



ASIAN-PACIFIC POSTAL UNION
ASIAN-PACIFIC POSTAL COLLEGE



e-Commerce and Sustainable Logistics Forum



**Bangkok,
18-20 November 2013**



ASIAN-PACIFIC POSTAL UNION
ASIAN-PACIFIC POSTAL COLLEGE

e-Commerce and Sustainable Logistics Forum
AGENDA

Monday 18 November 2013

08:30 -12:15	Registration followed by morning session	
09:00-10:15	Inaugural session	
09:00-09:15	Opening, Welcome, Introduction	Mr. Somchai Reopanichkul Director of APPU Bureau
09:15-09:30	Opening tone setting presentation	Mr. Derek Osborn Whatnext4you
09:30-09:45	Setting of expectations and message from the experts	Presenters and Experts
09:45-10:05	Global overview of e-Commerce and Logistics	Mr. Hibiki Mizuta, Accenture
10:05-10:15	Discussion	
10:15-10:35	Coffee break hosted by 	
10:35-12:15	Case studies from the Asia-Pacific Region Facilitator: Mr Derek Osborn	
10:35-10:55	e-Commerce and Sustainable Logistics: Building a Strong Future	Mr. Brian Chandler New Zealand Post
10:55-11:00	Discussion	
11:00-11:20	The Chinese Postal Industry and Cross Border e-Commerce	Mr. Lin Hongliang State Post Bureau of China
11:20-11:25	Discussion	
11:25-11:45	Scaling-Up Postal Services through e-Commerce and Logistics	Ms. Maria Josefina M. Dela Cruz PHLPOST
11:45-11:50	Discussion	
11:50-12:10	e-Commerce and Sustainable Logistics: issues, challenges and responses in India	Ms. Smita Kumar India Post
12:10-12:15	Discussion	
12:15-13:15	Buffet lunch hosted by  	

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e-Commerce and Sustainable Logistics Forum AGENDA

Monday 18 November 2013

13:15- 17:15	Post lunch session	
13:15- 15:00	Perspectives on global e-Commerce solutions Facilitator: Mr Gavin Macrae	
13:15-13:35	The new postal supply chain and the UPU e-Commerce framework	Mr. David Avsec UPU
13:35-13:45	Discussion	
13:45-14:05	Vision on sustainable solutions in e-Commerce	Mr. Carl Schelfhaut Deutsche Post DHL
14:05-14:15	Discussion	
14:15-14:35	Payment requirements & solutions for e-Commerce	Mr. Michel Stuijt Eurogiro
14:35-14:45	Discussion	
14:45-15:00	Open discussion and summing up of the session	
15:00-15:20	Coffee break hosted by 	
15:20-17:15	Case studies from the Asia-Pacific Region Facilitator: Mr Shailendra K. Dwivedi	
15:20-15:40	Cross border e-Commerce: What does it mean for the postal service?	Mr. Bill Zhang eBay
15:40-15:50	Discussion	
15:50-16:10	Riding the e-Commerce Wave	Mr. Lim Kian Peng Singapore Post
16:10-16:20	Discussion	
16:20-16:40	Promotion activities for e-Commerce and EMS in Japan	Mr. Kenichi Hosokawa Japan Post
16:40-16:50	Discussion	
16:50-17:15	Open discussion and round-up of ideas Generated on Day 1	
17:15	Close of Day 1	
17:30	Coaches depart for cruise dinner hosted by 	

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e-Commerce and Sustainable Logistics Forum AGENDA

Tuesday 19 November 2013

08:30 -12:15	Registration followed by morning session	
09:00-10:30	Deep dive into the e-Commerce opportunity for Posts Facilitator: Mr Shailendra K. Dwivedi	
09:00-09:15	Recap of Day 1 and opening of Day 2	Mr. Derek Osborn WHATNEXT4U
09:15-09:35	e-Commerce and growth opportunities for Posts	Mr. Peter Somers bpost
09:35-09:40	Discussion	
09:40-10:00	Evolution of e-Commerce, distribution services and Posts	Dr. Tim Walsh Pitney Bowes
10:00-10:05	Discussion	
10:05-10:25	e-Commerce and Sustainable Logistics operations with a focus on the future	Mr. Alan Barrie IPC
10:25-10:30	Discussion	
10:30-10:50	Coffee break hosted by  EUROGIRO <small>20 years as your global payments intermediary</small>	
10:50-12:15	Case studies and new initiatives Facilitator: Mr Derek Osborn	
10:50-11:10	Future directions of Thailand Post on e-Commerce and Logistics: issues and approaches	Mr. Phitsanu Wanitchaphol Thailand Post
11:10-11:15	Discussion	
11:15-11:35	e-Commerce and Sustainable Logistics: issues, challenges and responses in Pakistan	Mr. Syed Ghulam Panjtan Rizvi Pakistan Post
11:35-11:40	Discussion	
11:40-12:00	Reinventing Philately on an e-Commerce platform	Mr. Glendon Martinez WOPA
12:00-12:15	Discussion	
12:15-13:15	Buffet lunch hosted by 	

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e-Commerce and Sustainable Logistics Forum AGENDA

Tuesday 19 November 2013

13:15- 17:15	Post lunch session	
13:15- 15:00	Role of Posts in e-Commerce, Breakaway Workshop	
13:15-13:35	Role of Posts in e-Commerce	Mr. David Spottiswood Neopost
13:35-13:45	Discussion & Group photograph	
13:45-15:00	Workshop session to discuss opportunities for the postal sector to engage in every element of the e-Commerce value chain and the key challenges to overcome and UPU Workshop on e-Commerce framework implementation in member countries	Breakaway sessions in smaller groups
15:00-15:20	Coffee break hosted by 	
15:20-16:30	Panel discussion and feedback from Workshop	
15:20-16:20	Key questions, expert panel and open discussion	Mr. Derek Osborn Mr. Shailendra K. Dwivedi
16:20-16:30	Round-up of ideas generated on Day 2	
16:30-17:15	Visit to the exhibition area	
17:15	Cocktail party followed by dinner hosted by 	

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e-Commerce and Sustainable Logistics Forum
AGENDA

Wednesday 20 November 2013

08:30 -12:30	Registration and distribution of the book "Reinventing the Post" to delegates. Courtesy of 	
09:00-10:30	Opening session for Reinventing the Post Facilitator Mr Shailendra K. Dwivedi	
09:00-09:20	Keynote address for Reinventing the Post	Mr. Derek Osborn WHATNEXT4U
09:20-09:30	Discussion	
09:30-09:50	Role of postal operators and integrators in the new economy	Mr. Thomas Kipp Deutsche Post DHL
09:50-10:00	Discussion	
10:00-10:20	The Postal Innovation Platform (PIP)	Mr. Bernhard Bukovc Postal Innovation Platform
10:20-10:30	Discussion	
10:30-10:50	Coffee break hosted by 	
10:50-12:30	Perspectives on Reinventing the Post Facilitator: Mr Derek Osborn	
10:50-11:10	Reinventing the Post: your customers want your revolution	Mr. Jeffrey Sibio Intermec
11:10-11:15	Discussion	
11:15-11:35	Reinventing the Post to be ready for future customers	Mr. Hans G. Landgraf SAP
11:35-11:40	Discussion	
11:40-12:00	Posts: Taking convergence to the next level	Mr. Shailendra K. Dwivedi APPU
12:00-12:05	Discussion	
12:05-12:25	The lean and mean postal machine	Mr. Richard Hagen Prime Competence
12:25-12:30	Discussion	
12:30-13:30	Buffet lunch hosted by 	

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Wednesday 20 November 2013

13:30- 17:00	Post lunch session	
13:30-15:40	More perspectives on Reinventing the Post Faciltator Mr Shailendra K. Dwivedi	
13:30-13:50	Helping postal organizations re-invent their core business	Mr. Edouard Villa Neopost
13:50-14:10	Reinventing the Post with technology that builds trust	Mr. Dave Williams Blackbay
14:10-14:30	Parcel Lockers: A smart answer to booming e-commerce parcel delivery	Mr Christian Secci InPost
14:30-14:50	European Union perspective on parcel delivery in the Internet age	Mr. Martin Schraa Cullen International
14:50-15:00	Discussion	
15:00-15:20	Coffee break hosted by  WOPA <small>World Online Philatelic Agency</small>	
15:20-15:40	Generating value through sustainability	Ms. Liene Norberg
15:40-16:00	Reinventing the Post with IT outsourcing	Mr. Wasim Zafar APPU
16:00-17:00	Final Open Panel and Summing Up	
16:00-16:30	Final open panel	
16:30-16:50	Summing up of the whole event	Mr. Derek Osborn WHATNEXT4U
16:50-17:00	Closing of the forum	Mr. Somchai Reopanichkul Director of APPU Bureau
17:30	Farewell dinner and cultural evening hosted by 	

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Director's Message

The opportunities arising out of e-Commerce for different stakeholders and the possible role the Posts could play as a trusted intermediary is receiving a lot of attention in different circles. The postal sector is also looking at the options to deliver increased value and reassert its relevance as a service provider integrated to the needs of the new platforms.

The new economy needs new processes and approaches. Postal operators could play a constructive role provided that they could transfer their strengths of the Industrial Age to the new Digital Age. There is a need for a new postal platform embedded in the new value chains of clients on both sides, without

compromising on the trust, security, reach, accountability, reliability and adaptability that is associated with the Posts through their long history.

While e-Commerce is a big opportunity everyone is looking at, sustainability, green growth, global warming, climate changes and the future of our planet are the biggest concern that is emerging from all corners of the world. The opportunity and the concern need to be addressed together through a balanced and innovative approach to solve the problems we face.

It is in this background that the Asian-Pacific Postal College is hosting the “e-Commerce and Sustainable Logistics Forum” to create a platform for dialogue and collaborative action to move forward. This forum is a follow-up of the forum on “e-Commerce and Innovation” held at the College in October 2012 and the “e-Business and Innovation Forum” during the APPU Congress in New Delhi in September 2013.

We at the APPU Bureau believe that the Posts need to reinvent themselves for the new opportunities and expectations in a mission mode. This requires challenging our conventional responses and coming up with new collaborative solutions to the problems of a wider and also common group of stakeholders.

While I hope that this forum takes the regional postal development agenda forward, I also take this opportunity to thank all the member countries, the experts and speakers, our premium sponsors: Deutsche Post DHL and Neopost, and all other industry players who chose to support the event in one way or the other. I hope our concerted efforts will lead to the achievement of our common goals in the coming days. We will be happy if this meeting point can bring value to all interested parties in a meaningful way.



Somchai Reopanichkul
Director
APPU Bureau

Reinventing the Post

Derek has been actively engaged in the organisation of this forum, building on his involvement as an occasional lecturer in Bangkok at the Asian-Pacific Postal College and his role in helping with the successful forum which was held in October 2012.

For this event, Derek will be opening the forum with a short tone setting presentation, facilitating some of the sessions, recapping and summarising as the forum progresses and providing a keynote address for the final REINVENTING THE POST day.

The book “Reinventing the Post – Emerging Opportunities for the Postal Industry” showcases a mosaic of over 40 different perspectives on how the Post is newly emerging and being **reinvented** around the globe: in many different ways, including through a great focus on customer needs, in the last mile, as a trusted intermediary, by integrating with digital solutions, through technology platforms and in a sustainable way.

It features a wide range of insights and ideas on how the Post is being re-born. Some of the books’ authors will be at the forum to present and lead discussion and debate about the new and exciting future of the emerging postal sector and the different forms it is taking.

The intention of the book is to encourage people in the postal industry to see opportunities alongside the many challenges.



Derek Osborn

Derek is an enthusiastic and innovative **business coach, workshop trainer, facilitator and postal business expert**. He focuses on postal strategy, human resources, market development, business excellence, customer orientation, innovation, culture change and transformation in all aspects of the postal sector worldwide.

He is an acknowledged postal expert, with over 22 years in senior management in Royal Mail, and over 12 years working internationally across the postal industry. He is passionate about the benefits of collaboration in the postal industry so as to share knowledge, good ideas and best practice in order to promote the industry, develop capability, encourage training and foster innovation.

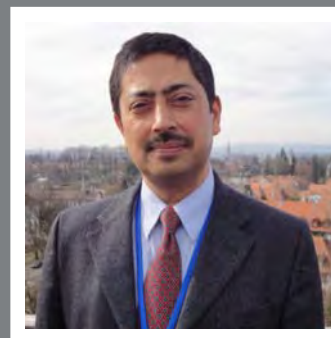
Together with Dr Kristian Sund, of Middlesex University, he has co-edited three important books entitled, The Future is in the Post, which feature industry thought leadership on postal strategy, transformation and innovation in the industry.

Posts: Taking Convergence to the Next Level

In his presentation, largely based on his contribution in the volume “Reinventing the Post”, Shailendra sketches a possible picture of the postal platform for the new economy. The picture is based on a survey and assimilation of megatrends and better practices in today’s world of business, including the postal services.

The new economy, *inter alia*, is about digital and economic convergence, multisided collaborative platforms as hubs of business activity cutting across industrial and sector boundaries, disruptive innovation and new business models to ensure efficiency and sustainability. On the demand side, it is the unique requirement of a single customer at a time ($N=1$, the market is composed of one unique customer) and on the supply side it is about the ability of multiple service providers across sectors and geographies to collaborate and share their resources and competencies ($R=G$, resources are global in nature) to meet the needs and expectations of their customers. The new economy is a *collaborative economy* as opposed to the *competition economy* of yore.

With technology as the key enabler, a deep awareness of customer desires and the ability to design solutions from a wide lens view of stakeholders and providers is a critical requirement for business growth in the emerging digital age. The possibilities for Posts are limitless provided they identify new ways (“**how**”) and means (“**what**”) of meeting their core purpose of connecting people and businesses with flows of information, goods and money in efficient, environment friendly, sustainable ways (“**why**”). New ICTs offer hitherto impossible options for process and product changes. The traditional strengths of the Posts could be adapted to the new environment to create a robust platform of services dealing with all the logistics flows of goods, money and information through the 3-D postal network. The Posts could indeed take convergence of the economies and digital platforms to the next level by integrating the real and the virtual economy through the multisided postal platform.



Shailendra K. Dwivedi

An officer of the Indian Postal Service, since 1997, Shailendra is serving as a lecturer at the Asian-Pacific Postal College, Bangkok from 2010 onwards. There he designs and leads courses, sharing knowledge on Innovation Management, Sustainable Business Models, Leadership and Change Management for the Posts. He is Course Director for several Postal Business Management Courses held at the College in which he brings a unique blend of first-hand postal service experience with passion for better business practices. With almost four years at the College and training missions in member countries, he knows the Asia-Pacific Region very well. His formal higher education was in Economics, Law and International Business. He is passionate about realizing the potential of the postal network as an enabler of sustained and balanced socio-economic development of communities served by it. His belief is that the solution to the larger challenges lies in collaborative efforts of all stakeholders with Posts providing a constructive meeting ground for them.

Shailendra has been actively involved in the organization of this forum and would facilitate some of the sessions, apart from making a presentation on the third day about reinventing the Posts with the theme elaborated alongside.

Global Overview of e-Commerce and Logistics

Accenture is working with postal organizations around the world as they look to reshape the business of delivering mail and respond to a challenging, ever-changing environment. Accenture's experience, combined with deep research and insights, enables postal organizations to transform their operations while creating innovative revenue sources that capitalize on existing technology investments.

As the parcel business grows and mail declines, posts are becoming increasingly focused on providing consumer-facing services in order to provide options and increased control to recipients of both mail and packages.

Accenture believes that the key to a successful future for any postal organization is to focus on monetizing the valuable services provided to receivers, especially to gain parcel market share.

New research from Accenture, 2013 Accenture Postal Research, has been designed to understand consumers' behavior to design solutions that would drive both adoption and frequent use. Based on surveys of 11,000 consumers in Australia, Belgium, Canada, France, Germany, Italy, India, Japan Switzerland, the UK and the US, each of whom received at least two parcels a month, it pinpoints where some of the most promising opportunities may lie.



Hibiki Mizuta

Mr Hibiki Mizuta is a Managing Director at Accenture, working for Health & Public Service Group in the Asia-Pacific Region. With offices in Canberra & Tokyo, he also leads the work Accenture does with postal services in the region.

He has been working in the Postal industry for over a decade. He has experience in large & complex transformations including privatization, large scale BPO, core-systems replacement, Programme management, IT Governance and CEO agenda items. He is interested in developing new services for the Postal industry which would create new growth streams and add innovative image to their trustworthy brand.

Accenture is a global management consulting, technology services and outsourcing company, with 275,000 people serving clients in more than 120 countries. We collaborate with postal and express clients around the world to help them become high-performance organizations. We mobilize the right people, skills and technologies to help our clients improve operational efficiency, identify and enter new markets, and enhance customer relationships. Our systems help deliver over 50 percent of the world's mail. www.accenture.com/postal



Building a Strong Future

E-business is fast growing and demanding ever more efficient and flexible logistics support. Postal companies have traditionally done a good job servicing this market. The problem is postal companies have focused on products. E-business demands solutions. To support e-business we need to move away from presenting the customer with a suite of products, and move towards building a tailored solution for each client out of existing modular components. As the needs of the clients evolve rapidly, so our solutions must be capable of being

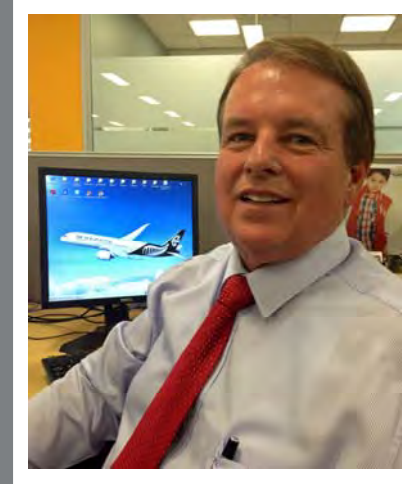
re-engineered quickly and seamlessly. This approach fundamentally changes the way we supply logistics services and IT support. At New Zealand Post, we have successfully begun this journey. Along with our global partners in Asia, Europe and North America, we are providing global distribution for Weta Workshop, producer of collectibles for international hit movies such as *The Lord of the Rings* trilogy.

Background

Traditionally, postal business has been dominated by a small number of products. This worked well when our market was retail and document driven. The landscape has changed. The retail and document market is shrinking and email is taking over the role of transmitting information. However, the computer systems that have led to this decline have fostered a tremendous growth in e-business. The key to our survival is to transition from the business of transmitting information to delivering parcels driven by e-commerce.

The services needed to support e-commerce are quite different to those needed to support the traditional document and retail business. E-commerce demands flexible, dynamic systems. The systems must be developed and deployed quickly. They need to be optimised across mode and route. This optimisation needs to be dynamic, so the logistics system can rapidly adapt to changes in customer demands.

Postal companies are excellent at handling large volumes of small packages. Freight forwarders are excellent at delivering flexible, dynamic supply chains. E-commerce demands both. Freight forwarders already understand this and are moving into our traditional markets. We need to develop supply chain capabilities in order to survive.



Brian Chandler

Brian Chandler has worked as Global Logistics Director at New Zealand Post for two years building a first-rate network of global logistics partners. He has held senior positions in the global logistics industry for the past 20 years, including serving as general manager for two of the largest international logistics companies in New Zealand. He has served as president of the Customs Brokers and Freight Forwarders Federation of New Zealand. Along with New Zealand Customs, Mr. Chandler was instrumental in developing security protocols for New Zealand exporters required under CT-PAT. Mr. Chandler led the first logistics company in New Zealand to be fully certified as compliant.

Mr. Chandler has faced diverse challenges in his career, from optimising retail supply chains, to co-ordinating the international logistics for the relief effort following the major earthquakes in Christchurch in 2011.



The Postal Sector and Cross-border e-Commerce in China

The Postal Sector and Cross-border e-Commerce in China

In China, the soaring cross-border e-Commerce has brought unprecedented opportunities for growth to the Chinese postal industry, unfolding a promising future for the concerted development between players in the e-Commerce value chain and the postal sector. The Chinese express companies have proactively rolled out innovative cross-border delivery services suitable for the cross-border e-Commerce market. Meanwhile, the Chinese Government has taken great pains to create favorable policy environment with view to facilitating the concerted development between both industries. In this presentation, Mr Lin Hongliang, urges member Posts of the Asian-Pacific Postal Union to join hands in seizing the robust growth opportunities of the cross-border e-Commerce and its delivery segments.



Lin Hongliang

**Director General of Department of
Universal Postal Service,
State Post Bureau P. R. China**

**State Post Bureau of
The People's Republic of China**

Scaling – Up Postal Services through E-Commerce and Logistics

In this presentation, Postmaster General Dela Cruz talks about the opportunities and challenges seen by PHLPost related to e-Commerce and Logistics Services in the Philippines. She also touches upon the plans and initiatives of PHLPost in venturing into these services.

Background

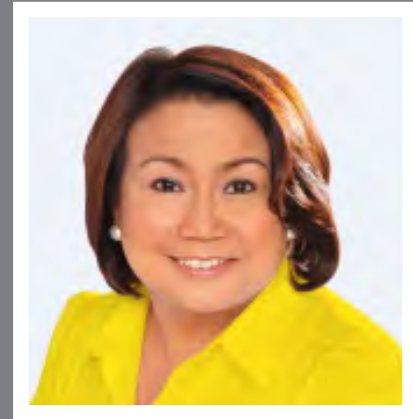
In this age of IT revolution and with the ever changing preference of customers in buying products and availing services, postal operators like PHLPost should not be confined with the traditional postal services. They must, instead, undertake efforts to scale – up their services like undertaking e-Commerce and logistics especially now that there are many opportunities for these ventures.

In the Philippines, the potential of growing e-Commerce cannot be disregarded. Both the MasterCard Online Shopping Behavior Study and the Visa e-Commerce Monitor Research in 2012 project a growing e-Commerce market as more Filipinos are now into online shopping. This is further evidenced by the increasing popularity of homegrown e-commerce platforms and portals notwithstanding, the budding of entrepreneurial Filipinos delving on buying and selling products via social networking sites. Meanwhile, there is also a positive outlook about the logistics industry in the Philippines as it is expected to gain from the revitalized Philippine economy, which registered one of the most impressive GDP growth rates in Asia at 6.8 percent in 2012 and 7.6 percent in the first half of 2013.

Currently, PHLPost is developing a portal that will provide buyers and sellers with an online marketplace for the exchange of goods and services. Specifically, PHLPost intends to feature the goods under the Philippines' "One-Town-One Product" (OTOP) Project produced by the micro, small, and medium enterprises, which constitute about 99.6 percent of the businesses in the Philippines. Complementing the proposed e-Commerce is the logistics service, which is the answer of PHLPost to the growing demand by businesses, government institutions, and other organizations for a time-definite and end-to-end solution for the delivery of their goods.

However, there still are roadblocks in providing these services like the poor infrastructure development and inherent reluctance of the Filipinos to transact via internet. Aside from the efforts of the National Government, PHLPost is also improving its network to remove these roadblocks towards trade facilitation. The move of PHLPost towards e-Commerce and Logistics is also aligned and consistent with the 2011-16 Philippine Development Plan. Specifically, it is expected to contribute to the attainment of rapid, inclusive, and sustained economic growth which is one of the five major guide posts of the national government.

As PHLPost continues to undertake scaling – up efforts by evolving with technology and considering the preference of the customers, postal services will never become irrelevant in the Philippines.



Josefina M. Dela Cruz

Dela Cruz is the first lady Postmaster General and CEO of the Philippine Postal Corporation (PHLPost) appointed in July 2011 by the President of the Republic of the Philippines. Prior to her appointment as the head of PHLPost, she served as the first lady governor of one of the most progressive provinces in the Philippines for three consecutive terms. A multi-awarded local chief executive and a champion in reinventing public service, Dela Cruz uses her 30 years' experience in local governance to revitalize the postal services in the Philippines.

She steered the Corporation to a financial turnaround in 2011 by realizing a profit after incurring losses for several years. This positive development has enabled PHLPost to make its first dividend contribution to the national treasury. In 2012, PHLPost surpassed the 2011 profitability, thus affirming the tenacity of Dela Cruz to lead the Corporation towards sustainability. It is also during her time when the Rationalization Plan was approved by the Office of the President. A milestone in the history of PHLPost, the Rationalization Plan paved the way for better corporate governance.



e-Commerce in India-Issues, Challenges and Responses

India Post as a department of Government of India has been the backbone of India's communications network. However, in the rapidly transforming communications sector and emerging socio-economic trends within the country and globally, the department is facing challenges posed by globalisation, competition, digitisation, focus on inclusive growth, higher level of delivery standards, and so on. In its quest of becoming self-sustaining, India Post is looking at new opportunities like emerging e-commerce and logistics market to leverage its vast network.

In a developing country and an emerging market like India, e-commerce and logistics besides being a commercial opportunity, also has to be viewed in the context of inclusion and mainstreaming a large population. e-Commerce is being driven by growth in IT infrastructure, Internet and broadband penetration, Government policies and digitisation of the economy. A large portion of projected growth in e-commerce is to come from smaller towns and cities. To exploit this growth potential, India Post with its extensive reach is aiming to develop an enterprise wide technology enabled IT platform for transparency in operations, efficient payment systems and better service delivery levels in rural areas through rural ICT network.

e-Commerce market brings in its unique challenges. Consumers expect low prices and seamless return processes along with convenient and flexible delivery options. E-retailers must offer a variety of payment options in India and COD remains too big to ignore (40-60%). Integration of logistics capabilities with money transfer and technology along with desired service levels is being targeted as a strategy in India Post for leveraging on its traditional strengths. Capacity building in parcel handling, optimisation of mail network and employee engagement and key performance monitoring through 'Project Arrow' in about 20,000 post offices is an effort to improve delivery services.

While a lot of preparatory and foundational work has been carried out, there is still a long way to go and India Post is committed to put its best foot forward in supporting growth in India.



Smita Kumar

Smita Kumar has been associated with the Business Development Directorate of India Post for about two years and is responsible for development of value additions and new businesses as per the changing market needs. Previously, as Director (Mails) in Postal Directorate of India Post, she has been associated with the setting up of policy and practices of mail operations. She has been involved in managing/ developing mails systems in the hilly state of Himachal Pradesh in India.

She also has wide experience in Establishment practices in Government of India and has served as Director Establishment in Ministry of Personnel , Government of India.

India Post touches the lives of every citizen, be it through mail, banking, life insurance, money transfer or retail services. It has a network of about .15 million post offices including .14 million rural post offices.



Perspectives on Global e-Commerce Solutions

E-commerce is growing rapidly all over the world. While this represents an unprecedented opportunity for postal operators, it also challenges the traditional business models that are in place after many years of focusing primarily on letter mail.

By their very nature, packages are almost infinitely variable in size, shape and weight and configuring postal operations to meet the rising volumes is proving to be a major challenge. However, it's not just in operational areas that traditional business models are under stress. The whole principle of e-commerce is that it is an open environment where consumers and businesses can place orders and configure deliveries to whatever their practical needs are. Services that can operate 24 hours a day, 7 days a week are the norm in this world and providers who fail to adapt to that reality risk being marginalised.

During this session, Gavin Macrae will introduce a number of key speakers who are at the forefront of defining the challenges that require to be addressed in the world of e-commerce. We will hear from the UPU who are leading the work on setting standards worldwide for this emerging market. One of the most prominent brands in the e-commerce world – eBay – will share its view with regard to expectations from operators in this industry. Deutsche Post/DHL, one of the world largest logistics providers will share its vision for rising to the e-commerce challenge. Finally, Eurogiro will explore the various needs that require to be addressed with regard to paying for products and services in this on-line world.



Gavin Macrae

Gavin Macrae is Group Executive Director for Corporate Partnerships Worldwide at Neopost. Based in Paris, France, Gavin has board level accountability for Neopost's partnership activities with postal organisations and technology providers.

Gavin has previously held senior management positions with Royal Mail Group and Postcomm in London, TNT in Amsterdam, PostEurop in Belgium and is a former chair of the UPU's Operations Committee.



The UPU e-Commerce framework

Since 1995, the PTC has been developing IT solutions for the postal operators. Through the PTC, posts now have a portfolio of IT products and can in particular:

- Manage their international mail (Letters, Parcels, EMS) with the IPS family of products
- Manage their money transfer business (both domestic and internationally) with the IFS family of products
- Settle their international accounts with the Clearing system
- Pre-advise shipment, and manage the declaration and clearance of postal items with their Customs organizations with the CDS product
- Exchange data between Posts, and with airlines and Customs organizations using a secured, dedicated EDI network: Post*Net
- Nest their web presence under the umbrella of a dedicated top-level domain: .Post
- Provide top-quality mail addressing services to big mailers and marketing companies with the Post-Code database
- Monitor quality in real time, with the QCS and some dashboards available on Post*Net

All these tools represent what we call the UPU e-Commerce framework, and the presentation is about integration of these existing IT solutions. Posts are in a unique position to provide answers for every aspect of e-Commerce: advertisement from merchants, Customs clearance and delivery of goods, payment of goods. Linking postal payments with tracking and tracing of physical goods delivery, and linking the purchase order with the creation of the payment instrument are some of the IT bridges that are envisaged today. With the PTC of the UPU, posts have a key partner to bring this e-Commerce framework to the next level.

The Postal Technology Center of the UPU serves Designated Operators of UPU member countries and their partners (e.g. Customs, Airlines) in the postal supply chain. It runs an EDI Network linking postal operators and provides standard software for International Mail Management and Postal Money Order services used in nearly 170 countries. In 2012, a Customs Declaration System has been released for both postal and customs use.



David Avsec

With 18 years of experience in the IT industry, David Avsec serves as the deputy director, and manages the account relationships of the UPU's Postal Technology Centre (PTC) since July 2010. Previous to this position he was successively product manager during 3 years and then IT manager of the PTC during 4 years. He led the software development of various products in the PTC and in particular the IPS (for international mail services) and IFS (for international postal financial services): systems that are now used by nearly 170 postal operators in the world. He has a strong international experience, with direct responsibility of on-site projects in more than 50 countries.

He owns an Engineering degree in computer science and electronics from "l'école des Mines" in France, and an MBA from the Polytechnic School of Lausanne (Switzerland).

PostalTechnologyCentre



UPU
UNIVERSAL
POSTAL
UNION

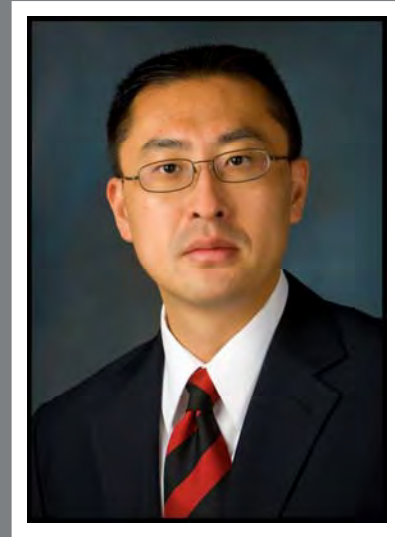
Cross Border e-Commerce: What does it mean for the postal service?

Mr. Zhang, in his presentation, will discuss the changing landscape of cross border ecommerce from eBay's perspective, as well as what this means for the logistics industry.

Cross border ecommerce is growing at a torrid speed for online marketplaces such as eBay. Everyday thousands of transactions are being done between buyers and sellers worldwide. eBay is working with global logistics providers including postal services in building international shipping and fulfillment solutions to enable the tremendous business. The presentation will discuss the unique opportunities and challenges brought by these changes, and how they may affect where global logistics providers stand. What do these changes mean for postal operators?

There is still some distance to travel for the equilibrium of the global logistics industry in this robust growth phase. Will the postal services of the world and Asia-Pacific Region be ready for the challenge? How can postal service work with companies such as eBay?

eBay is the world's largest online marketplace, connecting people with the things they need and love virtually anytime, anywhere. eBay has 120 million active users globally and more than 400 million live individual and merchant listings at any given time, the majority of which is new and fixed-price merchandise. With mobile apps available in 190 countries, eBay delivers a personalized shopping experience and seamless access to inventory from down the street and around the world. Tailored shopping experiences, including eBay Fashion and eBay Motors, customize buying and selling; and eBay provides variety and choice for sellers by enabling them to offer goods through online, mobile and local channels to consumers around the world. For more information, visit www.ebay.com.



Kang Zhang

Mr. Kang Zhang is currently the Director of Shipping and Logistics for eBay APAC. In this position, Mr. Zhang is responsible for ensuring the trusted delivery experience for eBay cross border ecommerce business from Greater China (China, Hong Kong, and Taiwan) to the world. Mr. Zhang also manages eBay Australia's cross border and domestic shipping and logistics business.

A veteran of the cross border ecommerce logistics industry, Mr. Zhang joined eBay in 2011 from the United States Postal Service, where he last served as Director of Global Business Solutions. During his tenure with the USPS, Mr. Zhang launched China to US ePacket service with China Post Group, as well as other shipping solutions serving cross border ecommerce sellers in APAC.



Vision on Sustainable Solutions in e-Commerce

Carl Schelfhaut's presentation discusses various innovations in the light of the booming e-Commerce market.

The presentation is split into two parts. First, Carl Schelfhaut will give an overview of the global e-Commerce and the inherent impact it has on consumer behaviour and on postal operators. In a generic e-Commerce section, the development of this young industry and its future outlook will be assessed.

In the second part, he looks at the new e-Commerce value chain; from searching a product, towards the logistical steps, finishing with after sales services. In the light of this e-Commerce value chain, he discusses three selected innovations of Deutsche Post DHL which help to improve the respective process, for the consumer, the merchants and for the postal operators:

- **MyWay**
A crowd-sourced delivery solution which is currently piloted in Sweden
- **Parcel Lockers (Letter Box addition)**
An individual parcel locker, letterbox type, increases convenience and decreases costs of a parcel delivery
- **RFID technology**
A passive transponder which provides real time track and trace events for parcel products

All three innovations help Deutsche Post DHL to prepare itself towards a challenging, changing and exciting future.

DHL Global Mail is one of the world's leading providers for international postal solutions. The Division offers a global network with direct connections to more than 200 destinations, and with sales offices and production centers across Europe, the Americas and the ASPAC region. Global Mail is the Group's facilitator for international Business Mail, B2C Parcels, Direct Marketing, and Hybrid Services, also developing mail products and solutions for German export customers as the preferred provider for international letter service with destination Germany.

DHL Global Mail keeps up with a postal market changing from physical to digital and from mail to parcel. We offer services along the entire value chain for e-commerce business and facilitate hybrid or fully digital mail solutions.

We also maintain close partnerships with other postal operators worldwide and represent the Group's interests in international organizations such as the International Postal Corporation and the Universal Postal Union.



Carl Schelfhaut

Carl Schelfhaut manages the strategic relationship between the German Public Postal Operator and the incumbent Public Postal Operators in Asia Pacific, Middle East and Emerging markets. He establishes high level bilateral and multilateral relationships with Public Postal Operators and their Regulators, facilitating joint projects, business co-operation and alliances under the prevailing international (UPU) and national Postal Regulations in the Region. He develops both official and commercial relations with the most prominent and important Public Postal Operators in order to achieve bilateral or multilateral mutual win-win scenarios for DP DHL as a Group.

In regards to Corporate Social Responsibility, Carl Schelfhaut upholds the relationship with the government departments in the Asian Pacific countries who are responsible for disaster preparedness, risk control and disaster management, in close relationship with UNDP and UN-OCHA. The main duties amongst others are to organise training sessions for volunteers, organise and coordinate the disaster response team deployments in the event a natural disaster where the United Nations appeals for assistance in the respective country, as well as coordinate the GARD (Getting Airports Ready for Disaster) trainings for the government departments.

Deutsche Post DHL

Payment requirements and solutions from Eurogiro

Michel will be giving an overview of Eurogiro value proposition, reach and the global payments opportunity for Posts and banks around the world. With the vast global reach of the Eurogiro network members in city and rural areas, Eurogiro offers one of the most extensive payment networks for international payments and remittances.

Eurogiro offers reach and efficiency through a single system reaching posts, banks, and other financial service providers with a community spirit in business practice. Their community of over 60 active members in over 50 countries continues to grow. Their global disbursement and collection network serves rural and undeveloped areas- where many financial companies cannot.

The Eurogiro Payments Gateway easily connects SWIFT and non-SWIFT members using the SWIFT-based formatted message. Add to this the flexibility and control offered through a range of payment options and tailor made solutions riding on a trusted and secure platform which is compliant with anti-money laundering and anti-terrorist funding regulations.

How could we use the capacity of this network for facilitating e-Commerce?

Eurogiro A/S is a global payments network and community connecting the postal and banking worlds. Founded in 1993, the company now connects over 60 postal organisations, postbanks, commercial banks and other financial service providers from more than 50 countries in all regions of the world. Eurogiro is a trusted partner for cross-border payments at a global level.

The results speak for themselves: A steady growth in transactions over the years and more than 30,000,000 transactions go currently through Eurogiro network a year.

With the vast global reach of the Eurogiro network members in city and rural areas, Eurogiro offers one of the most extensive payment networks for all kind of payments, e.g. P2P, migrant payments/remittances, trade payments, corporate payments, low and high value payments, etc.

Company Website: www.eurogiro.com



Michel Stuijt

Michel Stuijt joined Eurogiro in April 2013 as CEO, and has more than 25 years of corporate banking and payment expertise. Michel comes from a position as General Manager Market Management at Equens. Michel's key positions prior to Eurogiro were:

- Equens for five years as Region Manager and Head of the Market Management department
- CMG (later Logica, now CGI), where he started as Senior Banking Business Consultant. 12.5 years at CMG in different senior and management roles, including heading the Banking Business Consulting unit, but also in commercial roles representing Logica as Global Account Director in the Financial Market
- KBC bank, as Manager in the corporate banking arena
- Bank of Tokyo in corporate banking (including internship in Tokyo)
- Started at NMB Bank (now ING) and specialised in structured finance



Promotion Activities for e-Commerce and EMS

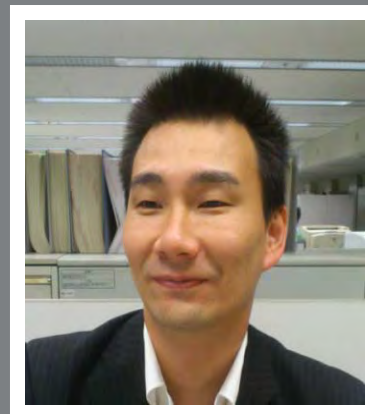
Mr Kenichi Hosokawa in this presentation provides an overview of the e-Commerce market in Japan and the rest of the world as viewed from Japan. The e-Commerce market is growing for years continuously and the trend is similar across the globe.

Japan Post started concerted assistance activities for e-Commerce sellers since 2009. It has laid special stress on stakeholder education through e-Commerce seminars, e-Commerce handbook and related activities.

Japan Post has also focused on product development and IT development with a focus on e-Commerce. It has also built collaborations with suitable business partners to develop the e-Commerce backbone for the Japanese and international market.

At the same time, lots of newcomers start cross border e-Commerce. Among other factors, cheap Japanese yen trend encourages them to challenge recently.

In this background, Kenichi-san introduces Japan Post's recent activities of e-Commerce and EMS.



Kenichi Hosokawa

Kenichi Hosokawa is with Japan Post since 1999. In 2004 he began working at the International Business Division of the Japan Post Headquarters.

He has worked as Operations, Linehaul specialist between 2004-2009 and has been Kahala Posts Group Operations Leadership Group member as the representative of Japan Post between 2005-2008.

Since 2009 he has been working as Sales and Marketing specialist. He is part of Kahala Posts Group Business Development Task Force as Content Manager and representative of Japan Post.

His experiences on the operations and marketing side of the postal business provide him with a complete perspective on what it would take for the posts to “Wow” their modern customers.



Riding the e-Commerce Wave

With more than 150 years' history, SingPost is transforming to stay relevant by riding on the e-Commerce wave.

With a declining mail volume, SingPost is innovating by converging digital and physical channels as well as building on its e-Commerce logistics capability in transportation, warehousing and fulfilment, last mile delivery and returns and e-Commerce platform marketing, content management and payments. This end-to-end solution empowers customer of all sizes to take their business online through its various platforms.

SingPost transformation journey was also validated by the numerous awards it has received over the last few years.



Lim Kian Peng

Mr Lim joined SingPost in 2012 as Executive Vice President/Chief Sales Officer. He spearheads the Group Sales function and oversees its transformation into an integrated sales force.

Prior to joining SingPost, he has spent 13 years with DHL Express in various key management positions in Singapore, Vietnam and Thailand including Indochina countries. Mr Lim graduated with a dual Master degree in Industrial Engineering from Georgia Institute of Technology and Logistics and Supply Chain Management from National University of Singapore. He also obtained his Bachelor of Engineering (Mechanical) Honours degree from the National University of Singapore.

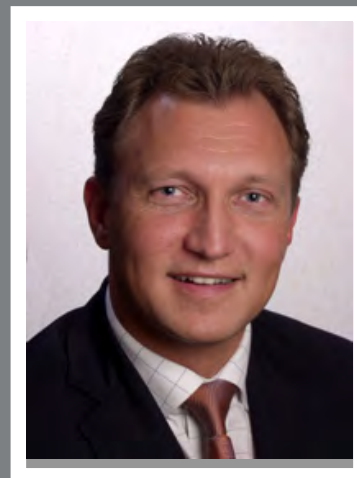


e-Commerce and Growth Opportunities for Posts

Peter Somers in his presentation underlines the transforming face of postal services in Belgium and other parts of the world. Most of the change revolves around the last mile delivery advantage of postal operators like bpost adapted to the needs of the e-tailers whereby an increasing number of parcels are being delivered in personalized ways as per the needs of the addressee- door delivery, 24x7 parcel terminals, Saturday delivery, shop & deliver, bpost by appointment and other disruptive solutions for the new consumers.

For the businesses, the bpost solution offers complete control and satisfaction to the end customer. bpost has comprehensive fulfillment, delivery and return solutions backed by e-tools to support the convenience in organizing shipping on both sides. It has over 1250 pick-up points for parcels apart from door-to-door solutions for businesses ranging from the well-known brands to local startups.

To support the main value of last mile delivery, bpost has been developing its network on all the three dimensions- physical, digital and financial. As a deeply customer focused business, bpost is not afraid to ask customers what more they want. It has been deep diving into customer behavior and life styles to offer the most innovative postal delivery solutions to its customers in Belgium, Europe and the entire globe.



Peter Somers

Peter Somers is member of the Executive Committee of bpost, the Belgian Postal Operator, and heads **bpost Parcels & International**.

Being responsible for the international & parcel business of bpost, he is now actively working on sustainable growth of bpost's parcel business and international expansion. The declining mail volumes and increasing parcel volumes are a serious challenge that he believes calls for new strategic thinking, tactical action and operational conduct.

Peter Somers is a seasoned international logistics director with more than 25 years' experience from executive positions in leading transport and distribution companies in Belgium, The Netherlands and United Kingdom. In the postal and logistics market, he has in-depth expertise in designing and implementing distribution systems, new market entry and innovation.

Peter joined bpost in December 2000 as Managing Director of DeltaMedia and moved on to become Managing Director of bpost international in June 2002. He became member of the Executive Committee in 2007 and in 2011 added the domestic parcel business and the shop&deliver project to his board responsibilities.

bpost Parcels & International is active in 10 European countries, United States of America, Canada, Australia, Hong Kong, Singapore and China.

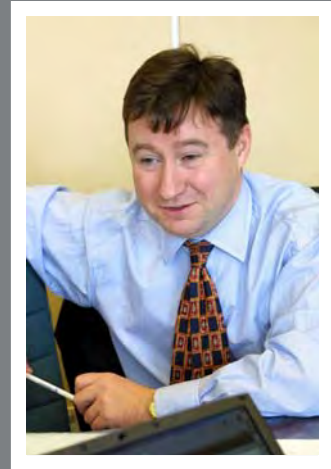


Evolution of e-Commerce, Distribution Services and Posts

Dr Walsh in his presentation focuses on the evolution of posts and e-commerce. He lays particular focus on the distribution requirements necessary to meet the needs of both sides of the e-commerce market: e-merchants and recipients.

He reviews the past and present of postal and distribution aspects of e-commerce and shares a vision of the future of distribution at the end of his presentation taking all the elements into account.

In particular, Dr Walsh analyses the dynamics within the distribution and ecommerce market, including the specific challenges for cross-border e-commerce, to assess and suggest how posts can avoid the commoditization of delivery services and play a central role to shape and support the e-Commerce value chain.



Dr Tim Walsh

Tim Walsh joined Pitney Bowes Inc in 2003 and is currently Vice-President, International working on various corporate, strategy, regulatory and technology projects across the European, Asia Pacific and Latin American postal, e-commerce and software markets.

Previously Dr Walsh held a number of senior strategy, sales, marketing and international positions with Royal Mail including directly working with two of the British Post Office's former CEOs.

Tim is married with two children and is a Board Member of St Mary's University College, Twickenham, London.



Future Directions of Thailand Post on e-Commerce and Logistics: Issues and Approaches

Phitsanu shares information on the future development plan of Thailand Post Co.,Ltd. on e-Commerce and Logistics to support The Royal Thai Government's policies. As a state enterprise under the Ministry of Information and Communication Technology (MICT), Thailand Post is mandated by the government to expand its network and range of services in the future, in order to play a key role in fulfilling the gap of domestic logistics market in Thailand. He reports on the intention to utilize newly upgraded postal facilities and networks under the campaign called "Smart Post" to support, as part of the bigger "Smart Thailand" campaign of the MICT, the national development agenda of inequality between urban and rural areas.

Background

Thai economy has benefited from the changing global economic landscape for several years and foreseen that the future economic integration of the AEC will provide even greater opportunities for Thai economy. However, at the national level, some structural problems still persist especially with the continuous economic growth. Major issues are middle income trap and inequality of opportunities within the nation. On close consultation between MICT and Thailand Post, "Smart Post" campaign is planned with the 4-pronged strategic initiatives aimed at easing those problems.

1) Thailand Mall for OTOP and SME

The government mandates Thailand Post to develop fully serviced and easy-to-access business channel for small to medium size e-Commerce businesses in Thailand; including e-Marketplace, warehousing, distribution, related financial services, and return management. The channel will operate by the end of 2013 to better serve the promotion of locally produced handcrafts and unique cultural products called "OTOP" across the country in an attempt to redistribute national income more evenly within the country.

2) Logistics and Distribution

Thailand Post is setting up its wholly-owned subsidiary, Thailand Post Distribution Co.,Ltd., which is expected to start operation within the first quarter of 2014. The new subsidiary will provide distribution and 3PL/4PL logistic services to help reduce logistics cost, especially for those businesses in rural areas by utilizing the backhaul capacity and to provide businesses with total solution that can meet all the requirements of customers in a single network.

3) Smart Provinces

It is the government's initiative that tries to develop strong regional business areas. Thailand Post will develop a specific solution utilizing advance IT system in term of logistics, warehousing, and distribution services in order to support trading activities of those provinces, and also links them to the future infrastructure, such as high speed trains etc.



Phitsanu Wanitchaphol

Phitsanu joined Thailand Post (a business unit of the Communication Authority of Thailand at the time) in 1991 as the company scholarship. After graduation on MBA from Manchester Business School, he has been working with Thailand Post for 10 years up until now. Throughout those years, Phitsanu assumed several managerial positions at Thailand Post in the area of business planning, business development, marketing, and corporate strategic planning. Before joining the Post, he worked in manufacturing sector in Thailand as a production planning manager.

Currently, Phitsanu is an Executive Vice President of Thailand Post (Office of Corporate Strategy), responsible for corporate planning, enterprise risk management, organizational development, and corporate governance. He also works as a company secretariat to the board of directors of Thailand Post. Outside the Post, he serves as an assessor of the Thailand Quality Award (TQA).

4) Super Service Centre

Thailand Post intends to expand its current geographic and business scope. Domestically, plan is put in place to enable Thailand Post to serve customers at their home. Also regionally, Thailand Post is planning to propose a joint operation among the Posts in Indochina Region on some services, such as money remittance, cross border e-Commerce, and intra-region logistics to accommodate the expected changing business opportunities from the AEC.



THAILAND POST CO.,LTD

Reinventing Philately on an e-commerce platform

In his presentation, Glendon will introduce a new online philatelic sales platform that allows Postal Administrations to successfully sell direct to collectors in over 100 countries.

The presentation will focus on why Postal Administrations should still see philately as a profitable source of revenue for them and how WOPA is already helping many countries increase their philatelic sales without any risks or investments required from the postal administrations.

WOPA stands for “World Online Philatelic Agency” and WOPA-STAMPS.com is the first site to offer stamp collectors worldwide the unique advantages of being able to buy new issues online directly from a variety of major postal administrations in one site, at face value and in one single transaction.

The WOPA-STAMPS.com site is currently in English, Chinese, French, Spanish, German and Italian and other languages are being planned in order to expand into other major collector market.

Glendon will explain how thanks to WOPA implementing a very comprehensive marketing plan, both online and in the international philatelic press at its own cost, it has managed to not only promote Philately online but most importantly attract a new breed of collectors to the site, create new collectors and generate new additional sales for all the participating Postal Administrations. The presentation will also touch on how social media initiatives will assist to increase the awareness of our own philatelic business worldwide and thus increase our philatelic turnover

In the last two years, WOPA has processed thousands of online orders on behalf of the postal administrations it represents to customers in over 100 countries becoming a truly international e-commerce platform!

Joining WOPA is completely free for Postal Administrations and all the work needed to add the stamps to the website will be produced by their own professional IT team.



Glendon Martinez

Glendon has extensive knowledge and experience in the philatelic market with a 15 year track record which includes the launch of various online services and one Guinness philatelic world record for stamp printing innovation. He has held various managerial posts throughout the years and since 2004 has been the Managing Director of the Gibraltar Philatelic Bureau. In 2012, Glendon founded WOPA-Stamps.com, a new philatelic business that offers a unique internet service for Philatelic Offices worldwide. In just over two years, the site has become a key player in the worldwide philatelic market and already represents 20 postal administrations and has ambitions to attract many more within the next 2 years. WOPA was awarded in 2012 the local Federation of Small Business Award for Innovation & Achievement

Glendon works globally and focuses on generating new philatelic business through innovation and use of new technologies. He believes that a good philatelic strategy is a great source of revenue for any Postal Administration.

WOPA
.....
World Online Philatelic Agency

Addressing the e-Commerce opportunity

The evolving landscape

With the increasing emphasis on the new economy and the complexities that have developed, the importance of understanding the transactional supply chain has become critical in the role of the logistics industry.

From the source to the return, the management and understanding of the data and information, and how to apply that to the physical delivery has now to be part of the tool kit of any postal/logistics company.

The need to change

Connecting the logic and elements of the consumer experience is now the offering that retailers require to boost their on line sales.

Postal and logistics companies need now to understand the paradigm shift occurring in the industry and transform to address the opportunity.

Fresh approach

New skills and approach will become key in the borderless economy. Postal and logistics companies will need to play in the checkout and develop solutions that are packaged and saleable, and provide a plug and play product that can be regionalised.

The collaborative approach in the solutions is essential to create the end to end solution that will drive volumes and protect margins.

Last and First mile solutions will need to be a fundamental part of the e-Commerce offering



David Spottiswood

David started his career in the logistics industry with a diverse spread of roles in Sales, Commercial Marketing and Operations.

Beginning with TNT IPEC in the 80's he then progressed to DHL where he was Deputy MD in the Netherlands then MD in Denmark and Iceland. Following the acquisition of DHL by Deutsche Post David was then promoted to the Global Board as Director of Global operations. David then left DPDHL to found an on-line global eCommerce company.

Today David heads up Neopost ID in Asia Pacific and supports various online solution activities within Neopost.

Neopost ID is the leading supplier of technology shipping solutions to the industry.

Neopost ID is a division of Neopost SA servicing over 800 000 customers worldwide



The role of postal operators and integrators in the new economy

In this presentation Thomas will talk about the changing environment and the implication this has for the posts. He will also lay out how posts and integrators complement each other and can collaborate in the new economy.

Background

For years changes in communication behaviour through digital communication, and now also through the mobile Internet, have led to shrinking letter mail volumes, leaving postal operators all over the world with the challenge to maintain their operational infrastructure in the face of declining revenues.

At the same time consumers started to embrace the convenience of e-commerce – but e-commerce comes with new demands for posts from both shippers AND shippers.

Posts have thus to reinvent themselves in order to achieve sustainable growth.

New opportunities

Postal operators have different options to position themselves in the new economy: by broadening their service portfolio and/or their presence in new segments and markets.

Today e-commerce is the main growth driver for most of the postal operators – but e-commerce is not waiting for the posts.

Competition is fierce as integrators and private parcel operators are eagerly picking up on the new opportunities as well. However, integrators' and parcel operators' networks are laid out rather for B2B than for B2C business.

Posts main asset, on the other hand, is their connection to the consumer through their tightly knitted delivery and postal outlet networks.

Complementation and collaboration

Connecting complementary logistics networks from the integrators and postal last mile delivery networks through collaboration is a highly effective way to satisfy the high demands of modern shoppers and e-commerce merchants.

In this presentation Thomas will show how this is reality at Deutsche Post DHL.



Thomas Kipp

Thomas is the CEO of DHL Global Mail, Deutsche Post AG. In this role, he is responsible for the international mail and parcel business of Deutsche Post DHL. He has been a member of the divisional board for MAIL since 2006.

Prior to assuming his current position, Thomas served as CEO Global Mail Europe. Within this role, he was responsible for the European sales and operational activities of DHL Global Mail.

Previously, he headed up the MAIL division's Large Business Customers department. In this position, he was responsible for developing and marketing tailored customer solutions in Dialog Marketing and Corporate Information Solutions.

Deutsche Post DHL

The Postal Innovation Platform (PIP) - New Ways of Identifying Business Opportunities and Providing Solutions

In this presentation Bernard provides information on the background and main objectives of the Postal Innovation Platform. He reports on the outcome of the first Postal Innovation Platform (PIP) Conference as well as future platform activities and projects which were agreed upon by the founders of the initiative at the PIP Roundtable in September 2013.

Background

The Postal Innovation Platform was founded by a common initiative of the Ecole Polytechnique Fédérale de Lausanne (EPFL), one of the leading universities in the world, the Universal Postal Union (UPU) and Swiss Post. The objective is to have a unique platform and forum that focuses on innovative postal services and studies the future of the postal industry.

This platform shall thus contribute to the success of the postal industry in a rapidly changing market environment that creates new needs and demands taking an industry and stakeholder driven approach. This initiative creates a conference, think tank and research platform, bringing all stakeholders with their different backgrounds on board, including postal operators, governments, suppliers or industry associations. The PIP was officially launched in the course of the PIP Roundtable & Conference, which took place in Lausanne, Switzerland from 23 to 25 September.

The Postal Innovation Platform (PIP) Conference

The conference started by underlining the importance of the process of 'constructive destruction' which reverberated throughout the conference in many different forms.

Re-invention requires a profound knowledge of the market environment. Posts need to ask themselves some relevant questions, and find the respective answers, before venturing into new and unknown domains. Who are their customers today? Who will be their customers in the future? What are these customers' needs? Posts also need to show a willingness to innovate. They need to be ready to create a need for their products and services in the market. The conference focused on innovation opportunities in digital platforms, social media, e-commerce and e-governance among others.

The Postal Innovation Platform (PIP) Roundtable

The objective of the PIP Roundtable is to provide the main guidelines for all PIP activities, steering the content of the PIP projects and discussing key topics of the postal industry. The first PIP Roundtable took place on 23 September and brought together 18 participants interested in getting the platform activities started and in contributing to common activities. The participants decided to focus on four areas (a) customer needs and market acceptance, primarily analysing the acceptance and success of new and innovative products or services offered by postal operators when building upon the USPs of their postal networks (b) service partnering for government,



Bernhard Bukovc

Bernhard has been working in the postal industry for over 14 years. He held several managerial positions in Austria Post as Head of Regulatory and Government Affairs and the International Post Corporation as Director for Intercompany Pricing & Regulation from 2007 until 2012. Before starting in the postal sector Bernhard was working in the financial and banking sector.

He is the founder and managing director of Vinaficio, a company operating a European e-commerce platform. Besides managing Vinaficio, Bernhard is the General Manager and Chairman of the Postal Innovation Platform (PIP), a platform launched by the Ecole Polytechnique Fédérale de Lausanne (EPFL) and the Universal Postal Union (UPU) with the objective to have a unique platform and forum that focuses on innovative postal services and studies the future of the postal industry. The platform activities include an industry roundtable, a postal conference as well as various activities and innovative projects in the postal sector.

focusing on the identification of services and product solutions for governments (c) e-commerce, an analysis of products and services provided by posts in the context of e-commerce as well as identifying gaps and barriers to a 'seamless service' customer experience, and (d) public-private partnerships, which could as a first step be a way of overcoming infrastructural problems in developing countries.

PIP

Postal Innovation Platform

New Technology and Process are Critical to Meeting Customer Demands

The world's supply chain is evolving at an ever accelerating pace. For many operations such as postal and courier operations participating in the supply chain this evolution is to put it mildly, creating opportunities.

There are a variety of ways that operations tend to respond to these new opportunities. In the book *Reinventing the Post: Emerging Opportunities for the Postal Industry* we investigate how companies approach these same types of market driven opportunities and how taking a disruptive innovation approach to handling these challenges can make all of the difference in the world.

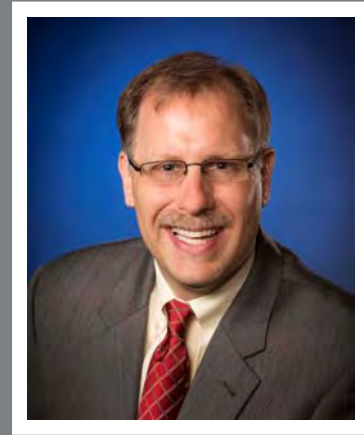
In this session we will be touching on the same subject but taking on the challenge from the perspective of how companies have approached innovation and to what end goal.

During this session we will utilize data from a primary research survey recently completed by market research firm Vanson Bourne on behalf of Intermec by Honeywell.

In this research we will see how 375 transportation executives from around the world view topics on process development, technology and customer demands. These views will help us drive an innovation strategy that is customer centric and differentiated in meaningful ways vs. the simple evolutionary approached that has dominated businesses in generations past.

Intermec is the **workflow performance company**. We design the leading data capture and information management **solutions at the interface between mobile workers, assets, and customers**. Through continuous innovation in hardware, software, services and integrated solutions, Intermec helps customers realize the **full potential of their people, time, space, and information**.

Visit us at: www.intermec.com



Jeff Sibio

Jeff Sibio is the Director, Industry Marketing for Transportation and Logistics at Intermec Technologies. He is known for his innovative, customer-first approach and his deep expertise in T&L. With over 25 years of experience, he is considered a thought-leader in the T&L industry and has spoken and published widely on transportation topics. In his current role with Intermec Technologies, Jeff has been sought out for his unique ability to bridge the gap between operations and technology. He works closely with clients to understand their entire process, including what people actually do, and then delivers that information to technical teams to create solutions that not only perform but also improve the efficiency and productivity of the client's operations. Jeff has assisted companies globally in understanding today's best practices while also acting as a visionary, helping these companies imagine their own futures.



Reinventing the Post to be ready for future customers

Staying Relevant in the Internet & Social Media Era – Reinventing Postal Services

The Postal Industry is at an inflection point. Falling revenues, lack of profitability; the advent of new communication channels like social media, digital, internet; combined with the newer technology trends like mobile, cloud, big data are making traditional postal services insignificant. Postal service providers like yourselves need to rethink your strategy, secure revenue streams, monetize your assets and capital investments better, align with newer media channels to stay relevant to your customers.

Hans Landgraf, Global Head of Postal Services at SAP will share trends and approaches around how SAP is working with Postal Organizations around the world in their Transformation Journey by utilizing Mobile Platforms for service delivery, ecommerce across an Omni Channel network for improved revenues and harnessing the power of Social Media to customize and deliver innovative services that customers are demanding for.

As market leader in enterprise application software, SAP helps companies of all sizes and industries run better. From back office to boardroom, warehouse to storefront, desktop to mobile device – SAP empowers people and organizations to work together more efficiently and use business insight more effectively to stay ahead of the competition. SAP applications and services enable more than 251,000 customers to operate profitably, adapt continuously, and grow sustainably. The company also has deep experience with some of the world's largest cloud implementations, some with more than 2 million users. For more information, visit www.sap.com.



Hans G. Landgraf

Hans Landgraf joined SAP in 1992. He has worked in development and consulting of several industry solutions at SAP and has led an industry consulting group at SAP America with responsibility for North and South America.

Since 2009, Hans joined IBS Public Sector as solution manager for Postal Services at SAP AG in Germany.

As of April 2013 Hans became head of the Industry Segment Postal Services at SAP. Hans holds a degree in business-mathematics with focus on information technology from the University of Ulm, Germany.



The lean and mean postal machine

In the presentation “**The lean and mean postal machine**” Richard Hagen will present his vision on the radical changes in the postal world and the technological consequences. What are the current trends and how to make best benefit of this situation?

Introduction

Whilst the dynamic postal market may seem like a ‘roller coaster’ ride for many, the good news is that automation technology has kept pace with the changes. It is able to accommodate the needs of both established postal operators and new market entrants to achieve greater cost efficiency, high productivity and assured quality.

As a result the postal industry is evolving into one of the most commercially agile sectors. Canny postal operators are actively integrating automated process methods that are protecting revenue, saving operational costs and giving them the freedom to develop their systems in line with customer demand.

Let’s take a look at the trend in the postal world.

‘Un-level’ playing field

Despite the changing nature of the business, the universal service obligation in industrialized countries to deliver mail five or six days a week remains an obligation for traditional posts.

New, dynamic postal organisations

We are seeing the emergence of new and dynamic postal organisations whose priorities are cost, cash-flow, customer satisfaction and above all, flexible processes.

Open technology platforms

An increasing number of posts are adapting to dynamic customer demand by adopting open software platforms as the foundation for strategic development.

Outsourcing of non-core activities

This approach is increasingly delivering cost savings without the burden of long-term capital investment.

Maximising income

This is the third area of focus for many posts. They are finding that one of the routes to increased profitability is the introduction of revenue recovery and protection systems. The technology is already available to recognise meter marks and other indicia.



Richard Hagen

Richard Hagen is a 44-year-old postal consultant being active in the postal industry since 2002 and in the logistic world since 1993. Richard was one of the founding fathers of Prime Vision, the mid-size postal system integrator providing new and advanced technologies to the postal industry. After being for 7 years responsible for the marketing and sales department and being part of the management team, Richard founded Prime Competence in January 2013. Prime Competence is an independent postal consultancy firm. Our fields of expertise include strategic, tactical and operational process knowledge, in-depth technical know-how on postal processes and innovations and expertise on sorting equipment.

When not working, Richard enjoys sports (running, fitness, maintain biking), cooking and international travel. Richard has a 12-year-old daughter and an 8-year-old son.

Prime Competence has an excellent track record in postal operations and has assisted many national postal organizations in their operational and strategic reviews. Prime Competence has an enviable background with decades of postal industry experience and being part of the innovative and respected TNO organization in Europe.



Helping postal organizations re-invent their core business

With the challenging environment, and their core business shifting drastically, all postal organizations have been looking at optimizing their operations, and sometimes feel dragged down by their structure, that they feel may not be adapted to this new shifting business.

Freedom

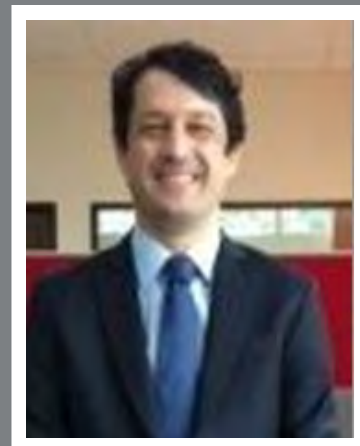
What postal organizations are looking for is the freedom to innovate, adapt and compete, without having the ever present constraint of how to upgrade their current set up.

As technology develops, and e-commerce solutions become ever more specific, it is becoming increasingly difficult for Postal Organizations to do all the necessary development in house (cost, time to market, experience), and finding the right technology outside is a must.

Partnering to leverage and focus

However, working with technology providers requires a strong Partnership and Collaborative approach to design country specific, scalable and upgradable solutions

Only if they get this approach right, will postal organizations be able to focus fully on re-inventing themselves to provide better service and create more value to their customers



Edouard VILLA

Edouard started his career in the retail industry, with Procter and Gamble in Europe, before joining Neopost 8 Years ago. He has held various positions in the international department and has been stationed in Asia for the last 5 years (HK & Singapore). His regional role has seen him witness at first hand the changes happening.

He is currently the Business Development Manager for Neopost in the Asia Pacific region



Reinventing the Post with Technology that Builds Trust

While Technology can provide an advantage to a Logistics business this is often short lived. Long term advantages, especially in the Postal area, can be more effectively delivered by leveraging the current relationship field staff has through the day to day contact with customers.

The Trust within the relationship that has been built up over many years, mixed with technology to an appropriate level, can deliver an unbeatable combination. Canada Post, for instance has a Similar Trust rating to the Canadian Mounted Police (one of the highest in the world).

The major problem faced in the near future will be as mail volumes decline to the point where networks are completely unsustainable, the day to day advantage will be eliminated.

The immediate task is to introduce a medium to high value of work into the network, which replaces the lower value mail volumes. The most effective products and services will be those that require knowledge that is held by the Postal Workers, which can be combined with a commercial offering that is compelling to the end customer.

The most valuable type of service is delivered when there is some kind of face to face interaction with the customer. These meetings can be leveraged in significant ways, as staffs have the tools and training combined with automated processes.

It is this type of interaction and extended service that Blackbay feels can provide revenue opportunities that can stop the slide and eventual collapse of postal networks.



Dave Ffowcs Williams

Dave has been involved in the delivery of mobile technology since the early days of IP based communication.

In the past 18 years, he has been instrumental in the delivery of systems to major Postal clients, along with small Transport and Logistics clients across Australia, New Zealand, the UK and USA.

The Projects have seen core problems of traceability in real time solved as well as innovation for depot and delivery processes. These new processes have allowed Courier Express and Parcel customers to change the way they interact with both shippers and receivers, whilst lowering both the cost of operations and reporting.

Dave has a very strong belief in the power of the postal network and inherent trust people have in that network.

Blackbay have close to 130,000 Drivers using the Blackbay Delivery Connect product across the Asia Pacific, Europe and the USA. The product is used by businesses to provide real time traceability and process control in the Depot, Outbound, Pickup and Delivery. Blackbay's clients track between 4 and 8 million parcels per day depending on the time of year.

Blackbay
Empowering Mobile Workers



InPost Asia –

Parcel Lockers: A smart answer to booming e-commerce parcel delivery

In this presentation Christian provides information and insights from several markets about the way automated parcel lockers are changing consumer behavior, optimizing delivery routes, cutting operational cost, and offering innovative services to the e-commerce industry.

About InPost:

InPost is part of Integer.pl Capital Group listed on the Warsaw Stock Exchange Market since 2007, a leading Polish postal group, an independent financial operator and a provider of innovative postal-courier solutions and e-commerce services.

InPost is renowned for reinventing parcel delivery by removing the frustrating steps of traditional delivery methods. Our global network of innovative self-service parcel collection through parcel lockers is available to our customers 24/7 and we deliver by the next day.

We currently operate in 17 countries, from the UK to Australia, and we are the delivery method of choice for companies and individuals looking for a faster and more convenient service at a lower cost. We are on our way to having 16,000 parcel lockers throughout Europe of which 2,000 are being deployed in the UK.

Our innovation in business and technology has earned four prestigious World Mail awards: Growth (2010), E-commerce and Innovation (2011) and Customer Service (2013).

www.integer.pl

www.inpost24.com



Christian Secci

Christian has been working in the mailing and postal industry for the last 7 years. First, developing and importing in Asia tailor made high-end technological solutions from Italy (e.g. paper wrapping machineries, one to one trans-promo solutions, etc.), then accepting the challenge to develop the biggest parcel locker system network across Asia.

In January 2013 he moved to Hong Kong to set up the operations and the headquarters of easyPack Far East, the Asian branch of InPost.

He is passionate about analyzing customer needs and challenging himself with the development of new, tailor-made solutions in order to exceed customers' expectations. Being responsible for the management of eight countries on two continents he gained rich experience in working in an extremely intercultural environment cooperating with people from all over the world and becoming the open-minded person he is today.



A European Union perspective on parcel delivery in the Internet Age

Martin will present on the findings of the European Commission Green Paper on *“An integrated parcel delivery market for the growth of e-commerce in the EU”*.

In this exploratory document published on November 29, 2012, the European Commission aims to improve the European parcel delivery market in the European Union (EU).

The Commission says that the European parcel delivery market, estimated at €42.4 billion in 2008, is highly fragmented, not affordable and not reliable enough.

At the same time, the Commission has identified parcel delivery as one of the top five factors contributing to a doubling of the share of e-commerce in retail sales by 2015.

Cross-border delivery problems

The Green Paper particularly addresses cross-border issues, since studies show that only 9% of EU citizens buy goods online from other countries.

EU statistics indicate that 57% of retailers are reluctant to sell cross-border because of delivery concerns and 47% of consumers have reported problems with the delivery of goods bought cross-border (e.g. losses, damages, delayed delivery, bad return conditions).

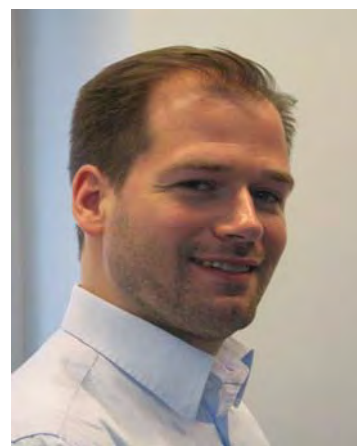
Goals and possible actions

The Commission has asked stakeholders about their views on the following objectives:

- increased transparency and a better delivery service,
- development of cost effective and competitive delivery solutions
- improved interoperability along the whole delivery chain and
- efficient governance towards a sustainable European delivery market for online transactions.

Among the possible solutions, the Commission proposes to assess the need for a *“universal delivery service”* for parcels. This would guarantee consumers a minimum level of service in terms of information on the delivery process and options for returning items, as well as meeting the demands of e-retailers in terms of tracking and the affordability of their commercial offer for parcels.

Another option is increased interoperability along the entire delivery chain.



Martin Schraa

After working at a Brussels-based telecoms trade association, Martin joined Cullen International in 2007.

Along with tracking European Union (EU) regulation in telecommunications, he has been involved in the monitoring of the postal sector since Cullen International started its service two years ago. His main focus is on developments at EU level and in the Netherlands.

Cullen International

Cullen International was founded in Belgium in 1986, and has since developed as a leading provider of regulatory monitoring and benchmarking services in the fields of postal, e-commerce, telecommunications and media.

The Cullen International postal service assesses regulatory and market developments at EU level and in six critical markets: Belgium, France, Germany, the Netherlands, Sweden and the UK.

Cullen International's neutral, unbiased approach has made it a reliable source of information for industry players, regulatory authorities and ministries around the world.



Generating Value through Sustainability

Sustainability is not only responsibility towards the society, environment and economy, but also a tremendous long-term business opportunity that increases value, develops a strong competitive advantage, improves efficiency and builds the company profile.

Furthermore, sustainability is no longer just about carbon emissions, waste or resource efficiency. It is about systems, the way they communicate with each other and the impact they make on business, people and planet.

Liene's presentation is based on her article in 'Re-inventing the post' book where she uses examples from the global sustainability leaders to describe the way sustainability should be taking.

In her presentation Liene will look at different approaches to adoption of sustainability strategies and the potential value it delivers to the various stakeholders. She bases her vision on the principles of circular economy and uses the idea of the "value circle" to demonstrate it.

Moreover, we will talk change and new type of leadership sustainability calls for. There are very high requirements for the future leaders- they need advanced business skills, they should be able to lead in a complex stakeholder environment and at the same time- effectively lead change. They should also engage the new generation of consumers and attract talent and new knowledge to their organisations.

Who are these new leaders and what does it take to be one? Most importantly- how can we make this so needed transition from "business as usual" often creating a false sense of progress into scalable sustainability and circular economy in the best possible way?



Liene Norberg

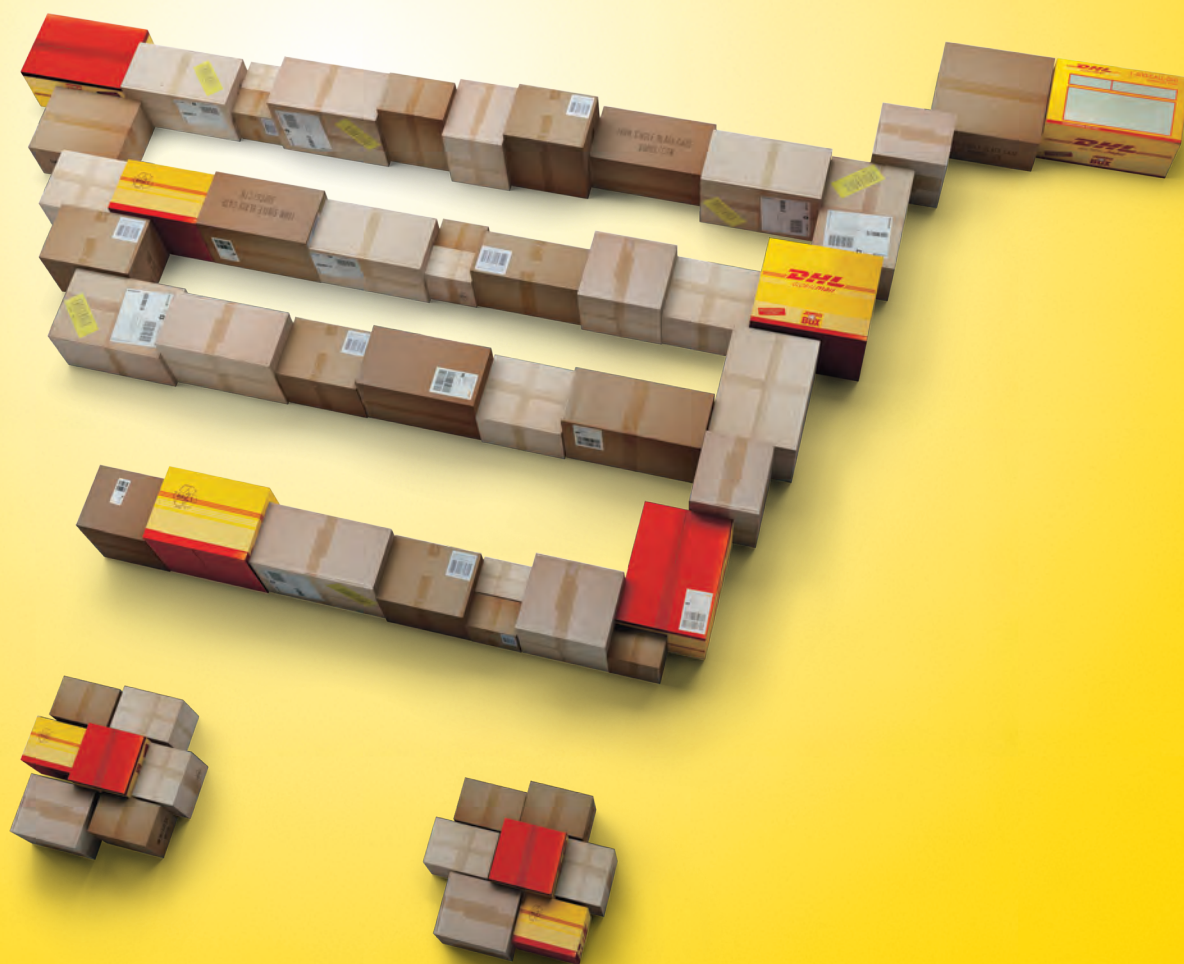
Liene is a Sweden-based Management Consultant working internationally and her area of expertise is business strategy and international expansion of the SMEs. Her focus and heart is in sustainability and she is working actively to increase the awareness across various sectors and spread sustainable business practices.

Prior to making a shift to management consulting in 2010, Liene held a number of leadership positions in postal and direct marketing industries. During her 7 years at the postal industry, among other positions, she was a Director International at the Latvian Post.

Today, Liene focuses on extended leadership in the domain of sustainability and she researches and benchmarks globally across various industries to find sound and creative solutions that will help scaling-up sustainability and enable change, both cross-sector and cross-nationally.

When we talk about sustainability, an industry-approach is too narrow. Liene believes that sharing ideas and learning from those who are ahead of the game today is vitally important – moreover that our ability to sustain depends largely on our ability to collaborate.

Her future activities are connected with creating a platform for cross-industry collaboration that the postal community could benefit from. Partnering with Derek Osborn, a series of workshops will be held bringing together the wider postal industry and global leaders in sustainability.



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