



International **Post**
Corporation

OPERATIONS

INTERNATIONAL MAIL QUALITY OF SERVICE MONITORING

UNEX™ CEN 2023 results



10 pages

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INTERNATIONAL PRIORITY LETTER MAIL EXTERNAL QUALITY OF SERVICE MONITORING

UNEX™ CEN module > 2023 results

3.9 DAYS

AVERAGE TIME FOR LETTER MAIL DELIVERY IN EUROPE

56.6% J+3

PROPORTION OF LETTER MAIL DELIVERED IN 3 DAYS

84.4% J+5

PROPORTION OF LETTER MAIL DELIVERED IN 5 DAYS

Posts still facing challenging times

The IPC UNEX™ CEN measurement has shown that, on average, international priority letter mail in Europe was delivered in 3.9 days in 2023. The 2023 results show that posts continue to face challenges to regain the quality achieved prior to the Covid-19 pandemic, having delivered 56.6% of the mail in three days (speed indicator) and 84.4% in five days (reliability indicator).

The IPC UNEX™ CEN measurement provides end-to-end quality of service: from posting in the origin country, to delivery to the final addressee in the destination country. The results cover the postal operators' time for collection in the origin country, sorting, international transportation as well as the processing and delivery by the postal operator in the destination country.

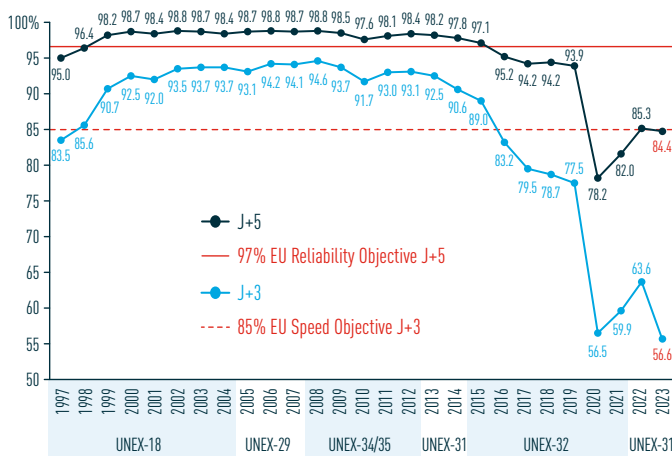
European postal operators face the challenges of maintaining cost-efficient and sustainable cross-border logistic operations in a market with declining envelope letter mail volumes while experiencing increasing transportation complications due to the unavailability of air transport for letter mail on most flows within Europe and making the logical business decision of prioritising e-commerce postal products over envelope letter mail. This effect has been present already for the past ten years but became more outspoken in the last few years after the hit by the Covid-19 pandemic.

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), where J for "Jour" is the day of posting and +3/+5 are the number of working days for international priority letter mail to be delivered to the final addressee.

J+3 & J+5 performance across years

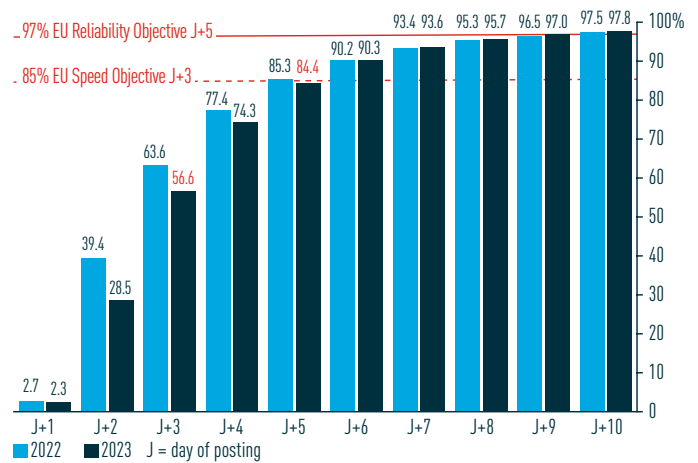
The chart below shows the J+3 and J+5 yearly averages since 1997, when the EU objectives for letter mail service were set by the 1997 European Union (EU) Directive on Postal Services (97/67/EC Directive).

The trend lines show that European letter mail averages have been consistently above the J+3 and J+5 EU Postal Directive objectives from 1998 to 2015. Since 2016, posts have continuously experienced operational challenges, with the most severe drop during the Covid-19 pandemic in 2020.



The 2023 results show that 56.6% of international priority envelope letter mail was delivered within 3 days (J+3) and 84.4% within 5 days (J+5). That is an overall decrease in the quality of the postal processes within Europe compared to the recovery of quality levels which were seen in 2021 and 2022.

J+1 to J+10 cumulative performance



The chart above shows the 2022 and 2023 postal performance from J+1 to J+10 in Europe, where J for "Jour" is the day of posting. Each bar shows the proportion of international priority envelope letter mail that was delivered to its final addressee within n working days since posting (J+n).

It shows a decrease of 7.0 percentage points for the J+3 speed key indicator, from 63.6% in 2022 to 56.6% in 2023, and a slight decrease of 0.9 percentage points for the J+5 reliability key indicator, from 85.3% in 2022 to 84.4% in 2023.

While the levels in the first part of the cumulative tail have deteriorated, (from J+1 to J+5) the chart also shows more stability in quality of service and even slight improvements from 2022 to 2023 (between 0.1 and 0.5 percentage points) in the cumulative tail from J+6 up to and including J+10.

Challenges for letter mail quality

Since 2016, posts have continuously experienced operational challenges which have made it difficult to maintain the previous high level of letter mail performance. It was, however, the Covid-19 pandemic in 2020 that hit the overall postal quality in Europe the most. The start of the recovery, which was reported for 2021 overall performance in Europe, had further continued into 2022. The 2023 results, however, showed an overall decrease in the quality of the postal processes within Europe.

The key challenge for European postal operators to recover pre-Covid years' quality levels remains the low availability of flight connections and the limited capacity to transport untracked letter mail on these flights. Road transportation can be organised very effectively for short distance destinations such as neighbouring countries, but when road transportation is replacing air transport, the time to be foreseen for transport tends to increase, thus decreasing the probability to achieve J+3 from posting to delivery within Europe.

Most European postal operators are facing financial pressure and experience the same conflict between costs to solve the transportation challenges (national as well as international), declining mail volumes and the overall push to become more cost efficient. In many countries, regulators have supported postal operators by extending the national service standards.

The end-to-end J+3 international service standard is setup assuming that the postal operators collecting and delivering the mail each operate with a J+1 (or overnight) national service standard, with one day foreseen for transport. When national regulators extend the domestic service standards for the postal operators, it becomes structurally impossible to meet the J+3 service at cross-border level. At the start of 2023, one third of the UNEX™ CEN participating postal operators were no longer working with a national standard of J+1: 4 posts in Europe operate against a national J+2 standard, 5 posts against J+3 and 1 post against J+5. In a situation where letter mail is posted or delivered in a country with a relaxed service standard it is thus no longer possible to achieve the J+3 speed objective neither the J+5 reliability objective in many cases.

Declining mail volumes in Europe (overall around 30% drop over the last 6 years and expected to continue its decrease in the upcoming years as well) have pushed posts to shift their operational attention from letter mail into tracked and registered products to the detriment of untracked envelope-letter mail. For these e-commerce postal products, posts are actively working on quality aspects to maintain or expand their market shares.

Additional issues mentioned last year also affect the 2023 performance levels of postal operators in Europe: structural challenges to attract and retain staff in specific jobs and/or areas and the consequences of cyber-attacks. On this last topic, some European posts have been facing cyber-attacks, with various durations and impacts, but each time paralysing the entire cross-border logistics and operations into and from these countries due to vital systems and infrastructure being damaged or shut down as precaution, and thus no longer available for postal operations.

Integrity and independence of results

The validity and independence of the statistics are guaranteed by the UNEX™ external contractor in charge of the panel since January 2022, Kantar (30 Stamford Street, London SE1 9LQ, United Kingdom - www.kantar.com).

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 throughout the year.

Performance level

The table below shows the average performance level for the group of 18 countries that have been monitored continuously since 1994, the extended group of 29 countries monitored since 2005, and for the 31 countries covered in 2023 respectively.

	UNEX-18 ¹	UNEX-29 ²	UNEX-31 ³
J+3, speed indicator	59.6%	56.7%	56.6%
J+5, reliability indicator	86.8%	84.6%	84.4%

For all groups, 2023 postal performance has remained below the objectives set out by the 1997 EU Postal Directive.

The core group of UNEX-18 shows the highest quality levels although still below the required EU objectives. Most high-volume flows between countries are within this group of 18 countries.

Performance consistency

The table below shows the consistency i.e. the proportions of UNEX™ CEN module country-to-country flows meeting each EU objective. In 2023, 4.9% of the measured European country-to-country flows achieved the J+3 EU objective (a decrease of 1.4 percentage points versus 2022) and 7.7% achieved the J+5 EU objective (an increase of 0.4 percentage points versus 2022).

	UNEX-18 ¹	UNEX-29 ²	UNEX-31 ³
85% J+3, speed indicator objective	6.8%	5.3%	4.9%
97% J+5, reliability indicator objective	10.9%	8.3%	7.7%
Total number of country-to-country flows	265	637	710

These low proportions indicate a high disparity across the matrix of European country-to-country flows.

- 1) 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, at the time in the EU, together with Iceland, Norway and Switzerland.
- 2) UNEX-29 covers 29 countries with the extension of the UNEX-18 group in 2005 to the new EU member countries: Cyprus, Czechia, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia.
- 3) UNEX-31 covers UNEX-29 extended to Bulgaria and Croatia, i.e. the 2023 EU membership of 27 member states, along with Iceland, Norway, Switzerland and the United Kingdom.

Pre-produced envelopes are posted and received by volunteer panellists recruited and trained by Kantar, 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 local physical appearance and characteristics of everyday customer letter mail envelopes and are consequently processed anonymously through national and international postal networks.

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

Key performance indicators: the three indicators presented in the tables hereafter are the percentage of test mail items delivered within three working days (J+3) (i.e. the speed indicator), the percentage of test mail items delivered within five working days (J+5) (i.e. the reliability indicator), and the average number of delivery days taken to deliver mail.

The results cover the postal journey end-to-end. J (“Jour”) is the day of posting in the country of origin and so, for example, +3 refers to the number of working days before final delivery to the addressee in the country of destination; J+n indicates the period during which 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 710 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 2023, and on a standard five day or six-day business week, depending on the actual days of collection, delivery and processing operations of each postal operator. 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.

The results in this brochure reflect the real postal quality of service performance achieved in 2023. No Force Majeure cases were applied on the quality of service scores hereafter.

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.

UNEX™ CEN module > 2023 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	SK	SI	ES	SE	CH	GB	
Austria (AT)	J+3 (%)		71.5	55.0	75.5	39.5	83.7	4.0	38.5	22.8	55.3	91.4	8.9	86.0		39.2	83.1	71.4	41.4	26.0	37.5	74.3	5.8	54.9	30.6	54.5	95.1	92.9	34.9	50.7	86.9	65.1
	J+5 (%)		98.8	90.0	93.3	81.4	96.9	62.0	87.2	67.4	91.3	97.5	48.1	97.7		83.5	95.2	97.8	86.2	90.0	86.4	95.8	59.3	91.2	71.3	88.5	99.6	98.9	75.3	91.4	98.5	95.8
	Days		3.1	3.9	3.1	4.2	2.7	6.0	4.2	5.0	3.7	2.4	6.4	2.6		4.2	2.8	3.1	4.1	4.2	4.1	3.2	5.5	3.7	5.0	4.1	2.2	2.3	4.9	3.7	2.6	3.2
Belgium (BE)	J+3 (%)	67.2		11.0	18.0	10.3	12.5	4.3	37.9	4.3	72.0	92.7	5.6	14.1	5.0	2.5	54.5	56.4	37.3	89.5	31.8	89.7	12.5	33.4	3.0	1.9	1.5	37.9	7.2	13.3	67.5	72.6
	J+5 (%)	95.1		51.1	70.7	48.4	64.6	23.2	72.6	58.1	96.5	98.5	28.6	63.0	25.0	64.5	91.6	81.3	77.6	96.8	74.0	97.2	43.8	79.3	21.6	10.1	35.6	84.5	53.0	72.8	98.8	94.4
	Days	3.1		6.8	5.1	6.0	5.2	7.1	4.8	5.6	3.3	2.3	7.4	5.1	8.2	5.6	3.8	3.9	4.7	2.6	4.8	2.5	6.0	4.5	7.7	8.0	6.1	4.4	6.1	5.0	3.0	3.1
Bulgaria (BG)	J+3 (%)	30.1	22.9			5.9	17.6	0.0	10.3	3.3	11.2	15.6	0.0			5.1	11.3	11.1	8.6	12.5		6.2	0.0		0.0		9.5	10.0	7.2	4.4	7.5	7.9
	J+5 (%)	68.5	65.7			35.3	47.1	14.3	46.2	23.3	48.0	50.5	3.6			25.6	38.3	58.3	60.0	32.5		43.2	7.8		23.7		52.4	42.5	24.6	22.2	27.5	23.7
	Days	5.5	6.2			8.2	6.6	10.1	6.6	9.4	6.6	7.1	10.3			8.4	7.2	6.4	5.9	7.6		6.7	9.4		8.4		6.3	7.0	9.1	7.8	7.4	8.4
Croatia (HR)	J+3 (%)	46.5	35.6								21.9	30.4		80.0		9.4	23.5					64.4						81.7	0.0		57.0	10.8
	J+5 (%)	92.6	94.5								77.7	80.1		91.4		47.3	61.8					90.7						97.4	47.9		90.1	53.0
	Days	3.8	4.3								4.8	4.6		3.0		6.1	5.5					3.6						2.8	6.6		4.0	5.9
Cyprus (CY)	J+3 (%)	47.7	8.5	30.2						2.6	7.7	34.0	6.6			4.8	15.7					9.0	0.0	7.9					15.2	0.0	43.5	33.8
	J+5 (%)	81.8	63.8	69.8						33.3	53.6	82.5	41.6			45.2	67.5					53.1	25.6	50.0					36.4	52.5	84.8	79.0
	Days	4.0	5.6	5.0						6.5	5.9	4.3	6.7			5.9	5.0					6.1	7.0	6.4					6.8	6.0	4.0	4.7
Czechia (CZ)	J+3 (%)	77.6	14.3	7.1	3.7			1.9	13.3	8.2	6.5	62.3	0.0	20.4		19.6	16.4	25.0	0.0	14.3		30.9	0.0	29.3	15.5	20.0	79.8	12.0	7.0	3.6	44.7	8.3
	J+5 (%)	97.1	74.6	28.6	37.0			11.5	65.6	50.8	50.6	93.0	17.0	63.0		67.4	70.5	80.6	41.5	55.1		83.6	7.0	78.0	76.1	52.7	96.7	66.0	26.3	42.9	87.2	37.5
	Days	3.1	5.0	6.7	6.7			8.5	5.3	6.1	5.7	3.4	8.6	5.0		5.0	5.0	4.5	6.9	5.6		4.5	8.1	4.7	5.2	6.3	2.9	5.0	7.5	6.1	4.1	6.6
Denmark (DK)	J+3 (%)	28.7	27.5	20.6	25.0	5.0	11.6		33.3	8.1	9.7	83.9	0.0	17.6	18.8	31.3	38.3	50.0	28.1	24.4	5.4	41.2	21.6	13.8	14.3	16.7	26.5	36.2	13.1	66.9	44.6	23.4
	J+5 (%)	75.0	92.5	73.5	70.8	50.0	79.1		89.7	65.5	75.0	97.6	30.6	58.8	68.2	84.4	85.2	80.8	75.0	70.7	37.8	88.2	89.2	55.0	69.0	47.6	63.3	78.7	55.7	96.5	94.6	76.6
	Days	4.7	4.1	5.0	5.3	6.1	4.8		4.0	5.3	5.0	2.7	7.7	5.1	5.2	4.3	4.2	5.2	4.6	5.2	6.9	4.4	4.3	5.4	4.8	6.6	4.9	5.0	5.7	3.4	3.8	4.6

* Deutsche Post DHL and Swiss Post do not participate in this measurement. Germany and Switzerland are included as origin countries only upon a destination’s Post request.

UNEX™ CEN module > 2023 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	SK	SI	ES	SE	CH	GB
Estonia (EE)	J+3 (%)	65.5	49.0			11.4	35.9	3.3		7.6	4.3	16.4	0.9			12.0	30.6	50.0	4.3			56.3	3.9	42.9	27.3			44.4	2.5	30.1	28.0	8.5
	J+5 (%)	96.4	95.2			65.9	92.3	41.5		71.4	66.0	75.4	24.8			58.0	86.1	90.5	48.9			95.8	52.0	85.7	61.4			86.7	45.0	88.0	84.0	58.1
	Days	3.3	3.7			5.5	4.0	6.3		5.1	5.5	5.2	7.9			5.9	4.2	3.8	5.8			3.5	5.6	4.0	5.4			4.0	6.2	4.2	4.3	6.1
Finland (FI)	J+3 (%)	71.1	45.5			16.3	2.2	64.1		12.3	64.6	0.0	35.9	25.6	15.4	59.4	94.3	41.5	38.3			48.1	0.0	41.9	7.8	9.1	36.2		14.6	21.6	75.2	60.5
	J+5 (%)	93.0	94.5			65.1	37.0	94.4		65.9	92.7	22.9	71.8	71.8	76.9	92.8	97.1	81.1	85.1			88.5	56.3	90.7	68.6	36.4	74.5		62.8	85.0	93.8	90.7
	Days	3.3	3.8			5.3	6.6	3.3		5.1	3.4	7.9	4.9	4.6	4.8	3.4	2.7	4.3	4.6			3.8	5.5	3.9	5.1	6.7	4.8		5.3	4.5	3.1	3.5
France (FR)	J+3 (%)	43.9	80.0	4.7		18.2	25.7	4.2	16.4	5.5		77.1	2.7	17.1	13.0	2.5	49.7	31.7	0.0	79.7	2.2	79.7	1.7	32.6	41.5	34.8	30.2	18.6	21.9	43.0	81.9	58.4
	J+5 (%)	79.9	94.9	30.2		40.9	78.4	28.4	50.7	41.8		96.7	29.8	67.1	40.7	55.0	84.7	68.3	36.2	94.4	45.1	95.6	39.7	76.8	75.7	74.2	64.2	59.3	63.9	80.4	97.0	87.1
	Days	4.7	3.1	7.1		6.5	5.1	7.1	6.3	7.7		3.0	7.9	5.5	7.1	5.7	4.0	5.2	7.6	3.1	6.8	3.0	6.3	4.7	4.8	5.0	5.3	6.1	5.5	4.6	2.8	3.8
Germany* (DE)	J+3 (%)	93.5			80.1					76.3			72.2			74.4						86.5		46.0	9.0				29.1			
	J+5 (%)	98.7			92.5					97.0			97.3			96.7						97.5		89.2	58.6				77.1			
	Days	2.3			2.9						3.1		3.0			3.1						2.7		3.9	5.7				4.7			
Greece (GR)	J+3 (%)	51.5	47.1	4.3		43.9		0.0		30.8	35.5					38.5				6.3	36.1			3.4					16.4	0.0	63.5	42.0
	J+5 (%)	85.8	79.4	48.9		78.5		8.2		76.7	77.3					78.2				29.2	72.2			40.7					52.5	22.2	92.1	76.1
	Days	4.0	4.3	6.6		4.4		9.0		5.2	4.7					4.5				7.8	4.7			6.3					5.9	7.5	3.6	4.7
Hungary (HU)	J+3 (%)	92.0	39.7	17.9		34.2	30.6	3.7		15.8	88.7					26.6				23.3	43.8	5.6	46.9		9.6	85.5	67.4	7.1	24.5	54.0	27.2	
	J+5 (%)	99.1	89.0	59.0		71.1	79.6	22.2		81.4	98.3					77.1				76.7	90.6	31.5	87.7		57.7	95.2	97.8	30.6	86.8	100.0	81.5	
	Days	2.3	4.0	5.9		4.8	4.5	7.1		4.7	2.5					4.6				4.8	4.0	6.2	3.9		5.8	2.5	3.2	6.8	4.4	3.4	4.6	
Iceland (IS)	J+3 (%)						0.0			30.6	24.0				3.1						36.9	1.8	0.0						34.0		54.2	
	J+5 (%)						25.0			84.7	85.3				67.2						80.0	57.9	14.9						92.5		94.8	
	Days						6.5			4.3	4.6				6.8						4.5	5.7	8.4						4.2		3.6	
Ireland (IE)	J+3 (%)	22.4	20.0	5.4	4.9	13.2	4.2	0.0	5.9	0.0	20.5	39.2	0.0	6.9	4.8		5.3	0.0	12.0	0.0	12.5	8.6	0.0	7.8	14.6	21.4	5.9		7.9	4.9	22.6	68.2
	J+5 (%)	80.0	97.8	37.8	48.8	52.6	52.1	11.9	61.8	33.3	88.1	93.3	16.2	62.1	28.6		50.8	10.3	64.0	36.5	40.0	70.7	34.0	65.6	58.5	66.7	47.1		58.7	53.7	90.3	94.0
	Days	4.6	4.1	6.5	6.2	6.1	5.6	7.5	6.3	6.6	4.5	3.9	9.0	5.4	7.5		6.0	7.4	5.6	6.4	6.3	5.2	6.5	5.1	5.0	5.2	6.3		5.8	5.9	4.1	3.4
Italy (IT)	J+3 (%)	55.7	39.7	33.3	22.0	13.9	18.4	4.4		4.5	43.5	63.7	0.0	17.1		33.3			6.7	38.4	14.6	45.2	0.0	0.0	47.5	6.7	28.0	69.8	20.3	23.5	69.0	20.1
	J+5 (%)	81.3	69.0	61.9	65.9	50.0	52.6	13.3		47.7	80.9	87.9	23.1	60.0		80.6			48.9	78.1	63.4	83.9	27.5	46.7	80.0	40.0	70.0	74.4	53.4	66.7	83.5	71.5
	Days	4.4	5.4	6.0	5.3	6.1	5.8	8.2		6.1	4.2	4.0	7.8	6.3		4.5			6.7	5.2	5.9	4.5	7.5	6.7	4.4	8.0	5.1	4.6	6.8	5.9	3.8	5.2
Latvia (LV)	J+3 (%)	81.4	75.5	26.8		56.3	16.7	91.0	44.7	53.3	67.5	4.3	61.7		34.1	50.0		54.1		33.3	78.2	9.5	55.1	44.9	48.8		44.4	12.3	59.6	52.9	25.8	
	J+5 (%)	93.8	95.9	82.9		95.8	65.0	97.9	87.2	92.2	92.2	28.3	93.6		87.8	95.0		91.8		81.0	96.4	78.6	95.9	77.6	83.7		90.7	47.4	93.0	91.2	77.3	
	Days	2.9	3.0	4.6		3.5	4.9	2.4	3.8	3.6	3.7	8.0	3.2		4.1	3.8		4.0		4.8	3.0	4.9	3.9	4.7	3.9		3.8	6.8	3.4	3.9	4.8	
Lithuania (LT)	J+3 (%)	11.6	9.6	0.0		5.6		2.3	3.2	0.0	0.9	1.7		6.7		5.1	2.9	31.0		2.6	10.0	0.0	19.4	4.1			0.0	8.8	2.9	5.2		
	J+5 (%)	44.2	46.2	24.3		5.6		9.3	35.5	4.4	17.0	38.0		33.3		23.7	35.7	83.9		5.3	58.0	9.6	61.2	16.3			13.2	47.5	26.5	32.5		
	Days	6.1	6.3	8.6		11.2		9.5	7.4	10.1	8.1	6.5		10.0		7.9	6.8	4.5			13.6	5.2	8.8	5.1	9.2			9.1	6.0	8.0	7.8	
Luxembourg (LU)	J+3 (%)	82.7	91.5	42.1		33.3	41.0	0.0		26.7	79.2	97.4	5.4	52.8		33.3	77.1	35.9		37.8	89.0	2.2	25.6	63.5	28.2	58.3		23.1	41.7	95.7	68.6	
	J+5 (%)	96.5	99.0	73.7		75.0	89.7	23.7		82.2	97.7	99.5	35.1	91.7		80.0	94.8	89.7		89.2	96.8	65.2	82.1	86.5	64.1	89.6		76.9	85.4	98.4	93.1	
	Days	2.8	2.4	5.1		4.4	3.9	6.9		4.6	3.1	2.0	7.1	3.7		5.1	3.0	3.9		4.1	2.5	5.4	4.7	3.7	5.6	3.5		4.7	4.0	2.3	3.3	

* Deutsche Post DHL and Swiss Post do not participate in this measurement. Germany and Switzerland are included as origin countries only upon a destination's Post request.

UNEX™ CEN module > 2023 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	SK	SI	ES	SE	CH	GB	
Malta (MT)	J+3 (%)	60.0	46.3							0.6	29.0				0.0	49.2			24.4		42.9	1.1	3.0	2.6				8.9	13.3	61.2	10.0	
	J+5 (%)	100.0	87.8							80.6	68.5				40.0	85.2			65.9		83.3	4.6	30.3	30.8				44.3	26.7	89.8	59.5	
	Days	3.3	4.4								5.2	5.3				6.6	4.3			5.2		4.6	10.1	7.6	7.0				6.5	6.3	3.7	5.5
Netherlands (NL)	J+3 (%)	73.2	89.2	1.1	10.2	4.6	50.0	2.6	0.0	4.8	55.7	53.4	0.0	28.0	27.0	2.1	37.3	9.1	3.3	87.5	0.3	2.9	21.9	16.5	5.5	15.4	17.6	22.9	16.5	60.6	68.3	
	J+5 (%)	95.4	98.1	24.1	71.3	27.5	84.5	32.3	27.3	57.7	90.1	81.4	5.3	88.1	63.0	25.1	86.0	51.5	43.3	98.2	20.1	39.4	82.4	76.3	31.0	69.2	69.1	71.0	76.0	95.6	92.8	
	Days	3.4	2.5	7.7	5.0	7.7	4.1	6.2	6.3	5.5	3.9	4.1	9.1	4.2	5.0	7.0	4.2	5.4	6.0	2.5	7.6		5.9	4.5	4.8	6.6	5.0	4.9	4.9	4.7	3.5	3.2
Norway (NO)	J+3 (%)	21.8	23.2	6.1	12.8		0.0	0.5	17.9	12.7	6.6	19.5	0.0	7.9	15.3	40.7	25.5	36.2	6.5	2.3		36.6		5.0	4.3	8.8	15.7	20.9	2.3	24.3	46.4	41.9
	J+5 (%)	72.3	80.4	33.3	68.1		28.3	33.0	89.7	73.6	80.3	84.9	4.1	50.0	64.4	79.6	69.1	89.4	71.7	79.5		84.5		48.5	23.4	58.8	78.4	67.4	33.3	80.5	92.9	88.1
	Days	5.1	4.5	7.7	5.2		6.5	6.5	4.4	5.0	5.0	4.5	10.6	5.6	5.2	4.5	4.6	4.1	5.1	4.9		4.3		6.2	7.6	5.8	4.9	5.2	6.9	4.5	3.8	4.2
Poland (PL)	J+3 (%)	23.0	11.9		7.8	0.0	4.6	0.0	5.1	5.6	3.4	54.3	0.0	3.6		0.0	17.4	3.8	6.9	1.5	0.0	0.8	0.0		1.3	1.5	2.5	8.5	3.8	2.5	16.7	0.0
	J+5 (%)	66.1	66.7		39.0	6.7	52.3	7.7	20.5	29.2	21.9	90.8	4.9	46.4		20.7	64.1	42.5	31.9	23.5	4.2	22.3	12.1		25.0	35.3	53.2	43.7	17.9	38.0	61.7	3.8
	Days	5.2	5.5		7.6	11.1	6.0	8.7	7.8	7.3	7.7	3.7	11.4	6.8		8.2	5.4	6.4	7.0	7.9	10.9	7.0	8.6		8.1	7.2	5.9	6.6	8.2	6.5	5.9	9.9
Portugal (PT)	J+3 (%)	68.4	77.8	13.8		6.1	31.0	4.7	6.9	8.1	25.9	86.4	2.7	45.7		76.2	76.4	41.4	20.0	72.6	10.8	74.3	2.7	54.8		8.6	46.4	26.5	57.4	40.0	84.5	81.3
	J+5 (%)	96.2	94.4	55.2		45.5	83.3	53.5	72.4	75.7	90.1	97.1	32.4	88.6		95.2	96.7	82.8	66.7	95.2	64.9	94.3	24.3	85.7		65.7	89.3	76.5	84.6	83.6	97.2	97.7
	Days	3.1	3.3	5.7		6.4	4.7	6.2	4.9	5.2	4.2	2.7	7.4	4.1		3.2	3.2	4.1	5.1	3.2	5.3	3.2	7.1	4.1		5.8	3.9	4.4	3.8	4.6	2.7	2.6
Romania (RO)	J+3 (%)	11.6	10.4	14.3			5.3				5.2	11.3	4.0	13.6		6.3	7.5					16.7		9.5	6.1		31.5	10.4	7.3		41.4	18.0
	J+5 (%)	45.3	50.0	42.9			45.3				46.3	56.7	14.0	45.5		27.1	40.9					59.7		40.5	26.5		59.3	54.2	40.2		69.0	54.0
	Days	6.8	6.9	6.9			7.2				6.8	6.1	10.0	6.9		8.0	7.0					6.2		7.6	7.7		6.1	6.5	7.7		5.2	6.5
Slovakia (SK)	J+3 (%)	89.2	30.9	46.5			82.3	0.0		1.9	41.8	78.3		85.1		17.2	37.9		28.8			37.9	0.0	34.5	11.8	29.7		82.4	16.7	26.9	64.2	62.0
	J+5 (%)	99.4	86.8	88.4			96.6	29.8		51.9	89.6	97.0		98.6		67.2	90.9		75.0			91.4	18.8	86.2	68.6	81.1		94.1	44.4	76.9	88.7	95.8
	Days	2.5	4.3	4.1			2.7	7.1		6.1	4.2	3.0		2.7		5.2	3.8		4.4			3.9	7.3	4.3	5.2	5.1		3.1	6.2	4.4	3.6	3.4
Slovenia (SI)	J+3 (%)	95.7		31.0	95.4		86.9		41.3		58.8	92.6	6.5	93.6		83.0	8.5					93.6		2.7	31.4	47.6	95.5		9.0	13.6	37.9	17.3
	J+5 (%)	99.0		73.8	98.0		97.0		84.8		94.8	98.3	23.9	100.0			95.5	78.7				97.9		74.7	82.9	87.3	97.7		42.3	69.7	88.7	76.9
	Days	2.1		5.2	2.2		2.6		4.0		3.5	2.4	8.2	2.3			2.8	5.0				2.5		5.4	4.3	4.4	2.2		6.3	4.9	4.0	4.8
Spain (ES)	J+3 (%)	47.0	57.8	27.9	35.3		33.3	0.0	5.7	2.3	21.3	61.7	2.2	27.0	2.9	34.8	47.0	19.1	19.3	9.1	8.7	52.1	0.0	39.2	68.6	37.8	54.0	37.3		25.9	67.0	46.0
	J+5 (%)	84.8	89.2	65.1	72.5		68.9	24.3	42.9	30.2	78.7	92.5	17.8	75.7	22.9	85.4	84.6	70.2	47.4	50.9	43.5	91.1	8.3	76.5	89.1	73.0	82.0	80.4		74.1	92.0	86.4
	Days	4.0	3.7	5.0	5.1		5.0	7.1	6.7	8.2	4.7	3.5	8.6	4.6	8.3	4.2	4.0	5.4	6.1	6.5	6.6	3.8	8.3	4.3	3.5	4.4	4.3	4.6		4.8	3.3	4.0
Sweden (SE)	J+3 (%)	82.6	70.5	14.6	53.4	23.8	50.0	16.9	77.0	21.4	58.2	88.8	0.0	43.3	46.1	83.6	77.2	81.1	58.8	48.9	17.8	72.1	39.6	66.7	61.1	21.3	77.6	48.9	48.5		91.5	76.6
	J+5 (%)	100.0	90.9	73.2	91.4	66.7	88.1	56.8	98.0	84.0	89.1	98.0	24.4	96.7	88.2	96.7	95.9	100.0	88.2	89.4	71.1	95.1	94.3	95.2	96.3	83.0	93.9	86.7	89.4		100.0	97.1
	Days	2.8	3.3	5.0	3.7	4.9	3.8	5.4	3.1	4.6	3.8	2.5	8.8	3.7	3.8	2.9	2.9	2.6	3.9	3.9	5.6	3.4	3.9	3.5	3.6	4.6	3.0	3.9	4.0	4.0	2.5	2.9
Switzerland* (CH)	J+3 (%)	96.2									80.0			43.3			90.8					79.1							36.0			
	J+5 (%)	98.9									97.2			90.0			98.1					97.5							77.3			
	Days	2.2									3.0			3.9			2.5					3.3							4.5			
United Kingdom (GB)	J+3 (%)	1.3	61.1	0.0	4.8	5.3	5.3	0.4	5.2	3.3	25.4	32.2	0.4	2.4	13.2	65.0	8.4	13.6	2.6	21.6	1.0	34.6	0.0	2.4	9.5	5.7	1.5	11.6	7.8	0.7	14.8	
	J+5 (%)	44.2	90.8	4.5	43.0	33.2	46.6	8.2	35.2	34.6	75.5	74.3	11.1	50.2	49.3	93.3	62.3	53.1	32.8	64.7	16.9	79.7	8.1	34.1	45.7	28.6	34.8	40.6	52.1	20.2	65.5	
	Days	6.7	3.5	13.7	6.8	8.2	6.5	8.3	7.4	7.2	4.8	4.8	10.0	6.4	6.6	3.5	5.4	6.5	8.7	5.5	9.7	4.5	8.3	6.6	6.9	8.4	7.5	7.4	6.1	7.5	5.7	

* Deutsche Post DHL and Swiss Post do not participate in this measurement. Germany and Switzerland are included as origin countries only upon a destination's Post request.

UNEX™ CEN module countries in 2023

ISO alpha-2 codes

Participating postal operators

Website addresses

Austria	AT	Österreichische Post AG	www.post.at
Belgium	BE	bpost	www.bpost.be
Bulgaria	BG	Bulgarian Posts plc	www.bgpost.bg
Croatia	HR	Hrvatska Pošta	www.posta.hr
Cyprus	CY	Cyprus Post	www.cypruspost.post
Czechia	CZ	Ceská Pošta	www.ceskaposta.cz
Denmark	DK	PostNord Danmark	www.postnord.dk
Estonia	EE	Omniva	www.omniva.ee
Finland	FI	Posti	www.posti.com
France	FR	Le Groupe La Poste	www.laposte.fr
Germany	DE	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.	
Greece	GR	Hellenic Post ELTA	www.elta.gr
Hungary	HU	Magyar Posta	www.posta.hu
Iceland	IS	Iceland Post	www.posturinn.is
Ireland	IE	An Post	www.anpost.com
Italy	IT	Poste Italiane S.p.A.	www.poste.it
Latvia	LV	Latvijas Pasts	www.pasts.lv
Lithuania	LT	Lietuvos Paštas	www.post.lt
Luxembourg	LU	POST Luxembourg	www.post.lu
Malta	MT	MaltaPost	www.maltapost.com
Netherlands (The)	NL	PostNL	www.postnl.nl
Norway	NO	Posten Bring	www.posten.no
Poland	PL	Poczta Polska	www.poczta-polska.pl
Portugal	PT	CTT Portugal Post	www.ctt.pt
Romania	RO	Poșta Română	www.posta-romana.ro
Slovakia	SK	Slovenská Pošta	www.posta.sk
Slovenia	SI	Pošta Slovenije	www.posta.si
Spain	ES	Correos	www.correos.es
Sweden	SE	PostNord Sverige	www.postnord.se
Switzerland	CH	Although the Swiss Post itself was not participating in the study, test mail was sent from and to Switzerland on behalf of other postal operators.	
United Kingdom	GB	Royal Mail Group plc	www.royalmail.com

The addresses of the postal operators above can be obtained from the respective post's website.

Statistical design

The UNEX™ CEN measurement covered by this report 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 streams 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.

Although Covid-19 did not affect Europe equally, the aftermath of the pandemic did further affect the posting tasks of the panellists in 2023 due to new postal routines, posting points network, as well as to new working ways. With more people working from home, business-sender panellists have reported not being able to use their office metering machine on a regular basis, which has decreased that specific franking method's availability for the study.

The UNEX™ CEN module and in particular, the European Committee for Standardization CEN Standard *EN13850:2020 Postal services – Quality of service – Measurement of the transit time of end-to-end services for single-piece priority and first-class mail* require the design in terms of 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™ results within Europe cover international priority single-piece letter mail envelopes, i.e. mail which is neither bulk mail nor implying constraints for the customers at posting such as registration of items or minimum induction volumes, in line with the CEN Standard EN13850:2020 scope.

The measurement covers the cross-border mail postal 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.

Since 2016, the field of study for the UNEX™ CEN measurement has been set to “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. The country-to-country results published in this report are calculated for information purposes only, i.e. as a detailed sub-result of the country-to-Europe and Europe-to-country statistical design.

135,000

TEST LETTERS ACROSS
EUROPE IN 2023

710

COUNTRY-TO-COUNTRY
FLOWS MEASURED

31

COUNTRIES SENDING AND/
OR RECEIVING TEST MAIL

4,600

PANELLISTS SENDING AND/
OR RECEIVING TEST MAIL

For the UNEX™ CEN module 2023:

- > Volumes of test letters to be sent from each country to the rest of Europe and vice versa are calculated based on the procedure described in the CEN EN13850:2020 Standard, i.e. using the international priority single-piece real mail volumes travelling from each country to Europe and vice versa. Recent real mail data is provided by both postal operators on each international flow based on the accounting agreements used to calculate annually each other's remuneration for delivering each other's international mail (“terminal dues”). Once the required total test letter volumes, both 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 a correct representation of real mail flows in Europe.
 - > In 2022, IPC introduced a new approach to its UNEX™ measurement modules, including the CEN module. The change consists in re-using all test items from other UNEX™ postal quality measurement modules which meet the CEN requirements set in the CEN EN13850:2020 Standard, instead of measuring the same flow for each UNEX™ module in isolation from each other. This new approach has resulted in a higher number of test items available than required by the statistical design, spread amongst a larger base of sender and receiver panellists. Aiming at a higher statistical precision and a better panel spread, this new efficiency approach strengthens the accuracy of the measurement results published.
 - > Very small country-to-country flows were not measured; the CEN EN13850:2020 rules specify that flows with real mail volumes below 11,500 mail pieces per year may be excluded from the measurement. Indeed, if the test mail was inducted on such flows, these test letters 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 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 statistics into national and international mail volumes 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 required by the CEN Standard EN13850:2020. Indeed, to handle possible deviations between the final test volume, sample proportions achieved and the required real mail statistics proportions from the statistical design, a complex process of weighting is to be applied.
- As required by the CEN Standard, IPC first analyses the variation in the 2023 postal performance data 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 total weighted European average score.
- More information on the discriminant analyses or on the corrective weighting process can be obtained via unex@ipc.be.

For the UNEX™ CEN module 2023 (continued):

- > The post-factum weighting above also applies to statistical accuracy. For the 2023 results, 18% of the margins of error on the country total outbound and inbound aggregated performance indicators were below 5% - where the margin of error is the half-width of the 95%-confidence interval.
- > 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 Germany and Switzerland by default (when enough real mail volume exists).

The CEN EN13850:2020 Standard's methodology for international postal measurement is not applicable in a multi-operator postal market situation which is the case in Germany. This country remains an exception in Europe as there is no single post providing the universal service for the entire country.

- > As described in previous editions of this publication, 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 until mid-year 2023: each test item is correctly attributed to a specific zone with the correct calculation logic applied based on the alternate delivery day methodology. Iceland Post ended this operational model mid-2023.

Radio Frequency Identification (RFID) technology

In 2023, all 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 presence at specific points can be recorded automatically by radio frequency receivers located in postal facilities. These RFID receivers are linked to a global RFID network run by IPC. In a fully anonymous and automated manner, the RFID tags help to identify any bottlenecks

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 over 25 years. In 2023, IPC RFID network served 28 postal operators and covered 157 postal facilities with 2,202 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.

Mieloo & Alexander (The Netherlands) conducted an audit, at the request of IPC, of the UNEX™ CEN measurement for the operational year 2023. This audit involved the validation of UNEX™ CEN measurement 2023 processes and (intermediate) results against the stipulated requirements in the European Committee for Standardization CEN standard EN13850:2020 for postal services – Quality of Service – measuring the transit time of end-to-end services for single-piece priority and first-class mail.

The audit took place through a series of visits, encompassing IPC premises (in Brussels, Belgium) and the facilities of Kantar (in London and West-Bromwich, UK), who have overseen the UNEX™ CEN measurement since 2022.

In accordance with the UNEX™ CEN requirements (CEN standard EN13850:2020), the statistical standard or baseline design for the UNEX™ CEN measurement (period 2023) must align with the real mail information provided to IPC by the participating postal operators.

Unfortunately, the concerns raised in the previous audit (2019), that real mail data (characteristics) may not reflect the realities on the ground, are still relevant. Furthermore, with the large volume changes taking place annually within the postal sector, the timing

of real mail data provided (e.g. 2020 mail data collected in 2021 used for the 2023 CEN module statistical design) may lead to the data provided not being entirely representative anymore at the time of the measurement.

In 2023 IPC have actively initiated a coordinated effort with the participating postal operators to address the issue of realistic mail data in order to validate the extent to which the data currently being used does indeed reflect the current realities on the ground. The discussions have already provided some valuable feedback and insight. Unfortunately, not all postal operators have responded to the inquiries of IPC.

It would be recommended to continue these assessments with the postal operators so that final conclusions can be made on how to proceed. It would be recommended to set a deadline for the assessments with the postal operators and after completion present the conclusions at a UNEX governance meeting where a decision can be made on how to proceed.

The second area of concern relates to the fact that insufficient business panellists were available in various countries. As a result, specified mail characteristics in the statistical design may not be able to be included in the UNEX™ CEN measurement.

Despite identifying some areas of concern and providing operational recommendations in the audit report*, Mieloo & Alexander have determined that the UNEX™ CEN measurement carried out by IPC in 2023 is in compliance with the requirements outlined in the CEN standard EN13850:2020.

* The full report is available to the European participating postal operators as well as their regulators upon request via 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 26 member postal operators in Asia Pacific, Europe and North America.

IPC's solutions and services are used by over 180 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.

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 2023 CEN module results can be obtained via unex@ipc.be or found on www.ipc.be.

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