



# Where do we grow?

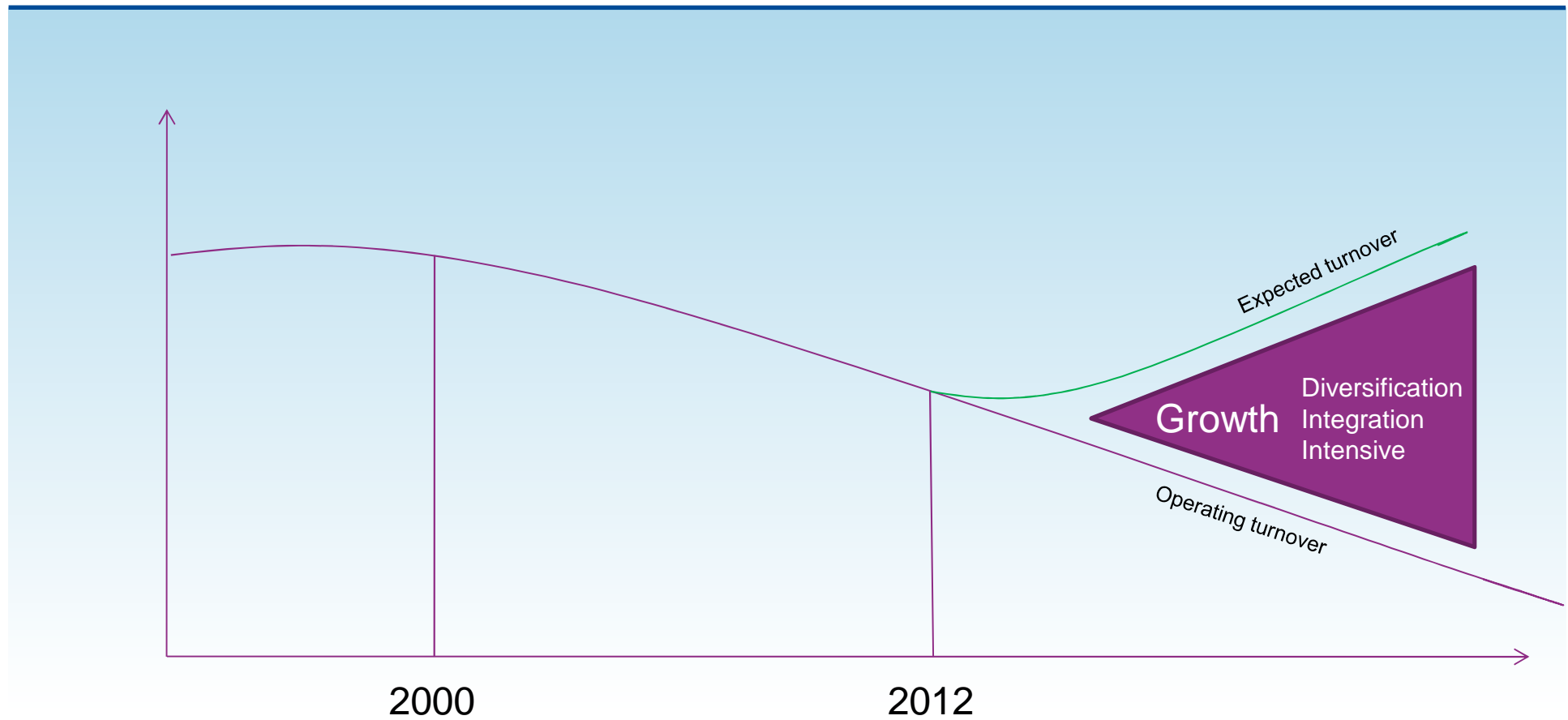
Adding value to the core

**Botond Szebeny**  
Secretary General

WME, 19 May 2011, Brussels



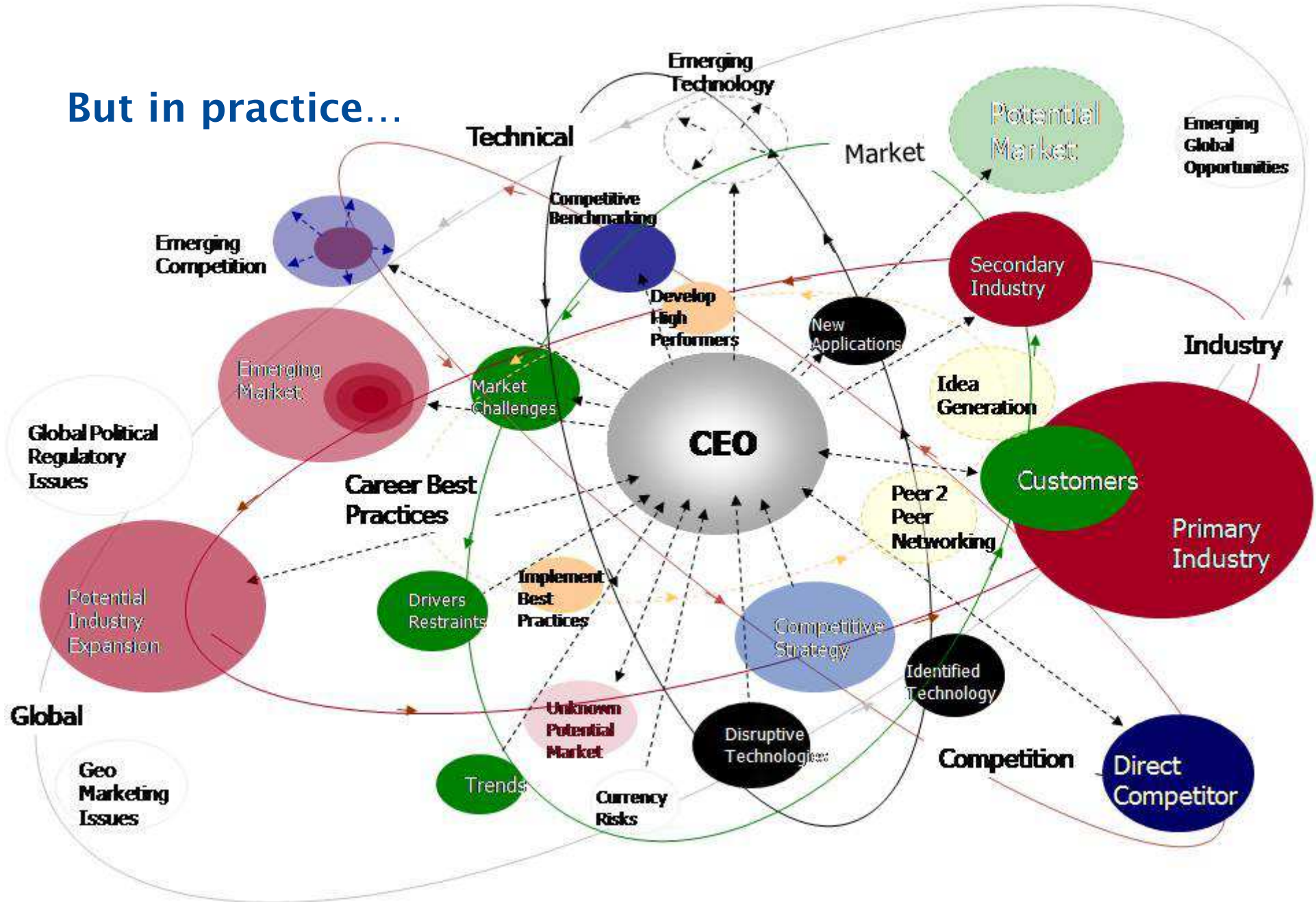
## The Postal Challenge



## Growth is simple in theory...



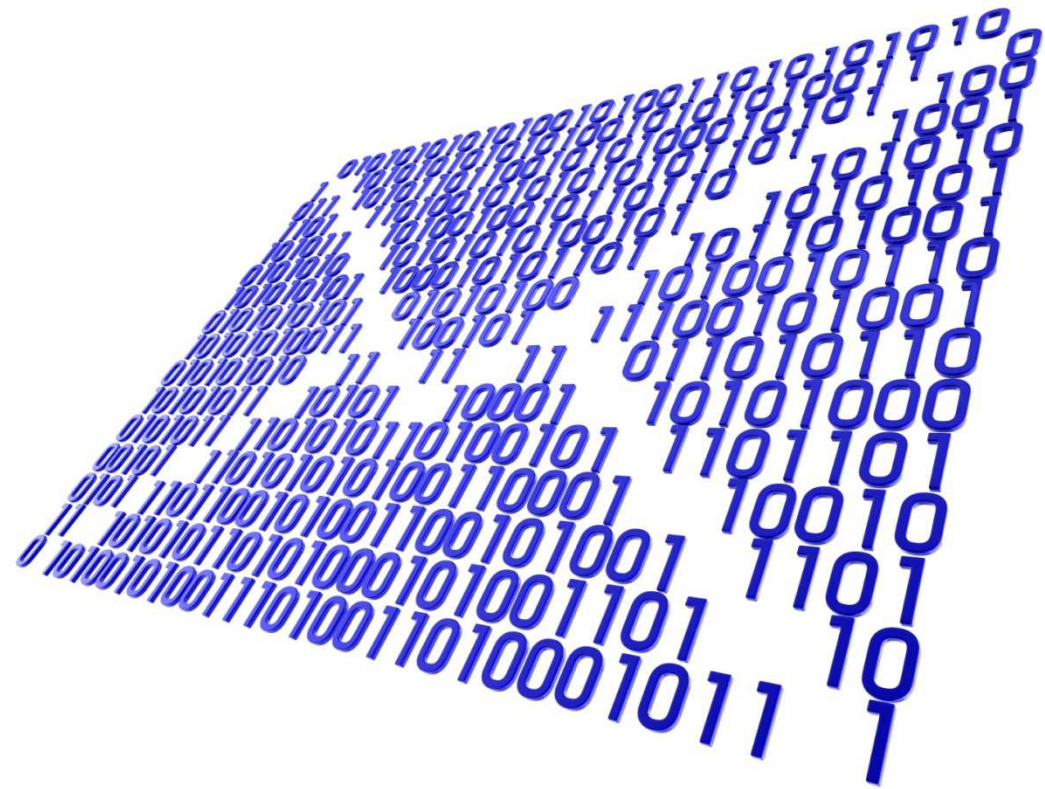
# But in practice...



## So which direction are we going to take?



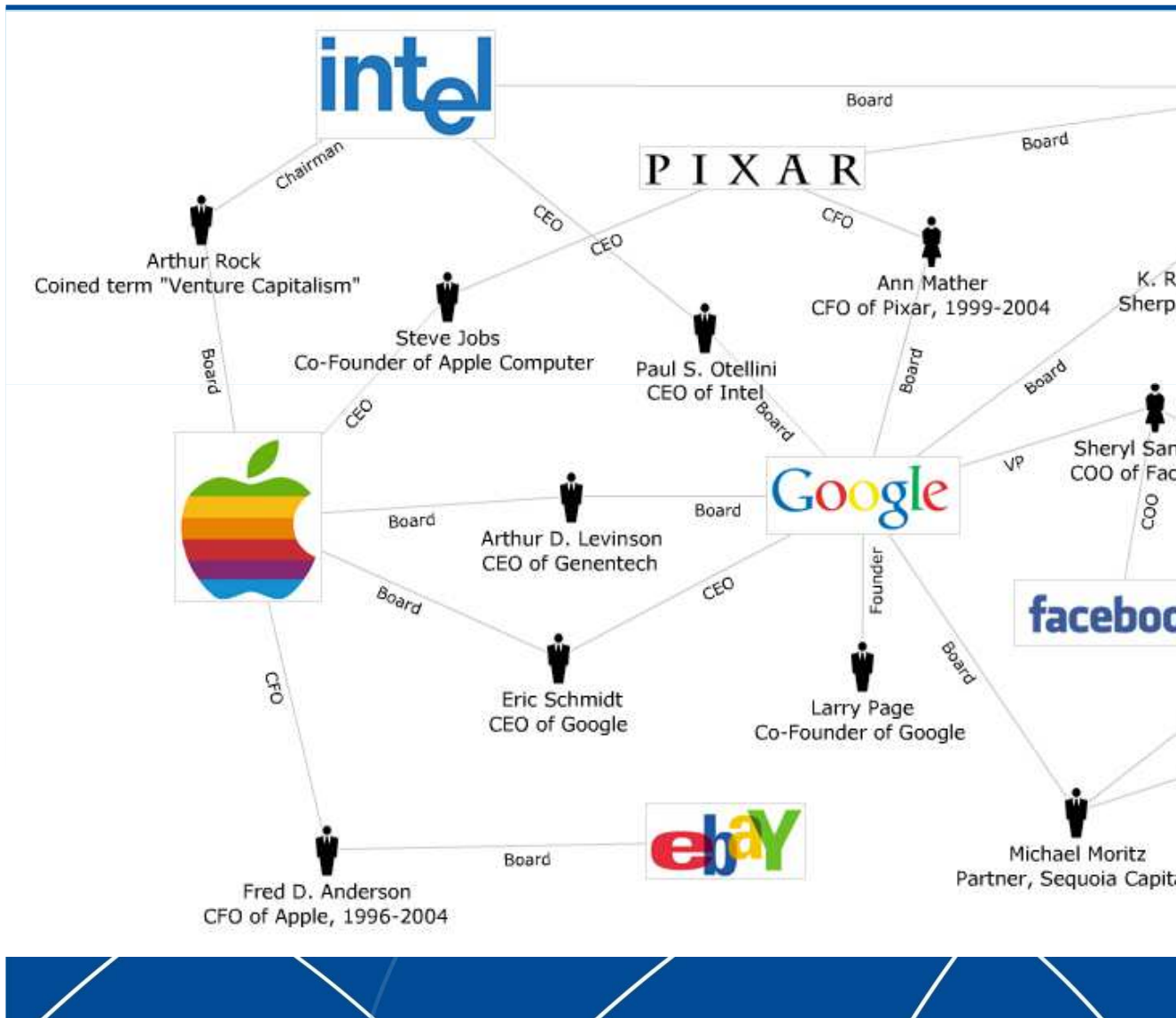
*(As far as we know, photo is public domain)*



# And so we now have to compete with...

BrandZ Top 100 Most Valuable Global Brands 2011

#	Brand	Brand Value 2011 (\$M)	% Brand Value Change 2011 vs. 2010	#
1		153,285	84%	26
2		111,498	-2%	27
3		100,849	17%	28
4		81,016	23%	29
5		78,243	2%	30
6		73,752	8%	31
7		69,916	N/A	32
8		67,522	18%	33
9		57,326	9%	34
10		50,318	12%	35
11		44,440	1%	36
12		43,647	-2%	37
13		42,828	N/A	38
14		37,628	37%	39
15		37,277	-5%	40
16		36,876	97%	41
17		35,737	35%	42
18		35,404	-11%	43
19		29,774	N/A	44
20		28,553	15%	45
21		27,249	N/A	46
22		26,948	9%	47
23		26,078	7%	48
24		25,524	22%	49
25		24,623	-20%	50



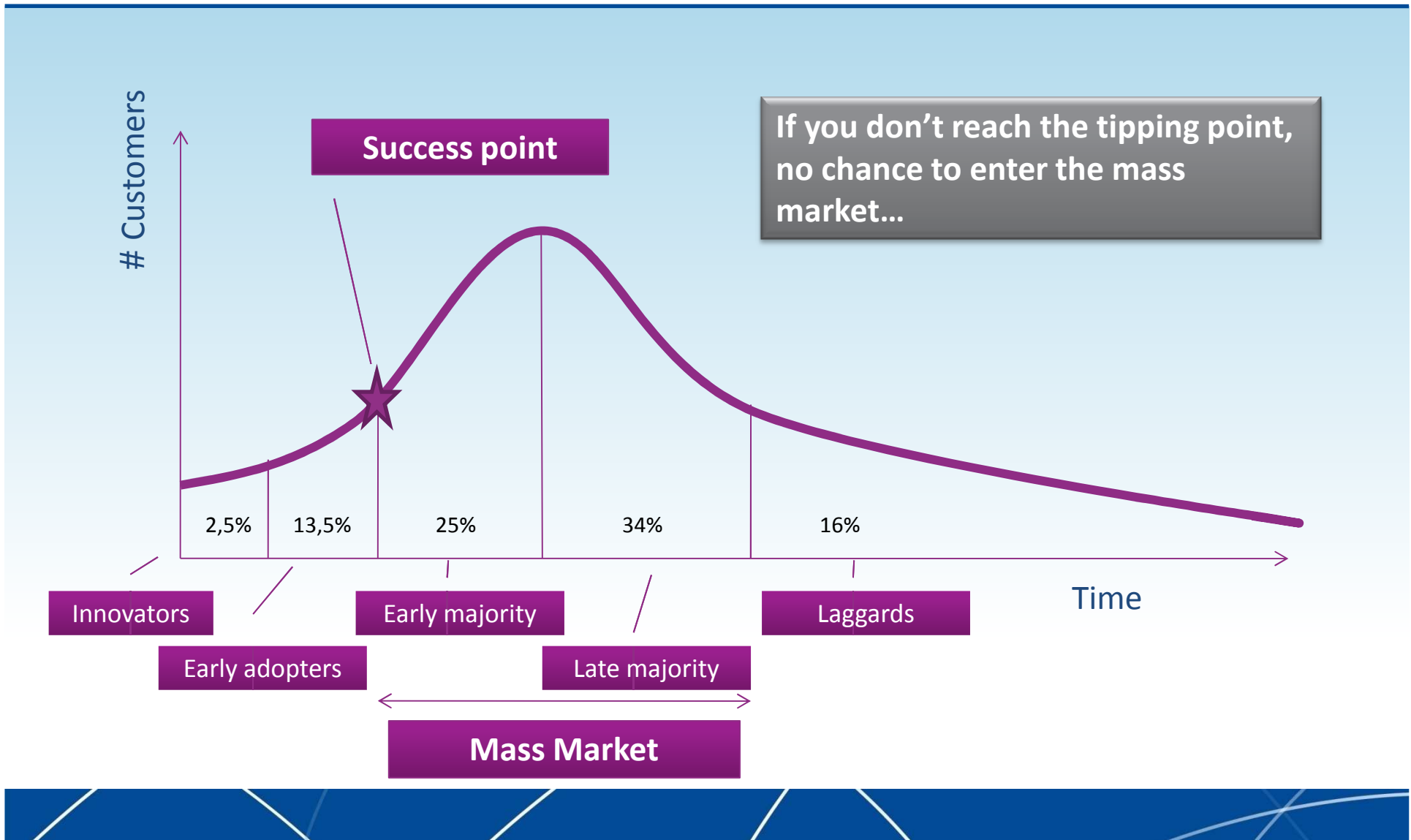
## Not so simple...



Because in general, it's perceived as:

**Free**  
**Moving fast**  
**IT dependant**  
**Innovative**  
**&**  
**None of our business...**

# The Innovation Adoption curve





First conclusion...

It will take time,  
and it's not going to  
be easy...

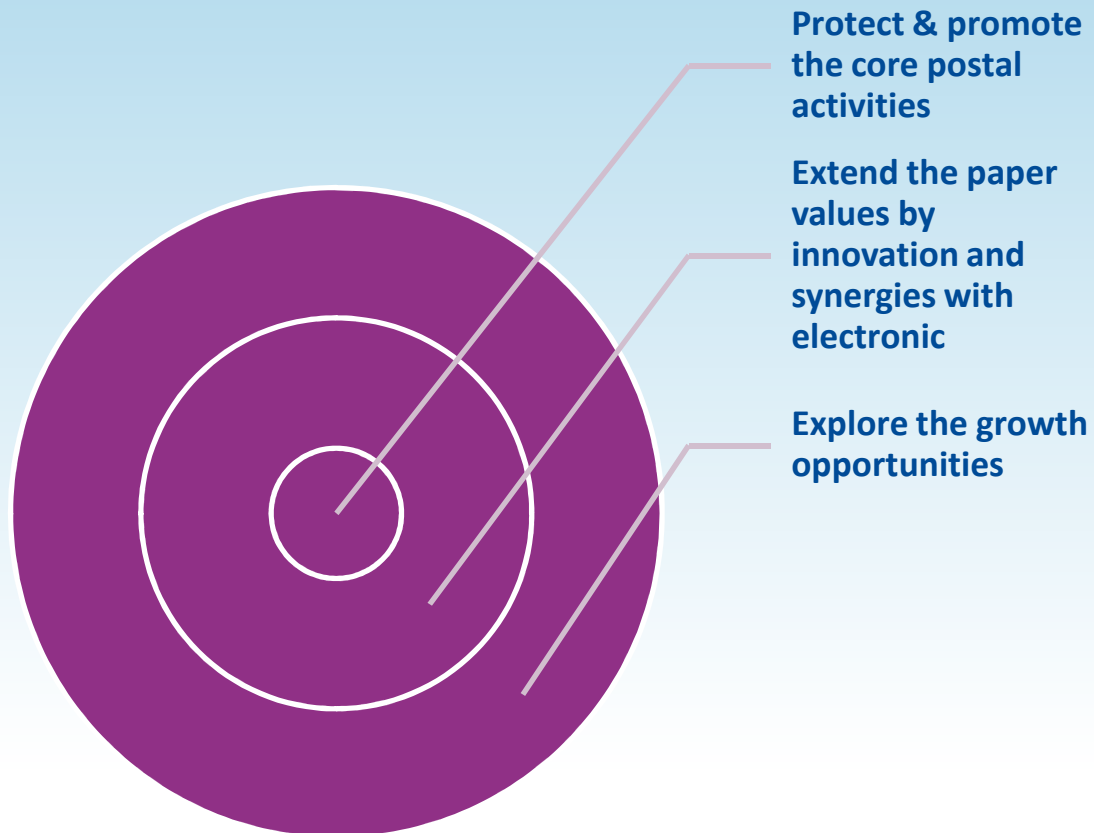
## Work on the core

One thing is sure, our core business made us who we are today. If we need to grow, and we need to grow, it must start from within...

From the core and on the core...



## PostEurop Market Activities



# POST EUROPE

---

1) Protect and promote  
the core postal activities



## The Print Power project

The Print Power project launched in November 2009  
by 5 European trade associations

- Intergraf(printing industry)
- Eugropa(paper merchants)
- Cepifine(fine paper manufacturers)
- Cepiprint(publication paper manufacturers)
- PostEurop(European public postal operators )



**INTERGRAF**



## To cope with 3 immediate challenges

### Structurally

- Substitution by electronic media
- Sustainability misconceptions

### Cyclically

- Recession-based budget cuts



	Electronic Invoice	emailed Image	Scanned Paper	Paper
Cost				
Environmental Impact				
Data Accuracy				
Processing Efficiency				

## Objective

*To strengthen the position of print in today's multi-media world  
and maximize print media's share in total marketing  
& advertising spending in Europe.*

*by*

- Promoting the effectiveness of print (Print Power)
- Demonstrating the environmental friendliness of print (Two Sides)

*and*

- Uniting the entire print media value chain

## United we stand

**5** sectors covering entire value chain

**3+** million people employed

**20+** central partners

**1000+** local partners

**12** countries

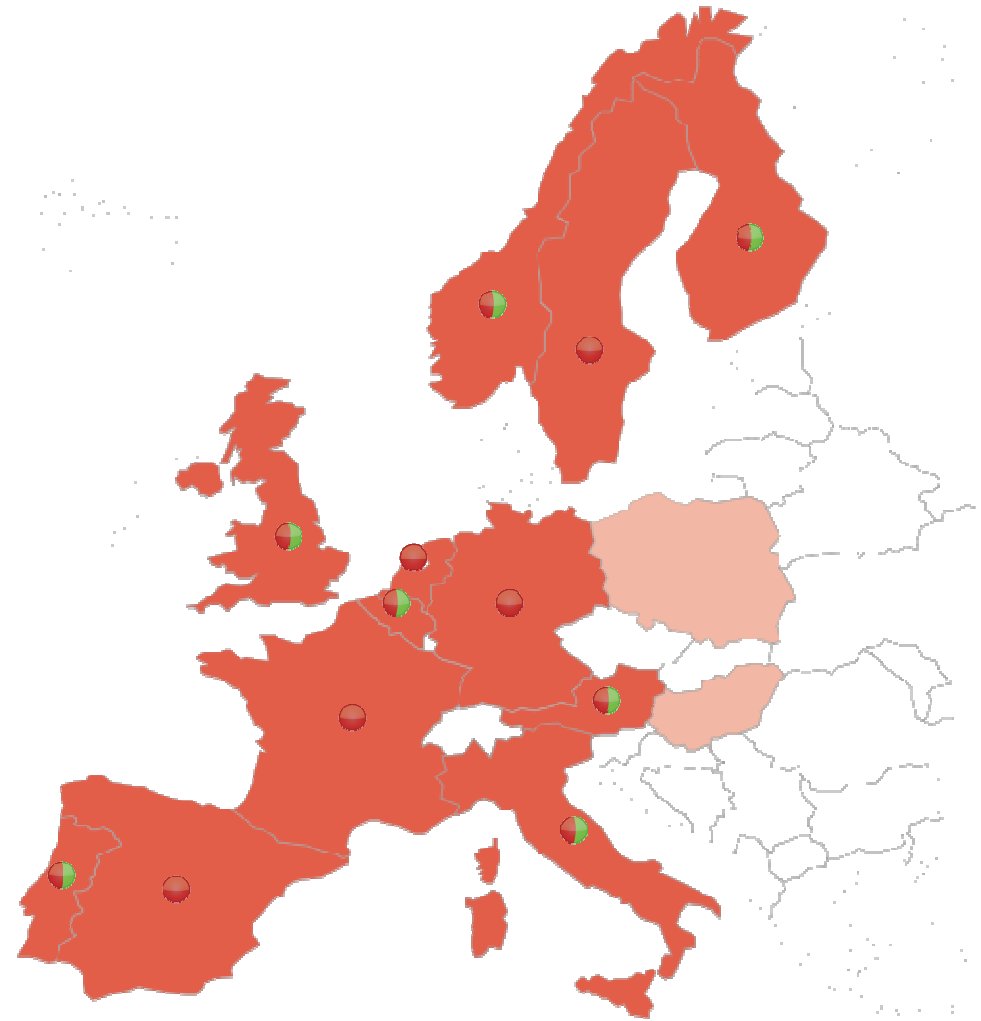


# Which countries participate?

2011

TBD 2011

- Print Power
- Print Power & Two Sides



## How do we measure success?

### *Quantitative Measurement*

- Media exposure
- Website activity and engagement
- Annual perception study decision makers
- Tracking print media expenditures
- Tracking direct mail expenditures
- Removal of anti-print messages by companies and other bodies

### *Qualitative Measurement*

- Positive industry perceptions and enthusiasm

## Protect and promote the core activities

### European Mail Industry Platform ( EMIP )

We work with all the stakeholders involved in the graphical value chain to represent towards specific entities our interests. As example, the Open Letter send to the European Commission around e-invoicing.



**2) Extend the paper values  
through innovation and  
synergies with electronic**



# Add value to transactional mail: Transpromo

## Degree of redesign

Invoice today

Restructuring of the core part of invoice

Adding color

Improving overall page layout

Including targeted marketing message

Original invoice from numericable.be. It is a standard black and white document with a dense layout of text and tables. The header includes the company logo and contact information. The main body contains a table of services and their costs, followed by a summary section. At the bottom, there is a promotional message for 'Le Video Club de Numericable'.

Redesigned invoice with restructuring and color. The layout is cleaner and more organized. The header is simplified. The main table of services is more prominent. The promotional message for 'Le Video Club de Numericable' is integrated into the layout with a small graphic. The overall design is more professional and easier to read.

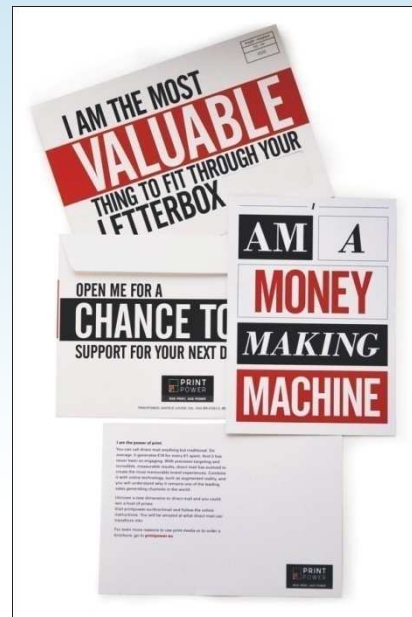
Redesigned invoice with color and layout improvements. This version uses a color palette of greens and greys. The layout is further refined, with clear sections for 'Vos abonnements, FORNITS ET OFFRES de 120€ en 120€' and 'Vos factures ANTÉRIEURES ET DÉTACHES de 120€ en 120€'. The promotional message for 'Le Video Club de Numericable' is highlighted with a green background.

Redesigned invoice with targeted marketing message. This version includes a 'Vos services' section with small images of people. The layout is modern and uses a mix of colors. The promotional message for 'Le Video Club de Numericable' is prominently displayed at the bottom with a large graphic and clear text.

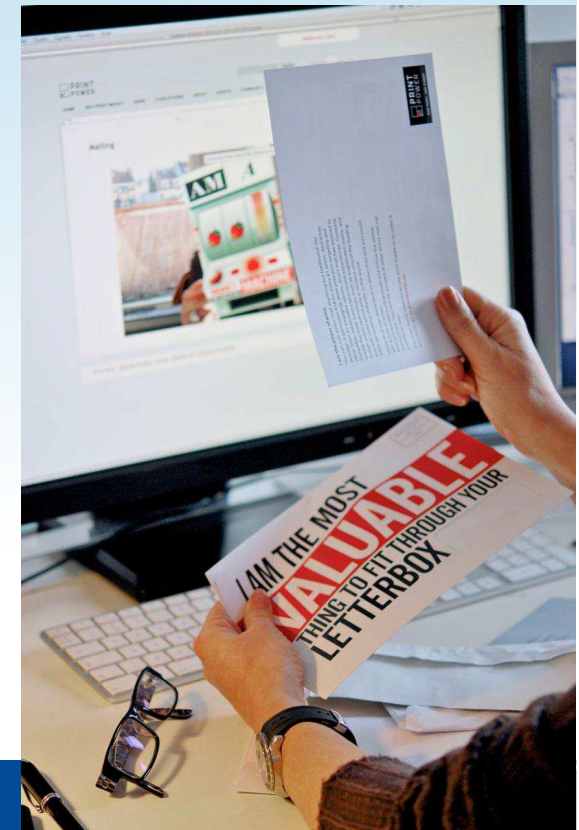
Redesigned invoice with targeted marketing message. This version features a large 'numercable.be' logo at the top. The layout is clean and uses a color palette of greys and greens. The promotional message for 'Le Video Club de Numericable' is integrated into the layout with a small graphic. The overall design is more professional and easier to read.

## Add value to paper and prove the synergies with electronic

We foster paper mail by promoting innovation in general and by creating the bridge between paper and electronic



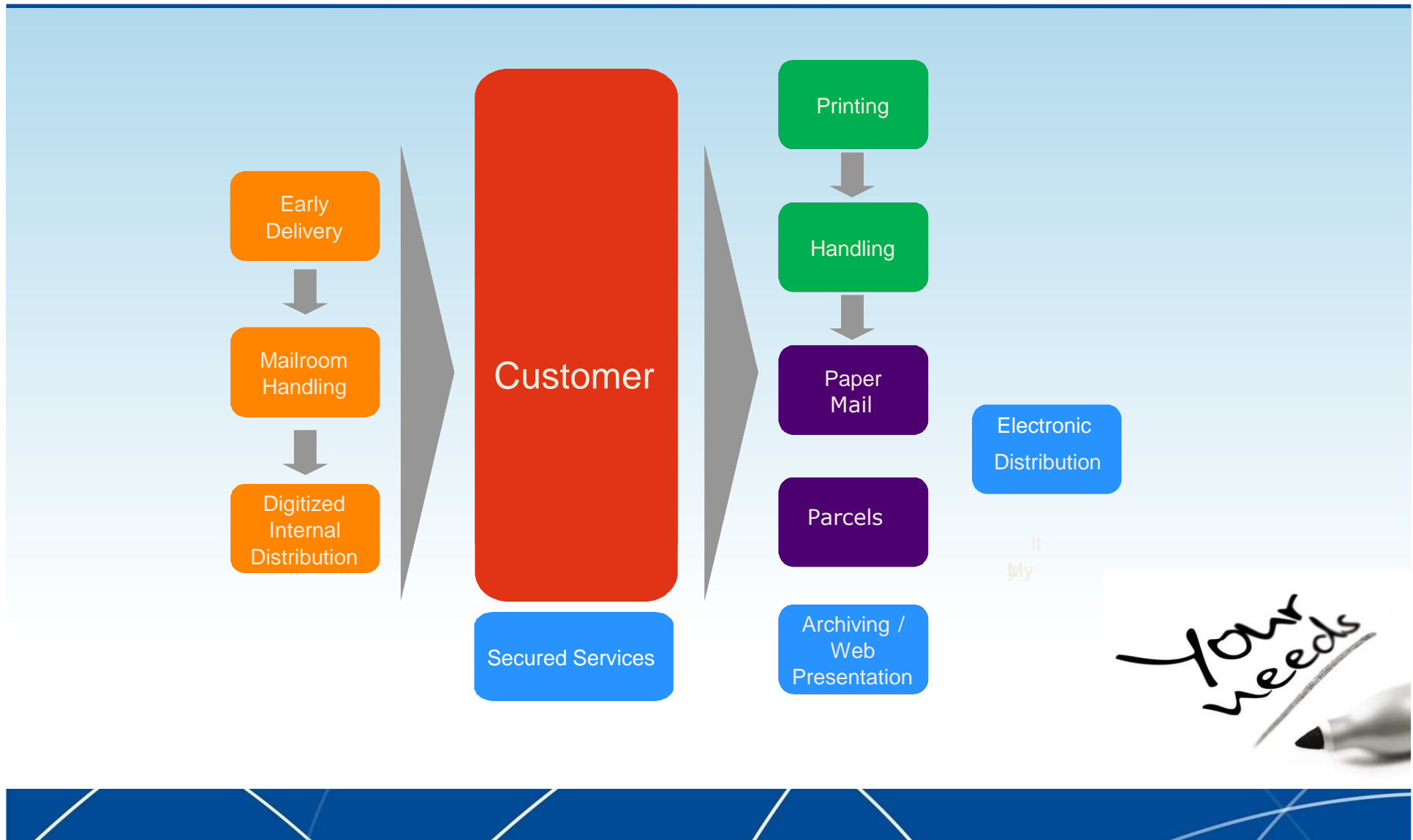
<http://www.printpower.eu/mailing>



## **3) Explore the growth opportunities**

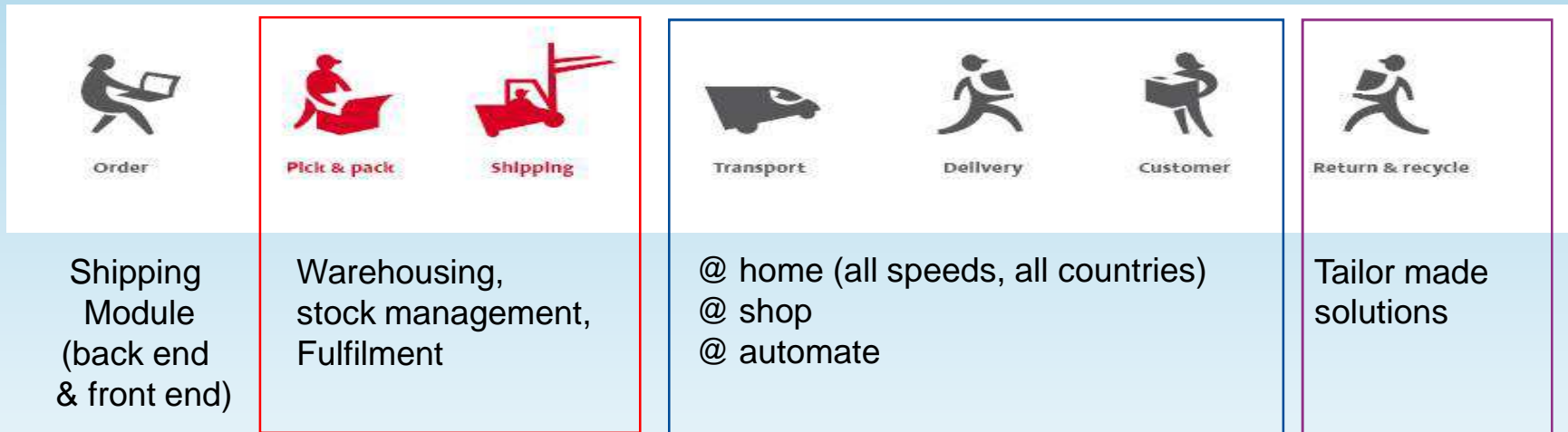


## Explore the customer value chain





## E-commerce value chain



## Final conclusion

**We have to follow the market and the market goes „e” ...**

**But...**

**Don't forget we are experts and recognized for our physical delivery experience, network and logistics. Mail is still valuable and profitable.**

**It will take time to find a profitable place in the e-market.**

**In the meantime, work on your core to make it as strong as possible, because it will be the foundation for your future development.**



Association of European Public Postal Operators AISBL  
Association des Opérateurs Postaux Publics Européens AISBL

[www.posteurop.org](http://www.posteurop.org)

