

23rd Conference on Postal and Delivery Economics

June 3rd – 6th, 2015
Vouliagmeni Athens, GREECE

Presented by

CENTER FOR RESEARCH IN REGULATED INDUSTRIES
Rutgers Business School – Newark and New Brunswick

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Wednesday, June 3, 2015

- 5:30 - 7:00 Registration
- 7:00 Reception, Welcome and Introduction to Conference: **Michael A. Crew & Tim Brennan**
- 8:00 Dinner & Speech: **Kostis Melachroinos**, Chairman and CEO, ELTA SA

Thursday, June 4, 2015

- 7:00 Breakfast
- 9:00 - 10:45 **Concurrent Sessions**
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| <p>FUTURE OPPORTUNITIES I <i>Athina</i></p> <p>Chair: Peter Dunn</p> <p>Discussants: Peter Andersson and David Taylor</p> <p>Dominique Bailly & Margaux Meidinger: Managing Flexibility and Quality in Parcels Delivery</p> <p>Christian Jaag & Urs Trinkner: Postal Strategies for a Digital Age</p> <p>Timothy Walker, David Asher, Lisa Nieman, & Amanda Stafford: Framing the Future – Trends, Scenarios, and Opportunities for Tomorrow’s Postal Service</p> | <p>INTERNATIONAL <i>Alea</i></p> <p>Chair: John Hearn</p> <p>Discussants: Joost Callaert, Beatriz Galván Santiago, and Tarjei Weseth</p> <p>James I. Campbell Jr.: Revised Estimate of the Effects of UPU Terminal Dues, 2014 – 2017</p> <p>Henrik Ballebye Okholm, Anna Möller Boivie, & Bruno Basalisco: An Economist’s Perspective on Terminal Dues</p> <p>Ralf Wojtek: UPU Compensation Rates for Packages under EU Competition Law – Are there Lessons to be Learned from Other International Fee Arrangements?</p> |
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- 10:45 - 11:15 Coffee Break
- 11:15 - 1:00 **Concurrent Sessions**
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| <p>USO I <i>Athina</i></p> <p>Chair: Carla Pace</p> <p>Discussants: Robert Campbell, João Confraria, and Giota Christodoulou</p> <p>John Hearn: Implications of Recent Developments in E-commerce for Universal Service Providers and the USO</p> <p>Chris Rowsell: Origins of Universal Service Obligations</p> <p>Vincenzo Visco Comandini: Reshaping Universal Service Obligations in Collection and Delivery</p> | <p>EFFICIENCY <i>Alea</i></p> <p>Chair: Michael Scanlon</p> <p>Discussants: José María Rodríguez</p> <p>Kirk Kaneer, Benjamin Gough & Margaret Cigno: The Unrecorded Cost of Mail – A Consumer and Small Business Perspective</p> <p>Alan Horncastle, Leonardo Mautino & Srin Parthasarathy: What is the Impact of e-Substitution on Cost Efficiency</p> <p>Edward Pearsall, John Klingenberg & Margaret Cigno: The Shape of Postal Inefficiency</p> |
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- 1:00 - 2:15 Lunch
- 2:15-4:00 **Concurrent Sessions**
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| <p>PERSONAL DATA <i>Athina</i></p> <p>Chair: George Kuehnbaum</p> <p>Discussants: Margaret Cigno and Edward Pearsall</p> <p>Claire Borsenberger, Denis Joram, Olaf Klargaard & Philippe Regnard: Big Data and Privacy Issues – Where Do Posts Stand?</p> <p>Jeff Colvin, Michael D. Bradley, & Mary K. Perkins: Privacy, Behavioral Targeting and Postal Services</p> <p>Jody Berenblatt & Jessica Lowrance: Authenticity and Transparency of Postal Operators in the Connection/Sharing Economy</p> | <p>DECLINING VOLUMES <i>Alea</i></p> <p>Chair: João Confraria</p> <p>Discussants: Soterios Soteri and Ian Streule</p> <p>Tim Brennan & Michael Crew: Price Cap Regulation and Declining Demand</p> <p>Antonia Niederprüm, Alex Kalevi Dieke & Christian Bender: Scale Economies and Postal Price Caps in Europe – Declining Volumes, Lower Productivity, Higher Postage?</p> <p>Gavin Knott, Leonardo Mautino & Dariusz Nehrebecki: What is the Relationship between the Change in Demand for Postal Services and the Cost of the USO?</p> |
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- 4:00 Exercise Break
- 7:00 Reception
- 8:00 Dinner & Speech:

Friday, June 5, 2015

7:00	Breakfast		
9:00 - 10:45	Concurrent Sessions		
	LESSONS ELSEWHERE	<i>Athina</i>	MARKET DYNAMICS
	Chair: Bruno Basalisco		Chair: Michael Crew
	Discussants: Joakim Levin and Rita Silva		Discussants: Frank Rodriguez
	George Houpis, Isabelle Carslake & José María Rodríguez: Reflections on the Impact of Applying the EU Telecom Regulatory Framework to the Postal Industry		B. M. Martinelli, S. Gori, & G. Scarfiglieri: A Welfare Analysis in a Multisided Market: The Case of the Postal Sector
	Mark van der Horst: Cross Border Delivery – Digital, Virtual, Tangible or Physical? You Cannot Regulate the Movement of Goods and Data in the Same Way		Philip Groves & Steven Cape: Case Studies in End-2-End Delivery Competition
	Christian Jaag, Martin Maegli & Denis Morel: Commercial and Regulatory Challenges for Postal E-services in Switzerland		Edward S. Pearsall: A Game-Theoretic Model of the Market for International Mail
10:45 - 11:15	Coffee Break		
11:15 - 1:00	Concurrent Sessions		
	USO II	<i>Athina</i>	E-COMMERCE
	Chair: Jean Paul Forceville		Chair: George Houpis
	Discussants: Robert Campbell, Axel Desmedt, and Ian Streule		Discussants: Anna Möller Boivie and Alberto Pimenta
	Axel Gautier, Pierre Copée, & Mélanie Lefèvre: Reforming USO and Promoting Competition at the Digital Age with an Application		Helmuth Cremer, Claire Borsenberger, Philippe De Donder & Denis Joram: Delivery Rates and the Structure of the E-Commerce Sector – Independent vs. Marketplace Retailers
	Chris Rowsell: UK Case Study – Assessing the Impact of Competition on the Universal Postal Service		Heikki Nikali, Kari Elkelä, Iiona Rintanen & Ville Huuhtanen: Demand and Regulation for E-Commerce in Goods
	Michael MacClancy & Joseph Broadway: Designing the Future Universal Postal Service		Tim Walsh: Digital Commerce and Postal Networks
1:00 - 2:15	Lunch		
2:15 - 4:00	Concurrent Sessions		
	DELIVERY	<i>Athina</i>	CUSTOMER VALUE
	Chair: Jim Holland		Chair: Frank Rodriguez
	Discussants: John Hearn & Michael Scanlon		Discussants: Derek Osborn
	Laraine Balk Hope, Michael Bradley & John Pickett: Mode of Delivery and Customer Use of Mail		Laurian Choain, Francesco Materia, & Antoine Tanguy: Postal Service in a Peer-to-Peer Sharing Economy Model
	Goeff Bickerton & Katherine Steinhoff: The Implications of Converting Home Mail Delivery to Community Mailboxes – The Canadian Experience		Amanda Stafford, Angelika Dimoka & Khoi Vo: Using Neuroscience to Understand the Value of Direct Mail
			Colvin, Jeff, Jennifer Bradley, and Michael Bradley: Which Universal Service Obligation Attributes Do Americans Value?
4:00	Exercise Break		
7:00	Reception		
8:00	Dinner & Speech: Constantinos Delicostopoulos, Vice-President of EETT (Hellenic Telecommunications and Posts Commission)		

Saturday, June 6, 2015

7:00	Breakfast	
9:00 - 10:45	RESHAPING REGULATION	<i>Athina</i>
	Chair: Keith Kellison	
	Discussants: Bruno Basalisco, Richard Eccles and Edward Pearsall	
	Alessandra Fratini: Compensation funds under EU law – A Suitable Solution for the Postal Market?	
	Claire Borsenberger: The European Parcel Delivery Market – A Contestable Market	
	Damien Geradin: Better Regulation in Postal Services	
10:45 - 11:15	COFFEE BREAK	
11:15 - 1:00	FUTURE OPPORTUNITIES II	<i>Athina</i>
	Chair: Mark Pollock	
	Discussants: Mary Kay Perkins	
	Laraine Balk Hope, Lee Upton & Virgil Stanford: Brand as a Financial and Strategic Asset – Lessons in Brand Valuation for Postal Operators and Others	
	Adam Houck: Innovation, Disruption, and Partnering: Changing the DNA of Posts from the Inside Out	
	Christian Jaag & Christian Bach: Cryptocurrencies – New Opportunities for Postal Financial Services	
1:00 - 2:15	Lunch (Conference Concludes)	

SPEAKERS, DISCUSSANTS & CHAIRS

Peter Andersson , Associate Professor, Linköping University	Jean Paul Forceville , Director - Regulatory, International and European Affairs, La Poste
Dominique Bailly , Director of HR performance and strategic planning, La Poste	Alessandra Fratini , Partner, FratiniVergano - European Lawyers
Bruno Basalisco , Senior Economist, Copenhagen Economics	Beatriz Galván Santiago , EU Relations Manager, International Affairs, Correos
Jody Berenblatt , Senior Advisor, Grayhair Advisors	Axel Gautier , Associate Professor, Université de Liège
Geoff Bickerton , Research Director, Canadian Union of Postal Workers	Damien Geradin , Professor of competition law & economics, Tilburg University; partner, Covington & Burling, Brussels
Claire Borsenberger , Economist, La Poste – European and National Regulation Division	Stefano Gori , Poste Italiane SpA & University of the West of England
Timothy Brennan , Professor, School of Public Policy, University of Maryland Baltimore County	Philip Groves , Senior Associate-International, Ofcom
Joseph Broadway , Director of Legal Affairs and Company Secretary, CFH Docmail Ltd & Mail Competition Forum	John Hearn , formerly ComReg and Vice-Chair CERP
Joost Callaert , Senior Advisor, BIPT	Jim Holland , Research Director, National Association of Letter Carriers
James I. Campbell Jr. , Attorney and Consultant	Laraine Balk Hope , Economist, USPS-OIG
Robert Campbell , President and Vice-Chancellor, Mount Allison University	Adam Houck , Managing Consultant, IBM Global Business Services
Steven Cape , Senior Analyst, Market Intelligence, Ofcom	George Houpis , Director, Frontier Economics
Isabelle Carslake , Frontier Economics	Christian Jaag , Managing Partner, Swiss Economics
Laurian Choain , Advisor, Costs and Tariffs unit, ARCEP	Denis Joram , La Poste
Giota Christodoulou , Regulatory Services Manager, International Post Corporation	Kirk Kaneer , Economist, USPS-OIG
Margaret Cigno , Director of the Office of Accountability, U.S. Postal Regulatory Commission	Keith Kellison , Senior Vice President – Public Affairs, UPS
Jeff Colvin , Director, USPS-OIG	George Kuehnbaum , Treasurer, Canadian Union of Postal Workers
João Confraria , Director, Anacom	Mélanie Lefèvre , University of Liege
Helmuth Cremer , Professor of Economics, IDEI Toulouse School of Economics	Joakim Levin , Expert Advisor, Swedish Post and Telecom Authority
Michael A. Crew , Director and CRRI Professor of Regulatory Economics, Rutgers University	Jessica Lowrance , Postcom
Philippe De Donder , Professor, IDEI	Michael MacClancy , Head of Regulatory Affairs, The DX Group
Constantinos Delicostopoulos , Vice-President of EETT (Hellenic Telecommunications and Posts Commission)	Martin Maegli , Head of Regulation, Swiss Post
Axel Desmedt , Member of the BIPT Council, BIPT	Bianca Maria Martinelli , Director for Regulatory and Public Affairs, Poste Italiane SpA
Peter Dunn , Principal Analyst Cullen International	Francesco Materia , Head of Accounting, Modelling and Economics Unit, ARCEP
Richard Eccles , Partner, Bird & Bird	Leonardo Mautino , Partner, Oxera
Kari Elkelä , Research Manager, Itella Corporation	Margaux Meidinger , Project Manager International HR Affairs, La Poste
	Kostis Melachroinos , Chairman and CEO, ELTA SA
	Anna Möller Boivie , Senior Economist, Copenhagen Economics
	Dariusz Nehrebecki , Senior Consultant, Oxera
	Antonia Niederprüm , Senior Economist, WIK GmbH
	Heikki Nikali , Research Director, Itella Corporation

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Revised – June 1, 2015

Derek Osborn, Director, Whatnext4u Ltd
Carla Pace, Senior Analyst, Cullen International
Edward Pearsall, Consultant
Mary Kay Perkins, Associate Professor, Howard University
Alberto Pimenta, Head of E-Commerce, CTT Correios de Portugal S.A.
Mark Pollock, General Manager Mail Products, Australia Post
Frank Rodriguez, Associate, Oxera
José María Rodríguez, Frontier Economics
Chris Rowsell, Competition Policy Director, Ofcom
Michael F. Scanlon, Partner, K&L Gates LLP
Gennaro Scarfiglieri, Head of Core Business Strategic Marketing –
Strategic Planning, Poste Italiane SpA
Rita Filipe Silva, Economist, European Union Affairs, ANACOM
Soterios Soteri, Head of Economic Forecasting, Royal Mail
Amanda Stafford, USPS-OIG
Katherine Steinhoff, Research Communications Specialist, Canadian
Union of Postal Workers
Ian Streule, Partner, Analysys Mason

Antoine Tanguy, Advisor, Accounting, Modelling and Economics Unit,
ARCEP
David Taylor, Manager, Regulatory Framework, Canada Post
Corporation
Urs Trinkner, Managing Partner, Swiss Economics, & Lecturer,
University of Zürich
Mark van der Horst, Director EU Affairs, UPS Europe NV/SA
Vincenzo Visco Comandini, Professor in Industrial Economics,
University of Rome Tor Vergata
Timothy Walker, USPS-OIG
Tarjei Weseth, Senior Advisor, Posten Norge A S
Tim Walsh, Vice President Corporate and Regulatory Affairs, Pitney
Bowes Inc
Ralf Wojtek, Rechtsanwalt, Heuking Kuhn Luer Wojtek

ORGANIZING COMMITTEE

Timothy Brennan, Professor, School of Public Policy, University of
Maryland Baltimore County
Larry Buc, President, SLS Consulting, Inc.
Philip Burns, Director, Frontier Economics
James I. Campbell, Office of James I. Campbell Jr.
Margaret Cigno, Director-Rates Analysis & Planning, US Postal
Regulatory Commission
Michael A. Crew, CRRI Distinguished Professor of Economics
Peter Dunn, Principal Analyst Cullen International
Colm Farrelly, Regulatory and International Affairs Manager, An
Post
Charles E. Fattore, President, R.R. Donnelley Logistics
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Veerle Nuyts, In-House Counsel, bpost
Anna Möller, Senior Economist, Copenhagen Economics
Carla Pace, Senior Analyst, Cullen International
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James Sauber, Chief of Staff, National Association of Letter Carriers
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Nancy S. Sparks, Managing Director - Regulatory Affairs, FedEx
Mark van der Horst, Director EU Affairs, UPS Europe NV/SA
Tim Walsh, Vice President Corporate and Regulatory Affairs, Pitney
Bowes Inc.
David Williams, Inspector General, USPSOIG

POSTAL AND DELIVERY ECONOMICS PUBLICATIONS

The following edited books resulted from previous CRRRI Postal Events:

- *Postal and Delivery Innovation in the Digital Economy*, edited by M.A. Crew and T.J. Brennan, forthcoming Springer, 2015
- *The Role of Postal Service in a Digital Age*; edited by M.A. Crew and T.J. Brennan, Edward Elgar, 2014.
- *Reforming the Postal Sector in the Face of Electronic Competition*; edited by M.A. Crew and P.R. Kleindorfer, Edward Elgar, 2013.
- *Multi-Modal Competition and the Future of Mail*, edited by M.A. Crew and P.R. Kleindorfer, Edward Elgar, 2012.
- *Reinventing the Postal Sector in an Electronic Age*, edited by M.A. Crew and P.R. Kleindorfer, Edward Elgar, 2011
- *Heightening Competition in the Postal and Delivery Sector*, edited by M.A. Crew and P.R. Kleindorfer, Edward Elgar, 2009
- *Postal Reform*, Edited by James I. Campbell, Jr., Michael A. Crew and Paul R. Kleindorfer, Edward Elgar, Dec 2008
- *Competition and Regulation in the Postal and Delivery Sector*, edited by M.A. Crew and P.R. Kleindorfer, Edward Elgar, 2008
- *Liberalization of the Postal and Delivery Sector*, edited by M.A. Crew and P.R. Kleindorfer, Edward Elgar, 2007
- *Progress toward Liberalization of the Postal and Delivery Sector*, edited by M.A. Crew and P.R. Kleindorfer, Springer, 2006
- *Regulatory and Economics Challenges in the Postal and Delivery Sector*, edited by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 2005
- *Competitive Transformation of the Postal and Delivery Sector*; edited by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 2004
- *Postal and Delivery Services: Delivering on Competition*, edited by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 2003
- *Postal and Delivery Services: Pricing, Productivity, Regulation and Strategy*, edited by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 2001
- *Future Directions in Postal Reform*, edited by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 2001
- *Current Directions in Postal Reform*, edited by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 2000
- *Emerging Competition in the Postal and Delivery Services*, edited by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 1999
- *Managing Change in the Postal and Delivery Services*, edited by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 1997
- *Commercialization of Postal and Delivery Services: National and International Perspectives*, edited by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 1994
- *Regulation and the Nature of Postal and Delivery Services*, edited by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 1992
- *Competition and Innovation in Postal Services*, edited by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 1991

The following are texts on postal economics:

- *Handbook of Worldwide Postal Reform*, edited by M.A. Crew, P.R. Kleindorfer, and James I. Campbell, Jr., Edward Elgar, 2009.
- *The Economics of Postal Service*, by M.A. Crew and P.R. Kleindorfer, Kluwer Academic Publishers, 1992

These books are published by Springer (formerly Kluwer) and Edward Elgar. For information on ordering the books is available at either www.springeronline.com or <http://www.e-elgar.co.uk/>.

CRRRI

The **Center for Research in Regulated Industries (CRRRI)**, located at Rutgers University, aims to further study of regulation by research in economics, finance, and institutions. Its publications, seminars, workshops, and courses make available the latest advances to academics, managers, consultants, and regulatory commission staff. The Center has over thirty-five years of experience providing research, instruction, conferences, courses, seminars, and workshops in economics of network industries. The Center's *Journal of Regulatory Economics* is an international scholarly bi-monthly publication intended to provide a forum for the highest quality research in regulatory economics. CRRRI was the recipient of The Hermes Award, 1992, awarded by the European Express Association.

CONFERENCE STAFF

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Professor Timothy Brennan, *Conference Co-Chair*
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 University of Maryland, Baltimore County
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HOTEL INFORMATION

The conference will be held in Vouliagmeni Athens, Greece. The conference site is **Amarilia Hotel**, Vouliagmeni Athens, Greece

Accommodation Rates: Double/Twin room €126 per day, Single €95 per day, includes VAT, breakfast, lunch and dinner.

The European plan runs from €75 for single and €86 for double/twin, this plan includes VAT and buffet breakfast only. Rates for 3, 4 and 5 June 2015 the American plan applies (lunch and dinner are included). The European plan applies for any stays before and after the Conference.

For Reservations:

1. Go to **Amarilia Hotel**'s website <https://amarilia.reserve-online.net/>
2. Click Booking Code on top of the page
3. Enter the booking code **RUTGERSG1**
4. Proceed with instructions needed (dates, room type, number of guests etc)
5. After completing the reservation procedure, guests will receive an email with the confirmation of their booking.

Hotel Contact Information: Tel: (+30) 210 899 0391 Fax: (+30) 210 895 5790 info@amarilia.gr

The deadline for reservations is May 1, 2015. Please make your reservations only through the hotel and not through reservation services/travel agencies.

Cancellation and Reservation Policy: Terms to be provided. When booking is made full pre-payment is required, credit card details must be giving for all bookings.

FEES AND EXPENSES

- A registration fee of \$1,565 is payable to Rutgers University.
- Food and lodging at the Conference are not included in the registration fee. Breakfast, lunch and dinner are included in the rates for lodging. All persons that do not stay at the either the hotel will be required to pay for meals separately.
- The conference fee is waived for a limited number of employees of sponsoring organizations.
- Registered participants will be provided with online access to the conference proceedings and a copy of the edited volume resulting from the conference (approximately 7 months after the conference).

Please forward the Registration Form to

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CANCELLATION POLICY: Until **April 24, 2015** cancellation is allowed (except for speakers, chairs, and discussants) without penalty and refunds will be provided in full. After this date, the indicated fee is due in full whether or not the participant actually attends. Substitutions may be made at any time.

Signature of Participant: _____