3 countries in Europe sold to	Germany	France	United Kingdom
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TOP 3 E-retailers (by revenue)	amazon.es	elcorteingles.es	pccomponents.com
TOP 3 Payment methods	Digital wallet (paypal, Alipay)	Visa/Master card	Domestic bank credit card / debit card

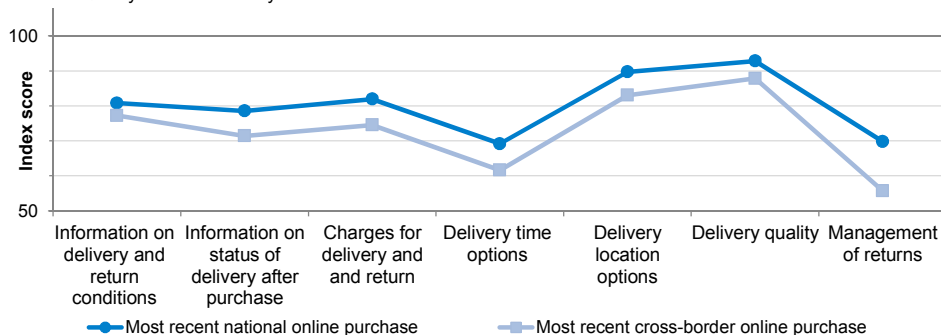
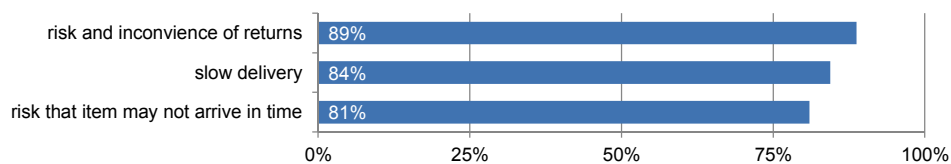

Highlights of WIK consumer survey
54% of online shoppers purchased goods in other countries

38% of online shoppers bought twice or more times a month from domestic online stores and 35% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

77% of the most recent domestic and 70% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	74.7 (EU/EEA 30: 72.0)
cross-border	66.4 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

69% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery



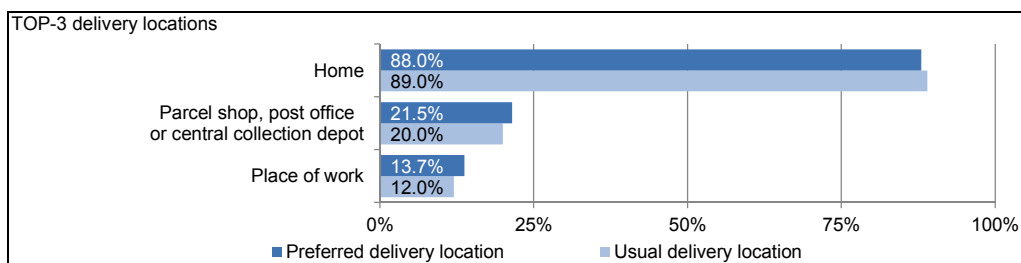
World Bank Logistics Performance Index (2018)	3.83 of 5 (88% of highest performer)
CEP market size	Revenues (2017) 2 714 m€
	Volume (2017) 459 m
Volume development (CAGR 2013-2017)	15.9%

9.9 items per capita (2017)

2C&2B

Universal service provider's volume share in X2C parcel deliveries: 20-50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> SEUR MRW Correos	65%-75%
<u>Cross-border</u> Correos SEUR DHL	60%-70%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	Yes
Contribution to NRA financing for exporting parcel carriers	No financing from carriers



Unemployment rate 2017 (% of population)	ES 17.2%	EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	930	
Unionisation (country)	19%	
Collective Labour Agreement coverage (country-wide share of employees)	70%	

	Number of employees	Development of employment
Sector (Postal and courier activities)	109 400 (2017)	3.0% (CAGR 2013-2017)
Universal Service Provider	52 476 (FTE, 2017)	-1.0% (CAGR 2013-2017)

4. Market developments



- Consolidation in the Spanish parcel & express market: GLS integrated ASM and acquired the express parcels delivery company Redyser Transporte in February 2018.
- Amazon is affecting the Spanish delivery market by launching own parcel delivery services in big Spanish cities (Barcelona, Madrid, Sevilla and Valencia).
- In 2017, SEUR launched a city logistics concept in Madrid and Barcelona with 'micro-depots'. Deliveries are made by part-time couriers working for crowdsourced delivery firm Stuart, a 100% La Poste subsidiary.
- Citibox offers carrier-agnostic parcel locker services (start-up founded in 2015 that offers a smart solution for e-commerce deliveries).

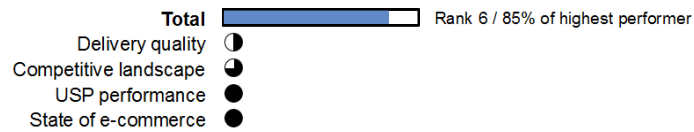
Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Sweden



Assessment of market performance - WIK Delivery Market Performance Index



○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ● = 5

1. Country facts



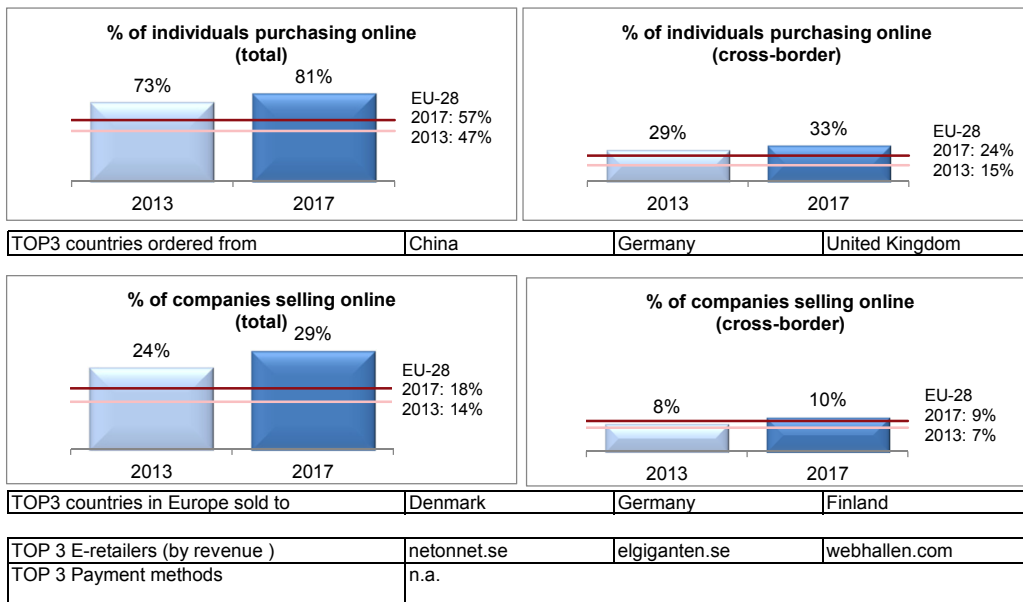
Population (2017)	10.0 m
Country size	449 896 sqkm
GDP development (CAGR 2013-2017)	2.3%
GDP per capita (2017, Purchasing Power Standard)	36 097 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	76.0 (EU-28: 62.6) (94% of highest performer)
Use of Internet	73.4 (EU-28: 50.5) (98% of highest performer)
Integration of Digital Services	56.4 (EU-28: 40.1) (92% of highest performer)



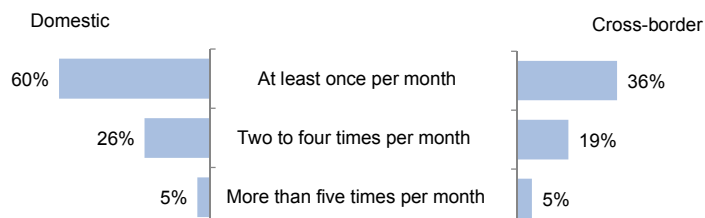
2. E-Commerce



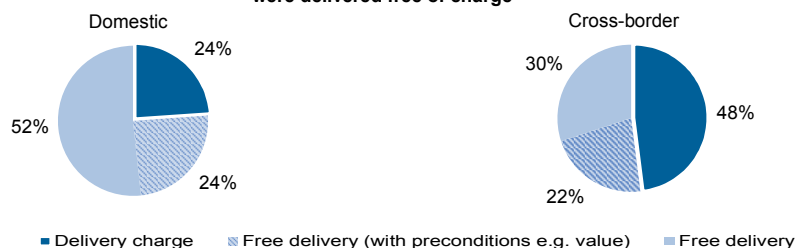
Revenues B2C e-commerce	14 500 m€
Revenue per capita	1 451 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	16.0%
% of GDP	3.0%



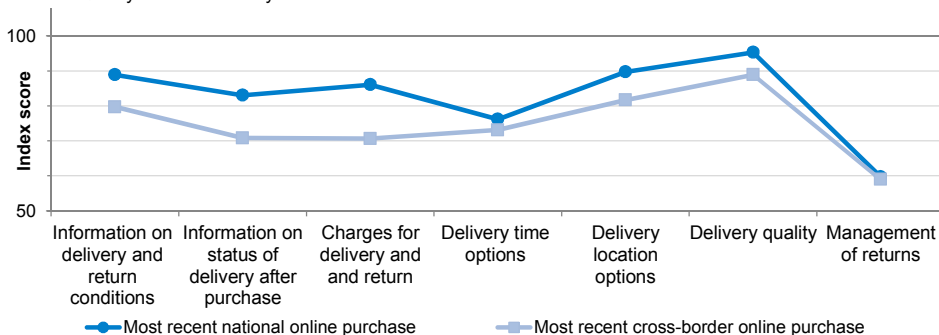
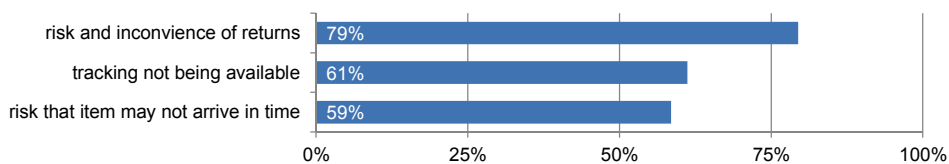

Highlights of WIK consumer survey
50% of online shoppers purchased goods in other countries

31% of online shoppers bought twice or more times a month from domestic online stores and 24% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games
Popular product categories (cross-border)	Clothes and shoes	Consumer electronics or other high-tech equipment	Books, DVDs, CDs or video games

76% of the most recent domestic and 52% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	70.9 (EU/EEA 30: 72.0)
cross-border	69.5 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

55% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery

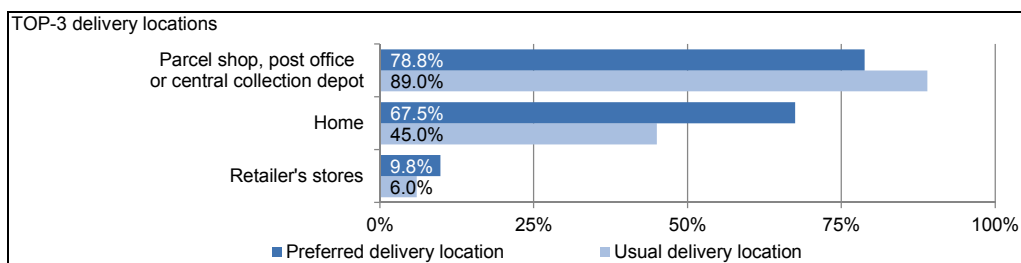


World Bank Logistics Performance Index (2018)	4.05 of 5 (95% of highest performer)
CEP market size	Revenues (2016) 4 400 m€
	Volume (2017) 113 m
Volume development (CAGR 2013-2017)	8.3%

11.3 items per capita (2017)


Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> PostNord DB Schenker DHL	> 90%
<u>Cross-border</u> PostNord DHL DB Schenker	80%-90%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	No
Contribution to compensation fund for exporting parcel carriers?	No compensation fund
Contribution to NRA financing for exporting parcel carriers	No financing from carriers



Unemployment rate 2017 (% of population)	 SE 6.7% EU-28 7.6%	Minimum wage (per month in Purchasing Power Standard)	No generally applicable minimum wage
		Unionisation (country)	70%
		Collective Labour Agreement coverage (country-wide share of employees)	88%

	Number of employees	Development of employment
Sector (Postal and courier activities)	33 500 (2017)	-3.4% (CAGR 2013-2017)
Universal Service Provider	19 550 (FTE, 2017)	-4.7% (CAGR 2013-2017)

4. Market developments



- Since March 2018, Sweden collects VAT of up to 25% for shipments with a value of less than EUR 22 from countries outside the EU. In addition, PostNord has introduced a handling fee of SEK 75 for packages with a declared value of
- PostNord made a deal with the Chinese shopping app Wish: Swedes using Wish are not burdened with the VAT payment or PostNord's handling fee after the arrival of the shipments in Sweden. These charges are handled by Wish
- Consolidation in the Swedish parcel market: Bring acquires part of Bussgods in 2014 to get access to 600 pick-up points/parcel shops for B2C packages.
- The Nordics are famous for their development of postal pick-up/drop-off (PUDO) points but Swedish consumers increasingly prefer home delivery.

Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - Netherlands



Assessment of market performance - WIK Delivery Market Performance Index

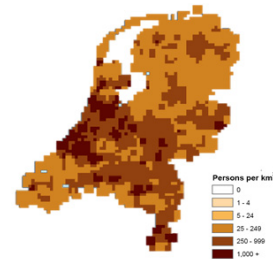
Total		Rank 1 / 100% of highest performer
Delivery quality	●	
Competitive landscape	●	
USP performance	●	
State of e-commerce	●	

○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ● = 5

1. Country facts



Population (2017)	17.1 m
Country size	37 824 sqkm
GDP development (CAGR 2013-2017)	2.9%
GDP per capita (2017, Purchasing Power Standard)	37 610 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	81.1 (EU-28: 62.6) (100% of highest performer)
Use of Internet	66.5 (EU-28: 50.5) (89% of highest performer)
Integration of Digital Services	52.3 (EU-28: 40.1) (85% of highest performer)



2. E-Commerce

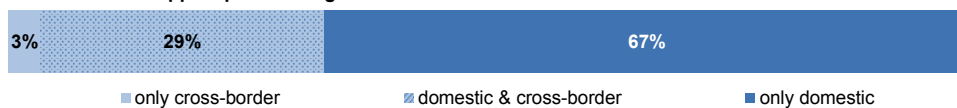
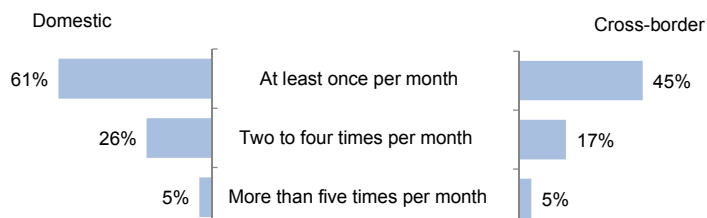


Revenues B2C e-commerce	22 500 m€
Revenue per capita	1 317 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	15.0%
% of GDP	3.1%

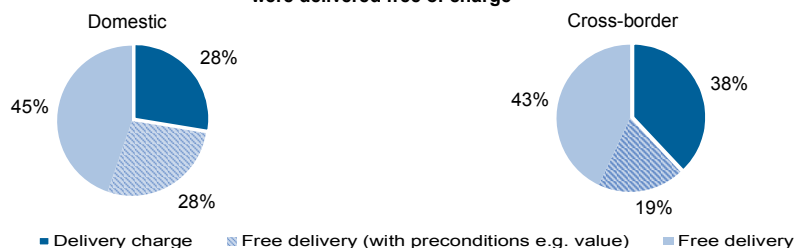
<p>% of individuals purchasing online (total)</p> <table><thead><tr><th>Year</th><th>% of individuals purchasing online (total)</th></tr></thead><tbody><tr><td>2013</td><td>69%</td></tr><tr><td>2017</td><td>79%</td></tr></tbody></table> <p>EU-28 2017: 57% 2013: 47%</p>		Year	% of individuals purchasing online (total)	2013	69%	2017	79%	<p>% of individuals purchasing online (cross-border)</p> <table><thead><tr><th>Year</th><th>% of individuals purchasing online (cross-border)</th></tr></thead><tbody><tr><td>2013</td><td>20%</td></tr><tr><td>2017</td><td>36%</td></tr></tbody></table> <p>EU-28 2017: 24% 2013: 15%</p>		Year	% of individuals purchasing online (cross-border)	2013	20%	2017	36%
Year	% of individuals purchasing online (total)														
2013	69%														
2017	79%														
Year	% of individuals purchasing online (cross-border)														
2013	20%														
2017	36%														
TOP3 countries ordered from	China	Germany	United Kingdom												

<p>% of companies selling online (total)</p> <table><thead><tr><th>Year</th><th>% of companies selling online (total)</th></tr></thead><tbody><tr><td>2013</td><td>13%</td></tr><tr><td>2017</td><td>16%</td></tr></tbody></table> <p>EU-28 2017: 18% 2013: 14%</p>		Year	% of companies selling online (total)	2013	13%	2017	16%	<p>% of companies selling online (cross-border)</p> <table><thead><tr><th>Year</th><th>% of companies selling online (cross-border)</th></tr></thead><tbody><tr><td>2013</td><td>9%</td></tr><tr><td>2017</td><td>12%</td></tr></tbody></table> <p>EU-28 2017: 9% 2013: 7%</p>		Year	% of companies selling online (cross-border)	2013	9%	2017	12%
Year	% of companies selling online (total)														
2013	13%														
2017	16%														
Year	% of companies selling online (cross-border)														
2013	9%														
2017	12%														
TOP3 countries in Europe sold to	Belgium	Germany	France												

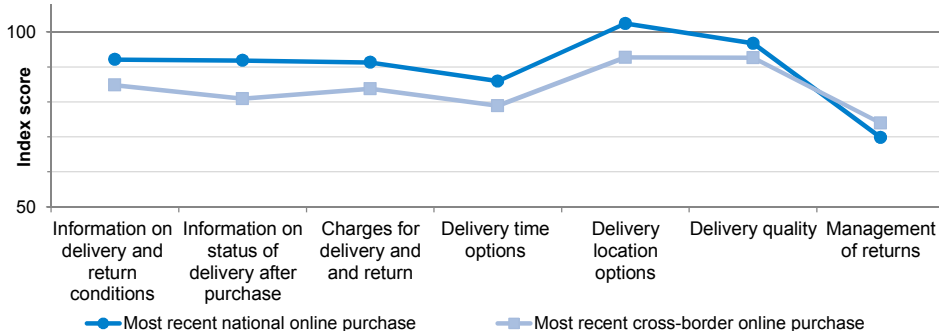
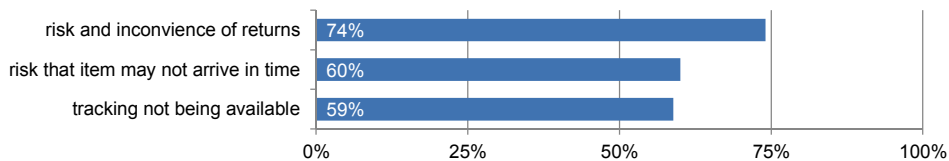
TOP 3 E-retailers (by revenue)	bol.com	coolblue.nl	zalando.nl
TOP 3 Payment methods	iDEAL (local payment method)	Digital wallet (paypal, Alipay)	Acceptgiro (local payment method)


Highlights of WIK consumer survey
33% of online shoppers purchased goods in other countries

31% of online shoppers bought twice or more times a month from domestic online stores and 22% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Books, DVDs, CDs or video games	Consumer electronics or other high-tech equipment
Popular product categories (cross-border)	Clothes and shoes	Books, DVDs, CDs or video games	Consumer electronics or other high-tech equipment

72% of the most recent domestic and 62% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	69.0 (EU/EEA 30: 72.0)
cross-border	71.3 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

51% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




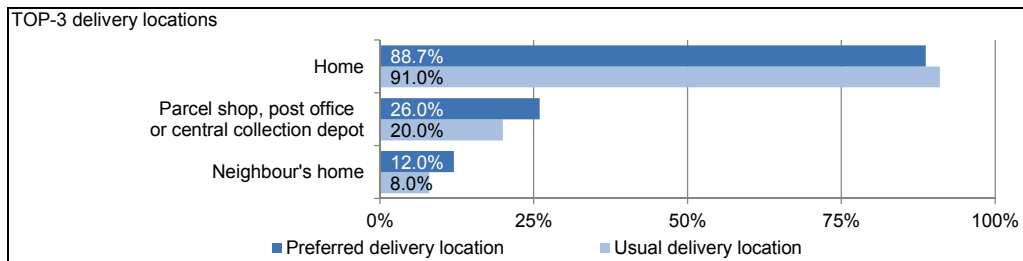
3. Parcel delivery



World Bank Logistics Performance Index (2018)	4.02 of 5 (94% of highest performer)
CEP market size	Revenues (2017) 2 130 m€
	Volume (2017) 420 m
Volume development (CAGR 2013-2017)	14.5%
<p>24.6 items per capita (2017)</p>	


Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> PostNL DHL DPD	> 90%
<u>Cross-border</u> PostNL DHL DPD	85%-95%



Cross-border parcel services included in universal service	Yes, up to 20kg
Authorisation required for exporting parcel carriers?	No
Contribution to compensation fund for exporting parcel carriers?	No compensation fund
Contribution to NRA financing for exporting parcel carriers	Yes



Unemployment rate 2017 (% of population)		Minimum wage (per month in Purchasing Power Standard)	1 420
		Unionisation (country)	20%
		Collective Labour Agreement coverage (country-wide share of employees)	81%

	Number of employees	Development of employment
Sector (Postal and courier activities)	63 000 (2017)	-1.5% (CAGR 2013-2017)
Universal Service Provider	25 279 (FTE, 2017)	-5.0% (CAGR 2013-2017)

4. Market developments



- Belgian and Dutch delivery markets are growing together, with PostNL active in both countries.
- The Dutch delivery market is very innovative with many start-ups like the e-food seller Picnic and attracts significant investments from DHL Parcel, DPD and GLS.
- PostNL is the strongest player in the Dutch B2C delivery market with a wide range of delivery times and options and close relations to Dutch e-retailers.
- DPD launches a ParcelLetter service for consumers and SME, a low cost delivery solution for small and light-weight merchandise (pilot only in the Netherlands).

Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.



Country Fact Sheet - United Kingdom



Assessment of market performance - WIK Delivery Market Performance Index

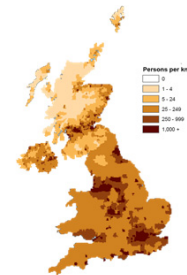
Total	<div style="width: 100%;"></div>	Rank 2 / 95% of highest performer
Delivery quality	●	
Competitive landscape	●	
USP performance	●	
State of e-commerce	●	

○ = 1, ◐ = 2, ◑ = 3, ◒ = 4, ● = 5

1. Country facts



Population (2017)	65.8 m
Country size	247 763 sqkm
GDP development (CAGR 2013-2017)	3.0%
GDP per capita (2017, Purchasing Power Standard)	31 596 (EU-28: 29 218)
Digital Economy and Society Index (2018)	
Connectivity	68.8 (EU-28: 62.6) (85% of highest performer)
Use of Internet	62.4 (EU-28: 50.5) (83% of highest performer)
Integration of Digital Services	40.0 (EU-28: 40.1) (65% of highest performer)

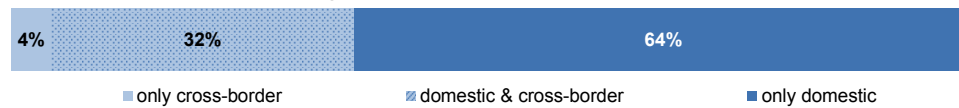
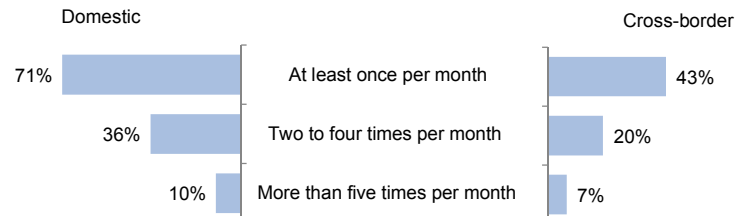


2. E-Commerce

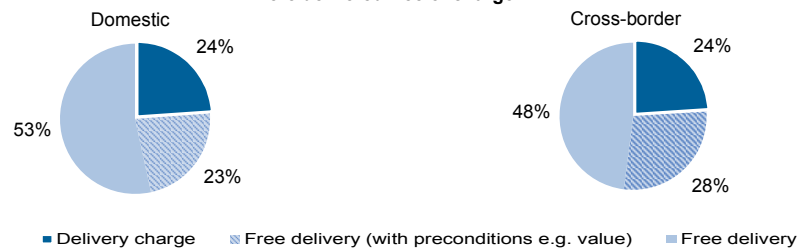


Revenues B2C e-commerce	156 710 m€
Revenue per capita	2 381 € (EU-28: 921 €)
Revenue development (CAGR 2013-2017)	16.9%
% of GDP	6.7%

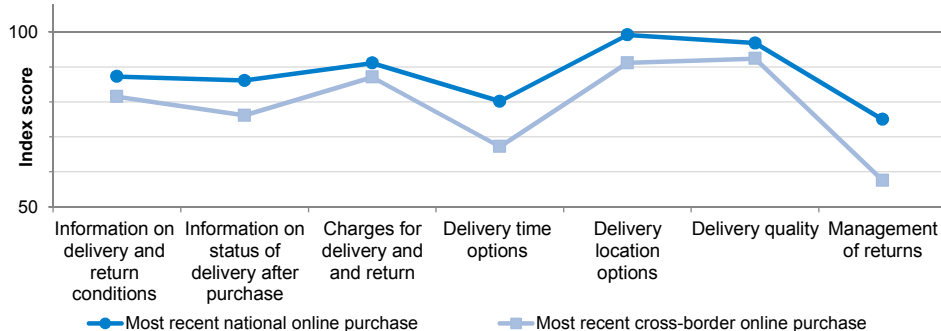
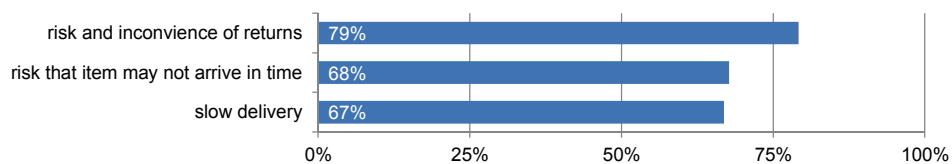
<p>% of individuals purchasing online (total)</p> <p>77% 82%</p> <p>2013 2017</p> <p>EU-28 2017: 57% 2013: 47%</p>		<p>% of individuals purchasing online (cross-border)</p> <p>21% 36%</p> <p>2013 2017</p> <p>EU-28 2017: 24% 2013: 15%</p>		
TOP3 countries ordered from		China	USA	Germany
<p>% of companies selling online (total)</p> <p>19% 20%</p> <p>2013 2017</p> <p>EU-28 2017: 18% 2013: 14%</p>		<p>% of companies selling online (cross-border)</p> <p>9% 9%</p> <p>2013 2017</p> <p>EU-28 2017: 9% 2013: 7%</p>		
TOP3 countries in Europe sold to		Germany	France	Spain
TOP 3 E-retailers (by revenue)		amazon.co.uk	tesco.com	argos.co.uk
TOP 3 Payment methods		Visa/Master card	Digital wallet (paypal, Alipay)	Domestic bank credit card / debit card


Highlights of WIK consumer survey
36% of online shoppers purchased goods in other countries

46% of online shoppers bought twice or more times a month from domestic online stores and 27% of online shoppers twice or more times a month from foreign online stores


Popular product categories (domestic)	Clothes and shoes	Books, DVDs, CDs or video games	Consumer electronics or other high-tech equipment
Popular product categories (cross-border)	Clothes and shoes	Books, DVDs, CDs or video games	Consumer electronics or other high-tech equipment

76% of the most recent domestic and 76% of the most recent cross-border purchases were delivered free of charge

Service Quality Score

domestic	78.4 (EU/EEA 30: 72.0)
cross-border	63.0 (EU/EEA 30: 67.8)

Service Quality Score - Delivery moduls

65% of online shoppers not purchasing cross-border have concerns about delivery. These consumers are particularly concerned about ...




3. Parcel delivery



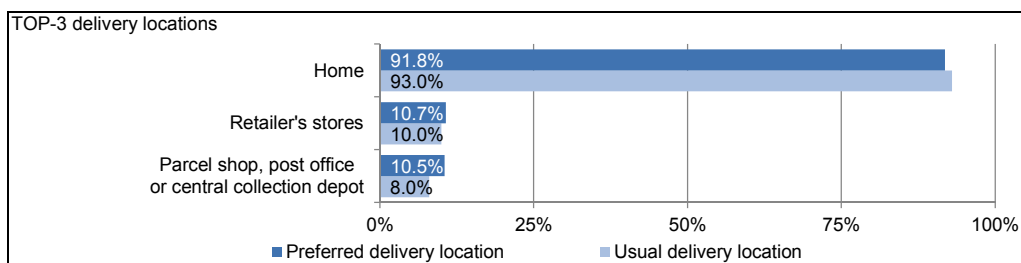
World Bank Logistics Performance Index (2018)	3.99 of 5 (93% of highest performer)
CEP market size	Revenues (2017) 7 282 m€ Volume (2017) 2 199 m
Volume development (CAGR 2013-2017)	7.3%

33.4 items per capita (2017)*

* domestic and cross-border inbound parcel and express items

Universal service provider's volume share in X2C parcel deliveries: >50%

TOP-3 parcel operators in B2C deliveries	Combined volume share
<u>Domestic</u> Royal Mail Hermes UK UK Mail	60%-70%
<u>Cross-border</u> Royal Mail UK Mail DHL Express	55%-65%



Cross-border parcel services included in universal service	Yes, up to 2kg
Authorisation required for exporting parcel carriers?	Yes
Contribution to compensation fund for exporting parcel carriers?	No compensation fund
Contribution to NRA financing for exporting parcel carriers	No financing from carriers



Unemployment rate 2017 (% of population)	UK 4.4% EU-28 7.6%
Minimum wage (per month in Purchasing Power Standard)	1 269
Unionisation (country)	26%
Collective Labour Agreement coverage (country-wide share of employees)	29%

	Number of employees	Development of employment
Sector (Postal and courier activities)	304 300 (2017)	-1.5% (CAGR 2013-2017)
Universal Service Provider	142 579 (2017)	-1.1% (CAGR 2013-2017)

4. Market developments



- The UK delivery market is highly competitive and dynamically growing with a wide range of domestic and cross-border B2C delivery services.
- The UK delivery market attracts significant investments by many carriers: DHL/UK Mail, Hermes and DPD are heavily investing in new sites to increase capacity.
- DPDHL acquired UK Mail in December 2016. Most recently, UK Mail reportedly set to take over Pass My Parcel to extend its PUDO network.
- Amazon Logistics launched Prime Now in London, Birmingham, Leeds and Manchester. Amazon operates 16 fulfilment centres and 13 Prime Hubs in the UK.

Sources: Eurostat, Ecommerce Europe, European Commission, World Bank, NRA reports, USP Annual Reports, IPC, ERGP, WIK consumer survey, WIK NRA survey, DPD survey, press releases.

Definitions

World Bank Logistics Performance Index:

The Logistics Performance Index (LPI) is an interactive benchmarking tool created by the World Bank. The LPI is based on a worldwide survey of global freight forwarders and express carriers, providing feedback on the logistics “friendliness” of 160 countries in which they operate and those with which they trade. They combine in-depth knowledge of the countries in which they operate with informed qualitative assessments of other countries where they trade and experience of global logistics environment. Feedback from operators is supplemented with quantitative data on the performance of key components of the logistics chain in the country of work.

For more information, see <https://lpi.worldbank.org/>.

The Digital Economy and Society Index:

The Digital Economy and Society Index (DESI) is a composite index to measure the progress of EU Member States towards a digital economy and society and to track the evolution of EU Member States in digital competitiveness. As such, it brings together a set of relevant indicators on Europe’s current digital policy mix. The DESI is composed of five principal policy areas which represent overall more than 30 indicators: (1) Connectivity, (2) Human Capital, (3) Use of Internet, (4) Integration of Digital Technology and (5) Digital Public Services. To calculate the index scores, each set and subset of indicators were given a specific weighting by European Commission experts.

For more information, see <https://ec.europa.eu/digital-single-market/en/desi>.

WIK Delivery Market Performance Index:

The WIK Delivery Market Performance Index provides a ranking of the national delivery markets in 30 countries (EU-28 Member States, Iceland and Norway). This ranking informs stakeholders on the performance of a national delivery market of one country in relation to the performance of delivery markets of the other countries. The index scores reflect WIK’s assessment on the status quo of national delivery markets with emphasis on B2C deliveries based on quantitative and qualitative indicators from the WIK consumer survey, in-depth desk research on national and cross-border delivery as well as on e-commerce markets, and is complemented by expert interviews and stakeholder workshops.

More information is provided in Chapter 9 of the study “Development of Cross-border E-commerce through Parcel Delivery”.

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