

INTERNATIONAL MAIL QUALITY OF SERVICE MONITORING

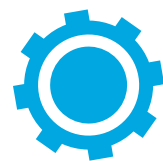
UNEX™ CEN 2020 results



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March 2021



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INTERNATIONAL PRIORITY LETTER MAIL EXTERNAL QUALITY OF SERVICE MONITORING

UNEX™ CEN module > 2020 results

4.4 DAYS

AVERAGE TIME FOR
LETTER MAIL DELIVERY
IN EUROPE

56.5% J+3

PROPORTION
OF LETTER MAIL
DELIVERED IN 3 DAYS

78.2% J+5

PROPORTION
OF LETTER MAIL
DELIVERED IN 5 DAYS

Reliability of international letter mail in Europe during the COVID-19 pandemic

In 2020, the IPC UNEX™ CEN measurement has showed that, on average, international priority letter mail in Europe was delivered in 4.4 days, despite the postal industry being affected by the ongoing COVID-19 pandemic like other economic sectors. Transit times and service quality were impacted by the pandemic and the lockdown measures imposed in different countries throughout Europe in various ways. Nevertheless, the 2020 results show that posts still managed to deliver more than half of the mail in three days (speed indicator) and almost four fifths in five days (reliability indicator).

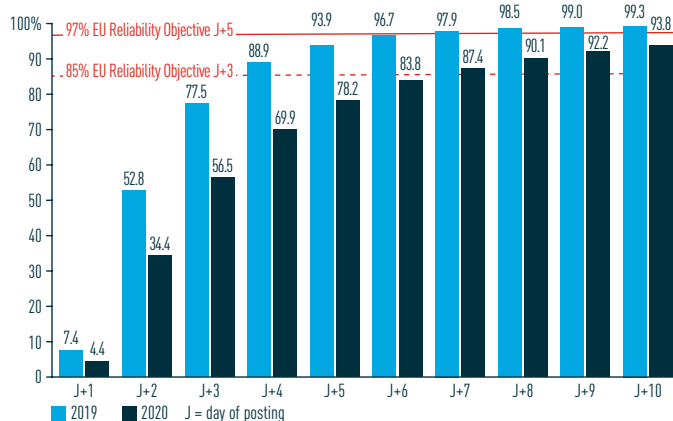
The IPC UNEX™ CEN measurement is end-to-end: from posting in the origin country, to delivery to the final addressee in the destination country. This includes the postal operations' time for collection in the origin country, sorting, international transportation, and processing and delivery in the destination country. All posts, as origin and/or destination, were impacted by national restrictions to fight the COVID-19 pandemic, at domestic sorting, collection or delivery level due to staff shortages. Due to the end-to-end nature of the measurement, the challenges encountered in the posts impacted their postal partners and vice versa. Lastly, the time for transportation was also heavily affected by a major international transport disruption, in particular the drastic reduction of both air transport capacity and capability in Europe, requiring solutions and adjustments almost daily, such as shifting to road or sea transport, using transit countries, or finding freight space on the remaining active air connections.

The EU objectives for letter mail service were set by the 1997 European Union (EU) Directive on Postal Services (97/67/EC Directive), at 85% of cross-border priority letter mail to be delivered within three days (J+3, the speed indicator) and 97% within five days (J+5, the reliability indicator).

J+1 to J+10 cumulative performance

The chart below shows the 2019 and 2020 postal performance from J+1 to J+10 in Europe (where J for "Jour" is the day of posting). Each bar shows the yearly average proportion of international priority mail that was delivered to its final addressee within n days of posting (J+n).

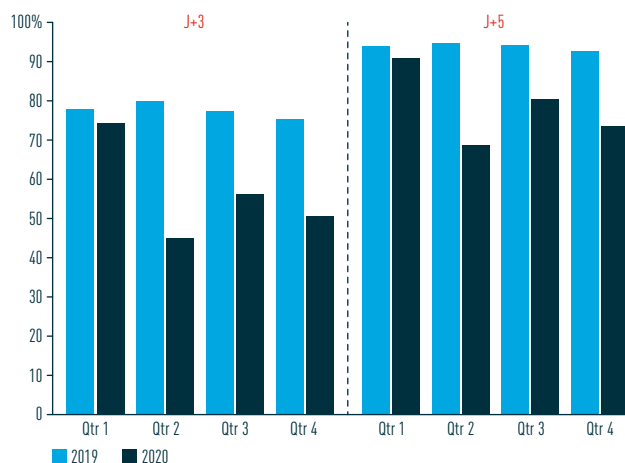
Despite being faced with the COVID-19 pandemic and resulting restrictions for most of the year, European posts in the UNEX™ CEN module still succeeded to deliver more than half of cross-border priority mail within three working days (speed indicator) and almost 80% within five working days (reliability indicator).



In 2020, 56.5% of test letters were delivered within three days of posting (J+3, speed indicator), a decrease of 21.0 percentage points compared to 2019, and 78.2% were delivered within five days (J+5, reliability indicator), a decrease of 15.7 percentage points.

Quarterly performance

Further analysing the data at quarterly level, the charts below clearly highlight the COVID-19 effect during the year: an overall good performance at the start of the year (in most of the cases, constraints related to COVID-19 were implemented in the second half of March) and a significant knock-out effect during the second quarter, more marked for J+3, the speed indicator than for J+5, the reliability indicator.

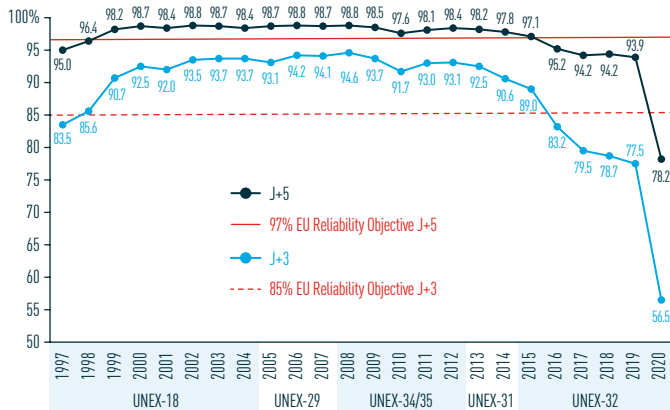


The quarters in the second half of 2020 show posts on their way to restoring little by little resources and processes by implementing alternative operational and logistical solutions while a second wave of constraints and restrictions were renewed during the Autumn across Europe. Further to the uncertainties on EU mail treatment by the UK caused by the Brexit preparations, the last quarter of the year was affected by the Christmas volumes, as usual.

J+3 & J+5 performance across years

The chart below shows the J+3 and J+5 yearly averages since 1997, when the EU objectives for letter mail service were set by the 1997 European Union (EU) Directive on Postal Services (97/67/EC Directive), which states that 85% of cross-border letter mail is to be delivered within three days (J+3, the speed indicator) and 97% within five days (J+5, the reliability indicator).

It shows that European averages were consistently above the J+3 and J+5 EU objectives from 1998 to 2015. Since 2016, posts have experienced challenges to maintain the former high levels of letter mail performance. It was, however, the COVID-19 pandemic in 2020 that had the most significant impact on the overall performance, on average, as the chart shows below.



The decreasing trend of quality for cross-border letter mail since 2013 has various reasons as explained in previous reports. It is an adverse consequence of the continued pressure on postal resources, processes and infrastructure. This pressure can also be seen in the relaxation of domestic quality of service standards set in agreement with national regulators (moving from next-day delivery to two, three or more working days).

Postal operators are pressured to reduce their operational costs related to the declining volume of international letter mail envelopes, while at the same time volumes of e-commerce postal letter products such as untracked packets are growing significantly and constantly, creating major challenges in the existing infrastructure and logistical capacity.

That trend has been accelerated over the past year as communities in lockdown have increasingly shopped online, including for basic purchases. To support this sudden rise in activity, posts expanded domestic letter packet/parcel processing and delivery capacity, sometimes by re-allocating operations resources from envelope letter mail, the postal product measured in the UNEX™ CEN module.

The social role played by posts, who have continued to connect citizens under lockdown and to support the population and governments by providing services and delivering online purchases, has been demonstrated.

Integrity and independence of results

The validity and independence of the statistics are guaranteed by the UNEX™ CEN module external contractor in charge of the panel, Quotas GmbH (Holstenplatz 20, 22765 Hamburg, Germany – www.quotas.de).

The UNEX™ CEN measurement uses test letters to sample the performance of cross-border mail flows end-to-end, i.e. from posting in the origin country to delivery in the destination country, continuously over the year.

Performance level across Europe

The table below shows the average performance separately for the group of 18 countries that have been monitored continuously since 1994, the extended group of 29 countries, and for the 32 countries covered in 2020 respectively. For all groups, postal performance for 2020 has remained below the objectives set out by the 1997 EU Postal Directive. It further suffered from the COVID-19 pandemic hitting the European economy and population in various ways for almost the entire year.

	UNEX-18 ¹	UNEX-29 ²	UNEX-32 ³
J+3, speed indicator	55.5%	56.6%	56.5%
J+5, reliability indicator	75.1%	78.1%	78.2%

- UNEX-18 covers the 15 EU countries before the May 2004 enlargement: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, the Netherlands, Portugal, Spain, Sweden and the United Kingdom together with Iceland, Norway and Switzerland (the latter as a destination only from 2018 onwards).
- UNEX-29 covers 29 countries with the extension of the UNEX-18 group in 2005 to the new EU member countries: Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia.
- UNEX-32 covers UNEX-29 extended to Bulgaria and Croatia, i.e. the 2020 EU membership of 28 member states, along with Iceland, Norway, Serbia and Switzerland (the latter as a destination only from 2018 onwards).

Performance consistency across Europe

The table below shows the proportion of UNEX™ CEN module country-to-country flows meeting each EU objective. In 2020, 3.2% of the measured European country-to-country flows achieved the J+3 EU objective (a decrease of 8.3 percentage points vs 2019) and 2.4% achieved the J+5 EU objective (a decrease of 15.4 percentage points).

	UNEX-18 ¹	UNEX-29 ²	UNEX-32 ³
85% J+3, speed indicator objective	5.6%	3.7%	3.2%
97% J+5, reliability indicator objective	3.0%	2.7%	2.4%
Total number of country-to-country flows	268	675	802

The small percentages above show the high disparity across the matrix of European country-to-country flows. Flows were impacted differently depending on the pre-COVID-19 pandemic international transport arrangements. Results show that traffic between neighbouring countries and through well-established road networks by truck have suffered less, except when borders were closed. All long-distance flows covered in normal times by air transport (regular passengers or cargo lines) required almost daily adjustments and solutions (transit countries, road or sea instead of air) depending on air freight capacity (note: by mid-2020, global air freight capacity was down more than 30% year on year).

The test letters are posted and received by volunteer panellists selected by Quotas, based on the specified criteria. Both the identity of these panellists and the location of their induction or delivery points are kept unknown from the postal operators participating in the measurement.

Furthermore, the test envelopes mirror the physical characteristics of everyday customer letter mail and are consequently processed anonymously through national and international postal networks. More information on the UNEX™ CEN module and overall methodology can be obtained on the IPC website or by contacting us via unex@ipc.be.

Europe > Percentage on time in J+3 & J+5 and average delivery days

IPC publishes the UNEX™ CEN module end-to-end results for international priority letter mail in Europe annually

Key performance indicators: the three indicators presented in this brochure are the percentage of test mail items delivered within three days (J+3) i.e. the speed indicator, within five days (J+5) i.e. the reliability indicator, and the average number of delivery days taken to deliver mail. J (“Jour”) is the day of collection by the post and so, for example, +3 refers to the number of working days before final delivery to the addressee during which time collection, sorting, national and international transport, and delivery has taken place. The distribution of the cumulative results from J+1 to J+10 as well as statistical precision figures are available for the 802 country-to-country flows upon request via unex@ipc.be.

Method of calculation: the results are calculated based on the posting date, for items sent between 1 January and 31 December 2020, and on a five- or six-day business week, depending

on the actual days of collection, delivery and processing operations of each postal operator. The standard business week was applied for the calculations despite a reduction in collection and delivery days due to staff shortages as a result of the pandemic. National and regional postal holidays are excluded in the destination country as well as holidays in the origin country if they directly follow the day on which the test letters were sent. Lists of non-working days (national and regional postal holidays or weekdays during which postal operations such as collection, delivery and processing do not take place) as well as a detailed description of the results’ calculation methodology are available upon request via unex@ipc.be.

The results in this brochure reflect the real postal performance achieved in 2020. Despite the impact of COVID-19, no Force Majeure cases were applied on the quality of service scores.

UNEX™ CEN module > 2020 results

Origin Country	Destination Country (ISO alpha-2 code)																																
	AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	GR	HU	IS	IE	IT	LV	LT	LU	MT	NL	NO	PL	PT	RO	RS	SK	SI	ES	SE	CH*	GB	
Austria (AT)	J+3		51.3	43.0	33.6	5.1	75.4	2.4	27.5	23.8	33.3	88.8	11.4	79.6	1.3	7.5	76.7	26.0	12.6	39.7	20.9	44.2	3.1	31.8	12.4	21.3	13.0	89.3	87.3	14.3	18.4	64.3	24.1
	J+5		76.9	58.2	57.6	35.9	96.7	34.1	50.5	55.4	66.7	98.0	31.4	94.8	10.0	24.6	90.0	51.0	44.8	91.4	41.9	83.7	16.3	71.7	43.4	42.6	27.8	98.3	95.5	23.8	52.6	98.6	58.6
	Days		4.1	5.6	6.3	12.3	2.8	6.6	8.1	7.7	5.5	2.4	10.5	3.0	12.9	11.6	3.1	7.2	7.9	3.8	15.3	4.0	10.2	4.8	8.0	8.3	8.5	2.4	2.5	8.4	6.8	3.2	5.1
Belgium (BE)	J+3	86.7		0.0	39.1	13.6	17.8	7.1	11.4	11.1	62.2	85.4	18.2	17.5	0.0	34.1	83.3	22.5	27.7	86.7	2.2	89.9	2.8	45.4	12.5	8.8	0.0	13.1	25.0	28.8	39.2	84.6	77.0
	J+5	95.6		2.3	59.8	35.6	32.2	55.4	24.3	55.6	88.4	95.1	42.0	69.0	16.7	65.9	91.7	32.5	38.5	95.7	13.5	96.9	38.9	83.2	31.3	15.8	19.4	37.7	51.7	55.2	70.6	94.9	94.7
	Days	2.4		10.2	5.1	9.6	7.6	5.7	8.3	5.9	3.7	2.6	8.0	5.2	13.8	6.0	3.5	8.4	7.0	2.6	13.9	2.6	7.3	4.2	7.9	9.0	16.0	6.8	6.7	6.0	4.9	2.6	3.0
Bulgaria (BG)	J+3	13.8	4.9		7.9	4.8	13.6	0.0	11.8	0.0	13.3	16.0	0.0	2.9		8.3	3.8	8.6	8.8	5.6	2.9	20.5	0.0	18.4	6.1	13.5	12.5	16.7	10.5	6.0	0.0	7.9	2.4
	J+5	65.5	26.8		21.1	19.0	50.0	2.7	26.5	7.7	44.7	47.3	17.9	26.5		16.7	19.2	22.9	29.4	8.3	2.9	38.5	2.9	26.3	12.1	35.1	42.5	57.1	21.1	26.0	17.1	39.5	19.3
	Days	5.6	12.5		10.0	11.0	7.5	13.1	10.7	12.8	7.9	7.0	10.5	11.4		16.3	10.1	10.3	9.6	12.8	31.6	10.1	14.7	9.9	11.9	6.9	7.5	6.0	9.2	10.0	11.1	9.4	10.0
Croatia (HR)	J+3	29.7	22.2			7.5					11.9	76.6		8.8		18.4	11.6			40.0		56.8	5.0	4.5			24.2	22.5	81.1	6.8	5.3	39.7	12.7
	J+5	58.9	55.6			25.0					31.0	93.0		20.6		52.6	20.9			82.5		73.0	22.5	22.7			65.2	60.0	93.9	22.7	26.3	80.9	38.1
	Days	5.5	6.1			8.0					7.9	3.2		10.7		8.0	9.9					4.3	9.5	9.3			5.8	5.9	2.9	10.5	6.8	4.8	7.5
Cyprus (CY)	J+3	25.0	15.8	20.0		6.5			6.1	14.8	17.8	13.3			0.0	5.6						8.6	0.0	0.0		20.0		20.0		7.7	0.0	23.5	20.9
	J+5	50.0	47.4	42.9		29.0			39.4	55.7	57.8	39.8			18.8	44.4						42.9	6.3	13.3		36.7		64.0		34.6	26.3	47.1	57.8
	Days	7.4	7.2	8.3		10.4			7.2	7.2	6.6	7.6			12.1	9.0						6.8	11.4	9.1		7.6		9.4		7.5	10.5	7.2	6.2
Czech Republic (CZ)	J+3	88.3	21.6	0.0	7.5	0.0		0.0	9.2	17.9	24.1	74.1	12.8	42.0		2.4	8.8	10.5	4.8	5.1	0.0	38.9	0.0	18.8	18.9	10.8	2.6	92.3	9.3	2.8	15.9	37.5	12.0
	J+5	96.4	32.4	18.4	15.0	2.9		8.3	26.2	33.3	50.6	93.5	33.3	78.4		14.3	28.1	26.3	40.5	28.2	10.8	77.8	15.4	55.3	27.0	32.9	23.7	98.9	48.8	19.4	27.3	50.0	46.0
	Days	2.4	8.2	11.2	12.2	15.6		9.8	12.0	8.5	7.7	3.1	13.4	4.4		10.9	8.8	11.3	9.7	9.7	30.7	5.3	10.8	5.7	9.8	9.0	10.1	2.2	6.9	9.8	7.1	6.9	7.6
Denmark (DK)	J+3	40.5	43.9	21.6		2.8	17.5		41.2	24.1	23.4	86.1	19.0	13.5	21.2	20.5	34.1	30.4	38.1	30.0	0.0	61.0	48.7	31.0	15.9	8.3	0.0	34.9	31.8	11.4	87.1	47.8	47.8
	J+5	70.3	73.2	43.2		30.6	60.0		76.5	70.1	57.4	96.4	59.5	45.9	60.9	54.5	61.0	54.3	60.7	65.0	2.5	95.1	90.1	57.1	34.1	33.3	16.7	72.1	68.2	25.7	96.8	89.1	72.2
	Days	4.5	4.5	6.8		10.4	5.3		5.4	4.7	5.7	2.5	6.3	5.9	5.8	6.9	6.5	5.6	5.0	5.5	23.0	3.6	3.9	5.6	8.7	8.3	15.2	4.9	4.9	8.6	2.6	3.7	4.3

* CH = Switzerland

UNEX™ CEN module > 2020 results

Origin Country		Destination Country (ISO alpha-2 code)																																
		AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	GR	HU	IS	IE	IT	LV	LT	LU	MT	NL	NO	PL	PT	RO	RS	SK	SI	ES	SE	CH*	GB	
Estonia (EE)	J+3	24.1	16.1		3.0		2.9	2.8		13.8	2.9	12.4	0.0			11.4	7.7	39.5	43.2	2.9		32.3	5.8	18.2	2.9				7.7	9.4	12.7	5.9	8.8	
	J+5	62.1	41.9		18.2		44.1	30.6		60.5	31.4	50.0	12.9			40.0	17.9	75.6	89.2	26.5		54.8	48.1	39.4	14.3				15.4	28.1	53.2	29.4	40.4	
	Days	5.8	6.6		9.6		6.9	7.6		5.3	8.0	5.9	12.5			8.2	10.6	4.6	3.8	7.9		7.1	6.5	6.8	11.0				11.2	9.0	5.9	8.3	7.8	
Finland (FI)	J+3	25.0	56.1	5.0			17.1	7.0	48.6		27.7	69.8	9.8	14.0	16.0	16.7	12.8	22.5	23.7	13.6		60.0	10.9	7.1	12.2	11.4		17.5	0.0	10.9	53.4	67.4	66.7	
	J+5	27.5	85.4	10.0			19.5	30.2	91.8		69.2	94.8	17.1	20.9	24.0	38.1	19.1	57.5	63.2	22.7		82.2	45.5	14.3	17.1	20.0		25.0	14.3	17.4	96.8	95.7	85.6	
	Days	7.6	4.0	10.4			9.4	6.7	3.7		5.2	3.3	18.2	9.4	7.8	9.2	9.7	5.9	5.6	8.1		3.9	5.7	10.0	10.2	10.9		8.1	9.9	9.6	3.5	3.3	3.5	
France (FR)	J+3	38.9	78.7	9.0	28.8	7.1	18.7	9.9	17.4	18.8		67.3	20.5	19.1	5.8	31.0	66.1	17.9	8.7	73.6	5.3	73.6	1.8	30.4	54.6	26.3	10.0	22.7	9.3	31.0	47.1	68.0	64.1	
	J+5	68.5	93.3	38.2	44.0	21.4	44.7	33.3	41.3	37.5		91.4	47.6	55.5	25.0	57.1	87.9	44.8	40.6	92.8	18.4	89.6	16.1	49.4	79.0	51.9	40.0	54.5	19.8	58.7	77.1	91.3	86.9	
	Days	5.3	3.0	7.3	8.2	11.3	7.5	8.2	8.3	9.0		3.3	10.1	6.5	9.9	5.6	3.6	8.0	9.3	3.1	13.1	3.3	8.7	7.2	4.6	7.4	9.5	6.6	9.0	6.5	4.9	3.2	3.6	
Germany (DE)	J+3	94.2																																
	J+5	98.7																																
	Days	2.3																																
Greece (GR)	J+3	47.1	66.7	2.6	21.6	25.3	25.6	2.2	18.2	10.0	49.3	48.4				14.3	25.9	20.5		25.6	5.3	35.6	0.0	15.9	20.0	35.7	11.1			36.6	9.5	56.3	39.9	
	J+5	70.6	88.9	56.4	37.8	64.7	46.2	8.7	39.4	30.0	63.2	69.8				31.0	58.6	41.0		34.9	18.4	53.3	17.4	38.6	37.5	64.3	22.2			43.9	31.0	77.1	62.1	
	Days	5.7	3.6	6.0	12.0	5.3	7.9	11.6	18.1	10.4	5.8	5.1				11.6	6.7	11.3		7.6	20.2	6.9	11.2	8.5	8.5	6.8	9.2			7.7	8.3	4.7	6.2	
Hungary (HU)	J+3	80.5	15.9	15.6	23.1	0.0	29.7	0.0		30.0	18.8	85.6	8.1			9.3	6.7	25.7	21.9	18.6	9.4	26.5	0.0	22.0	19.1	29.7	5.4	67.5	82.5	11.6	7.5	43.6	20.8	
	J+5	92.9	43.2	37.5	35.9	24.1	64.9	13.9		55.0	39.6	96.9	21.6			41.9	13.3	45.7	50.0	39.5	21.9	41.2	12.8	56.1	31.9	61.1	43.2	92.5	97.5	25.6	32.5	82.1	31.1	
	Days	2.9	6.0	6.9	7.2	12.8	5.8	9.3		6.2	8.6	2.5	9.8			7.4	9.8	6.9	6.9	6.9	21.4	6.4	11.2	5.4	7.8	5.4	7.5	2.9	2.6	9.8	7.1	3.9	7.1	
Iceland (IS)	J+3	9.5	0.0				1.4			10.5	20.0	13.9				0.0	0.0					25.0	0.0	0.0						0.0	17.3	6.1	23.8	
	J+5	45.2	29.7				36.6			23.7	40.0	50.0				20.9	2.6					65.0	31.1	26.5						18.2	56.0	52.4	70.0	
	Days	7.1	8.0				6.6			7.8	7.1	6.8				11.0	9.4					5.3	7.4	8.2						10.3	5.8	6.3	5.1	
Ireland (IE)	J+3	16.2	21.1	10.5	0.0	0.0	9.3	0.0	9.7	10.5	16.4	32.1	5.7	9.3	10.7		22.2	13.2	9.1	19.5	5.1	16.3	2.8	7.7	20.0	3.0		11.4	5.7	9.5	16.7	41.5	71.3	
	J+5	29.7	39.5	36.8	10.3	9.1	37.2	0.0	25.8	42.1	40.0	82.1	28.6	32.6	32.1		48.9	39.5	15.2	26.8	25.6	65.1	27.8	20.0	55.0	39.4		28.6	28.6	38.1	23.8	61.0	89.5	
	Days	8.6	6.2	8.2	19.8	22.0	10.6	9.6	14.9	7.8	6.3	5.8	11.7	10.2	9.4		6.6	10.0	9.4	8.5	15.3	5.7	8.4	10.0	7.7	7.4		10.0	25.2	8.5	12.5	5.3	3.3	
Italy (IT)	J+3	75.2	64.2	0.0	55.8	0.0	5.0	0.0		11.9	59.0	79.5	8.1	11.8		14.0		2.8	5.7	68.3	11.1	61.2	0.0	2.5	16.7	3.0	0.0	50.0	69.6	14.1	9.5	81.1	45.4	
	J+5	92.2	88.1	10.3	83.7	11.8	25.0	9.8		19.0	81.7	92.3	27.0	29.4		25.6		8.3	11.4	95.1	23.8	79.6	10.5	10.0	33.3	21.2	42.9	84.1	89.1	43.4	28.6	89.8	77.7	
	Days	3.1	4.2	12.1	4.3	14.8	8.3	12.4		9.0	3.9	3.0	10.2	8.4		13.0		11.9	12.2	3.4	13.5	5.1	12.8	10.1	8.9	12.9	7.2	4.2	3.3	7.1	8.4	3.0	4.7	
Latvia (LV)	J+3	41.7	25.6	2.3	13.5	26.3	22.9	9.5	91.8	48.4	10.5	31.1	5.4	38.5		29.5	32.4		31.9		5.4	43.6	16.7	28.6	21.7	8.1		51.3	14.6	14.6	36.8	38.5	50.4	
	J+5	66.7	51.2	30.2	21.6	55.3	45.8	42.9	99.0	73.4	39.5	73.0	27.0	53.8		54.5	44.1		55.1		21.6	74.4	59.5	51.0	42.0	21.6		69.2	24.4	19.5	57.9	71.8	70.5	
	Days	4.9	6.3	8.5	9.8	9.2	6.6	6.8	2.5	4.4	7.1	4.6	12.9	5.9		6.2	6.9		5.3		14.4	4.2	5.8	6.2	8.0	9.1		4.7	10.0	9.5	5.5	4.6	4.6	
Lithuania (LT)	J+3	25.0	25.7	2.8	15.4	2.6		5.3	57.1	11.1	5.6	49.0		17.1		21.1	18.0	37.0			6.7	25.0	7.7	15.2	13.9		26.8		12.0	19.0	23.7	12.7		
	J+5	65.6	62.9	27.8	46.2	30.8		23.7	92.9	58.3	17.8	80.1		36.6		42.1	50.0	70.7			20.0	36.1	52.3	60.6	19.4		68.3		24.0	57.1	42.1	23.8		
	Days	5.5	5.6	8.3	6.7	14.3		7.3	3.6	5.6	9.9	4.2		7.3		6.3	7.7	4.5			24.3	7.0	6.4	5.3	9.0		5.4		10.1	5.8	7.3	10.2		
Luxembourg (LU)	J+3	92.3	88.4	27.7		3.1	23.9	0.0		26.8	66.7	90.2	10.3	20.9	0.0	23.3	79.1	17.5	28.9		15.6	91.9	5.1	13.0	23.8	16.2		22.4		26.3	46.3	94.9	80.0	
	J+5	97.4	97.5	42.6		9.4	71.7	20.5		48.8	86.6	98.8	33.3	55.8	2.9	48.8	95.3	32.5	50.0		28.1	94.6	38.5	43.5	57.1	27.0		53.1		71.1	68.3	100.0	94.7	
	Days	2.3	2.7	7.7		34.2	4.8	7.5		5.7	3.7	2.3	19.7	5.3	37.9	12.3	3.2	8.1	6.7		23.4	2.6	8.3	6.2	5.6	7.8		5.7		4.8	5.1	2.1	2.7	

* CH = Switzerland

UNEX™ CEN module > 2020 results

Origin Country		Destination Country (ISO alpha-2 code)																															
		AT	BE	BG	HR	CY	CZ	DK	EE	FI	FR	DE	GR	HU	IS	IE	IT	LV	LT	LU	MT	NL	NO	PL	PT	RO	RS	SK	SI	ES	SE	CH*	GB
Malta (MT)	J+3	37.1	33.3				10.3	0.0		9.7	22.0	32.9	0.0		15.0	16.7					42.5	1.1	10.3	13.2					0.0	2.6	13.3	40.5	
	J+5	48.6	44.4				41.0	7.3		19.4	49.0	76.9	13.8		30.0	43.3					77.5	6.3	15.4	28.9					12.1	23.1	46.7	65.9	
	Days	6.8	7.1				8.5	11.0		10.0	8.2	5.3	13.1		12.1	8.6					4.3	10.8	13.6	11.4					10.8	10.0	10.0	6.2	
Netherlands (NL)	J+3	69.3	85.4	23.1	35.6	0.0	25.7	4.4	19.0	26.9	45.9	74.8	6.9	55.7	9.9	23.3	31.5	14.1	6.4	93.3	7.1	8.6	54.7	19.8	6.7	3.8	75.6	5.5	53.3	27.6	59.7	20.2	
	J+5	94.4	96.2	61.4	63.7	8.5	77.9	41.6	41.4	71.2	78.5	94.6	19.2	87.8	34.5	62.8	79.2	35.3	35.9	98.9	14.2	53.1	85.5	49.4	38.9	12.0	95.6	41.1	81.3	73.3	89.6	46.5	
	Days	3.3	2.7	6.0	5.5	13.4	4.7	6.1	6.0	4.8	4.4	3.0	10.3	3.8	8.7	6.2	4.6	7.1	7.1	2.3	14.7	5.4	3.9	5.8	7.0	9.7	3.4	7.6	4.3	4.9	3.6	6.1	
Norway (NO)	J+3	4.9	14.6	2.4	13.9	2.9	13.2	2.5	17.9	7.2	10.8	30.8	2.6	5.0	5.7	15.6	5.3	21.1	13.3	7.0	14.8	2.9	2.6	0.0		2.2	7.1	6.7	60.9	28.9	30.7		
	J+5	19.5	19.5	19.5	22.2	20.6	26.3	40.0	61.5	38.6	18.9	90.6	12.8	22.5	32.9	35.6	13.2	52.6	50.7	32.6	24.1	15.7	13.2	24.2		23.9	21.4	21.7	95.7	50.0	51.1		
	Days	8.0	9.2	10.0	11.5	21.8	8.4	6.5	5.7	6.1	8.8	4.1	11.5	9.5	8.2	9.0	9.2	5.6	6.1	8.6	9.4	9.4	9.5	10.2	11.1		8.3	12.2	9.7	3.5	7.3	7.0	
Poland (PL)	J+3	39.0	31.0	10.4	16.2	2.7	31.0	0.0	12.8	7.5	9.9	64.3	3.0	34.2	0.0	23.7	10.2	21.4	28.0	20.0	3.6	18.0	0.0	7.0	22.2	5.7	26.7	5.3	14.3	15.0	33.3	22.9	
	J+5	70.7	76.2	41.7	45.0	16.2	71.4	19.0	41.0	40.0	33.0	90.7	24.2	50.0	19.0	50.0	34.7	39.3	64.6	37.1	3.6	59.0	7.5	16.3	52.8	17.1	82.2	21.1	28.6	40.0	61.9	51.8	
	Days	4.6	4.7	7.0	8.7	9.9	4.8	8.1	5.9	7.4	7.4	3.5	9.3	6.1	9.7	7.1	7.0	6.6	5.7	7.1	15.4	5.6	10.3	13.4	6.0	13.3	4.4	11.5	10.2	7.5	5.9	6.9	
Portugal (PT)	J+3	27.0	46.2	4.7	17.6	3.2	25.0	5.0	10.3	5.4	32.5	61.8	11.1	12.8		40.0	44.4	8.6	11.5	40.9	5.3	59.0	5.1	9.3	12.2		18.4	14.3	47.0	29.7	60.2	66.7	
	J+5	67.6	71.8	30.2	20.6	22.6	42.5	30.0	27.6	35.1	76.8	81.8	30.6	33.3		60.0	63.9	28.6	34.6	68.2	15.8	92.3	53.8	39.5	24.4		44.7	23.8	78.7	59.5	74.8	87.7	
	Days	4.9	5.0	8.9	10.7	24.4	7.3	7.2	8.4	7.9	4.6	3.9	11.8	7.6		5.1	5.4	9.7	8.7	4.9	19.8	3.6	5.9	6.5	8.5		7.0	10.3	4.4	6.5	5.0	3.6	
Romania (RO)	J+3	22.7	15.4	7.7			17.9	0.0			6.8	31.3	11.1	16.7		0.0	3.8				23.7	0.0	5.0	2.5			18.9	5.4	16.1	0.0	12.8	16.9	
	J+5	61.4	35.9	38.5			35.9	0.0			28.6	68.3	16.7	61.9		15.0	16.7				66.1	8.6	40.0	22.5			40.5	24.3	46.4	10.3	41.0	50.3	
	Days	6.1	7.2	7.9			8.2	13.2			10.4	5.6	10.8	5.7		14.7	10.4				5.5	12.0	6.8	9.7			8.2	11.0	7.4	11.1	9.1	7.0	
Serbia (Republic of) (RS)	J+3	25.3	5.7	18.2	50.9		33.3				10.7	14.6	8.3	36.4		0.0					12.2	2.6	5.7				30.6	42.9	2.6	6.9	5.7	20.2	
	J+5	72.4	25.7	56.8	84.0		53.8				33.0	51.7	41.7	75.0		21.7					48.8	15.8	31.4				75.0	83.2	10.5	36.2	34.3	46.2	
	Days	5.2	11.2	5.8	4.0		7.6				8.7	7.0	7.3	6.3		8.3					7.5	10.8	10.8				4.4	4.4	14.8	8.6	11.0	7.4	
Slovak Republic (SK)	J+3	80.6	26.8	23.1	18.2	5.4	85.8	0.0		2.3	23.8	80.9	2.4	76.0		6.5	14.9	12.1	16.7		40.0	0.0	31.7	13.5	29.5	5.7		80.0	17.9		40.0	32.6	
	J+5	97.1	61.0	59.0	34.8	16.2	98.9	10.3		25.6	65.1	98.4	29.3	93.8		23.9	46.8	21.2	33.3		60.0	4.9	61.9	35.1	65.9	42.9		97.8	43.6		68.9	53.3	
	Days	2.7	5.6	6.7	7.0	20.6	2.5	9.7			9.2	6.4	2.8	16.8	2.8	10.5	6.7	9.1	7.3		5.4	10.6	5.9	8.6	6.3	7.7		2.8	7.6		5.0	6.5	
Slovenia (SI)	J+3	94.8	31.7	9.4	87.5		79.5	4.7	15.8	6.7	14.9	94.9	5.1	86.5			74.0	23.5		15.4	65.0	4.5	0.0	10.0	7.3	44.4	82.1		10.0	9.8	46.2	12.2	
	J+5	99.1	65.9	34.4	97.0		92.3	16.3	50.0	31.1	36.8	99.3	20.5	94.6			89.6	44.1		28.2	82.5	18.2	59.1	22.5	12.2	69.4	94.9		32.5	26.8	87.9	39.0	
	Days	2.2	5.1	10.5	2.4		2.7	8.7	6.3	7.4	9.4	2.3	10.5	2.8			3.4	7.0		7.3	4.1	7.3	6.0	10.3	9.7	5.4	2.4		8.2	7.5	3.7	7.9	
Spain (ES)	J+3	30.6	43.9	12.0	13.9	8.3	16.7	2.4	16.7	7.7	29.9	50.0	14.0	16.7	0.0	20.0	34.5			13.5	13.9	25.6	2.5	13.6	43.0	17.1	2.5	15.8	15.2		11.9	53.5	40.2
	J+5	50.0	63.4	20.0	27.8	11.1	19.0	7.3	33.3	20.5	60.2	78.6	39.5	25.0	6.7	22.5	64.3			32.4	16.7	69.2	12.5	31.8	66.3	36.6	12.5	18.4	33.3		28.6	74.4	65.8
	Days	5.8	6.8	10.9	13.2	21.4	9.1	9.9	9.9	9.9	5.7	4.7	13.4	11.1	12.8	9.5	5.3			9.1	24.1	6.4	9.4	10.1	5.3	7.9	11.0	13.2	20.1		9.6	4.5	5.9
Sweden (SE)	J+3	35.0	41.0	4.2	28.9	5.4	15.6	17.4	33.6	50.1	16.3	77.8	7.0	13.6	18.4	38.3	37.5	26.6	19.6	19.6	0.0	41.0	51.7	18.5	17.5	10.8	5.8	30.8	20.9	21.1		50.0	59.4
	J+5	67.5	92.3	41.7	65.8	16.2	35.6	64.9	78.3	91.0	32.6	96.3	48.8	45.5	57.1	57.4	52.5	64.1	51.8	67.4	7.9	92.3	93.6	58.5	35.0	37.8	22.5	69.2	62.8	52.6		77.3	80.2
	Days	5.0	3.7	7.9	6.2	9.2	6.5	5.0	4.7	3.7	6.9	2.8	8.2	6.2	6.2	5.5	5.9	5.0	5.5	5.5	20.0	3.8	3.8	5.6	8.3	8.2	14.2	5.4	5.7	7.5		4.2	3.8
United Kingdom (GB)	J+3	42.4	75.9	12.2	19.9	11.4	39.3	5.8	24.9	16.7	53.4	80.4	21.4	35.9	18.8	78.3	31.4	29.2	14.9	70.9	13.5	78.4	10.4	42.6	36.1	25.8	6.0	36.3	23.7	43.2	27.7	50.0	
	J+5	89.8	94.6	46.2	59.3	34.0	83.3	29.9	47.5	27.8	84.7	93.5	39.9	85.9	47.6	91.9	71.5	49.3	32.7	94.3	36.1	96.4	39.6	83.5	59.0	51.2	24.6	84.9	74.2	79.1	63.5	78.6	
	Days	4.1	3.0	6.3	5.7	10.3	4.4	6.7	6.2	6.5	3.9	3.0	8.0	4.3	5.9	3.1	4.8	6.9	7.9	3.5	8.7	2.9	6.3	4.4	5.4	5.8	8.1	4.4	4.8	5.0	5.1	4.2	

* CH = Switzerland

Statistical design

The UNEX™ CEN measurement covered by this publication is carried out continuously throughout the year and monitors both urban and rural areas in Europe in line with the real mail geographical spread of single-piece priority letter mail (sent or received).

The characteristics of the test letters and the panel are specified to ensure that they are representative of the real mail stream with respect to size and weight (C6-20g, C5-50g, C4-50g), posting methods (mailbox, post office, pick-up), payment methods (stamp, meter, PP), addressing (machine typed, handwritten), envelope lay-out and geographical coverage in terms of posting and delivery locations for mail in each country.

Further to its effect on postal networks, the COVID-19 disruption also affected the posting tasks of the UNEX™ measurement's panel: at times senders were not able to induct their test items due to lockdown measures and being limited in movements, post offices' opening days and hours were often restricted, and business panellists were not able to use their office metering machine when homeworking was imposed.

The UNEX™ CEN module and in particular, the European Committee for Standardization CEN standard *EN13850:2012 Postal services – Quality of service – Measurement of the transit time of end-to-end services for single-piece priority and first-class mail* which remains the main driver, require

the design i.e. test mail samples, physical characteristics of that mail, panellists profiles as well as origin and destination country spread, to be based on real mail studies that should be carried out by each post serving as the universal postal service provider in a CEN country.

The reported UNEX™ CEN module results cover international priority letter mail single-piece, i.e. mail which is not bulk mail or that would imply constraints for the customers at posting, e.g. the registration of items, minimum induction volumes, equal contents or the pre-sortation of the inducted mail, in line with the CEN standard EN13850:2012 scope.

The study covers the cross-border mail processes between countries in Europe, so given the regulatory situation in some countries, it might be possible that some part of the mail (hence also of the UNEX™ test mail) is handled by another postal operator than the universal service providers in the countries involved.

The country-to-country results published in this report are calculated for information as a detailed sub-result of the country-to-Europe and Europe-to-country statistical design. Since 2016, the field of study for the UNEX™ CEN measurement has been “country-to-Europe” and “Europe-to-country”: the mail characteristics and geographical constraints mix has been applied at country-to-Europe and Europe-to-country level, rather than forcing it on each individual country-to-country flow whatever the flow's size is.

80,000

TEST LETTERS ACROSS
EUROPE IN 2020

802

COUNTRY-TO-COUNTRY
FLOWS MEASURED

32

COUNTRIES SENDING AND/
OR RECEIVING TEST MAIL

900

PANELLISTS SENDING AND/
OR RECEIVING TEST MAIL

For the UNEX™ CEN module 2020:

- > Test letter volumes to be sent from each country to the rest of Europe and vice versa were calculated based on the procedure described in the CEN EN13850:2012 standard, using the international priority single-piece real mail volumes travelling from each country to Europe and vice versa. Real mail data is provided by both posts on each international flow based on the accounting agreements they exchange annually to calculate each other's remuneration in delivering each other's international mail (“terminal dues”). Once total test letter volumes outbound and inbound have been calculated for each country, they are allocated to specific country-to-country flows using relative real mail proportions to ensure correct representation of real mail flows in Europe.
- > Very small country-to-country flows were not measured; the CEN EN13850:2012 standard specifies that flows with real mail volumes below 11,500 mail pieces per year may be excluded from the measurement. Indeed, if the test mail itself was inducted on such flows, they would artificially increase the real mail volume by more than 2.5%.
- > The geographical spread of the test mail in origin or destination countries was mainly based on real mail statistics aggregating all mail processed i.e. often a mix of domestic and international mail. The mail characteristics sampling related to induction and payment methods, sizes and weights was in some instances based on all mail processed by the postal operator within the country. Indeed, not all operators can split their mail statistics into national and international flow for each of these parameters.
- > The letter mail sizes measured were C6, C5 and C4, and the weights were 20g and 50g. Test letters were no thicker than a few millimetres.
- > The results reported above meet the post-factum redress procedure requested by the CEN standard EN13850:2012. To handle possible deviations between the final test volume, sample proportions achieved and the initially required real mail statistics proportions, a complex process of weighting is to be applied. As required by the CEN Standard, IPC first analyses the variation in past postal performance to identify the key discriminant factors for each of the measured flows. Where deviations from the statistical design proportions were found on the discriminant factors, IPC has adjusted by implementing a corrective multivariate weighting on each of the factors for each of the country-to-Europe and Europe-to-country flows.

After the corrective weighting on each of the country-to-Europe and Europe-to-country flows, IPC has calculated the weighted European average. More information on the discriminant analyses or on the corrective weighting process can be obtained via unex@ipc.be.
- > The ex-post weighting above also applies to statistical accuracy. For the 2020 results, the precision range of a quarter of the country outbound and country inbound totals was below or equal to 5% (assuming a 95% level of confidence).

For the UNEX™ CEN module 2020 (continued):

> Deutsche Post DHL Group (since 2013) and Swiss Post (since 2018) have decided to no longer participate in the UNEX™ CEN measurement. Therefore, any flow measured from Germany or Switzerland and reported in the UNEX™ CEN module is the result of the individual choice of universal postal service providers in other countries to measure that country as an origin. In the other direction, all participating posts measure their flows towards these two countries by default (when enough real mail volume exists).

The CEN EN13850:2012 standard's methodology for international postal measurement is not applicable in a multi-postal operator market situation which is the case in Germany. This remains an exception in Europe as there is no single post serving as universal service provider in that country.

> As described in previous editions, postal operations in Italy have gone through a reorganisation since 2016. Poste Italiane has implemented a process based on alternating collection and delivery days, rotating postal collection and delivery processes every other week in selected areas of Italy, as agreed upon with the Italian postal regulator.

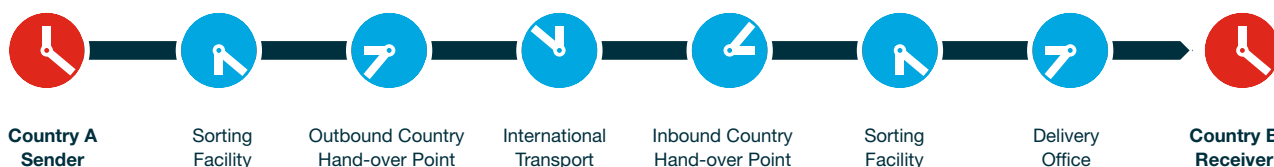
The process has been implemented by Poste Italiane in waves and areas affected stopped being part of the UNEX™ CEN measurement from the moment the change was applied in each area.

> In Iceland, a similar approach of alternate delivery days has been implemented nationwide. For Iceland, each test item is correctly attributed to a specific zone with the correct calculation logic applied based on the alternate delivery day methodology.

Radio Frequency Identification (RFID) technology

In 2020, about half of UNEX™ CEN module test letters contained a Radio Frequency Identification (RFID) device. As the test letter moves through the international mail pipeline, the time of its arrival at specific points can be recorded automatically by radio receivers located in postal facilities. These radio receivers are linked to a global RFID network run by IPC. In a fully anonymous manner, the RFID tags help

to identify any delays which may occur along the postal process, from origin country to destination country. This RFID technology, with continuous technical enhancements, has been in use for the UNEX™ postal quality of service measurement for 25 years. Currently this network serves 30 postal operators and covers 277 postal facilities with 2,875 reading points.



UNEX™ CEN measurement's regulatory framework

IPC has applied requirements from the European Committee for Standardization *CEN standard EN13850 Postal services – Quality of service – Measurement of the transit time of end-to-end services for single-piece priority and first-class mail*, on top of its own grid of European country-to-country flows.

In 2019, IPC requested Mieloo & Alexander in the Netherlands to perform an independent reasonable assurance engagement in accordance with the ISAE 3000 standard to assess the compliance of IPC's UNEX™ quality measurement processes with the CEN EN13850:2012 standard. In line with the CEN standard requirements, the next audit will take place in 2023.

In this audit on the 2019 measurement, the UNEX™ CEN processes and results have been validated by Mieloo and Alexander against the requirements documented in the European Committee for Standardization CEN standard EN13850:2012*. The audit was conducted during a series of visits at the premises of IPC in Brussels (Belgium) as well as at the facilities of the company Quotas in Hamburg (Germany).

Although there were two areas of concern and various recommendations made, Mieloo & Alexander have concluded that the UNEX™ CEN measurement conducted in 2019 by IPC is compliant with the requirements stated in the CEN standard EN13850:2012. For the 2020 measurement, IPC has not made any changes to the measurement methodology, processes or results calculation methods.

The first concern relates to the fact that the real mail data provided by the postal operators, used as input for the statistical design, might potentially not reflect the actual characteristics of cross-border single-piece priority mail only. For example, in some cases, the data provided by postal operators also include domestic mail and/or bulk mail and/or non-priority mail. Furthermore, with the large volume changes currently taking place annually within the postal sector, the timing of real mail data provided (e.g. 2017 data for the 2020 design) will inevitably lead to such data not being as representative as it could be.

The second area of concern is the fact that insufficient business sender panellists were available for the measurement in some countries, also during 2020, (being the result of the first concern above, i.e. having items included in the real mail data provided other than cross-border single-piece priority). As a result, there were cases where business-related mail characteristics specified in an individual country's statistical design were not measured with the required test volume in the UNEX™ CEN Measurement.

This second area of concern has been amplified by the constraints imposed by the COVID-19 crisis, when specific business mail characteristics were not measured for an extended period due to the closure of business offices in general.

* The full report is available to the European participating postal operators as well as their regulators upon request via unex@ipc.be

UNEX™ CEN module countries in 2020

Participating postal operators

Website address

Austria	Österreichische Post AG	www.post.at
Belgium	bpost	www.bpost.be
Croatia	Hrvatska Pošta	www.posta.hr
Cyprus	Cyprus Post	www.cypruspost.post
Denmark	PostNord Danmark	www.postdanmark.dk
Finland	Posti	www.posti.com
France	Le Groupe La Poste	www.laposte.fr
Germany	<i>Although Deutsche Post DHL Group itself was not participating in the study, test mail was sent from and to Germany on behalf of other postal operators (see above).</i>	
Greece	Hellenic Post ELTA	www.elta.gr
Hungary	Magyar Posta	www.posta.hu
Iceland	Iceland Post	www.postur.is
Ireland	An Post	www.anpost.ie
Italy	Poste Italiane S.p.A.	www.poste.it
Luxembourg	POST Luxembourg	www.post.lu
Norway	Posten Norge	www.posten.no
Portugal	CTT Portugal Post	www.ctt.pt
Spain	Correos	www.correos.es
Sweden	PostNord Sverige	www.posten.se
Switzerland	<i>Swiss Post stopped its participation in the study; test mail was sent to Switzerland on behalf of other postal operators (see above).</i>	
The Netherlands	PostNL	www.postnl.com
United Kingdom	Royal Mail Group plc	www.royalmailgroup.com
In 2020 the UNEX™ Monitoring System in Europe covered IPC European members' countries from IPC membership above together with:		
Bulgaria	Bulgarian Posts plc	www.bgpost.bg
Czech Republic	Ceská Pošta	www.ceskaposta.cz
Estonia	Omniva	www.omniva.ee
Latvia	Latvijas Pasts	www.pasts.lv
Lithuania	Lietuvos Paštas	www.post.lt
Malta	MaltaPost	www.maltapost.com
Poland	Poczta Polska	www.poczta-polska.pl
Romania	Poșta Română	www.posta-romana.ro
Serbia (Republic of)	PE Post of Serbia	www.posta.rs
Slovak Republic	Slovenská Pošta	www.posta.sk
Slovenia	Pošta Slovenije	www.posta.si

The addresses of the postal operators above can be obtained upon request at unex@ipc.be.

About International Post Corporation

International Post Corporation (IPC) is the leading service provider of the global postal industry that provides leadership by driving service quality, interoperability and business-critical intelligence to support posts in defending existing business and expanding into new growth areas. It is a cooperative association of 25 member postal operators in Asia Pacific, Europe and North America.

IPC's solutions and services are used by over 190 posts worldwide. Since 1989 IPC has set standards for upgrading quality and service performance and developed technological solutions that help members enhance service for international letters, packets and parcels. IPC engages in industry research, creates business-critical intelligence, provides a range of platforms and programmes for member post CEOs and senior management to exchange best practices and discuss strategy. IPC also manages the system for incentive-based payments between postal operators. Throughout the COVID-19 crisis, IPC has positioned itself as a crucial coordination platform between posts worldwide and put in place operational solutions to ensure the continuity of cross-border mail flows.

To find out more about IPC's UNEX™ Quality of Service Monitoring programme, please [click here](#).

More information on the UNEX™ system, its modules and technical documentation related to the 2020 CEN module results can be obtained via unex@ipc.be or found on www.ipc.be.

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UNEX™ 2020 CEN MODULE RESULTS

INTERNATIONAL POST CORPORATION

