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Mini Presentation on
SPPI for Postal Services in Austria
Content

- Structure and size of the industry
- Universal service obligation
- The Austrian Post AG
- Index construction and characteristics
- Alternatives and next steps
Historical development process
Structure of the industry and situation

- Liberalisation process in Europe since 1997
- 23 countries are producing SPPIs
- Only one respondent is the common sample size
- 100 % turnover coverage rate
- SPPI produced and „published“ since 2007
Universal service obligation

- Permanent provision of a postal service of specified quality at all points in their territory at affordable prices for all users.

- To take steps to ensure that the density of the points of contact and of the access points takes account of the needs of users.

- To take steps to ensure that the universal service provider(s) guarantee(s) every working day and not less than five days a week:
  - one clearance,
  - one delivery to the home or premises of every natural or legal person or, by way of derogation, under conditions at the discretion of the national regulatory authority, one delivery to appropriate installations.
Special conditions or restrictions

- Limited number of respondents
- Prices are a sensitive subject
- Respondent refuses to cooperate
- Difficult to split information into B2B and B2C clients
- Resulting index is based on list prices and business to all
Austrian Post AG turnover development

Turnover of the Austrian Post AG in Mio Euro

- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012

Turnover
Service Areas of the Austrian Post AG

Core business service groups

Letter, Advertising mail, Post office counter services

- Letters
- Advertising mails with and without address
- Newspapers
- Online services
- Post office counter services

Parcels and Logistics

- Parcels
- Combined freight
- Express delivery
- Temperature controlled logistics
- Fulfillment
- Valuable related logistics
Core business service groups

Share on turnover 2010 – 2012 in %

- Letter, Advertising mail, Post office counter services
- Parcels and Logistics
Letter, Advertising mail, Post office counter services

Share on turnover 2010 – 2012 in %

- Letters and Mail solutions
- Advertising-post
- Mediapost
- Post office counter services
Parcels and Logistics

Share on turnover 2010 – 2012 in %

- Parcel Premium
- Parcel Standard
- Parcel n.e.c.

Year 2010: 78.0%
Year 2011: 80.0%
Year 2012: 78.0%
POST AG

Per self-definition the Austrian Post AG offers services in the following areas:

- Postal services according to the definitions of a national regulation in regard to the universal service obligation
- Parcel services
- Financial services
- Financial services according to post office saving banks
- Communications- and Information-technology services

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Chosen service product groups for the SPPI (divided into further detailed subgroups)

- Letters and Mail solutions
- Parcels
- Advertising-post
- Mediapost
Resulting Index Coverage

Turnover coverage of the index in 2012

- Letters and Mail solutions: 35%
- Advertising-post: 20%
- Mediapost: 6%
- Parcels and Logistics: 39%

~ 94%
Pricing methods: Repeated services (List prices)

Pros

- Real transaction prices are surveyed
- Representative services (letters, parcels)
- Representative destinations or routes
- Various types of delivery speed
- Various types of delivery modes (e.g. cooled transport)

Cons

- Remain constant quality for the services
- Get additional price information (discounts, surcharges)
- Burdensome for the respondent
### Pricing methods: Unit values

#### Pros
- Provision of turnover and quantity data
- Delivered by the accounting system of the enterprises
- Not so burdensome
- Discounts are already incorporated
- Probably collected by national/international authorities

#### Cons
- Advisable for homogeneouse groups of service products
Index Aggregation Structure: List Prices

ÖNACE H 53.1
Postal activities under universal service obligation

Business segment: Letters
Letters, national
Letters, international

Business segment: Parcels
Parcels, national
EMS Parcel, national
Parcels, international
Wine.parcel, international
EMS Parcel, international

Business segment: Infomail
Infomail
Info.Post (standard)

Business segment: Mediapost
Mediapost, newspapers (daily, weekly, monthly)
Index Aggregation Structure: Unit Values

ÖNACE H 53.1
Postal activities under universal service obligation

- **Business segment: Letters**
  - Letters, national
  - Letters, international
  - Letters, prepaid
  - Letters, others

- **Business segment: Parcels**
  - Parcels, premium
  - Parcel, standard
  - Parcel, others

- **Business segment: Infomail**
  - Infomail, national
  - Infomail, international
  - Info.Post, national
  - Info.Post, international

- **Business segment: Mediapost**
  - Mediapost (adressed, unadressed)
Results and next steps

- Index is not published due to secrecy reasons
- Index is based on list prices
- New national regulation
- Respondent partly cooperative
- Detailed unit values according to our current aggregation scheme
- 2015: A new hope ("may the Austrian Post AG be with us")
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Thank you!

Questions?