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## Conditions for Organizing Access Infrastructure of Postal Operators Providing Universal Services in Sweden and Poland

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Jacek Buko<sup>1</sup>

**Abstract:**

**Purpose:** The aim of the article is to recognize the determinants regarding the solutions applied in the organization of access infrastructure (service point infrastructure) by dominant postal operators providing universal services in Sweden and Poland. The identification of the influence of these determinants makes it possible to attempt to establish whether and to what extent they imply the current economic condition and market position of these entities.

**Design/Methodology/Approach:** The fundamental research tool employed in the article is a rational approach to postal policy issues, utilizing factor analysis methodology, including a systemic perspective. Additionally, the method of critical analysis of the subject literature and the observational method with the utilization of arguments supporting generalized propositions were applied.

**Findings:** The conducted deliberations have enabled the identification of key determinants influencing the organization of access infrastructure by dominant postal operators providing universal services in Poland and Sweden. Concerning the operations of the Swedish operator, PostNord Sverige AB, the pivotal significance of economic conditions in the aforementioned matter was identified. In the case of the Polish operator, Poczta Polska S.A., political and social aspects emerged as the most significant determinants.

**Practical Implications:** The conducted deliberations can serve as significant material for political and economic decision-makers, especially in Poland, highlighting issues and potential solutions concerning the shaping of access infrastructure for designated postal operators.

**Originality/Value:** The presented issue has not been previously addressed in discussions published on the international forum.

**Keywords:** Postal access infrastructure, post offices, postal operator.

**JEL codes:** L22, L53, L87.

**Paper type:** Research article.

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<sup>1</sup>Assoc. Prof., Institute of Spatial Management and Socio-Economic Geography, University of Szczecin, ORCID 0000-0002-9804-9835, e-mail: [jacek.buko@usz.edu.pl](mailto:jacek.buko@usz.edu.pl);

## **1. Introduction**

In the 20th century, the significance of information transmission as the primary function fulfilled by postal services contributed to the implementation of meticulous and rigorous control over the operational principles of the postal services supply side. This control was particularly evident in the direct involvement of the state in the production processes of postal services and its legislative role in the postal domain.

The state's direct involvement in the production processes of postal services primarily entailed maintaining state ownership of essential postal economic units, mainly due to their indispensability for economic development and occasionally due to their low profitability. It is also worth noting that in most countries worldwide, postal services were attributed characteristics of a natural monopoly, which was justified by the assertion that with the operation of more than one entity on the supply side of the postal services market, the revenues obtained by these entities would not balance the total costs of the conducted operations (Czaplewski, 2015).

Emphasis was placed on the particular features of postal service provision, such as the necessity of significant capital involvement and the existence of economies of large-scale production and scope.

The application of such solutions led to specific consequences, among which the limited interest of postal operators in cost rationalization and the implementation of analytical accounting and controlling became particularly noticeable. These factors did not contribute to improving the economic outcomes achieved. It is also important to highlight the constrained financial capabilities and limited interest of postal operators in introducing innovative and advanced solutions, which did not foster the enhancement of postal services for society and the economy, nor the alignment of these services with the expressed needs.

Insufficient quality of postal services and unsatisfactory dynamics in the development of the postal services supply side prompted democratic states to initiate liberalization processes in their domestic postal service markets. These processes, initiated in the late 1980s, involved gradually easing legal restrictions and introducing principles of free trade in the postal domain.

Concurrently, the concept of universal postal services was introduced, ensuring the provision of services with spatial accessibility and socially acceptable affordability. It is noteworthy that ensuring a universal service can entail the provision of certain services to some recipients at prices that deviate from those arising from normal market conditions.

Further clarifying the essence of universal services, it should be noted that the instruments utilized in the European Union to satisfy needs of a universal nature are

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services of general interest. These were defined in the Treaty of Rome (Szwaja and Tabor, 1998). It was stated that such services should be based on three principles:

1. Accessibility to all interested parties at a moderate cost and a strictly defined quality.
2. Continuity, signifying uninterrupted provision of services of specified quality.
3. Equality, signifying service availability regardless of the place of residence.

According to the declarations of EU decision-makers (European Council, 2000), access to services of general interest is a fundamental element of European citizenship and is essential for enabling citizens to fully exercise their fundamental rights. Conversely, for businesses, the availability of high-quality public utility services is an essential condition for creating a competitive environment.

In this context, within the framework of regulating service markets associated with network enterprises, the European Union highlights the necessity of striking a balance between protecting free competition and safeguarding consumer rights, which may otherwise be excluded from accessing services provided under the realm of public utility (Commission, 1997).

Within the European Union, the notion of universal postal services finds its reference in postal directives (Directive, 1997; 2002; 2008), where it is defined as “a right for every European consumer to supply of high quality at a reasonable price.” The directives emphasized the necessity of guaranteeing universal postal services at the EU level for the benefit of all users. As a significant source of economic growth and job creation within the internal market (Commission, 2003), these services are also encompassed by the Lisbon Strategy framework (European Council, 2005).

It is indicated there that all universal services contribute to fulfilling the community's goals, particularly in terms of improving quality of life and enhancing economic, social, and territorial cohesion (Mendza-Drozd, 2007). The commitment of member states to ensure universal services constitutes the implementation of one of the European Community's priorities, namely, ensuring social and territorial cohesion within the European Union (Ząbkowicz and Ząbkowicz, 2013).

The analysis of postal regulatory authorities' decisions across individual European Union countries indicates that the provision of these services is generally mandated for the existing public postal operators, as they are the sole entities possessing the necessary infrastructure required to fulfill the specified requirements.

Legislative actions aimed at liberalizing postal service markets were accompanied by deregulation and reorganization. Deregulation involved reducing the direct administrative influence of the state on the market. It should be noted that deregulation should not be equated with the disappearance of the regulatory functions of the state, but rather understood as a departure from comprehensive

regulation based on commands and prohibitions, in favor of a free regulation of entrepreneurship, resources, and financial flows (Czaplewski, 2000).

Reorganization, which is a type of organizational transformation within existing structures (Adair and Murray, 2002), aims to enable the full utilization of the developmental potential inherent in a business. In the broadest sense, these transformations come down to internal organizational changes aimed at achieving organizational benefits, production and economic benefits, as well as financial benefits.

The goal of this article is to recognize the determinants and their impact in relation to the solutions employed in the organization of access infrastructure by dominant postal operators providing universal services in Sweden and Poland. The identification of the influence of these determinants will enable an attempt to determine whether and to what extent they imply the current economic condition and market position of these entities.

## **2. The Case of the PostNord Sverige AB**

The Swedish designated postal operator, PostNord Sverige AB, is the dominant player in the Swedish market, serving 4 million households and 0.5 million business entities. This enterprise traces its origins back to the former state-owned legal postal monopoly, Postverket, which in 1994 underwent transformation from a public utility enterprise (a mixed form of political organization and commercial company) into a state limited liability company named Posten AB (Postlag, 1993).

It is noteworthy that Postverket operated under an overwhelming number of regulations and rules governing its activities. Procedures became more important than outcomes. The organization was characterized by habits such as production orientation, control and compliance with rules and regulations, efficiency, service orientation, conditional work, etc. Political control hindered effectiveness and business orientation. Within governmental spheres, it was understood that postal operations required more autonomy to be competitive on equal terms. To streamline the organization, its transformation into a commercial company was necessary (Löfström, 2003).

The Swedish state fully liberalized the postal services market (no reserved areas whatsoever) in 1993, significantly ahead of all other European countries (Vaterlaus, Worm, Wild, and Telsler, 2003). In 2009, Posten AB merged with Post Danmark, creating a new holding company, Posten Norden AB, owned by the Swedish (60%) and Danish (40%) governments. However, voting rights are equally split (50/50) between the two owners, and individual owners exchange an equal number of board members of the company (Post and Parcel, 2008). In 2011, this holding was renamed PostNord AB.

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The designated operator of universal postal services in Sweden is PostNord Sverige AB, a subsidiary of the Swedish-Danish postal company (PostNord, 2022). PostNord Sverige AB is the largest parcel distributor in Sweden, holding over 50% of the market share for parcels weighing up to 20 kg in 2020 (PTS, 2021). In the letter market, it is the dominant player, with a market share ranging from 75-80% (Svensk postmarknad, 2021). PostNord Sverige AB's main competitor in the parcel sector is the non-public operator CityMail, which entered the Swedish market in 1991 (PTS, 2006).

It should be noted that for over two decades, the number of traditional physical letters delivered in Sweden has been steadily declining, while the number of parcels is increasing. For example, in 2000, Sweden delivered 3.43 billion physical letters (WIK-Consult 2004), whereas in 2020, this number amounted to 1.59 billion, representing a decline of 54%. The decline in the number of physical letters can be attributed to the gradual increase in digital message processing on the Internet. At the same time, it's important to mention that in 2020, letters accounted for about 40% of the total revenue of PostNord Sverige AB (PTS, 2021).

Starting from the beginning of 2010, the strategy of PostNord Sverige AB has focused more on the parcel delivery sector, which has been positively impacted by the increased volume of e-commerce. Another area where PostNord Sverige AB has been operating since the early 21st century is the management of secure electronic messages sent by governments and companies to individual recipients.

In 2020, the operating profit of PostNord Sverige AB was close to 206 million Euros (PostNord, 2021). Overall, strong financial results have characterized the operations of this company since its transformation into a limited liability company.

Starting from 2001, Posten AB concentrated on two key segments, namely postal services and logistics. The consequence of this decision was the sale of the postal bank and the closure of nearly 850 post offices (Postverksamhet, 2000). Swedish postal authorities acknowledged that the traditional organizational structures for providing postal services by Posten AB were not adequately aligned with the citizens' needs. This situation necessitated necessary restructuring moves to create a modern structure that would ensure higher efficiency than the previous solutions.

Justifying the closure of post offices, Posten AB indicated that over time, they became increasingly impractical and outdated forms of service provision, and their offerings satisfied fewer and fewer people. During times of the day when most customers used to handle their matters at the post office, long queues often formed. At other times, post offices had very few customers or were closed.

Furthermore, more and more customers started to handle certain matters in a different way, such as paying bills online, in order to avoid queues at the post office. Post offices, often occupying large spaces in city centers, also became increasingly

expensive to maintain, which ultimately led to their closure. A decision was made to shift entirely to an agency system, making postal services available in grocery stores, large retailers, local shops, hotels, and petrol stations, through the 'Post in store' service. Posten AB retained direct service to business customers only.

In 2020, PostNord Sverige AB had nearly 2200 such service points (PostNord, 2021). Currently, there are 30% more service points offering these services compared to all the points of postal service in final year of operation within Posten AB own offices (Postverksamhet, 2000). The main difference between the current state and the previous one is that in postal agencies, it is no longer possible to pay bills or withdraw money. Generally, the banking system has taken over these services (Nordea, 2009).

### **3. The Case of the Poczta Polska S.A.**

Until 1991, both postal and telecommunication services in Poland were provided as communication services by a single state-owned entity, Polska Poczta Telefon i Telegraf (Dz.U., 1984). After the formal separation of postal services, their implementation was entrusted to the public utility enterprise Poczta Polska. Until 2002, this entity held an undisputed market position due to its exclusive right to provide the majority of postal services (Dz.U., 1997b).

It should be noted that during this period, the overall offer of postal services was also influenced to some extent by private entrepreneurs operating in the courier services sector not covered by the monopoly. However, the market shares of private entities were marginal (Błaszowski, 2020). In 2003, a law came into force, envisioning the gradual liberalization of the Polish postal market (Dz.U., 2003).

Full liberalization of the postal market in Poland occurred from 2013 onwards (Dz.U., 2012). In 2009, the state public utility enterprise Poczta Polska was transformed into a state-owned company called Poczta Polska S.A. as part of its commercialization (Dz.U., 2008).

In 2020, the seven largest companies delivering parcels in Poland held over 95% of the total revenues in this segment. Poczta Polska S.A., part of this group, ranked only fifth in terms of market share among these companies (UKE, 2021). It is worth noting that in 2020, the parcel market in Poland reached a value of 356 billion euros, with 63.6 billion shipments, showing a growth of 7.9% in terms of value and 9.1% in terms of quantity compared to the previous year. The parcel market, both globally and in Poland, is one of the fastest-growing submarkets.

In the segment of postal items, Poczta Polska S.A. is a dominant player in the Polish postal market, handling an estimated over 95% of all shipments (Błaszowski, 2020). In 2020, slightly over 1 billion letters were delivered in Poland.

The number of physical letters sent in Poland has been steadily declining, as in the year 2000, there were as many as 2.34 billion pieces sent, indicating a decrease of 63%. The rise of the Internet, digital telephony, and social media have contributed to this trend (GUS, 2023).

Currently, 80% of Poczta Polska S.A.'s revenue comes from services considered non-developmental, such as letter volume handling (Forsal, 2021). It should be pointed out that without implementing innovations, a company essentially remains reliant on offering traditional services, which, in the face of increasing substitutive competition, inherently cannot be offered with a satisfactory profit margin.

The publicly disclosed financial results of Poczta Polska S.A. for 2020 show a loss of 27 million euros (Poczta Polska, 2022). Unfavorable financial results have been a characteristic trend in this company for many years. This situation is not helped by the observed multi-fold changes in strategic concepts of Poczta Polska S.A. after its commercialization (Buko, 2009).

Currently delivered letters in Poland primarily consist of transactional documents from the financial sector (banks, insurers, debt collection) and the telecommunications sector (mobile networks, cable TV), as well as correspondence sent by the public administration (UKE, 2021). It is important to note that Poczta Polska S.A. is the only operator that can confer official document status to shipments, upon a legal requirement set by a designated sender.

This privilege stems from the company's status as a designated operator of universal services in Poland for the years 2016-2025 (President of UKE, 2015). As a designated operator, Poczta Polska S.A. is obliged to provide universal postal services across the entire country, ensuring a uniform provision at affordable prices (Dz.U., 2022). Universal services include the following postal services provided domestically and internationally:

1. Acceptance, sorting, handling, and delivery of postal items, including registered items and those with declared value, weighing up to 2 kg (for items destined for the visually impaired, the handled weight of such postal items increases to 10 kg).
2. Acceptance, sorting, handling, and delivery of postal parcels, including those with declared value, weighing up to 10 kg (for parcels sent from abroad, the handled weight of such parcels increases to 20 kg).

Legal requirements stipulate that, on average nationwide, one permanent postal facility of a designated operator should serve 6000 inhabitants in urban and urban-rural municipalities. In rural municipalities, one permanent postal facility should serve an average of 85 km<sup>2</sup>. In each of the nearly 2,500 Polish municipalities, at least one permanent postal facility of a designated operator should be established (Dz.U., 2013).

It is important to note that legal regulations do not obligate the designated postal operator in Poland to maintain its own facilities. This activity can thus be carried out through postal agency arrangements.

In 2020, Poczta Polska S.A. had 6881 facilities, of which 2884 were run by postal agents. However, according to the Supreme Audit Office (the main state auditing body in Poland), the location and number of postal facilities in some regions did not adhere to the statutory requirement considering the existing demand for universal services.

Among the 4570 active postal facilities located in urban and urban-rural municipalities, 77 out of 2338 facilities served more than 6000 inhabitants (51.2% of facilities), 118 facilities served more than 10,000 inhabitants (2.6% of facilities), and 16 facilities served more than 15,000 inhabitants (0.4% of facilities) (NIK, 2021).

#### **4. Discussion**

The processes of liberalization undertaken in relation to the European postal service markets have led to the emergence of competition within these markets. The altered operational conditions have compelled state postal operators to adapt to the new circumstances.

The primary objective became the rationalization of ongoing operational costs while simultaneously ensuring the requirement of accessibility to universal postal services. It should be noted that for all postal operators, regardless of location and adopted strategy, the largest portion, nearly 70%, of costs consists of the operation of network facilities along with personnel costs (Drab-Kurowska, 2019).

The Universal Postal Union, a specialized agency of the United Nations responsible for promoting international cooperation in postal services and ensuring their development, stated in 2007 that one of the key measures to enhance production efficiency and reduce unit costs of postal services is the restructuring of the postal network (UPU, 2007).

The direction of change pursued by the Swedish state post, a long-standing operator with a relatively well-established network infrastructure, focused on maximizing the role of agency outlets in the logistical model. The modernization efforts undertaken by this postal operator can be considered highly innovative and justified, as they were driven by market-driven reasons.

The success of a company in the market is influenced by both the quality of services provided and the ability to tailor offerings to customer needs. The introduction of innovations allowed the company to better utilize its resources, ultimately contributing to reducing the unit costs of services and strengthening the company's competitive position in the market.



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As previously indicated, while Sweden fully liberalized the postal service market in 1993, Poland did so two decades later. A similar gap in time separates the commercialization of state postal services in Sweden and Poland. This situation has resulted in the transfer and consolidation of organizational solutions employed by the Polish postal enterprise during its monopoly privileges to the distinct current market times.

The contemporary postal market has undergone significant transformations, especially in the context of the development of advanced technologies. On one hand, postal services, as one of the oldest forms of social communication, have retained their unique character in the current socio-economic landscape, where digital content is transmitted rapidly and in vast quantities.

On the other hand, entrenched entities in the postal service market, like Poczta Polska S.A., should identify and leverage the opportunities brought about by the dynamic growth of technologically advanced electronic communication services, such as participating in e-government or e-commerce services.

However, the previously cited data indicate that 80% of Poczta Polska S.A.'s revenue is generated by services classified as non-developmental. A significant obstacle to changing this state of affairs is the appointment of the managerial staff of this state-owned enterprise based on political rather than meritocratic criteria, resulting in managers lacking the necessary knowledge and experience to manage an entity as large and complex as Poczta Polska.

Regarding infrastructure issues, the factors limiting the possibilities for reorganizing the access postal network of Poczta Polska S.A. include, in addition to the statutory requirement of ensuring a certain citizen access level to permanent postal facilities, primarily political and social factors. An example of politically motivated directives aimed at the state postal enterprise in Poland is the requirement to employ a larger workforce than necessary for production.

State decision-makers with ownership functions aim to avoid conflicts with labor unions operating within the largest Polish enterprise (Money, 2021). These actions are undertaken notwithstanding the institutional recognition of the presence of unfavorable and enduring shifts in the market, such as the rising e-substitution, contraction of the postal service market, and intense competition in the parcel service segment.

From a societal standpoint, a key consideration seems to be the distinct civilizing mission of the public postal service. It can be assumed that universal services represent a form of realizing the constitutional freedom of communication in Poland (Dz.U., 1997a). Undoubtedly, Poczta Polska S.A. is the most present public organization across all territories in Poland, including rural and economically neglected urban areas.

Postal facilities are, to the residents living there, the only representatives of a "government institution" they have direct contact with. Maintaining postal infrastructure can thus be assigned a supportive role in counteracting social exclusion in geographically and economically marginalized regions. The low demand for services offered by many peripheral postal facilities renders this activity unprofitable, hence unsuitable for delegation to postal agents.

It appears reasonable to consider the objectives aimed at promoting social cohesion as particularly important in Poland, where the threat of social exclusion persists at an unacceptable level (Budziejewicz-Guźlecka, 2019). This phenomenon, in a spatial context, particularly relates to peripheral rural areas, areas dominated by declining industrial branches, and areas of urban degradation.

It must be noted that the processes initiated in the 1990s to transform the Polish economy raised the average living standard, but this positive impact did not distribute uniformly across society. Despite economic growth, the number of people in Poland not benefiting from the overall economic improvement is on the rise. There are no indications that disparities in terms of civilization level and prosperity will fundamentally decrease in the near future; rather, they might deepen.

In the context of contemporary market economies, active state actions in the scope of its responsibility and care for the equal opportunities of economic participants are not questioned (Woźniak, 2003), including ensuring access to basic services regarded as a civilization standard. Given the considerations above, the argument for maintaining universally accessible postal infrastructure in areas threatened by social marginalization appears compelling in the case of Poland.

Despite the challenge of formulating public tasks related to ensuring this accessibility, the fundamental argument seems to be the belief that in market conditions, universal access to services of significance to many local communities, provided by the postal service, would be unattainable in the spatial and cost scope expected by public authorities.

## **5. Conclusions**

The considerations undertaken in this study affirm that the postal network is a vital element of the market economy, fulfilling significant social and economic functions. Despite growing competition from modern forms of electronic communication, postal services remain a crucial and indispensable tool for exchanging information and goods.

Through the course of the presented arguments, an analysis of the conditions of operation of dominant postal operators providing universal services in Sweden and Poland has been conducted, with a focus on the implications of these conditions for adopted solutions in the realm of access infrastructure.

Regarding the Swedish case, from a perspective of two decades since the fundamental changes in the Swedish postal operation, it can be said that the enterprise has succeeded in effectively adapting to both current market conditions and resolving issues related to inevitable future changes. The growing complexity of postal economic activities and limited internal infrastructure and financial capabilities prompted the analyzed enterprise to engage in cooperation with other economic entities in the service production process.

Among the fundamental organizational benefits resulting from these actions, the enhancement of flexibility and speed of response to changing demands of the demand side of the market should be particularly noted. There are now more postal outlets, and most of them are open from morning till late evening, on both weekdays and holidays. Financial benefits should also be highlighted, achieved through increased emphasis on linking financial resources with actual work efficiency, ensuring greater operational freedom.

When considering the situation of Poczta Polska S.A., it should be emphasized that as a result of losing monopolistic privileges due to liberalization, the organization has also lost a significant portion of its previous revenue to competitive firms. Simultaneously, Poczta Polska S.A. must maintain unchanged spatial accessibility to its core services. This situation inevitably leads to the weakening of the financial condition of this enterprise. Its market position is further worsened by the absence of governmental (ownership) development vision.

A direct consequence is the relatively weak financial position of Poczta Polska and the possibility of further deterioration due to the failure to implement necessary organizational changes. This situation may lead to increasing disruptions in the legally guaranteed access to universal postal services characterized by accessible prices and high spatial reachability. As a consequence, fulfilling the obligation imposed on Poczta Polska to provide universal services with mandated quality parameters will likely require future financial support from the state.

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