

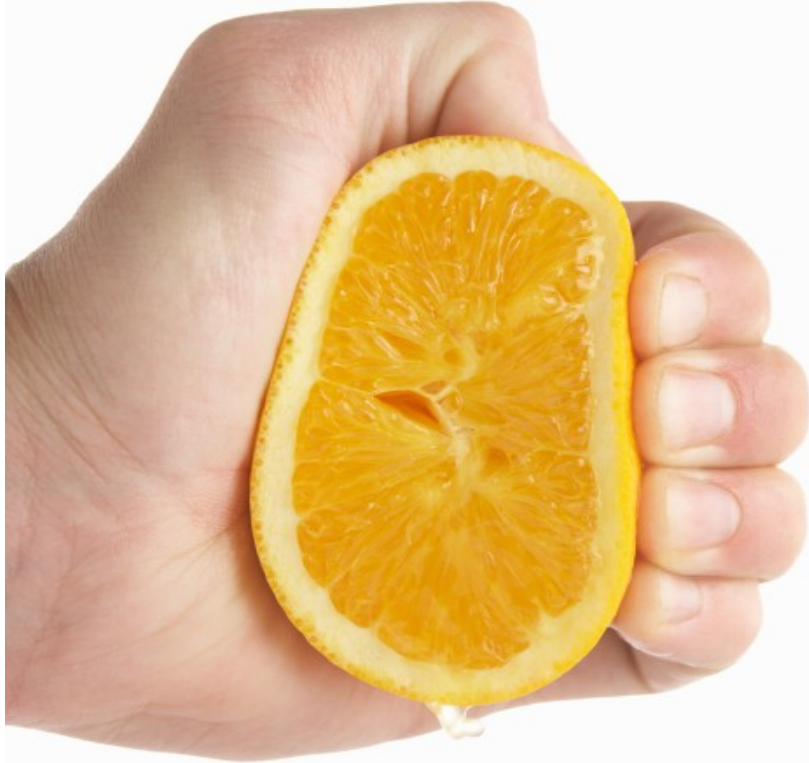


Bernhard Bukovc

The New Postal Ecosystem

PIP – market environment

PIP – pressure



Mail volumes

Costs

Political expectations

Organization

ICT developments

Market expectations

Competition

PIP – mail volumes



> 5 %

Post Danmark
Poste Italiane
Correos
Le Groupe La Poste
PTT Turkish Post
Posten Norge
India Post
PostNL



< 5 %

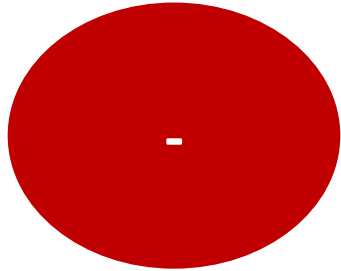
Deutsche Post DHL
Australia Post
Swiss Post
Austria Post
Correios Brasil
NZ Post
Singapore Post
Japan Post



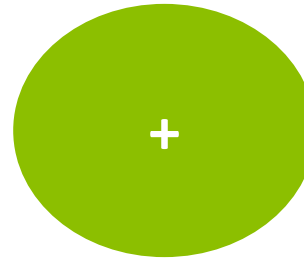
+

China Post
Luxembourg Post
Itella
Hongkong Post
Pos Indonesia
Thailand Post

PIP – parcel volumes

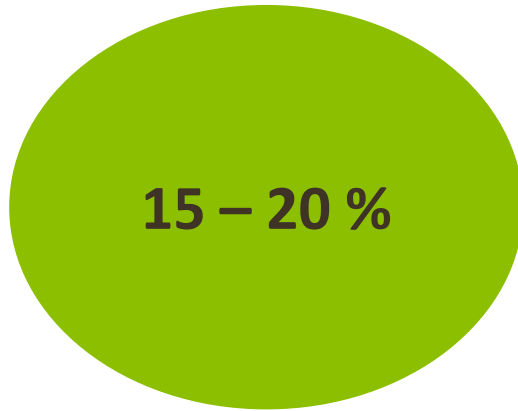


Mainly due to domestic economic problems (e.g. a general decline or lower growth levels of eCommerce)



Average growth rates per year between 4 – 6 %

PIP – eCommerce growth



online retail sales
annual growth until 2020

20 - 30

China, Belgium, Turkey,
Russia, India, Indonesia

10 - 20

Australia, Italy, Canada,
Germany, Thailand,
France, US

0 - 10

Japan, Netherlands,
Switzerland, UK

PIP – opportunities



PIP – some basic questions

What is the role of a postal operator in society ?

What is its core business ?

PIP – some basic questions



What is the postal DNA ?

PIP – bringing things from A to B



PIP – intermediary



B 2 B 2 C 2 C 2 G

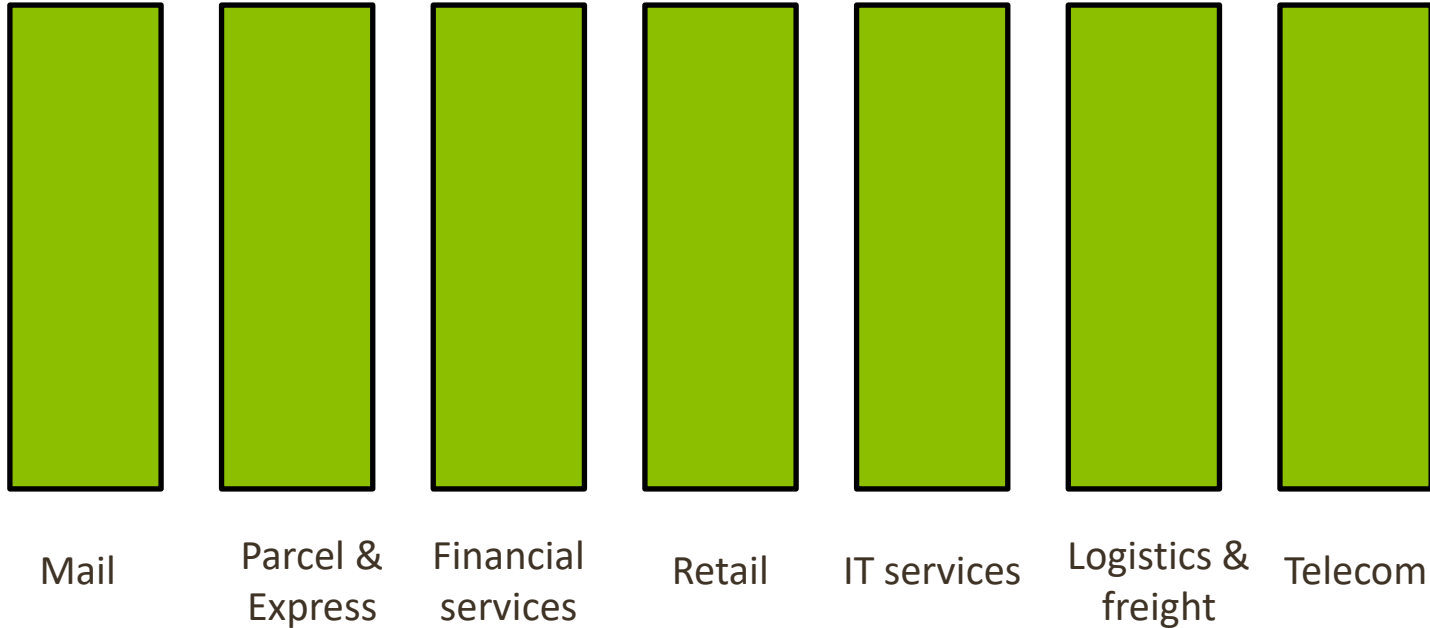
physical
financial
information

PIP – challenges

PIP – main challenges

- Remaining strong & even growing the core business
- Diversification into areas where revenue growth is possible
- Expansion along the value chain(s) of postal customers
- Being a business partner to consumers, businesses & government
- Embracing technology

PIP – diversification



PIP – value chain



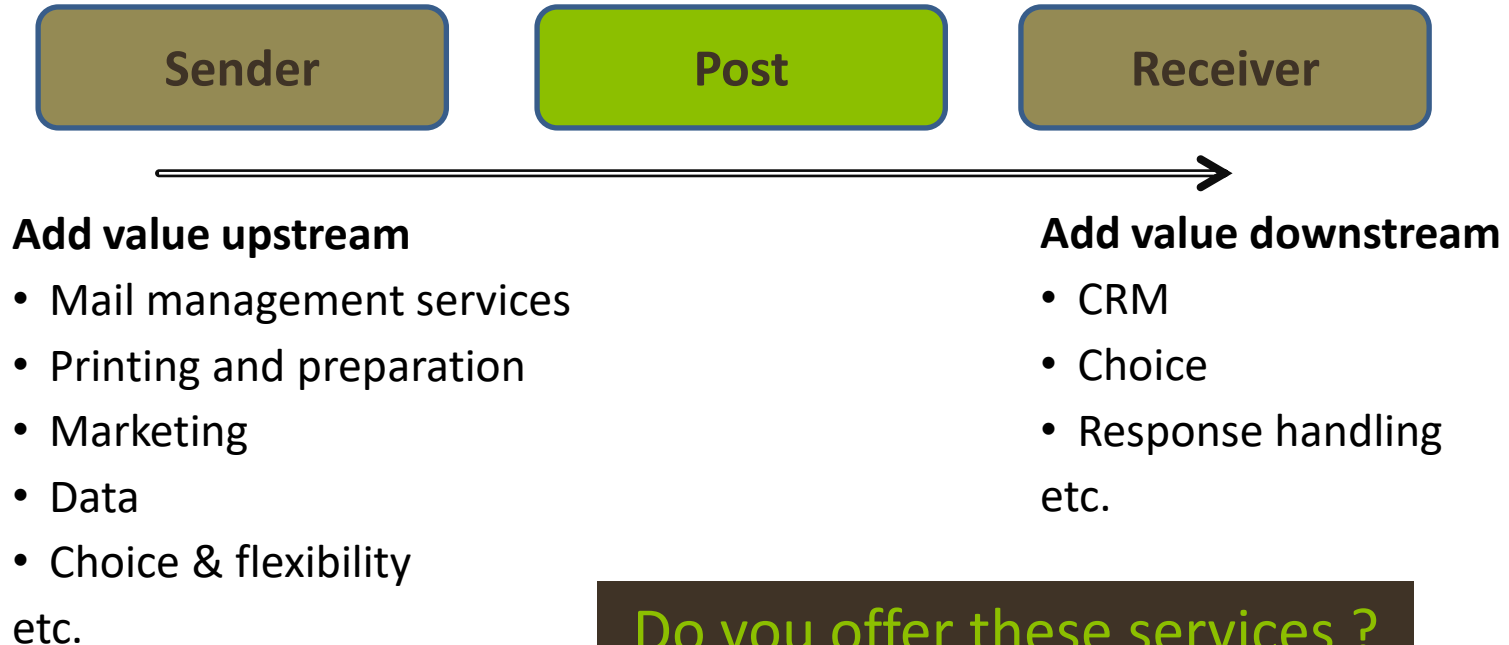
Sender

Post

Receiver

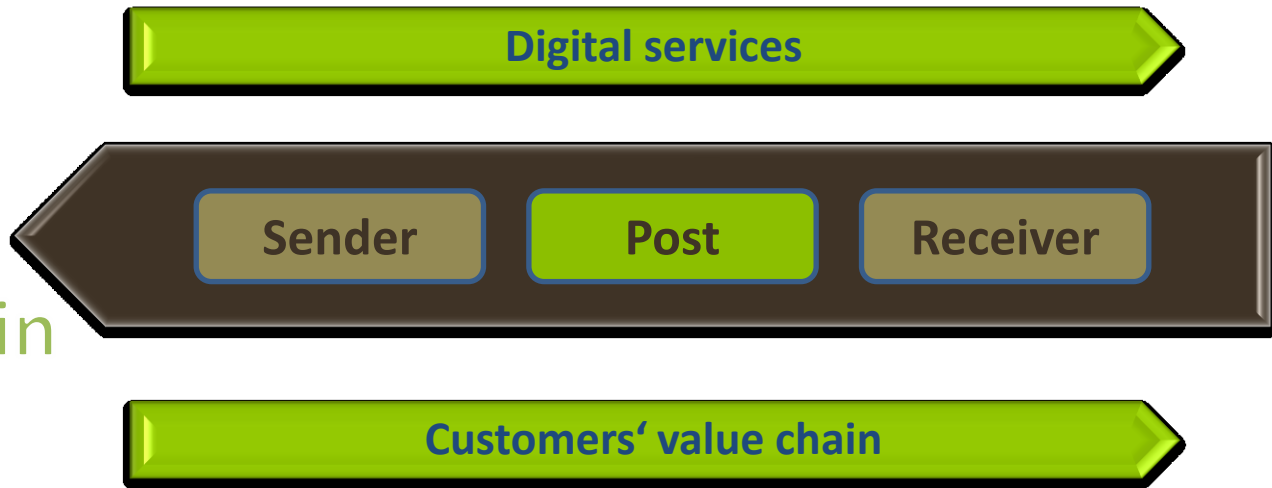


PIP – value chain mail



PIP – value chain parcel

3D
Value Chain



PIP – value chain parcel



- ✓ webshop services
- ✓ choice & flexibility products
- ✓ choice & flexibility pick-up
- ✓ choice & flexibility shipping
- ✓ fulfillment & warehousing
- ✓ customs & administration

- ✓ seamless cross-border solution
- ✓ track & trace
- ✓ re-routing
- ✓ delivery choice & flexibility
- ✓ returns
- ✓ claims handling
- etc.

Do you offer these services ?

PIP – to be solved

Domestic

- Flexibility (pick-up, shipping, delivery)
- predictability & speed & efficiency
- choice (location, re-routing etc.)
- track & trace
- define products in a customer friendly way

International (cross-border)

- returns
- track & trace
- harmonization & standardization

It's all about the
“where”

PIP – big data & IoT

Operational efficiency: real-time route optimization, crowd-based pickup and delivery, strategic network planning, and operational capacity planning

Customer experience: customer loyalty management, continuous service improvement and product innovation, and risk evaluation and resilience planning

New business models: market intelligence for small and medium-sized enterprises, financial demand and supply chain analytics, address verification, and environmental intelligence

source: DHL Research

PIP – robotics

Customer Contact Points	Automation / Work Processes	Transport / Delivery	Cloud Robotics
Locker (electronic) systems - Delivery - Shipping	Robotics solutions in work processes; mainly handling of items	Drones Self-driving cars etc.	“No robot is an island”

PIP – competences

trusted intermediary

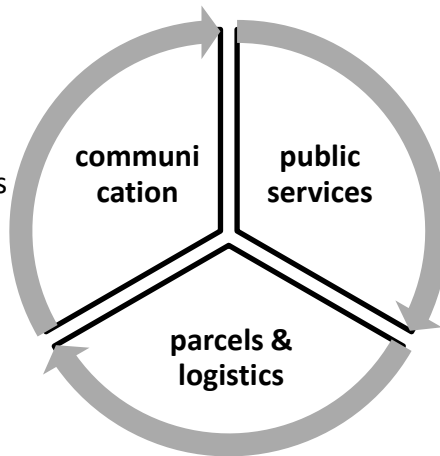
identity services
digital safe
document management
payment solutions
customs & security
banking & insurance

communication

- physical communication
- digital communication
- marketing services

logistics / parcels

B2B parcel & freight
B2C
C2C
B2B2C



public services

- eGovernment
- physical service solutions
- intermediary between government & citizens & businesses

eCommerce value chain

webshop services
shipping API
secure payment API
shipping choice & flexibility
pick-up choice & flexibility
customs and administration
fulfillment & warehousing
seamless cross-border solutions

PIP – who orchestrates the market?

if posts want to play a relevant role and become irreplaceable they have to develop services and solutions along the value chain(s) of their customers, thus becoming their partners

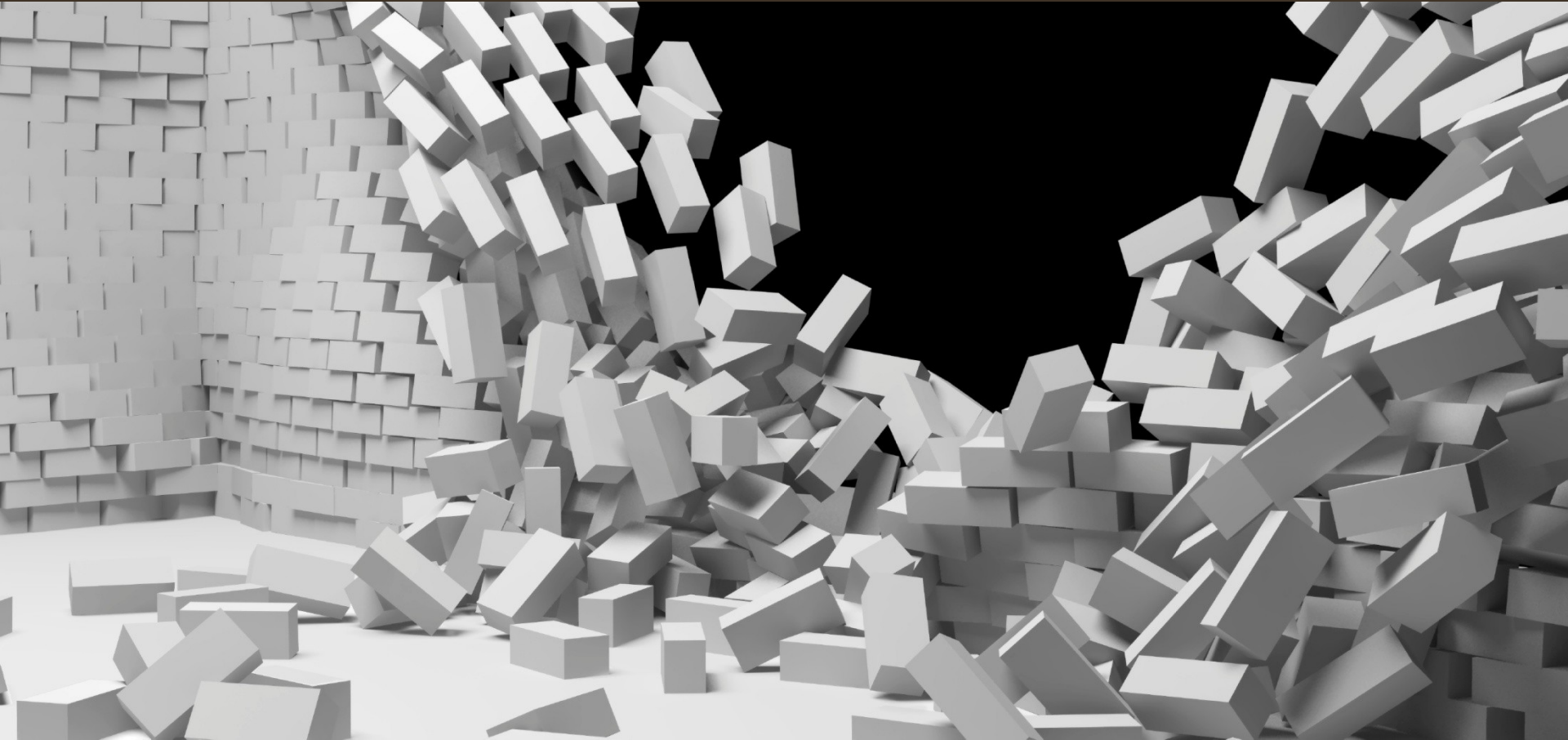
&

they have to master their core business



PIP – future scenarios

PIP – disruption & destruction



PIP – transformation & mutation



PIP – conclusions

1

Master the core business: offer the services your customer wants (choice, flexibility, customer centricity, cross-border solutions etc.)

2

eCommerce is a huge opportunity – capture the market and offer the services and solutions consumers and businesses are looking for

3

Who wants to stay relevant or even orchestrate the market must go down the value chain(s) of his customers

4

Big Data, IoT & location tools and services are the backbone and indispensable for providing valuable, customer focused solutions and services

The logo for GIS (Geographic Information Systems) is displayed in white text on a blue background. The background features a network of white lines and dots, suggesting a map or data network.

GIS