**Welcome to
Workshop 2: Prospective study on the future of the postal sector**

27 March 2024 – the workshop starts at 9.00am CET

House rules

- Please raise your hand to alert the moderator whenever you want to contribute.

- Please introduce yourself with your name and organisation before speaking for the first time.

- Feel free to put any comments in the chat – all comments, including those not read out during the workshop, will be considered in the study.

- The workshop will be recorded but the recording will be used only for internal purposes and will not be made public.

- Opinions expressed by the consultants are their own and do not represent the position of the European Commission.

Study objectives and approach (1/3)

- Study carried out by RPA and RAND for the European Commission

- The aim of the study is to support the European Commission in the development of a prospective assessment of the postal sector, including the potential need for and impacts of revisions to the EU postal services legal framework.

- The study builds on previous research and stakeholder engagement

- The specific objectives of the study are to:
  - Part 1 - Define several future scenarios for the development of the European postal sector over the next 10-20 years; and
  - **Part 2: Develop and apply a framework to estimate the impacts of potential policy changes on the postal sector.**

Study objectives and approach (2/3)

Part 1 – future scenarios:

- Developing five scenarios for the development of the European postal sector until 2040;

- Identifying the key challenges for the postal sector and market failures; and

- Mapping potential policy interventions to address the identified issues and market failures.

Part 2 – assessment model:

- Developing a framework for estimating the impact of policy changes on key variables of the postal sector;

- Collecting data to feed into the framework; and

- Applying the framework to potential policy interventions.

Study objectives and approach (3/3)

Stakeholder engagement:

- Three workshops:
  - Workshop 1 - to discuss the future scenarios (Part 1)
  - **Workshop 2 - to discuss the assessment methodology and data collection (Part 2)**
  - Workshop 3 - final validation workshop

- A survey to support the development of the assessment methodology and data collection (Part 2 of the study)

- Interviews with EU and national level stakeholders also to support Part 2 of the study

Role of the scenarios in the approach

- Five scenarios set out plausible future development trajectories

- Provide a baseline for Task 2

- The quantification of indicators for the New Normal scenario (i.e. the scenario that is expected to be the most likely depending on current trends and absent any policy measures on the sector) consists of two steps.

- Firstly, historical data for each indicator are analysed and extrapolated to quantify the future values of current trends.

- In a second step, the New Normal is analysed to understand where indicators may deviate from the extrapolated trend and to propose appropriate adjustments.

Role of the postal sector indicators in the approach

- A set of indicators has been selected to characterise the postal sector.

- They provide a framework for further development of New Normal scenario and Task 2 assessment.

- The indicators have first been categorised into broad indicator groups. Within each group, several indicators have typically been identified under each category.

- Some indicators are expected to be assessed quantitatively, some qualitatively.

- Specific metrics (e.g. volume/year) have been selected for each quantitative indicator.

- To keep the approach manageable and useful for modelling purposes, the study is focussing on a limited (but sufficient) number of indicators.

Role of the assessment framework

- The scenarios developed in the first part of this study (and presented in workshop 1) provide a largely qualitative understanding of the main drivers of potential future developments, issues and problems for the postal sector.

- To assess how policy changes in the postal sector could affect key postal indicators over the timeframe of interest for this study (until 2040), an assessment framework is now being developed. This framework is expected to be implemented in the following steps:

- A quantitative model is constructed that specifies relationships between indicators through a series of equations. Historical data, desk research and assumptions are used to populate this model. For some indicators, qualitative approaches will be used.

- Policy changes are implemented in the model by changing some (input) indicators; other indicators are then recalculated using the model equations.

- The updated indicators are compared to the quantified New Normal indicators for 2040.

Objectives of Workshop 2

- Discuss the approach to further tasks under the study, allowing the study team to adjust/further develop the approach.

- Large parts of the approach presented today are not set in stone – brainstorm on potential approaches.

- Safe space: no formal attribution, all ideas welcome.

- Discuss the indicators that characterise the postal sector, including segmentation and data sources.

- Discuss the approach to the quantification of the New Normal scenario, including the adjustment of the past trends to fit the New normal narrative.

- Caveat: the New Normal scenario presented today may not be the final version.

- Discuss the assessment framework and further stakeholder engagement under the study

Session 2

Postal sector indicators

Short introduction - indicators

- Indicators - selected to characterise the postal sector.

- Indicator group: for example, market competition.

- Indicator: for example, HHI or market share of the largest player.

- Metric: Incumbent market share (%)

- Segmentation: Stakeholder types, products for which data are available or sought.

- **Data available from a number of sources, focus on four main sources:**
  - UPU Database
  - DG Grow Postal services database
  - Copenhagen Economics (2022)
  - Eurostat

Discussion points - indicators

- Do the proposed metrics provide a good representation of each the indicators?

- Is the segmentation for each of the indicators and metrics (e.g. letters vs parcels) sufficient to capture the main developments in the postal sector?

- Are there any issues and uncertainties associated with the data from the different sources?

- Are there any additional data sources that the study team should consider?

- What would be the best way of assessing the qualitative indicators – would it be feasible to develop some qualitative criteria and what could they be?

Indicator groups, indicators, metrics, segmentation, sources (1/4)

Indicator group	Indicator	Metric	Product	Operator type	Data source	Years covered
Demand	Volume	Volume (thousands)	Domestic letters	All/ USP	DG GROW postal services database	2012-21
		Volume (thousands)	Domestic parcels	All/ USP	DG GROW postal services database	2012-21
		Volume (thousands)	International letters	All	DG GROW postal services database	2012-21
		Volume (thousands)	International parcels	All	DG GROW postal services database	2013-21
Market competition	No. of operators in market	No. enterprises providing postal services		All	DG GROW postal services database	2012-21
	HHI/market share	Incumbent market share (%)	Domestic letters	USP	Copenhagen Economics (2022)	2011, 2016, 2021
	HHI/market share	Incumbent market share (%)	Parcels, courier express (CEP)	USP	Copenhagen Economics (2022)	2016, 2021
Affordability	Price	Price (euro)	Priority letter domestic (20g)		DG GROW postal services database	2012-21
		Price (euro)	Parcel (<2kg) domestic standard		DG GROW postal services database	2012-21
		Relative price (%)	Priority to non-priority		Copenhagen Economics (2022) ERGP monitoring report	2021

- **Demand**
  - Do we know what the share of priority and non-priority is on letters and parcels?
  - Data needed on the different types of customers and the prices that are charged to these people.

- **Market competition**
  - Plan to construct this from the demand share, is this a reasonable assumption?

- **Affordability** - limited data on relative prices

Indicator groups, indicators, metrics, segmentation, sources (2/4)

Indicator group	Indicator	Metric	Product	Operator type	Data source	Years covered
Access and coverage	Access consumers	No. of post offices total		USP	DG GROW postal services database	2012-21
		No. of letter boxes		USP	DG GROW postal services database	2012-21
		No. PO boxes		USP	DG GROW postal services database	2012-21
		Parcel lockers		USP	UPU Database, CE 2022	2017-22
	Access business				Literature review and survey	
Quality	Delivery frequency	No. of deliveries/week		USP	UPU Database	2011-22
	Delivery speed	No. of days for delivery	Priority mail	USP	UPU Database	2015-22
	Delivery location	Proportion of population with home deliveries (%)		USP	UPU Database	2011-22

Access and coverage

- Better parcel locker data?
- What measure is there for business access?

Quality

- How do parcel delivery speeds and frequencies for USP and Other Service Providers compare?
- Are there data on delivery location (home/out of home) for parcels?

Indicator groups, indicators, metrics, segmentation, sources (3/4)

Indicator group	Indicator	Metric	Product	Operator type	Data source	Years covered
Revenues/profits	Revenue or turnover	Turnover (or gross premiums written) (million euros)	Postal and courier activities	All	Eurostat	2011-22
		Operating revenue (Special Drawing Rights, SDR)		USP	UPU Database	2018-2022
		Operating expenditure (SDR)		USP	UPU Database	2018-22
	Profits	Gross operating surplus (euro)	Postal and courier activities	All	Eurostat	2011-22
		Operating result (SDR)		USP	UPU Database	2018-22
Costs	Net cost of USO	€ or share in total costs			Various sources	single years only
Employment	No. employed	No. employed (postal and courier)	Postal and courier activities	All	Eurostat	2011-21
	Quality of employment	Share of providers other than USPs in total postal (%)	USPs and OSPs	All	Own calculations from USP and OSP employment data from DG GROW postal services database	2012-21

- **Revenues and profits**

- **Costs**
  - Can we get any information on the OSPs?
  - Are more data available on net cost of USO as a share of total cost?

- **Employment**
  - For employment (and other indicators), how comparable are data from Eurostat (data covers postal and courier activities) and the postal statistics database (USP and OSPs)

Indicator groups, indicators, metrics, segmentation, sources (4/4)

Indicator group	Indicator	Metric	Product	Operator type	Data source	Years covered
Environment	CO2 emissions	Grammes CO_2 per postal item			Literature review and survey	
	Local air pollution	Qualitative				
Harmonisation		Qualitative			Literature review and survey	
User needs	Service meets user needs	Qualitative, including the results of user surveys			Literature review and survey	
	Vulnerable users	Qualitative			Literature review and survey, Eurostat	

- ● **Environment**
  - – Any information on how we could calculate this?

- ● **Harmonisation**
  - – This will mainly be qualitative

- ● **Users needs**
  - – This will mainly be qualitative

Session 3

Estimation of the baseline (New Normal scenario)

Setting the scene – the five scenarios

- **Scenario 1 – The new normal (baseline):** Policymakers, citizens and the postal sector aspire to progressive growth and innovation, but global mega risks and technical challenges mean change across national postal sectors is incremental at most.

- **Scenario 2 - Poly-crises escalate ('wild-card' challenge scenario):** Fracturing of the climate, markets and sociopolitical order put pressure on postal demand and operations from many angles.

- **Scenario 3 - Platforms drive technological revolution:** Data-rich multinational tech platforms grow in size and scope, moving sideways into postal value chains. Government and postal operators follow suit to develop their own innovations.

- **Scenario 4 - Post-carbon discipline:** Environmental concerns render zero-digit and negative economic growth palatable, resulting in step-changes in regulation, logistics, consumer norms and products.

- **Scenario 5 - Public value innovations:** The successes of Europe's Digital Decade lead to a new era of socially valuable innovations across the public sector, and State-supported postal providers. The growth of eCommerce platforms and other multinational tech companies is capped by regulations and consumer mistrust.

Summary of the New Normal scenario

Policymakers, citizens and the postal sector aspire to progressive growth and innovation, but global mega risks and technical challenges mean change across national postal sectors is incremental at most.

- A **cautious green transition** takes place against backdrop of increasingly **frequent extreme weather events** and general **economic strain**.

- The postal sector enters a phase of **integration and "co-opetition"**, including more transnational operators and shared infrastructure.

- **Consumerism (and e-commerce)** is still the norm for most people.

- **Parcel flows remain strong** (but down from outside the EU).

- **Letter mail volumes are significantly reduced** (niche service and vulnerable consumers).

- The rising net USO costs lead to **reduction in the scope of the USO**.

- **Employment impacts** softened USPs by taking on secondary public functions.

Approach to the quantification of the New Normal scenario

- Start from extrapolation of historical trends in reported indicator data

- Compare forecast qualitative indicator trends/values from New Normal future with extrapolations

- Make 'adjustments' to extrapolations to obtain quantified estimates for indicators in New Normal

Key caveats:

- Historical data cover Covid-19 and period of rapid change in postal sector

- New Normal forecasts significant change from current trends for some indicators

- Adjustments made for each indicator separately, although consistent in scenario

Extrapolation of the past trends into the future

- **Three main data sources: Postal statistics database, UPU and Eurostat**

- **Pragmatic approach: linear (default), exponential, log**

- **Member state clusters: four geographical groupings**
  - Provide framework for managing data, looking for common trends
  - Approach in line with other studies and scenarios

  - o **Northern Europe:** Denmark, Finland, Ireland, Sweden
  - o **Eastern Europe:** Bulgaria, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia,
  - o **Southern Europe:** Croatia, Cyprus, Greece, Italy, Malta, Portugal, Slovenia, Spain
  - o **Western Europe:** Austria, Belgium, France, Germany, Luxembourg, the Netherlands

Quantification of New Normal scenario

For each indicator:

- Do the extrapolated trends make sense? How much confidence can we have in them?

- Are the proposed adjustments reasonable?

- Are there other data sources/assumptions that could be used?

- Are there member states that need to be treated differently?

Demand - Domestic letter volume
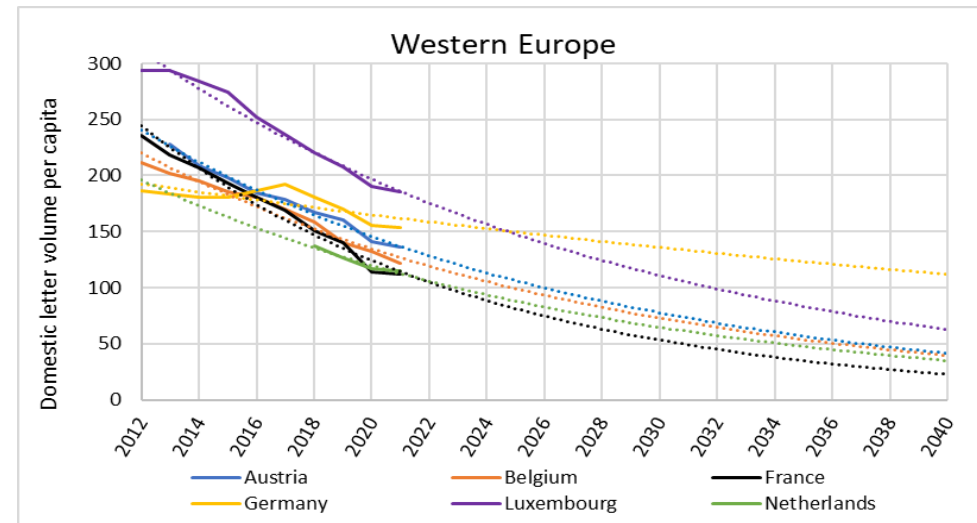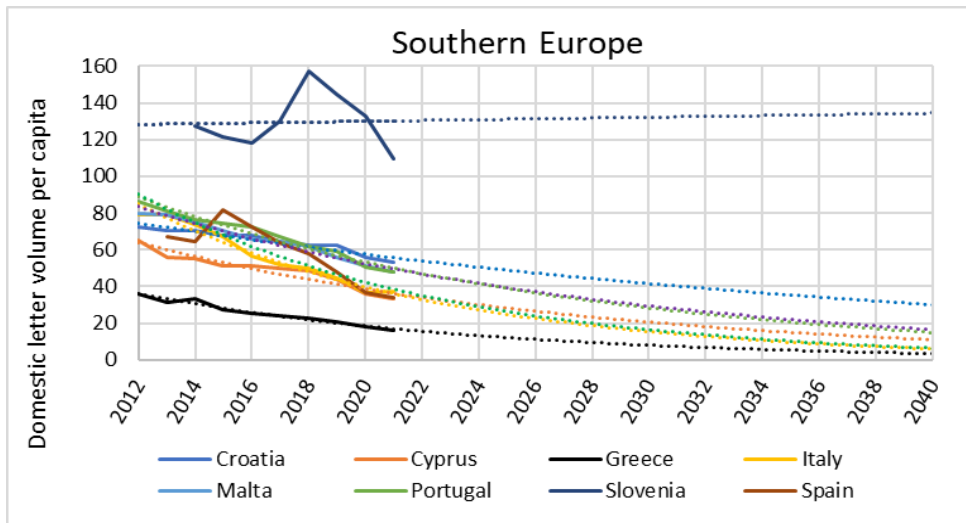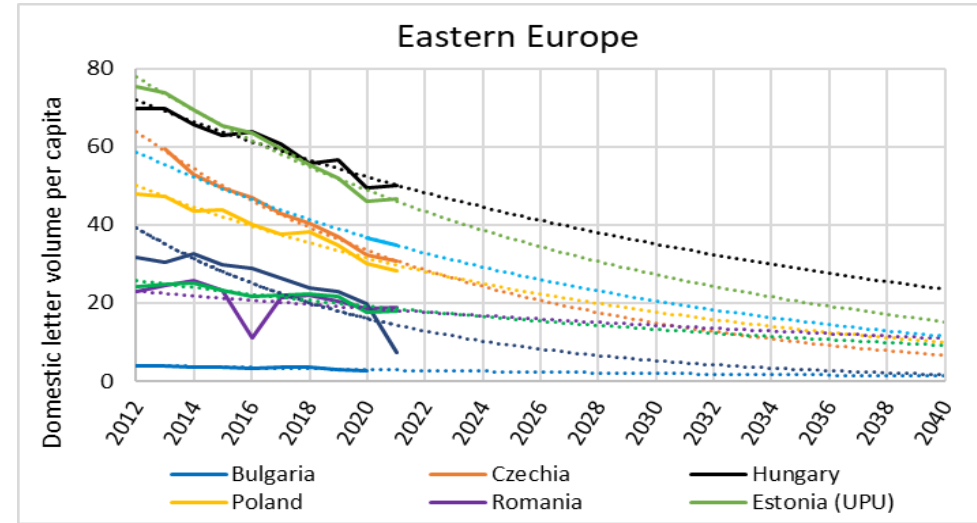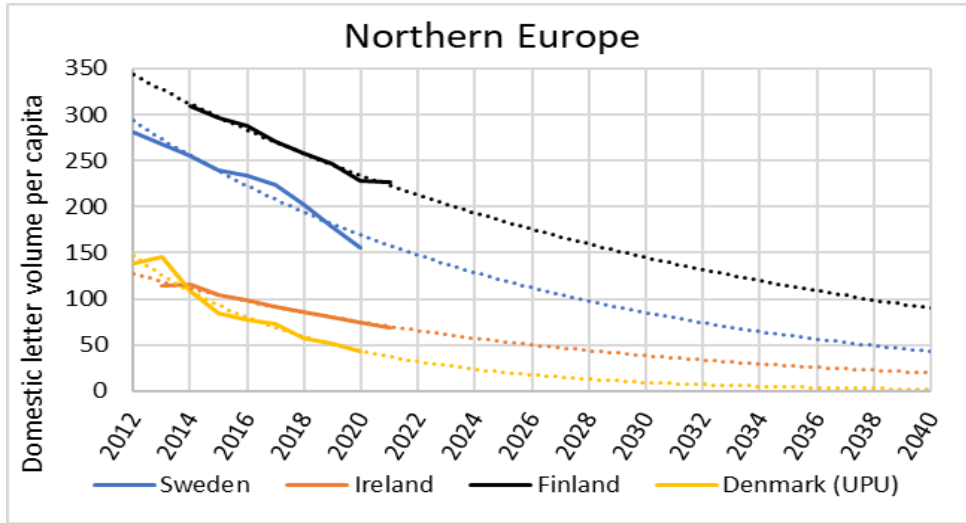
New Normal: 2040 values adjusted upwards by share of elderly in population relative to current to reflect higher share of vulnerable users. Share of non-priority mail increases to 70% of total.

Demand - Domestic parcel volume
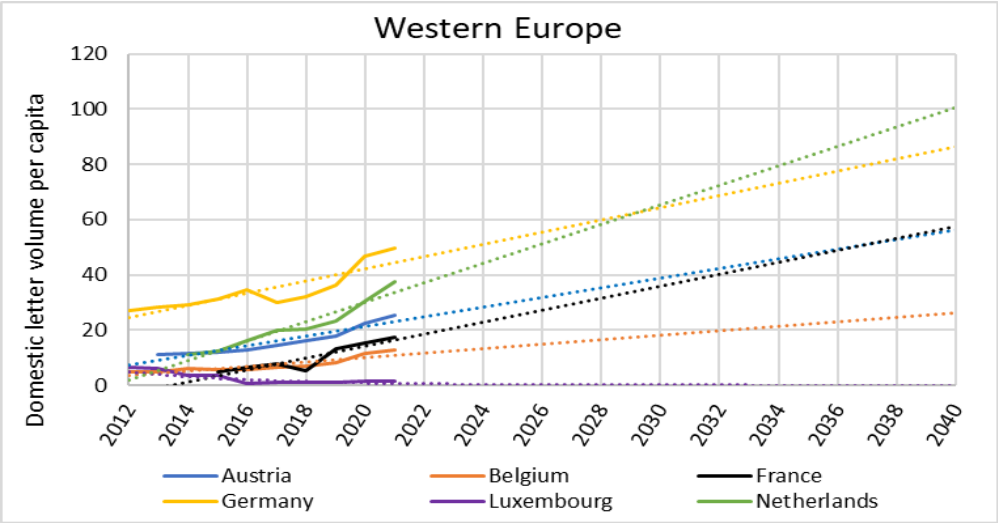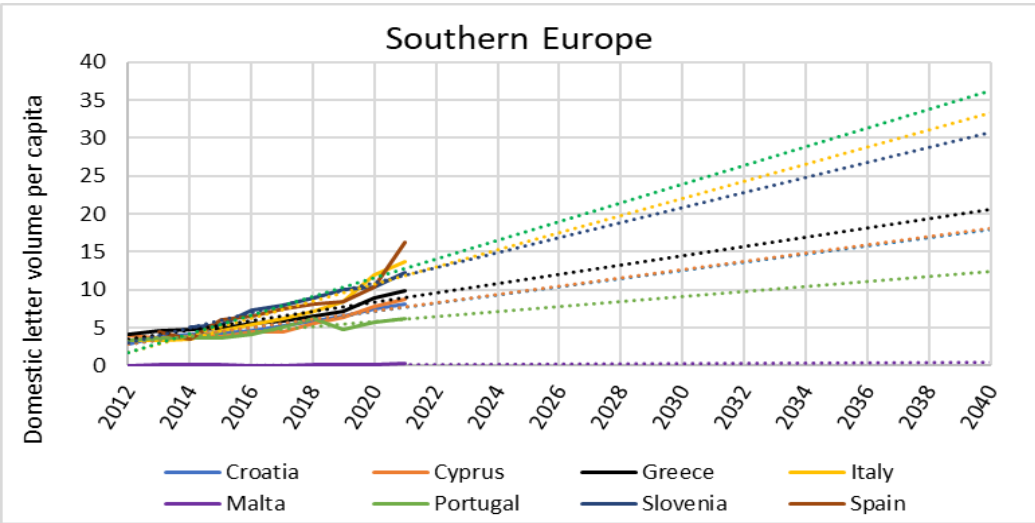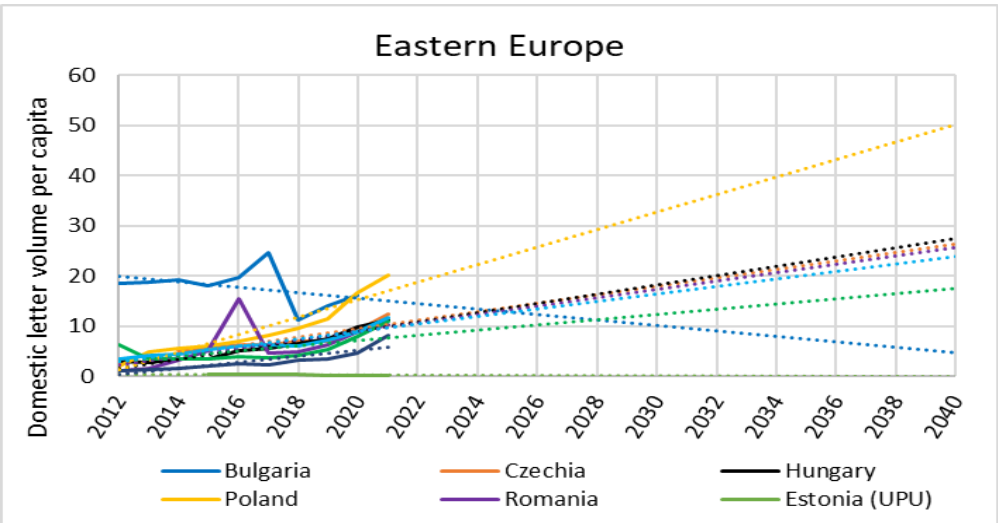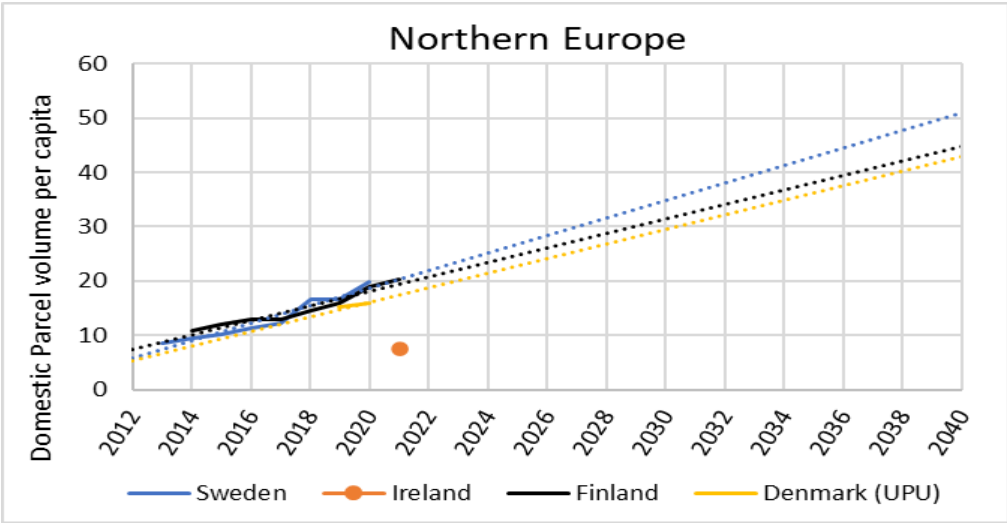
New Normal: Continuation of current growth rates in line with consumption. International flows reduced by 50% (30% move to domestic, 20% no longer sent)
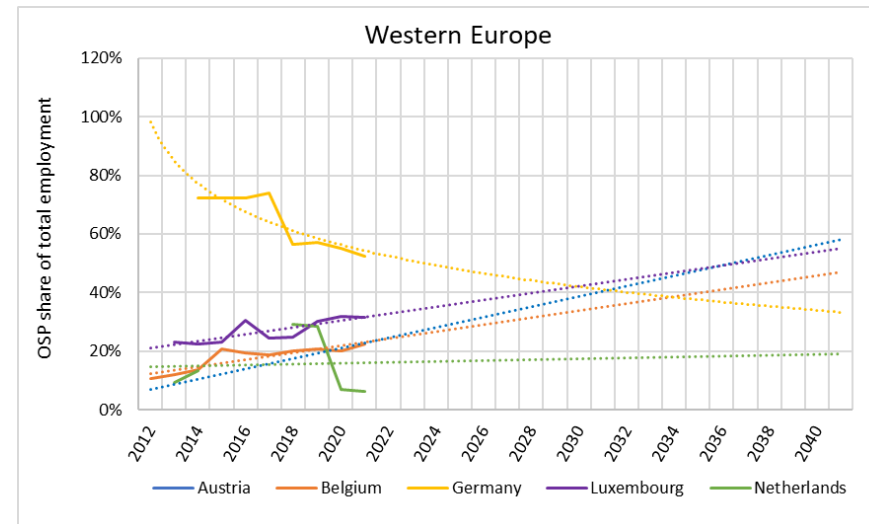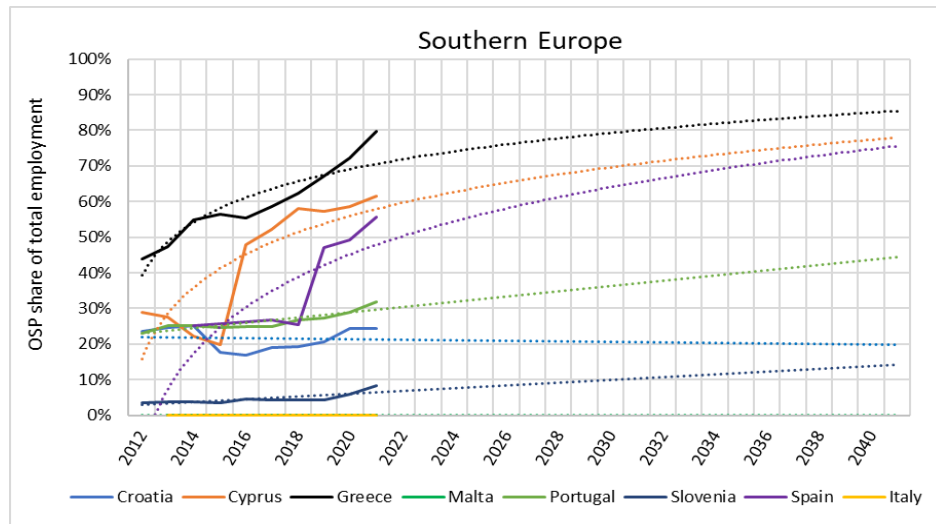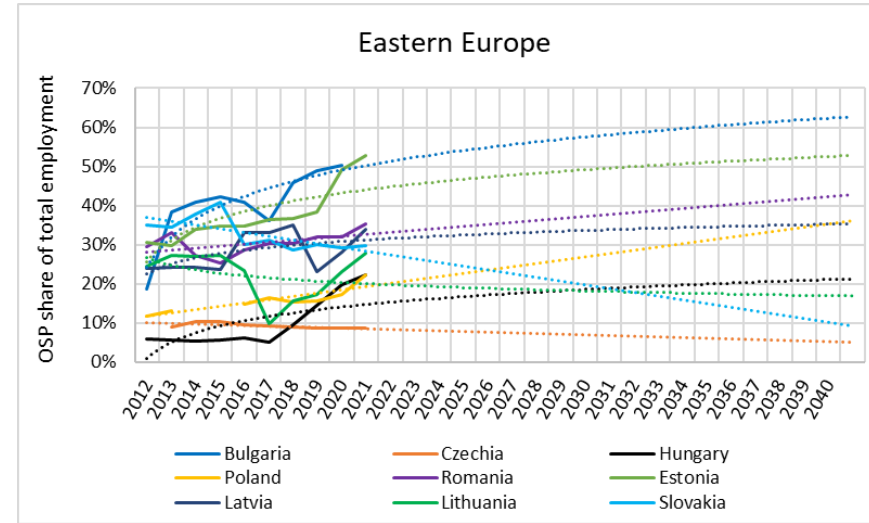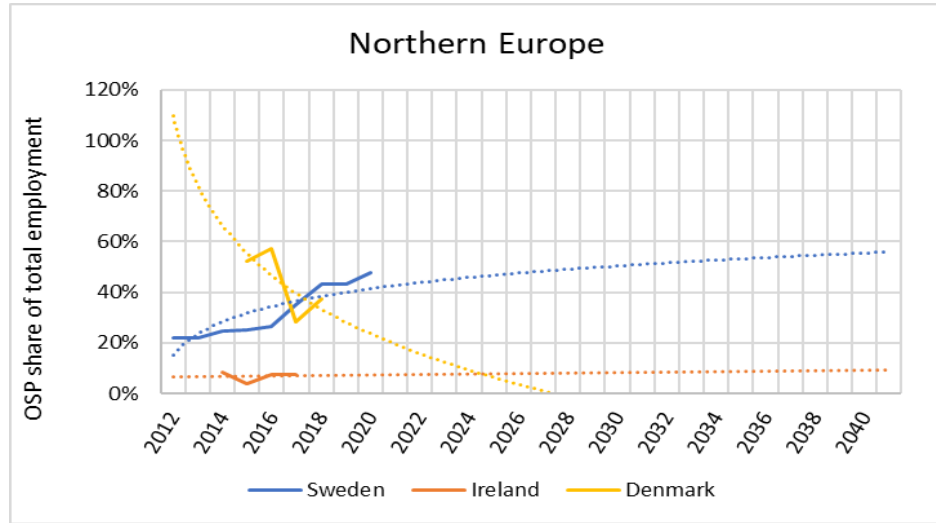
Employment – Postal and courier activities
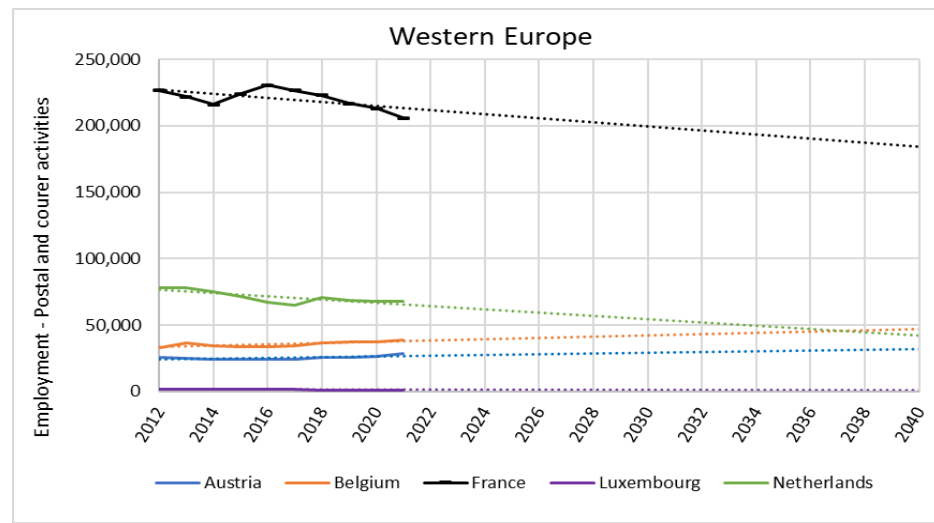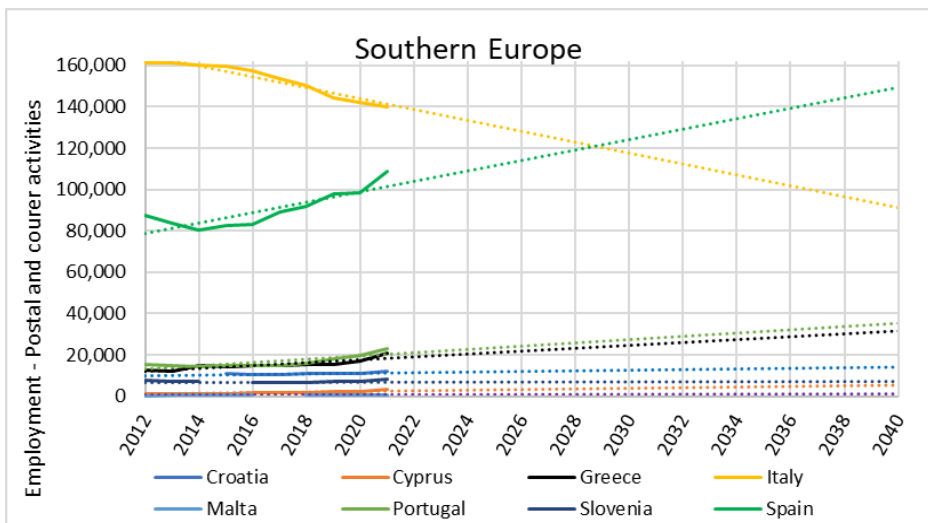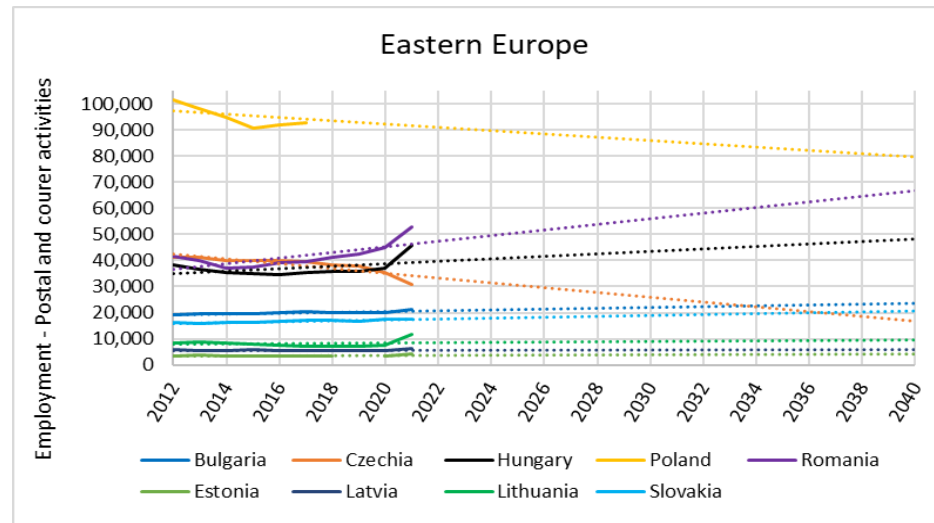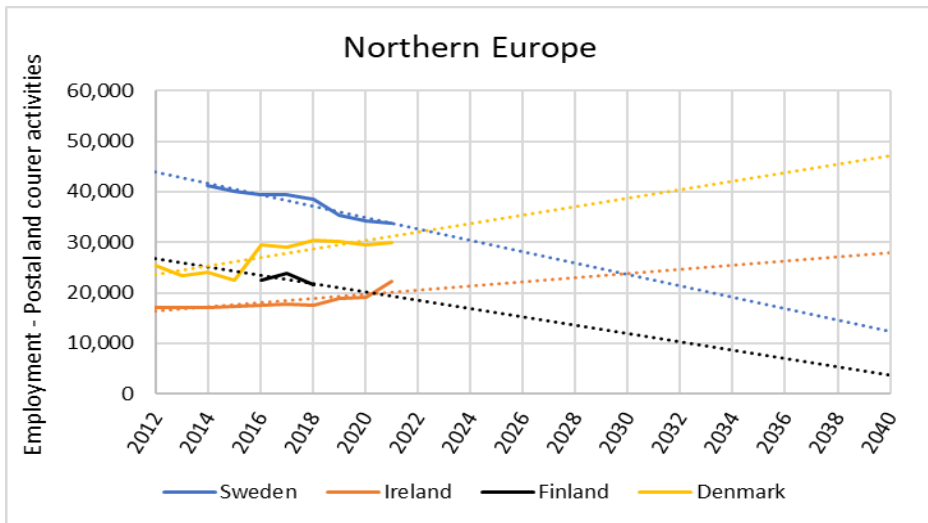
New Normal: Pressures on employment may be reflected in current trends but some additional downward pressures with limited upward mitigation. Propose continuation of declining employment or zero growth rates otherwise

Share of employment

New Normal: Propose that OSP share of markets stabilises at around 50% in Northern and Western Europe where USPs consolidate and markets strong, 60% in Southern and Eastern countries with high growth and 40% elsewhere.

Price – Standard 1st class letter less than 20 g, by USP under direct or indirect designation

Northern Europe

Eastern Europe

Southern Europe

Western Europe
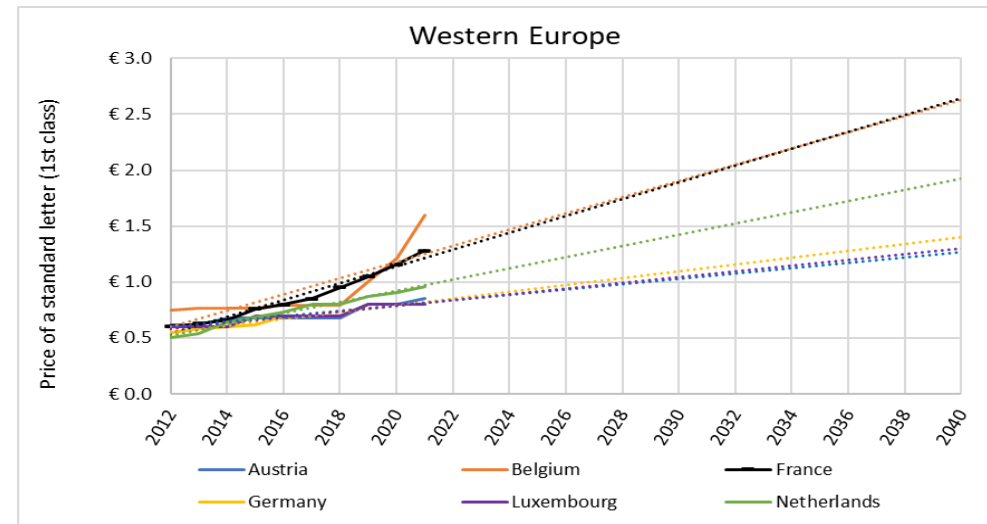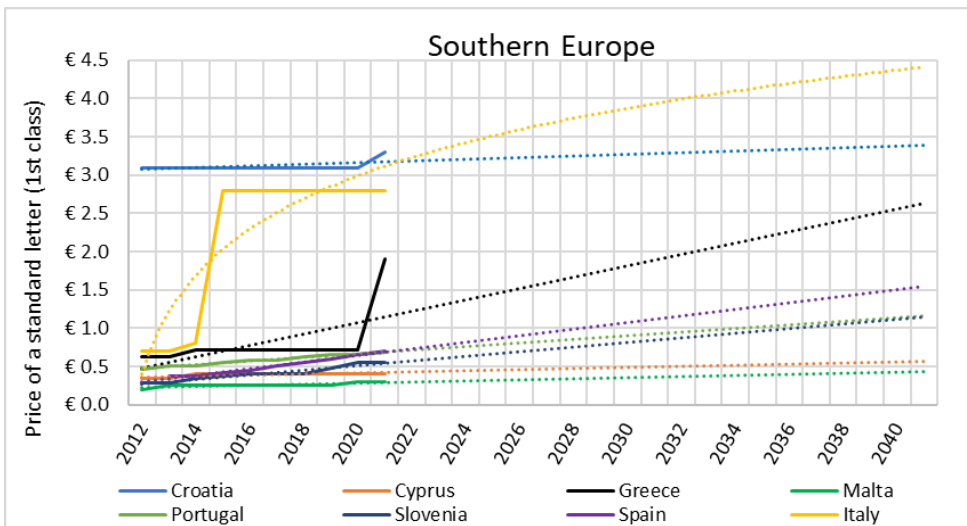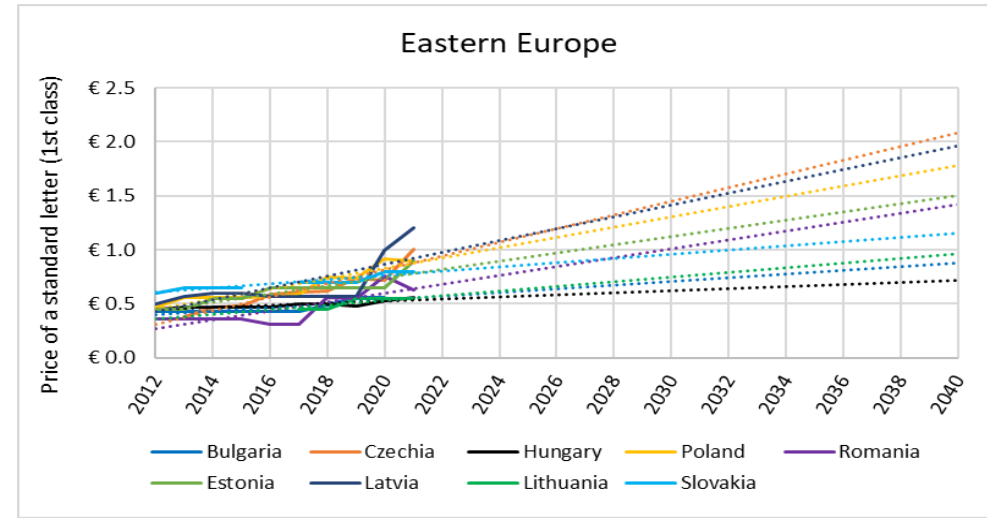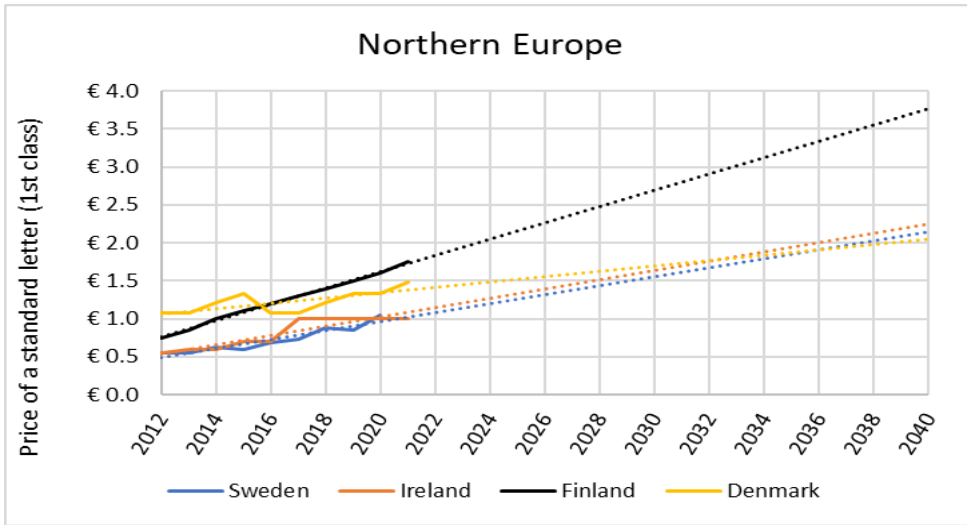
New Normal: Higher premium tariffs for high value documents, but standard mail also affected by higher unit costs.
Propose premium 3x extrapolated priority and relative price of premium/standard is same as current.

Price – Price of a standard ordinary parcel, up to 2 kg, by USP under direct or indirect designation
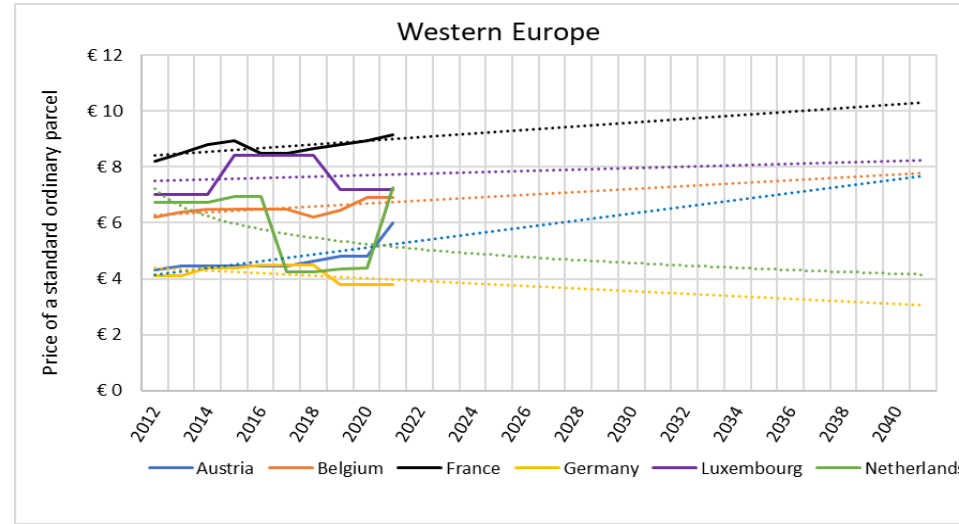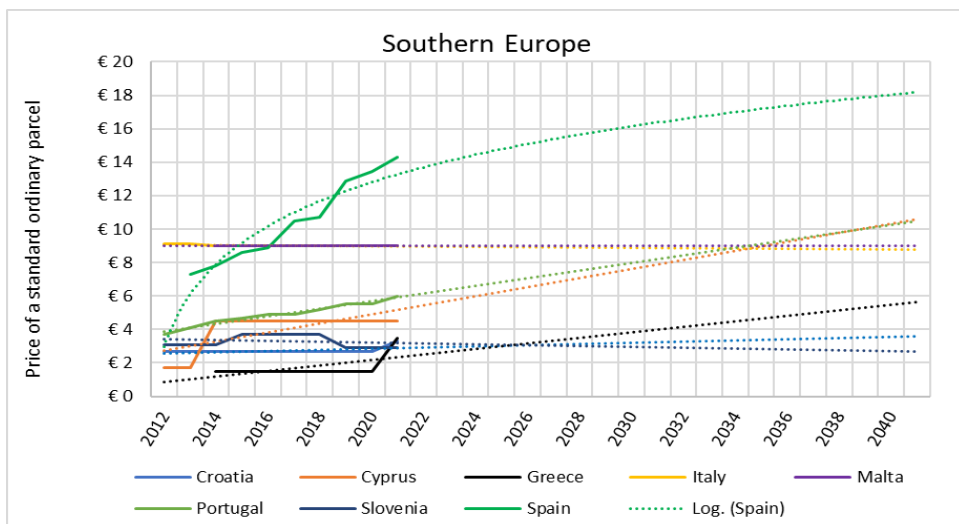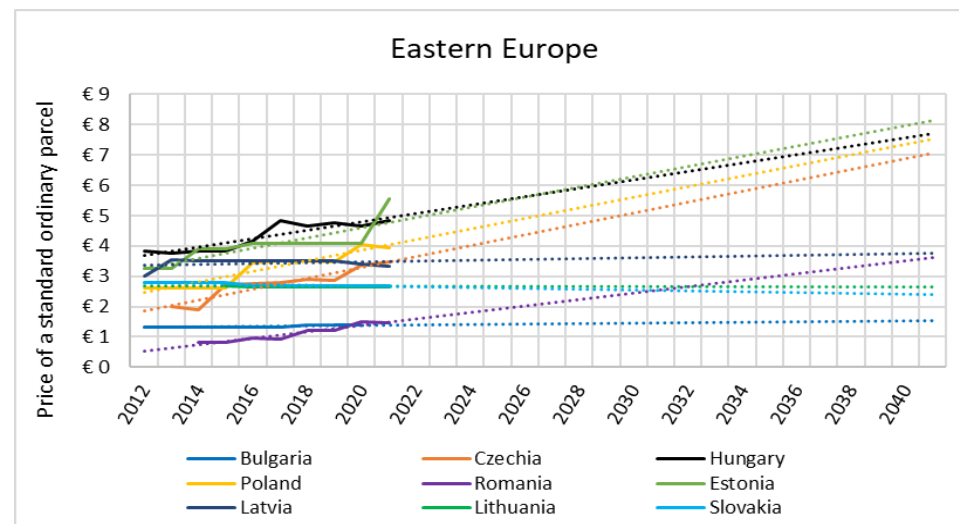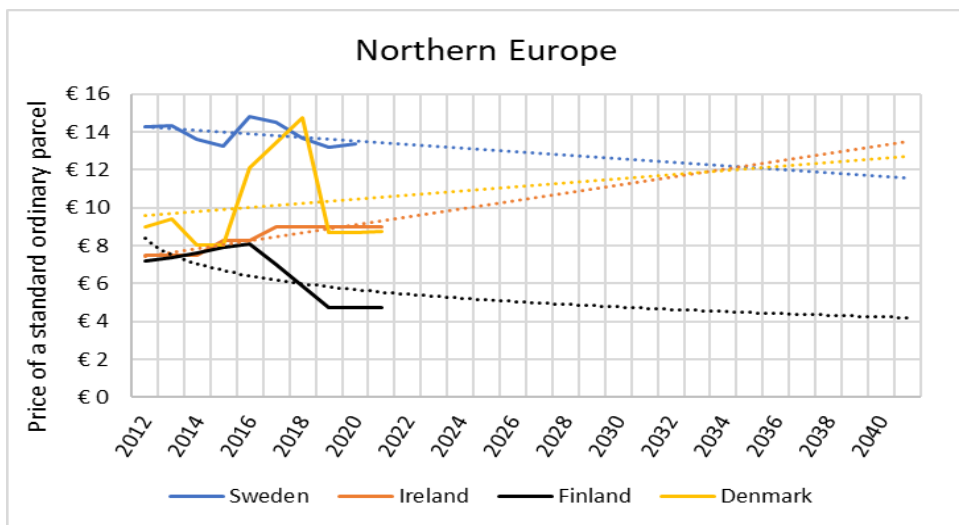
New Normal: Consolidation and competition in different regional markets for standard product. Propose upper bound of €10 for markets where increasing prices and lower bound of €4 for others. Premium for home delivery: 3x standard

Number of enterprises providing postal services

New Normal: Continued low or zero growth trend for most MS. Assume growth will plateau and competition in market share not number of firms.

Revenue (Turnover or gross premiums written) - Postal and courier activities

Northern Europe — Turnover or gross premiums written (Millions), 2012–2040. Legend: Denmark, Finland, Ireland, Sweden.

Eastern Europe — Turnover or gross premiums written (Millions), 2012–2040. Legend: Bulgaria, Czech Rep., Estonia, Hungary.

Southern Europe (excl Italy & Spain) — Turnover or gross premiums written (Millions), 2012–2040. Legend: Croatia, Cyprus, Greece, Portugal, Slovenia.

Western Europe (excl Germany) — Turnover or gross premiums written (Millions), 2012–2040. Legend: Austria, Belgium, France, Netherlands.

Without Italy, & Spain · With Italy, & Spain · Without Germany · With Germany

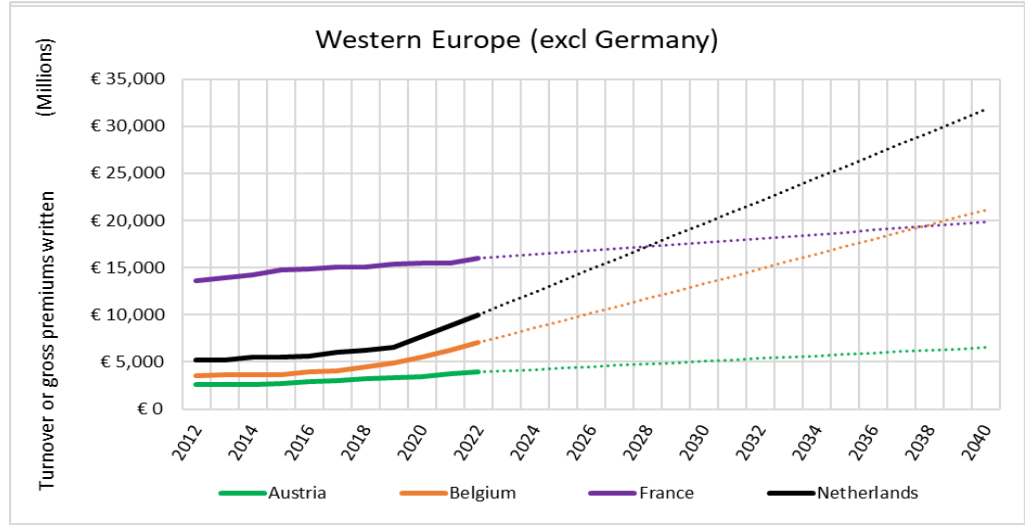New Normal: Sector turnover expected to increase in line with increased prices and demand growth for parcels. Dominated by standard parcel segment. Propose continuation of current overall market trend.

Adjustment of past trends for the New Normal scenario

Indicator/ metric	New Normal	Implementation based on past trends
Access points (per capita)	Wide variety of out of home pick up (and drop-off) locations including locker hubs, workplaces, transport hubs.	• Current mainly constant trend in total post office outlets continues but that this number includes increasing share of PUDO. • Reduction in letter boxes in proportion to decline in letter volumes (70%) • Increase trend in parcel lockers to around 0.4 per thousand population (comparable to number of postal outlets) including OSP lockers • Need additional assumption on lockers/PUDOs that are OSP
home deliveries (% total)	Large reduction for parcels. Little change for letters.	• 10% reduction for letters for MS currently 100% • 50% reduction for parcels (no data on current split)
Business access	B2B parcel trends plateau and B2C continues to grow.	• Assume business collection access unchanged from current trends for parcels. Reflects decrease in B2X letter volumes

Adjustment of past trends for the New Normal scenario

Indicator/ metric	New Normal	Implementation based on past trends
Quality: Delivery speed and frequency	For letters, premium services remain fast and standard letter delivery reduced to once per week. Parcels mainly differentiated by delivery location.	• D+1 delivery for premium letter (daily delivery frequency) • D+6 for standard, assuming collection from post offices or PUDO locations. Longer if letter box. • Premium parcels delivered to door, standard pick-up
Net cost of USO	Broadly rises in response to increased operational costs, particularly from letter mail	• May depend on diversification • No extrapolation. Limited data suggests USO in range 0.5% to 8% USP expenditure (CE 2021 report 0-15%)
Diversification (share in revenue)	USPs in some areas taking on secondary public services - socially impactful proximity services (libraries, waste, post, internet cafes), and e-health related.	• Assume reducing share of letters. MS with high current shares diversify or consolidate. • Current growth trends in parcel share continue with maximum at 70% to reflect increasing competition in parcel sector and diversification into proximity or other services.

Adjustment of past trends for the New Normal scenario

Indicator/ metric	New Normal	Implementation based on past trends
Environment	Environment is a driver of other indicators through its impacts on prices and costs at different points in value chain to achieve standards.	• Expect emissions reductions relative to current due to required standards (confirm trends in data) • Quantify based on demand and emissions per unit, which account for environmental regulations on value chain (need data)
USO scope and derogations	Scope reduction(product, frequency, place, retail network density), further divergence between MS	• Qualitative assessment • Some aspects considered quantitatively under other indicators
User needs	Nostalgic service. Vulnerable users. Consumerism prevails.	• Qualitative assessment • A gap between user needs and services – an overview differentiating between letters vs parcels, business vs private users, vulnerable consumers, etc. by service characteristic
Harmonisation	Development of further standards slow but more shared infrastructure	• Qualitative assessment

Time for a break

Return at 11:35 CET

RPA

Session 4

Draft assessment model

Assessment Framework

- A quantitative model is constructed that specifies relationships between key indicators through a series of equations.

- Policy changes are implemented in the model by changing some (input) indicators; other indicators are then recalculated using the model equations.

- The updated indicators are compared to the quantified New Normal indicators for 2040.

- A quantitative assessment to be used where appropriate; supplemented by qualitative approaches

Draft assessment model

- **Model structure**
  - Simplifications to ensure model tractable and focuses on what is important
  - Historical data, desk research and assumptions are used to populate this model
  - Model needs to reflect future (2040) market and respond to policy changes

- **Key quantitative relationships**
  - Have we identified the key relationships that can be quantified?
  - Are you aware of any similar published analyses (e.g. research that attempted to establish a cost function) or have done any work that could be shared?
  - Do you have data that could support the modelling?

- **Development of assessment framework for qualitative indicators**
  - What indicators should be treated qualitatively and how can they best be assessed?

Model overview

Letters
Total volumes – input (main determinant e-substitution)
One operator – USP
Two products – priority/non-priority

Volumes of priority/non-priority depend on price and quality (speed, frequency and location of delivery)

Assumptions: share of business customers, international mail and corresponding prices, quality

Parcels
Total volumes – input (main determinant e-commerce)
Two operators – USP/OSP
One product – standard parcel

Market share of USP/OSP depend on price and quality (speed, frequency and location of delivery)

Assumptions: share of business customers, international mail and corresponding prices, quality

Costs
Key determinant of prices, revenues, profits for operators
Expect to depend on labour, letter & parcel volumes, network access

Employment
Expect to depend on post volumes, network access, technology

Quality
Delivery speed, frequency and location   - inputs (may be specified by legislation or market conditions and differ for letter/parcel**)**

Access and coverage
Density of letter boxes, post offices, parcel lockers other PUDO mainly determined by required quality?

Model overview discussion points

Letters
- By using two products/one operator, do we miss any key information relevant to indicators?
- Are data available on the current shares for priority/non-priority?
- Are there key differences between businesses and consumers that affect the letter market?
- Are data available on current shares of business and customer letter volumes and business prices?
- How do we best take account of international mail?

Parcels
- By using one product/two operators do we miss any key information?
- What are the main determinants of USPs/OSPs shares of the parcel market?
- Are there key differences between businesses and consumers that affect the parcel market?
- How do we best take account of international parcels?
- Are there data on OSP prices and prices for business customers?

Methods of estimation

Three main approaches

- **Equation based on economic theory that can be calibrated using data (with some assumptions)**
  - Used for demand, price, revenue, profit (e.g. Price: fixed mark-up over costs (so prices adjust to cost increase) or prices fixed (so mark-up changes with costs))

- **Equation based on economic theory that needs to be estimated**
  - Uses econometric approaches to determine (non-causal) relationships
  - Used for cost, employment

- **Relationship not well understood**
  - Explore relationships through correlations in data, use assumptions or qualitative approach
  - May be due to complexity/limited data
  - Use for access and coverage, number of firms, USO costs, user needs

Key quantitative relationships: cost

- **NERA (2004) :**
  - Econometric approach based on cost minimisation
  - Looked at total costs and costs across value chain for USPs only
  - Key determinants of **total costs** - labour (wages), letter & parcel volumes, urban share of population and number of households
  - Access measures (letter boxes etc) used for collection and delivery costs.

- **Preliminary estimates using updated data:**
  - USPs: wages, postal volumes still have strong effect, urban effect reduced
  - Total sector: parcel/letter volumes comparable effect but urban population has positive impact on cost

Key relationships: cost

Cost driver	NERA (2004) (n=99)	USP update (n=61)	Total sector (n=135)
Ln wage	0.63 (0.01)***	0.37 (0.07)***	0.29 (0.06)***
Ln letter volume	0.61 (0.04)***	0.72 (0.03)***	0.40(0.03)***
Ln parcel volume	0.04 (0.01)***	0.11 (0.02) ***	0.49 (0.02)***
% urban population	-0.93 (0.34)*	-0.03 (0.17)	0.67 (0.20)***

- **Key questions**
  - Do these results/cost drivers reflect current experience?
  - Impact of parcel lockers, shared network infrastructure, technology, environmental drivers?
  - How do we capture the 'USO cost' in this function?
  - Are main costs from business customers captured?

  - **How can total costs be allocated across letter and parcel products to determine unit cost?**

Key quantitative relationships: indicators

indicator	Approach	Questions
Price	Price = unit cost +mark-up for each product and operator: $p_i = c_i + \psi_i$ Letters: price determined by cost and regulation Parcels: prices mainly determined by market competition (OSPs)	Do other factors influence mark-up? Is a cost change passed on in price or absorbed?
Market share	Market share depends on quality (delivery speed, frequency, location) and price (Discrete choice) equation can be estimated or simulated. Implicit effect of cost on market share through price assumed fixed	
Revenue/profit	Calculated as a function of price, demand and unit cost of products in simplified model Comparison with data trends in revenue, expenditure, gross surplus could identify effects of non-postal activities	Focus on postal sector activities. What is the role of diversification?

Key quantitative relationships: indicators

indicator	Approach	issues
Employment	Assume key determinants of employment are demand, network access/quality variables and technology. Use approach consistent with cost estimation to specify equation to estimate	What are the key network access/quality indicators to include?
Access and coverage	Assume that letter box density depends on letter volumes and requirements of USO. Other access infrastructure (post offices, parcel lockers, etc) depends on quality indicators and letter and parcel demand. Difficult to estimate as limited variation in speed, frequency and location over time, and limited data on parcel lockers, PUDO, shared infrastructure.	Are there other drivers? Are there additional sources for relationship or data? Is this different for business customers?
Environment	Use values from literature and demand to estimate. Take account of expected changes in transport emissions	Other key factors influencing this? Additional data sources?

Developing assessment framework for qualitative indicators

- **Scope, cost and sustainability of USO**

- **Vulnerable users**

- **Harmonisation**

- **Approach:**
  - Make qualitative assessment of indicators New Normal relative to current
  - Use survey to validate and estimate qualitative impact of policy changes (high/medium/low)
  - Provide guidance on criteria for high/medium/low to facilitate common understanding

Session 5

Data collection approach

Objectives of the survey and second round of interviews

🔹 **The main objectives of further stakeholder consultation is to:**

a) validate the quantification of the new normal scenario;

b) validate the design of the methodological framework; and

c) collect data to construct the methodological framework.

Data collection

- **What data should we source from each of the different data collection types?**

Data collection	
Literature	**Multiple published sources and databases have provided useful information.** • What key insights or data points do you believe should be sourced from existing literature relevant to our study? • Are there specific studies, reports, or sources that you recommend we review for relevant data?
Survey	**The survey aims to contact many stakeholders to gather quantitative and qualitative data. This aims to reach as many stakeholders as possible.** • What specific information or data would you like to see gathered in the survey questionnaire? • Are there any questions or topics you believe are crucial for us to explore through the survey?
Interviews	**In-depth interviews will aim to capture perceptions, views and understandings of stakeholders. These will be more detailed.** • What insights or perspectives do you think would be valuable to gather through interviews with stakeholders? • What specific topics should be discussed in the interview? • Are there specific groups or individuals you recommend we target for interviews, and what types of data should we aim to collect from them?

Approach of the survey and second round of interviews

Data collection timeline

Workshop 2		Wednesday 27th March
Launch survey		Mid-April
Second round of interviews	Part 1: key stakeholders	May
	Part 2: based on initial survey responses	June
Survey closes		4 weeks after launch
Workshop 3		Wednesday 26th June

Session 6

Summary and next steps

Next steps

- Thank you for participating today!

- We will be launching the survey soon and would appreciate if you could encourage as many organisations as possible to participate.

- We will also be conducting interviews over the remainder of the study.

- The third and final workshop will take place in late June.

- For questions about the study, please contact us at PostalSectorStudy@rpaltd.co.uk

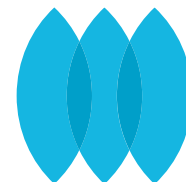# Thank You

postalsectorstudy@rpaltd.co.uk

If you have any further questions or comments

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