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# Progress toward Liberalization of the Postal and Delivery Sector

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# CONTENTS

<b>Contributors</b>	vii
<b>Sponsors</b>	xi
<b>Preface and Acknowledgements</b>	xiii
<b>Universal Service Obligation</b>	
1. The Welfare Effects of Entry and Strategies for Maintaining the USO in the Postal Sector <i>Michael A. Crew and Paul R. Kleindorfer</i>	3
2. Universal Service Obligations in the Postal Sector: Economic Learnings from Cross-Country Comparisons <i>Xavier Ambrosini, François Boldron, and Bernard Roy</i>	23
3. Profitability of the Universal Service Postal Provider Under Entry with Economies of Scale in Collection and Delivery <i>Gonzales d'Alcantara and Bernard Amerlynck</i>	39
4. On the Use of Cost Functions in the Assessment of the Impact of Liberalization on Postal Universal Service Burden <i>Stefano Gori, Emiliano Piccinin, Simona Romito, and Gennaro Scarfiglieri</i>	59
5. Questioning the Monopoly-Supported Postal USO in Developing Countries <i>Charles Kenny</i>	75
6. Estimating the Net Cost of the USO: A Case Study of Colombia <i>George Houpis, Almudena Lara, and Mark Williams</i>	89
7. Assessing the Cost of the Portuguese Postal Network: Practical Cost Evaluation of a USO and Other Applications <i>Ricardo Goulão Santos, Alberto Pimenta, and Sofia Beatriz Henriques</i>	103
<b>Access and Worksharing</b>	
8. Establishing Non-uniform Access Prices in the UK <i>Roger Hill and Richard Robinson</i>	123
9. Worksharing: How Much Productive Efficiency, at What Cost and at What Price? <i>Robert Cohen, Matthew Robinson, John. Waller, and Spyros Xenakis</i>	141
10. Regulating Access to Stimulate Competition in Postal Markets? <i>Paul W.J. de Bijl, Eric van Damme, and Pierre Larouche</i>	153
11. Enhancing Competition by Unbundling the Postal Administration <i>John Haldi and William J. Olson</i>	173

## **Liberalization and Quality of Service**

12. The Economic Implications of Quality of Service Regulation in a Liberalized Postal Market 193  
*Tom Balogh, Richard Moriarty, Paul Smith, Roisin Doherty and Ian Leigh*
13. Estimation of Consumers' Willingness-to-pay for Quality of Service in Post 209  
*Gregory Swinand and Siôn Jones*

## **Pricing Issues**

14. Pricing and Welfare Implications of Alternative Approaches to Setting Price Controls in the Postal Sector 227  
*Philippe De Donder, Helmuth Cremer, Paul Dudley, and Frank Rodriguez*
15. Pricing the Last Mile in the Postal Sector 249  
*Cátia Felisberto, Matthias Finger, Beat Friedli, Daniel Krähenbühl and Urs Trinkner*

## **Demand Studies**

16. Forecasting Swiss Mail Demand 267  
*Urs Trinkner and Martin Grossmann*
17. Generational Analysis of Mail Users 281  
*Luis Jimenez, Elena Diakova, and Chrystal Szeto*

## **Legal and Regulatory Issues**

18. The New EC Framework for State Aid to Public Service and the Postal Sector: Where Do We Stand Now? 303  
*Alessandra Fratini and Fabio Filpo*
19. Postal Services Regulation In Europe: A Comparative Study of the UK, the Netherlands, Belgium, France, Germany, Italy and Sweden 321  
*Richard Eccles and Pauline Kuipers*
20. Benefit-Cost Regulation of Negotiated Service Agreements 341  
*David Levy, Joy Leong, Lawrence Buc, and Michael Plunkett*
21. The "Real" Graveyard Spiral: Experiences from the Liberalized Swedish Postal Market 359  
*Per Jonsson and Sten Selander*

## **Postal Reform in Japan**

22. Competition Structure and Future Postal Reform in Japan: In Comparison with International Liberalization 369  
*Shoji Maruyama*
23. The Privatization of Japan Post: Ensuring both a Viable Post and a Level Playing Field 385  
*Amelia Porges and Joy Leong*

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## PREFACE AND ACKNOWLEDGEMENTS

This book arises out of the Thirteenth Conference on Postal and Delivery Economics held in Antwerp, Belgium, June 1-4, 2005. Leading practitioners, postal administrations, and the courier industry, as well as a number of regulators, academic economists, mailers, consultants, technology suppliers, and lawyers came together to examine some of the major policy and regulatory issues facing the industry. Issues addressed included the universal service obligation, regulation, liberalization, competition, access, worksharing, demand, cost, service quality, and postal reform.

The conference and the book follow our earlier conferences. In 1990, the first Conference on Postal and Delivery Economics (CPDE) was held at Coton House, Rugby, England, July 22-25, 1990, in honor of the one hundred and fiftieth anniversary of the Penny Post and the contributions of Sir Rowland Hill. The ensuing book, *Competition and Innovation in Postal Services*, was published by Kluwer Academic Publishers in 1991. In 1992 2<sup>nd</sup> CPDE was held at Village PTT, La Londe les Maures, France, on March 18-21, 1992. This conference resulted in *Regulation and the Nature of Postal and Delivery Services*, published by Kluwer Academic Publisher in 1993. Both conferences were recognized by the European Express Organization with the Hermes Award 1992 at its annual award dinner in Munich on June 22, 1992. The first workshop, The Workshop on Postal and Delivery Economics, was held June 23-26, 1993 in Daun, Germany. In 1994 the 3<sup>rd</sup> CPDE was held in Stockholm, Sweden, May 18-21, 1994, and a workshop, in Hakone, Japan, June 1-4, 1994 combined to produce the volume *Commercialization of Postal and Delivery Services*, published by Kluwer Academic Publisher in 1995. A workshop was held in Naantali, Finland, June 7-10, 1995. The 4<sup>th</sup> CPDE was held in Monterey, California, May 22-25, 1996, and resulted in the book *Managing Change in The Postal and Delivery Industries*, published by Kluwer Academic Publisher in 1996. The next book, *Emerging Competition in Postal and Delivery Services* was a direct result of the 5<sup>th</sup> and 6<sup>th</sup> CPDEs; the former was held in Helsingor, Denmark, June 11-14, 1997; and the latter held in Montreux, Switzerland, June 17-20, 1998. The 7<sup>th</sup> CPDE was held in Sintra, Portugal, June 23-26, 1999, which resulted in the book *Current Directions in Postal Reform*, published by Kluwer Academic Publishers in 2000. The 8<sup>th</sup> CPDE, was held in Vancouver, Canada, June 7-10, 2000, resulting in the book *Future Directions in Postal Reform*, published by Kluwer Academic Publishers in 2001. The 9<sup>th</sup> CPDE was held in Sorrento, Italy, June 6-9, 2001, and the book *Postal and Delivery Services: Pricing, Productivity, Regulation and Strategy*, was published by Kluwer Academic Publishers in 2001. The 10<sup>th</sup> CPDE was held in Potsdam, Germany, June 5-8, 2002, and the resulting

book, *Postal and Delivery Services: Pricing, Delivering on Competition*, was published by Kluwer Academic Publishers in 2002. The 11<sup>th</sup> CPDE was held in Toledo, Spain, June 4-7, 2003, and the resulting book, *Competitive Transformation of the Postal and Delivery Sector*, was published by Kluwer Academic Publishers in 2004. The 12<sup>th</sup> CPDE was held in Cork, Ireland, June 2-5, 2003, and the resulting book, *Regulatory and Economic Challenges in the Postal and Delivery Sector*, was published by Kluwer Academic Publishers in 2005.

The 2005 conference was made possible by the support of the following organizations: Pitney Bowes; Royal Mail; Deutsche Post World Net; United States Postal Service; Canada Post Corporation; FedEx; La Poste; La Poste / De Post; R.R. Donnelley & Sons Company; UPS; Swiss Post; CTT Correios de Portugal S.A.; IBM Business Consulting Services; Postcomm – The Postal Services Commission; Siemens AG; United States Postal Rate Commission; Posten AB ; Finland Post Corporation; Canadian Union of Postal Workers; Anacom; An Post; A.T. Kearney GmbH; Poste Italiane; Postwatch; TPG Post; Haldi Associates; Sidley Austin Brown and Wood LLP; Frontier Economics; Bird & Bird; Envelope Manufactures Association; London Economics; National Association of Letter Carriers; New Zealand Post; Oxera; Venable LLP; and Association for Postal Commerce .

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The host country plays an important role in these conferences. This year's conference, the *Thirteenth Conference on Postal and Delivery Economics*, benefited greatly from the efforts of our host PO, La Poste / De Post. Their representatives Gonzales d'Alcantara and Bernard Damiens were gracious hosts.

We would like to thank our distinguished dinner speakers, Johnny Thijs, James C. Miller III, and Matthias Krause. In the tradition of these

conferences we very much enjoyed the speech by Johnny Thijs, Chief Executive Officer of La Poste / De Post. His keynote speech at the Conference provided an outlook on the future of postal and delivery networks from the unique perspective of La Poste / De Post. James C. Miller III, Chairman of the Board of Governors – United States Postal Service presented an interesting discussion of postal reform in the United States. Matthias Krause gamely stood in for Stefan Keh, President of Postal Automation Division – Siemens AG, who was unable to be present because of illness. Matthias provided commentary on the role of a leading technology provider in the future of the mail.

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