



# 北欧における郵政改革の実態 ー物流セクターの発展可能性を探るー

関西学院大学 野村 宗訓

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# 主要郵政会社の現状比較

(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.18.

	政府所有	郵便物	一人当たり 郵便物	変化率 2010-2011	顧客獲得 競争	アクセス 競争	利益率	手紙 自動化率
<b>bpost</b>	50% plus 1	~2.6bn	236	-2.0%	<1%	Yes	2.9%	78%
<b>Deutsche Post</b>	30.5%	13.9bn	170	0.2%	10.2%	Yes	4.6%	>90%
<b>La Poste</b>	100%	14.3bn	220	-3.0%	<1%	Yes	3.1%	n/a
<b>Österreichische Post</b>	52.8%	2.0bn	241	-3.6%	<2%	No	7.2%	~90%
<b>Posten (Norway)</b>	100%	2.2bn	452	-2.9%	<5%	No	4.2%	79%
<b>Post Danmark</b>	100%	0.8bn	139	-12.4%	<5%	n/a	3.8%	90%
<b>Posten (Sweden)</b>	100%	2.4bn	258	-3.0%	19.2%	No	5.8%	90%
<b>PostNL</b>	0%	3.8bn	227	-9.0%	15.7%	No	9.7%	85%
<b>Royal Mail</b>	100%	16.6bn	266	-5.7%	<1%	Yes	3.2%	82%
<b>Schweizerische Post</b>	100%	2.3bn	297	-1.3%	<1%	No	10.6%	85%
<b>Australia Post</b>	100%	5.0bn	223	-2.1%	0%	No	6.7%	n/a
<b>New Zealand Post</b>	100%	0.8bn	181	-4.5%	<5%	Some	-2.7%	n/a
<b>Canada Post</b>	100%	9.8bn	285	-4.6%	0%	n/a	-3.4%	n/a
<b>U.S. Postal Service</b>	100%	167.9bn	567	-1.7%	0%	Yes	-5.6%	n/a

# 欧州郵政会社の郵便部門比較 1

(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.28.

	オーストリー	ドイツ	フランス	オランダ	デンマーク	スウェーデン
	Austrian Post	Deutsche Post	La Poste	PostNL	Post Danmark	Posten
郵便物/日 (百万)	8	50	48	11.4	2.6	9.2
届け先(顧客) (百万)	3.6	40	28	7.4	2.3	4.6
顧客別届け数/日	~2.2	~1.3	~1.7	~1.5	~1.0	~2.0
サービス・レベル, 翌日配達 (配達頻度/週)	96.0% (5 days)	92.3% (6 days)	87.9% (6 days)	93.9% (6 days)	93.5% (6 days)	94.8% (5 days)
プライオリティ郵便物 % (翌日配達)	~45-50%	~50-60%	~30%	<50%	~50%	~40-45%
ポスト設置数	16,000	110,000	142,000	19,000	7,400	24,000
郵便局・店舗数	2,000	13,000	17,075	2,375	718	1,547
ソーティング・センター数	6	82	48	6	3	11

# 欧州郵政会社の郵便部門比較 2

(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.28.

	オーストリー	ドイツ	フランス	オランダ	デンマーク	スウェーデン
	Austrian Post	Deutsche Post	La Poste	PostNL	Post Danmark	Posten
郵便ソーティング 機械設置比率	50%	95%	78%	95%	>90%	85%
手紙連続ソーティング 機械設置	No	Yes (90%)	Yes (58%)	Yes (95%)	Yes (90%)	Yes (80%)
配達拠点数	260	3,100	3,000	260	153	400
配達ルート数	9,000	51,500	60,000	20,000	4,250	8,400
郵便・小包共通 配達ルート数	4,500 (50%)	31,000 (60%)	30,000 (50%)	None (0%)	1,500 (35%)	2,500 (34%)

# 欧州郵政会社の小包部門比較

(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.31.

	オーストリー	ドイツ	フランス	オランダ	デンマーク	スウェーデン
	Austrian Post	Deutsche Post	La Poste	PostNL	Post Danmark	Posten
小包量/日 (百万)	0.22	4.2	1	0.4	0.16	0.3
ソーティング・センター数	7	33	14	18 (計画)	2	5
自動機械設置	No	No	No	Yes	Yes	Yes
小包専用 配送拠点	20	200	70	n.a.	13	70
配達ルート数	5,436	39,400	32,250	n.a.	2,300	n.a.
小包専用 配達ルート数	936	8,400	2,250	n.a.	800	n.a.
郵便・小包共通 配達ルート数	4,500	31,000	30,000	None	1,500	2,500
小包専用配達 外部委託の有無	No	Yes (12%)	No	Yes (80%)	No	No

# 欧州郵政会社のソーティング比較

(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.32.

Comparator operator	Austria	Germany	Denmark	France	Netherlands	Sweden
	Austrian Post	Deutsche Post	Post Danmark	La Poste	PostNL	Posten
Centralize sorting	●	●	●	●	●	●
Distinct mail and parcel sorting centres	●	●	●	●	●	●
Automate sorting	◐	●	●	◐	●	●
Sequence sorting of letters by machine	○ (planned)	●	●	◐	●	●
Sequence sorting of flats by machine	○	◐	○	○	○	○ (planned)
Centralize sequence sorting by machine	○ (planned)	●	●	◐	●	●
Centralize manual sequence sorting	○	◐	●	○	◐	◐
Optimize delivery	◐	●	●	◐	●	◐
Increase flexibility in delivery	○	○	●	○	●	○

達成度・低い～ ○ ◐ ◑ ◒ ◓ ～達成度・高い

# 郵政物流会社のM&A（2007年以降）1

（出所）Copenhagen Economics [2010], *Main Developments in the Postal Sector (2008-2010)*.

合併形態	国内市場
垂直統合	Finland: DH-Tools Oy, Kauko Group Oy, Tuottotieto Oy
	Latvia: Latvijas Pasta Noda.u T.kls (post office network)
	Hungary: Posta Kezbesit. Ltd.
	Iceland: INTIS
	Switzerland: FM Verzollungs AG, ANZA Security GmbH, Fleetconsulting AG, Dispodrom AG, IT Service-House AG, Microgen UK Ltd
多角化推進	Belgium: CNS, Express Road, MG Road Express;
	Germany: AeroLogic GmbH, Postbank Versicherungsvermittlung GmbH
	Ireland: Fortis (post banking joint venture), Gift Voucher Shop
	Portugal: Campos Envelopagem
	Norway: Bekk AS
	Switzerland: Highnes Group, Prevag Presse Vertriebs AG, ZUVO Zustell- und Vertriebsorganisation AG, Espace Media Vertriebs AG, Pressevertriebs GmbH



# 郵政物流会社のM&A（2007年以降）2

（出所）Copenhagen Economics [2010], *Main Developments in the Postal Sector (2008-2010)*.

合併形態	国際市場
水平合併	Belgium: MSI Worldwide Mail
	Denmark/Sweden: Post Danmark (Denmark) and Posten AB (Sweden)
垂直統合	Finland: PS Logistics AB (Sweden), BusinessPoint S.A. (Poland), Hansar Logistics AB (Sweden), NLC Group (Russia)
	Germany: Williams Lea Holdings Plc (UK), Exel-Sinotrans Freight Forwarding Co. Ltd. (China), FC International Transportation Ltd. (Israel); Norway: Transflex AB (Sweden), Combitrans AS (Sweden); IMS Europe AB (Sweden)
多角化推進	Germany: Express Couriers Australia Pty Ltd. (Australia), Polar Air Cargo Worldwide Inc. (USA), The Stationary Office Holdings Limited (UK), ASTAR Air Cargo Holdings LLC (USA), Polar Air Cargo Worldwide Inc. (USA)
	Norway: System AB (Sweden)
	Switzerland: Graphic Data Ltd. (UK), Global Business Services Plus (Slovakia)

# 郵政会社の変容パターン

(出所) Accenture [2011], *Achieving High Performance in the Postal Industry*.

Global players have the highest degree of service diversification followed by regional diversifiers.

Most of the service providers have diversified into financial services and retail.

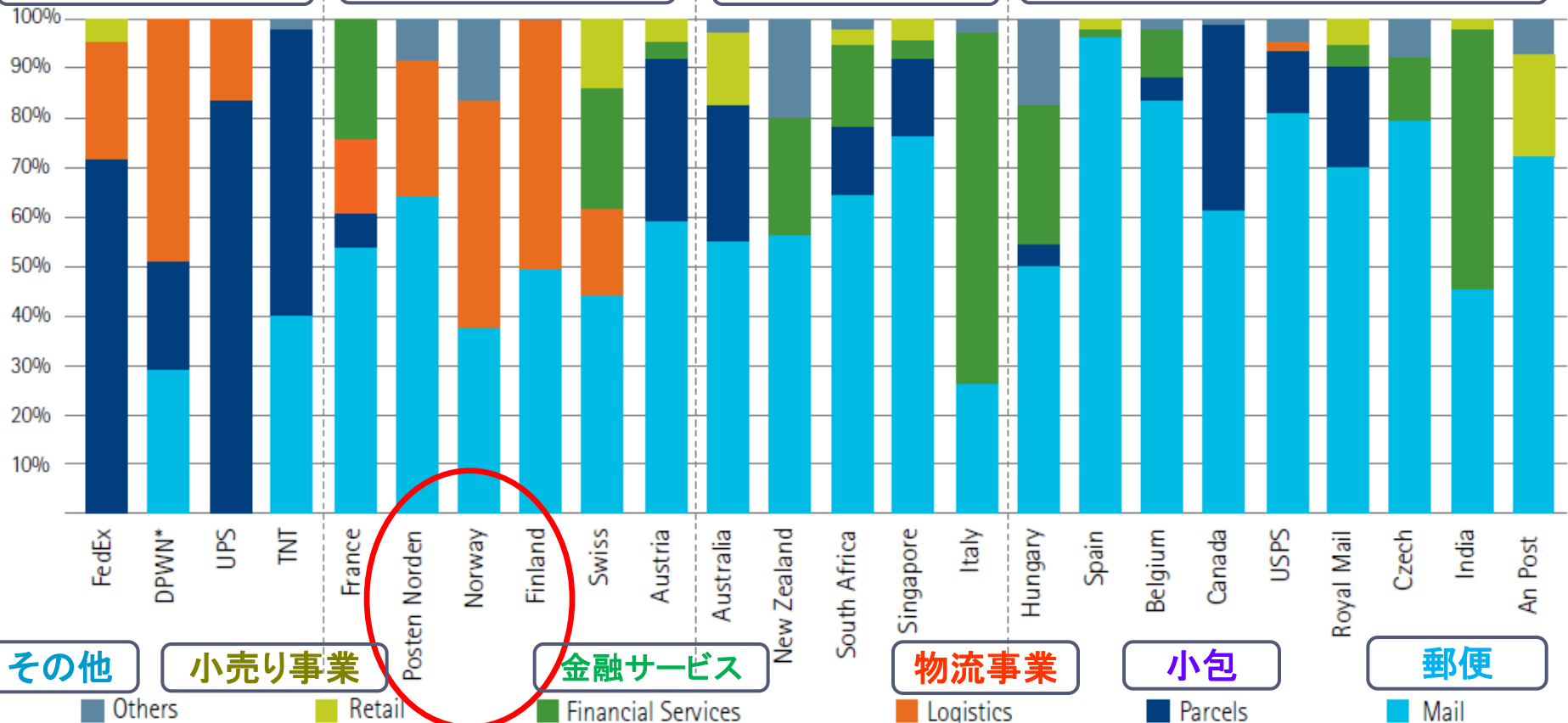
Traditionalists have the least degree of diversification and are lagging in parcels and logistics capabilities

グローバル・プレーヤー

地域で多角化推進

サービス・プロバイダー

伝統的事業者



その他

小売り事業

金融サービス

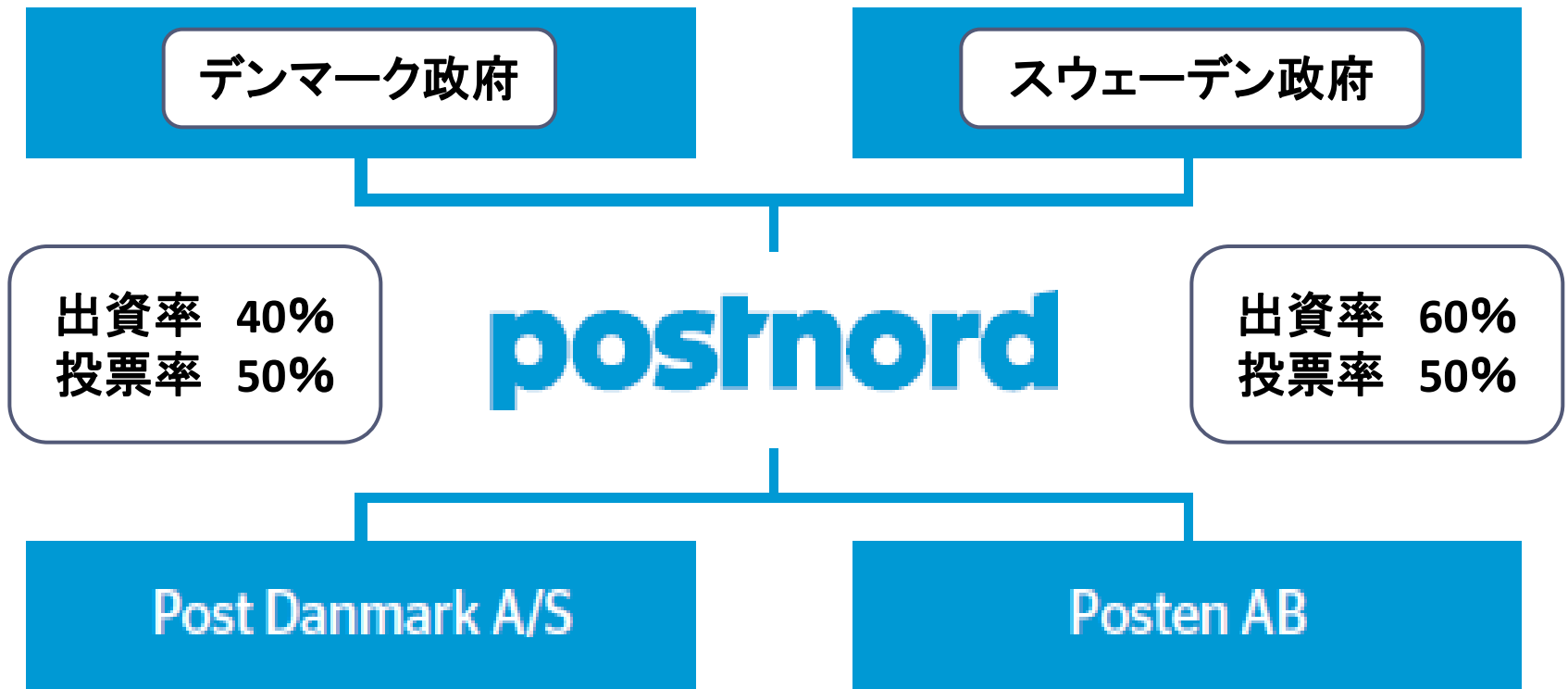
物流事業

小包

郵便





# PostNordの所有構造

(出所) PostNord, *Annual Report 2012*.



# PostNord の業務内容

(出所) PostNord, Annual Report 2013.

Business area	Brands	Services	Core customers	Markets
<div>デンマーク郵便</div> <div>MAIL</div> <div>スウェーデン郵便</div>	 	<div>Postal services</div> <div>Communication services</div>	<div>Businesses</div> <div>Individual customers</div>	<div>デンマーク</div> <div>スウェーデン</div>
<div>物流</div>		<div>Logistics solutions</div>	<div>Businesses</div> <div>Individual customers</div>	<div>北欧全土</div>
<div>データ管理</div> <div>決済</div>		<div>Communication services for businesses with large customer bases</div>	<div>Businesses</div>	<div>北欧</div> <div>ポーランド</div> <div>イギリス</div> <div>フランス</div>

# PostNord の郵便業務

(出所) PostNord, *Annual Report 2012*, p.8.

## MAIL

Posten and Post Danmark offer communication solutions for businesses and consumers.

### Business communication

Mail distribution and other services for physical or digital communication with large customer groups.

### Marketing communication

Consulting and distribution of physical and digital marketing communication.

### Consumer postal services

Postal services for the consumer market in Sweden and Denmark.

### Goods distribution

Distribution services for materials supply, supplier control, inventories and customer deliveries.



### Home deliveries

Home delivery of goods, food and drink to consumers.

### Facility services

Outsourcing services for corporate customers' mail management for e.g. e-commerce, city logistics, municipal distribution, medical logistics, etc.

### Newspaper distribution

Distribution of newspapers and periodicals.

*Operates PostNord's network of distribution points in Sweden and Denmark*

# PostNord の物流業務

(出所) PostNord, *Annual Report 2012*, p.8.

## LOGISTIK

PostNord offers logistics services for flows to, from and within the Nordic region.



**TOLLPOST GLOBE** 



## Parcel distribution

Solutions for management of B2B and B2C parcel flows. Distribution of C2C parcels.

## Groupage/pallet

Solutions for flows of pallet freight and other consolidated shipments.

## Solutions

- Third-party logistics/Outsourcing - management of all or parts of a company's logistics flows, stock-keeping and logistics administration.
- InNight - just-in-time logistics with overnight deliveries.
- Courier/Delivery services
- Consignment freight/part loads - solutions for flows of loads larger than pallets.

# PostNord のデータ管理・決済業務

(出所) PostNord, *Annual Report 2012*, p.8.

## STRÅLFORS

Strålfors offers services in the area of information logistics. The company develops and offers communication solutions that create stronger, more personal customer relationships for companies with large customer bases.



## Business communication

Solutions for efficient, individualized communication with large customer groups.

## Data Management

Maintenance and development of information databases.

## Marketing communication

Solutions for physical and digital individualized marketing communication.

## Service Fulfilment

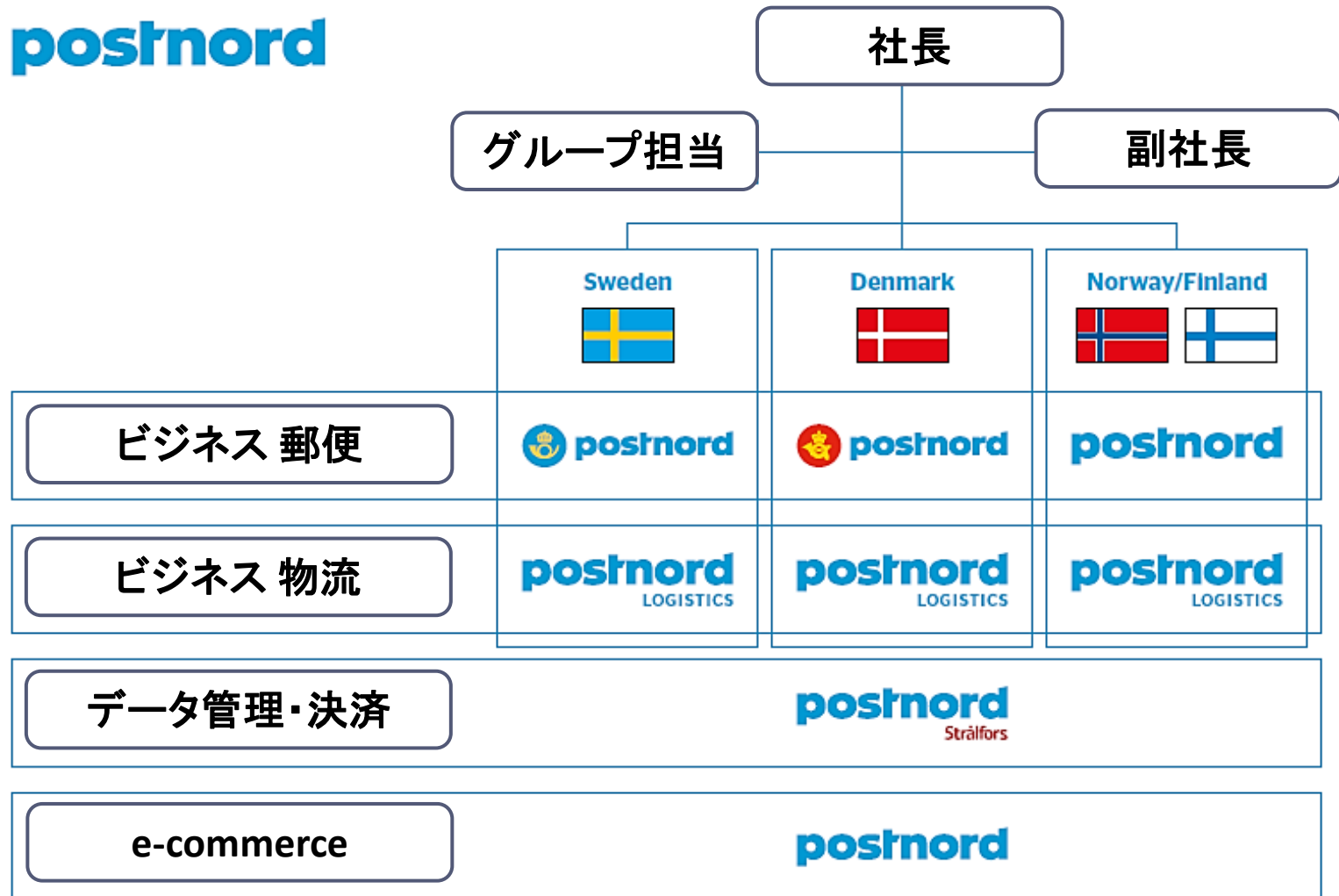
Supply chain solutions for delivery fulfillment of personalized products or information to end consumers.

# PostNord のブランド戦略

(出所) PostNord, *Annual Report 2013*, p.26.

New organization and new commercial brands

**postnord**

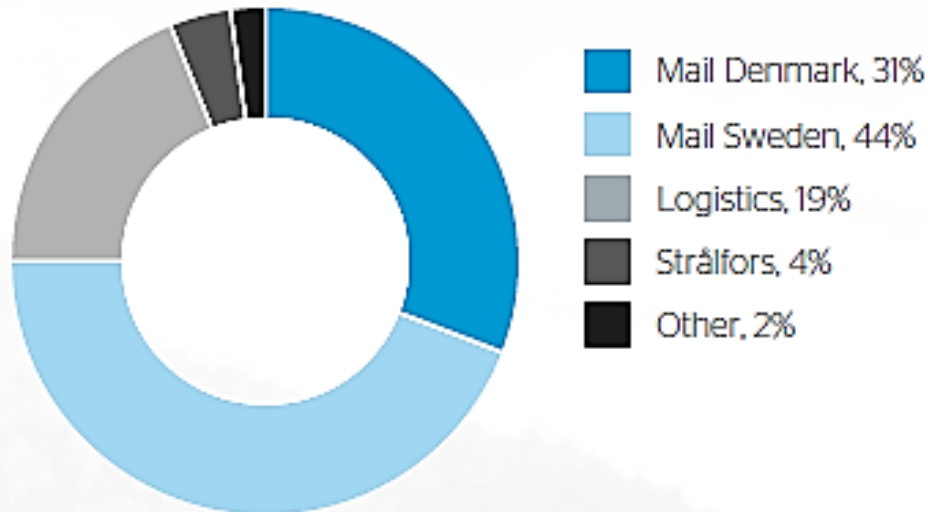




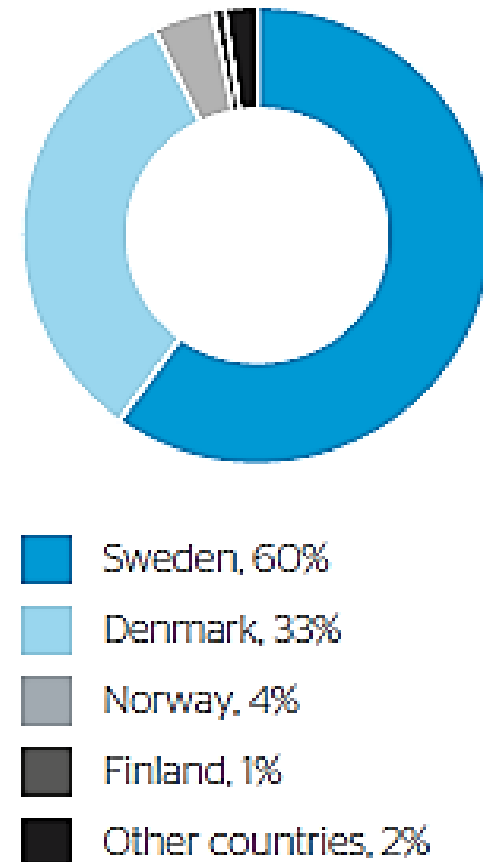
# PostNord の雇用者

(出所) PostNord, *Annual Report 2013*.

Average number of employees 2013



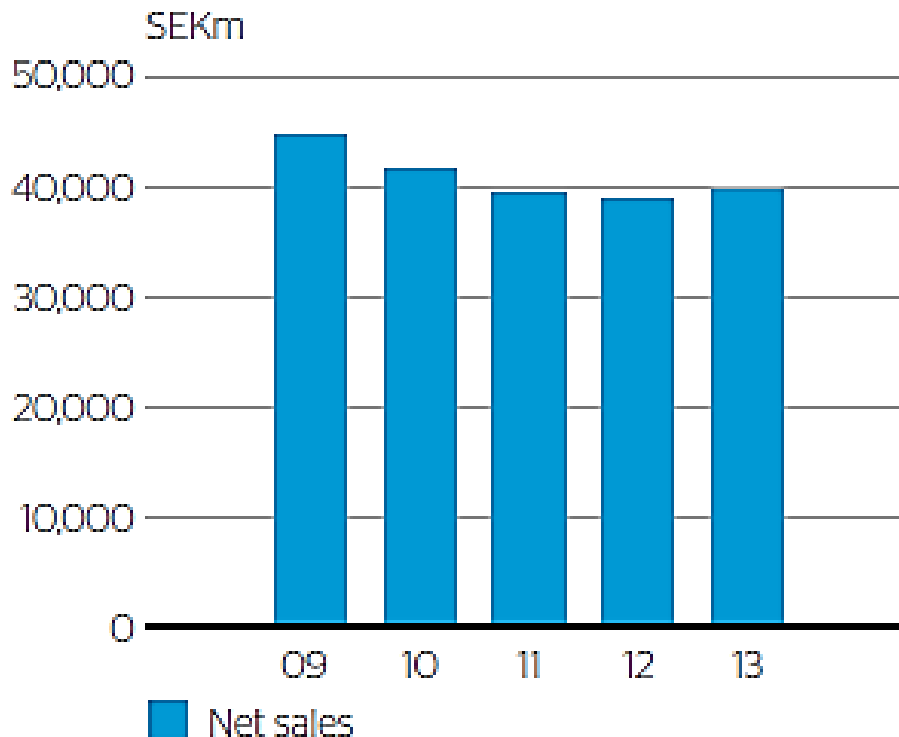
Average number of employees 2013, by country



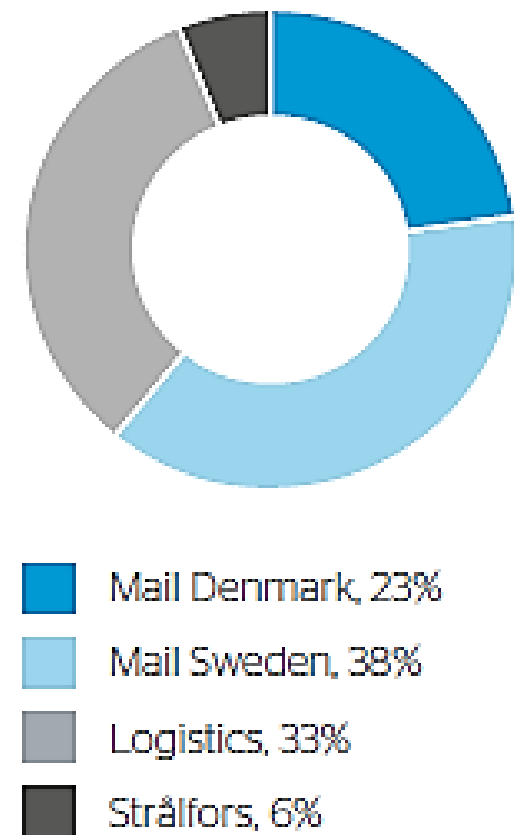
# PostNord の売上高

(出所) PostNord, *Annual Report 2013*.

## Net sales



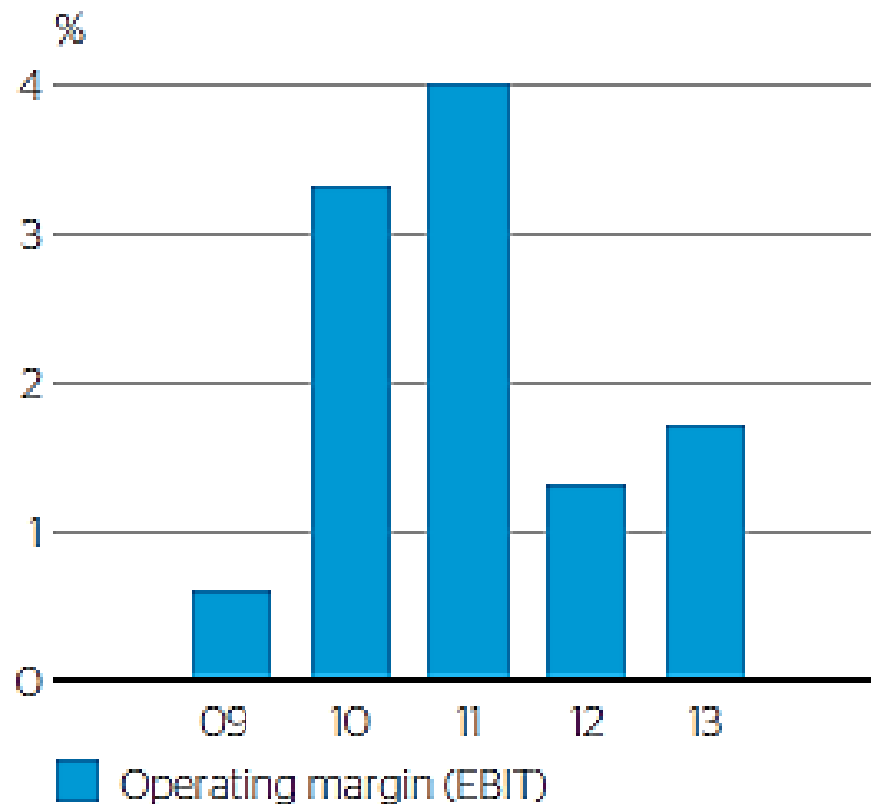
## Net sales 2013, by business area



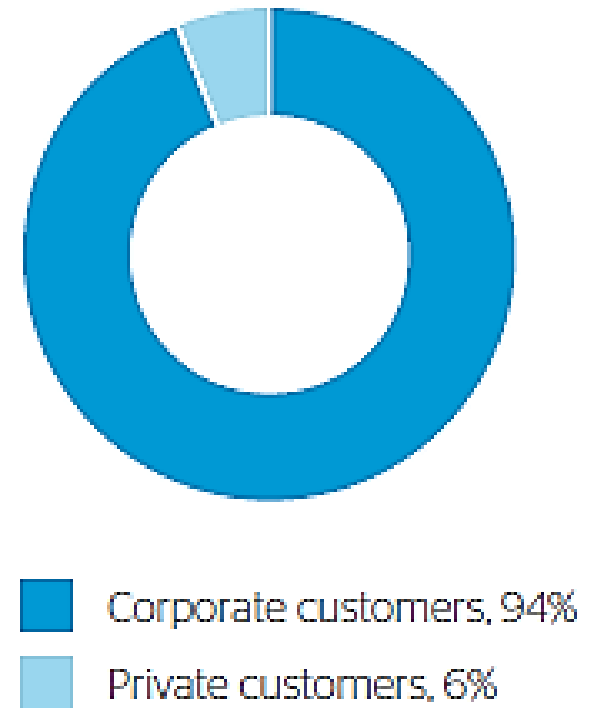
# PostNord の利益率

(出所) PostNord, *Annual Report 2013*.

## Operating margin



## Net sales 2013, private and corporate customers



# PostNord の経営戦略

(出所) PostNord, Annual Report 2012, p.15.

MISSION, VISION AND VALUES	TARGET PICTURE	STRATEGIES	ACTIVITIES
<b>MISSION</b> PostNord connects people and businesses reliably, efficiently and on time  <b>VISION</b> PostNord delivers world-class communication and logistics solutions to satisfied customer  <b>VALUES</b> <ul style="list-style-type: none"> <li>• Reliable</li> <li>• Accessible</li> <li>• Business partner</li> <li>• Environmentally sound</li> </ul>	<b>Fulfill rationale of the merger</b> <ul style="list-style-type: none"> <li>• Leading Nordic logistics business</li> <li>• Meet USO requirements</li> </ul> <div>企業価値向上</div> <b>Create financial value</b> <ul style="list-style-type: none"> <li>• Growth</li> <li>• Improved profitability</li> <li>• Effective capital utilization</li> </ul> <b>IPO-ready business</b> <ul style="list-style-type: none"> <li>• Profitable Mail businesses</li> <li>• Growth within Logistics</li> <li>• Appropriate capital structure</li> <li>• Attractive dividend</li> </ul> <div>株式上場計画</div> <b>ONE group</b> <ul style="list-style-type: none"> <li>• Increased coordination</li> <li>• Improved efficiency</li> </ul>	1. Reorganize to meet mail volume decreases and ensure profitability	<ul style="list-style-type: none"> <li>• Cost adjustments</li> <li>• Implementation of new production strategy</li> <li>• Dialogue on tomorrow's USO</li> </ul> <div>ユニバーサルサービス再考</div>
		2. Development within Logistics – broaden offer and market presence	<ul style="list-style-type: none"> <li>• Organic growth through additional sales and partnerships</li> <li>• Potential add-on acquisitions</li> </ul> <div>物流売上高の拡大</div>
		3. Increase value of Strålfors	<ul style="list-style-type: none"> <li>• Cost reductions – increase profitability</li> <li>• Growth within data management, marketing communication, fulfillment</li> </ul> <div>データ管理を重視</div>
		4. Strategic development projects	<ul style="list-style-type: none"> <li>• Continued development of e-commerce offer</li> <li>• Marketing communication advisor role</li> </ul> <div>e-commerceの発展</div>
		5. Realize group synergies	<ul style="list-style-type: none"> <li>• Increased coordination</li> <li>• Reduce costs within IT, purchasing and administration</li> </ul> <div>IT化によるコスト削減</div>

# PostNord のM&A (2012年) 1

(出所) PostNord, *Annual Report 2012*, p.18.

Company	Business area	Operation	Motive
<b>GREEN CARGO LOGISTICS, SWEDEN</b>			
物流会社		Sweden's largest and one of Scandinavia's three largest third-party logistics operators. The acquisition included Green Cargo Logistics's property holdings. 2012 net sales: SEK 1,094m.	Complementary acquisition. Gives PostNord a leading Nordic position in an attractive and growing segment of the logistics market.
<b>SVENSK MORGONDISTRIBUTION, SWEDEN</b>			
新聞配達		Distribution of approximately 100 million morning papers per year, including Sundsvalls Tidning, Dalarnas Tidningar, Gefle Dagblad, Östersunds-Posten and Västerbottens-Kuriren.	Synergy-driven acquisition of assets. Strengthens group's position within newspaper distribution in Sweden and enables increased use of vehicle fleet and production capacity.
<b>DISTRIBUTION SERVICES, DENMARK</b>			
ダイレクトメール		Packaging and management of unaddressed mail items.	Synergy-driven acquisition. Enables improved efficiency in production of unaddressed mail items. Part of PostNord as of January 1, 2013.





# PostNord のM&A (2012年) 2

(出所) PostNord, *Annual Report 2012*, p.18.

Company	Business area	Operation	Motive
HARLEM TRANSPORT, NORWAY			
ノルウェー 食料雑貨物流会社		Services for the transport of consignment cargo in four areas: Groceries, industry, shipping and recycling and waste. Strong position as groceries transport partner. 2012 net sales: SEK 346m.	Complementary acquisition. Further strengthens the group's position in the growing Nordic logistics market - chiefly within transportation of groceries.
BYRKNES AUTO, NORWAY			
ノルウェー 食料雑貨物流会社		One of Norway's largest thermal carriers. Primary services are transportation of fish and groceries.	Complementary/synergy-driven acquisition of assets. Strengthens position within convenience goods and fish transports. The acquisition was finalized on February 1, 2013.



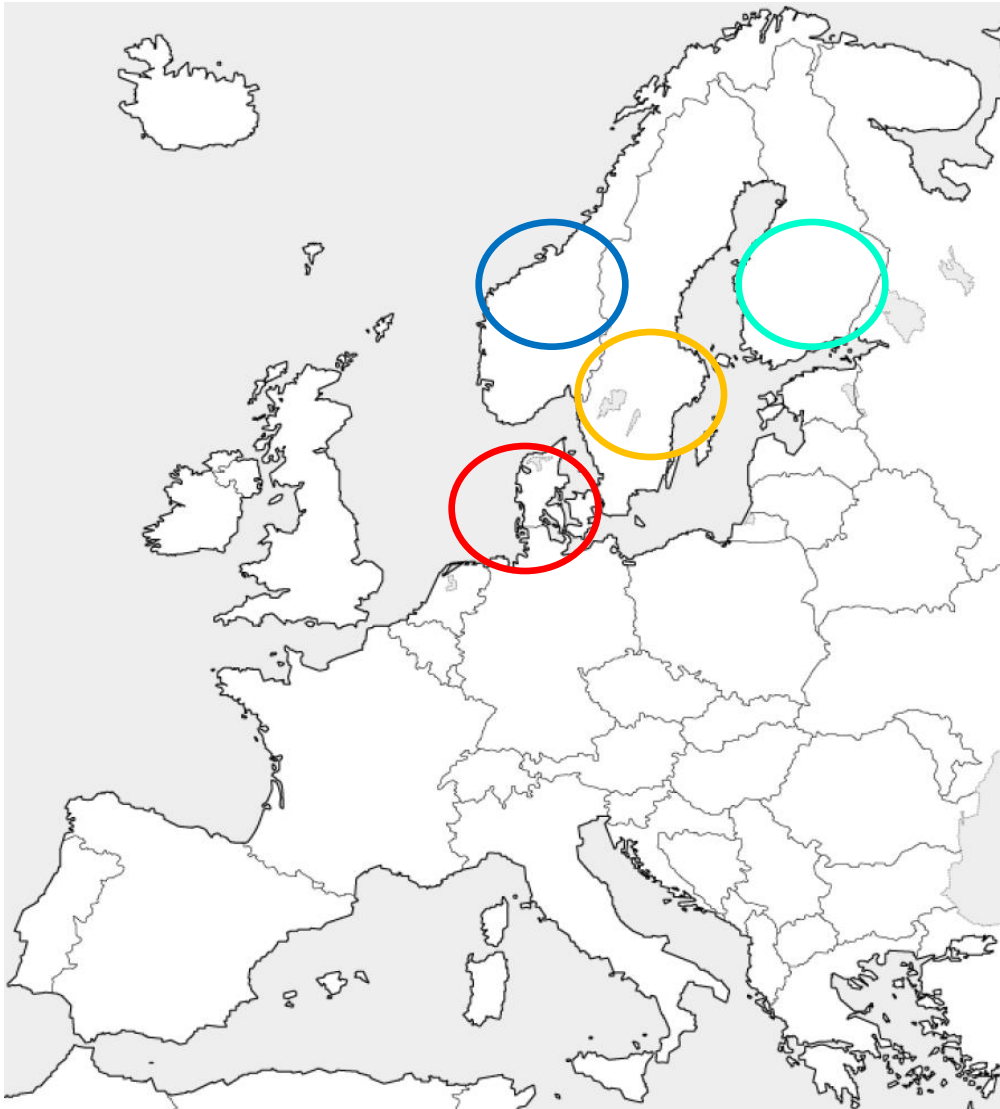
# PostNord のM&A (2013年) 3

(出所) PostNord, *Annual Report 2013*, p.41.

COMPANY	BUSINESS AREA	OPERATION	MOTIVE
ISS Document and Aditro Document Automation	Mail Denmark and Mail Sweden (Mail) <b>文書作成印刷会社</b>	Market leaders in Denmark and Sweden within digitization services and document management.	Synergy-driven acquisition of assets. Strengthens the group's integrated offer and position in the Nordic scanning market. Creates synergy opportunities with existing communication business.
Nordisk Kyl Logistik and Transbothnia	Logistics <b>ノルウェー物流会社</b>	Operations for mixed cargo, consignment cargo and thermal transports. Leading position in northern Sweden. Aggregate net sales in 2013: SEK 731m.	Complementary acquisition. Broadens logistics business in Sweden within mixed cargo, consignment cargo and thermal transports to further strengthen platform for growth within grocery and industry logistics. Part of business area Logistics as of June 1, 2013.
Printing business in Poland	Strålfors <b>ポーランド印刷会社</b>	Printing and inserting business with volume of approximately 60 million mailings per year.	Complementary/synergy-driven acquisition of assets. Strengthens Strålfors' presence and creates growth opportunities in the Polish market.



# 北欧4カ国の面積と人口



2012	面積	人口
ノルウェー	323,790 km2	5,018,869
デンマーク	43,090 km2	5,590,478
スウェーデン	450,300 km2	9,516,617
フィンランド	338,420 km2	5,414,293

<http://data.worldbank.org/indicator/AG.SRF.TOTL.K2>  
<http://data.worldbank.org/indicator/SP.POP.TOTL>

(出所) [http://www.sekaichizu.jp/atlas/europe/p800\\_europa.html](http://www.sekaichizu.jp/atlas/europe/p800_europa.html)

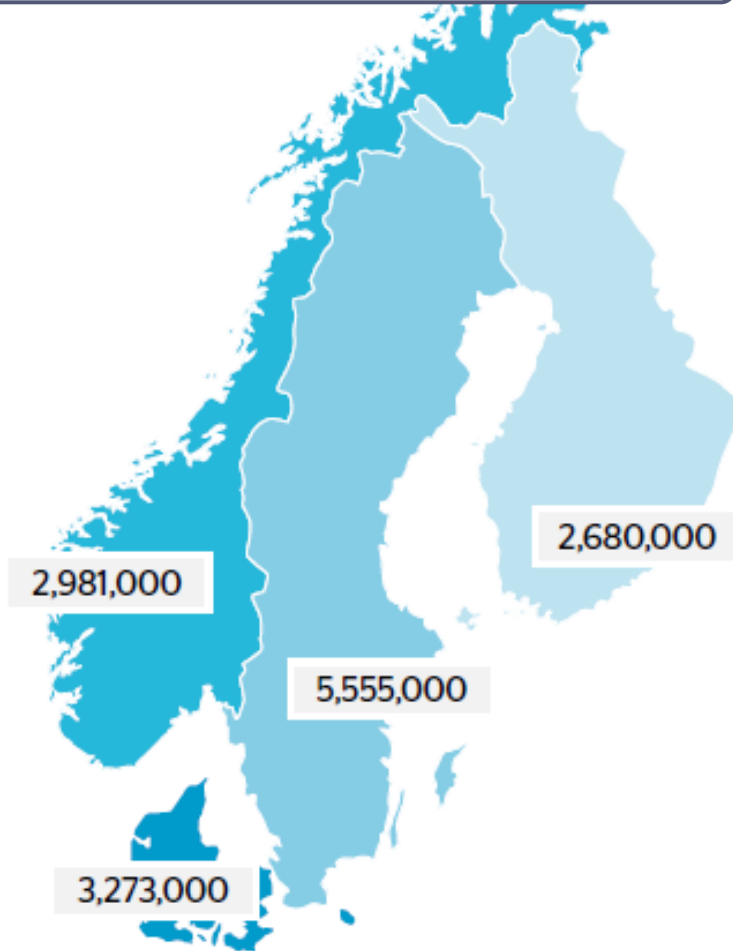


# 北欧4カ国のオンライン・ショッピング人口

(出所) PostNord, *E-commerce in the Nordics 2013*.

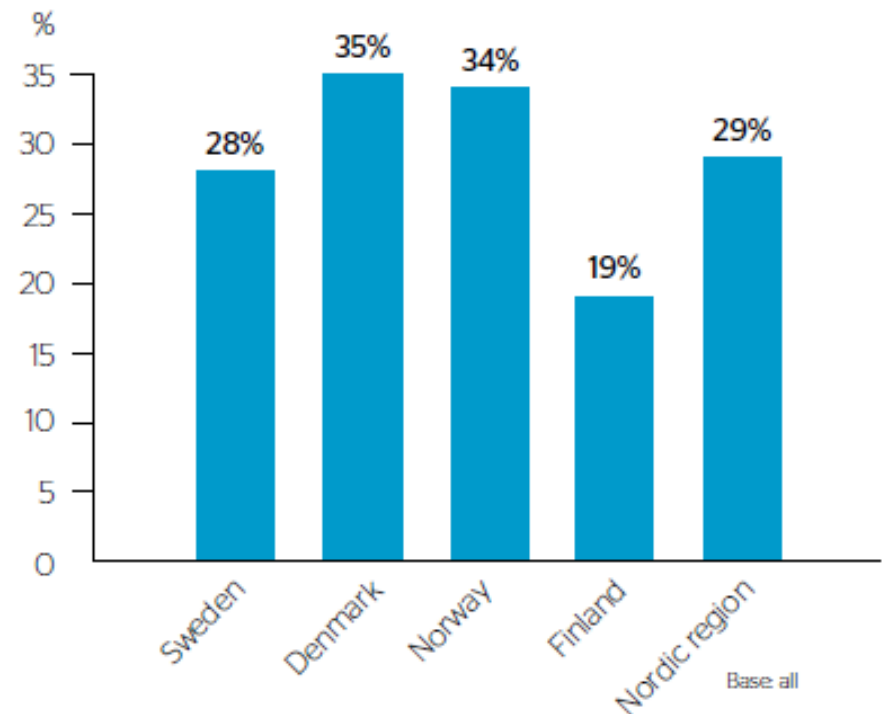
Consumers who bought goods online in 2012

オンライン・ショッピング利用者 2012年



オンライン・ショッピング毎月利用者率

Proportion who shop online every month



スウェーデン/ デンマーク/ ノルウェー/ フィンランド/ 北欧

# インターネット普及率 (%)

(出所) <http://www.stat.go.jp/data/sekai/0116.htm#07>

国(地域)	2006	2007	2008	2009	2010	2011
イギリス	68.8	75.1	78.4	78.0	78.0	82.0
ドイツ	72.2	75.2	78.0	79.0	82.0	83.0
フランス	46.9	66.1	70.7	71.6	80.1	79.6
イタリア	38.0	40.8	44.5	48.8	53.7	56.8
オランダ	83.7	85.8	87.4	89.6	90.7	92.3
ベルギー	59.7	64.4	66.0	70.0	75.0	78.0
スイス	75.7	77.2	79.2	81.3	83.9	85.2
ノルウェー	82.6	86.9	90.6	92.1	93.4	94.0
デンマーク	86.7	85.0	85.0	86.8	88.7	90.0
スウェーデン	87.8	82.0	90.0	91.0	90.0	91.0
フィンランド	79.7	80.8	83.7	82.5	86.9	89.4
アメリカ合衆国	68.9	75.0	74.0	71.0	74.0	77.9
カナダ	72.4	73.2	76.7	80.3	80.3	83.0
オーストラリア	66.0	69.5	71.7	74.3	76.0	79.0
日本	72.6	73.0	75.3	78.0	78.2	79.1

# オンライン・ショッピング利用率 (16~74才) (%)

(出所) <http://epp.eurostat.ec.europa.eu/tgm/table.do?tab=table&init=1&plugin=1&language=en&pcode=tin00067>

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
EU (27カ国)	..	..	15	18	20	23	24	28	31	34	35
ノルウェー	..	24	31	35	47	48	46	54	53	57	62
デンマーク	24	16	22	26	31	43	47	50	54	57	60
スウェーデン	24	21	30	36	39	39	38	45	50	53	58
フィンランド	11	14	24	25	29	33	33	37	41	45	47
フランス	..	..	..	..	19	25	28	32	40	40	42
ドイツ	17	24	29	32	38	41	42	45	48	54	55
イタリア	3	4	..	4	5	7	7	8	9	10	11
イギリス	25	24	28	36	38	44	49	58	60	64	64

# ノルウェーのe-commerce実態

(出所) PostNord, *E-commerce in the Nordics 2013*.



# デンマークのe-commerce実態

(出所) PostNord, *E-commerce in the Nordics 2013*.

## DENMARK

人口(18~79才)  
インターネット普及率  
オンライン・ショッピング利用者

人気商品  
1 家電  
2 衣服・靴  
3 書籍

3日以内の配達  
を希望する比率

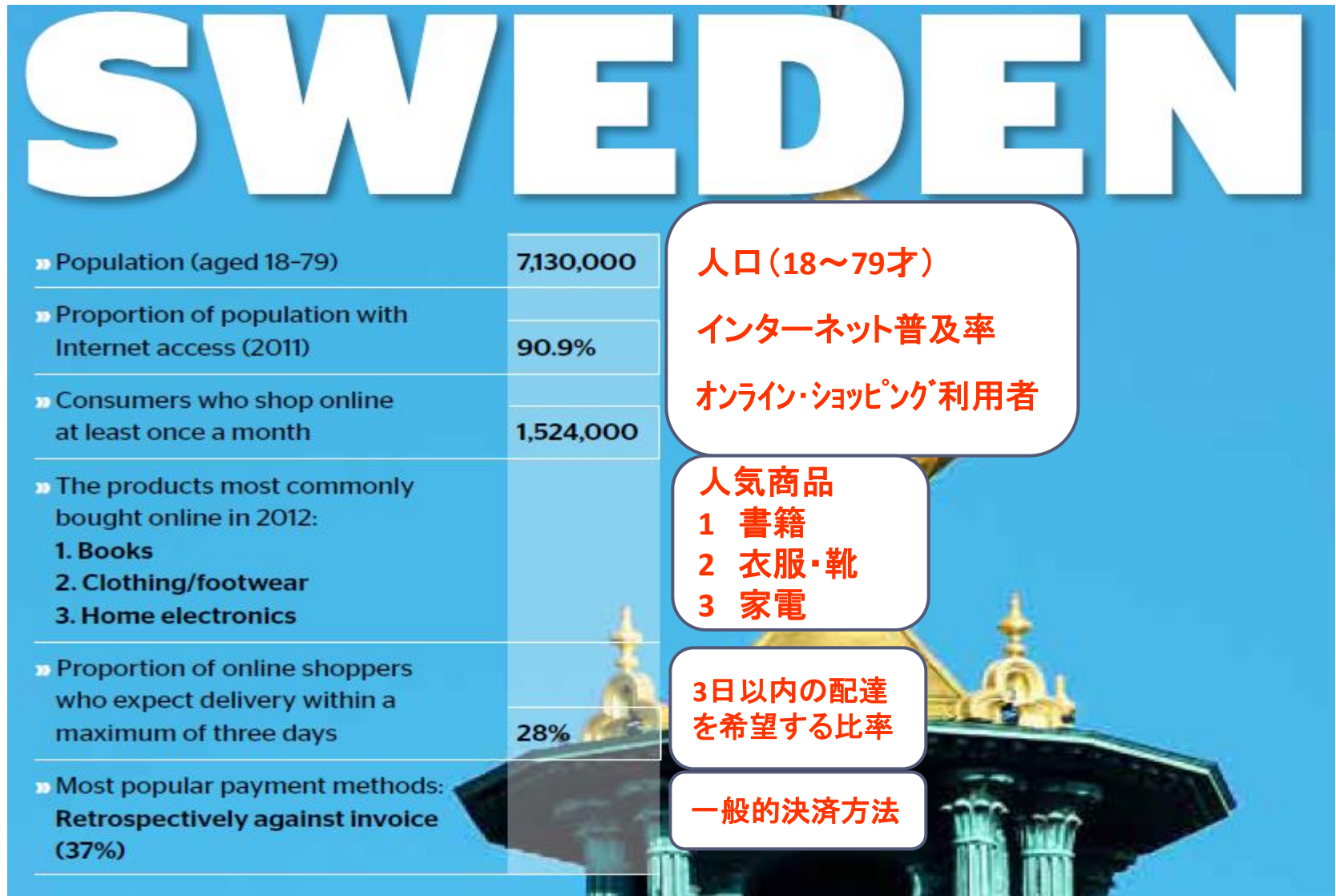
一般的決済方法

Population (aged 18-79)	4,179,644
Proportion of population with Internet access (2011)	90%
Consumers who shop online at least once a month	1,146,000
The products most commonly bought online in 2012: 1. Home electronics 2. Clothing/footwear 3. Books	
Proportion of online shoppers who expect delivery within a maximum of three days	49%
Most popular payment methods: Debit or credit card (76%)	



# スウェーデンのe-commerce実態

(出所) PostNord, *E-commerce in the Nordics 2013*.



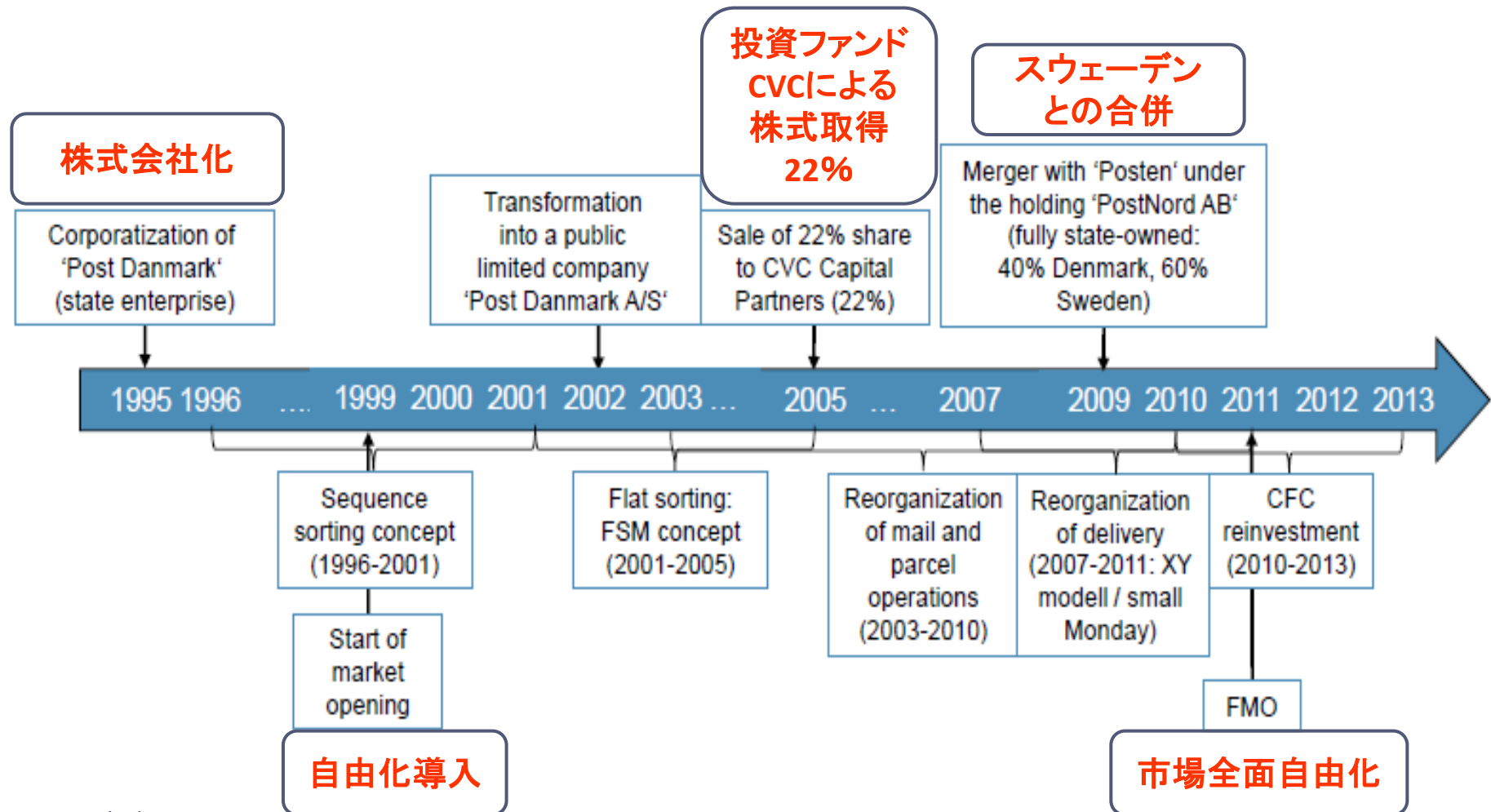
# フィンランドのe-commerce実態

(出所) PostNord, *E-commerce in the Nordics 2013*.



# デンマーク郵政改革の歩み

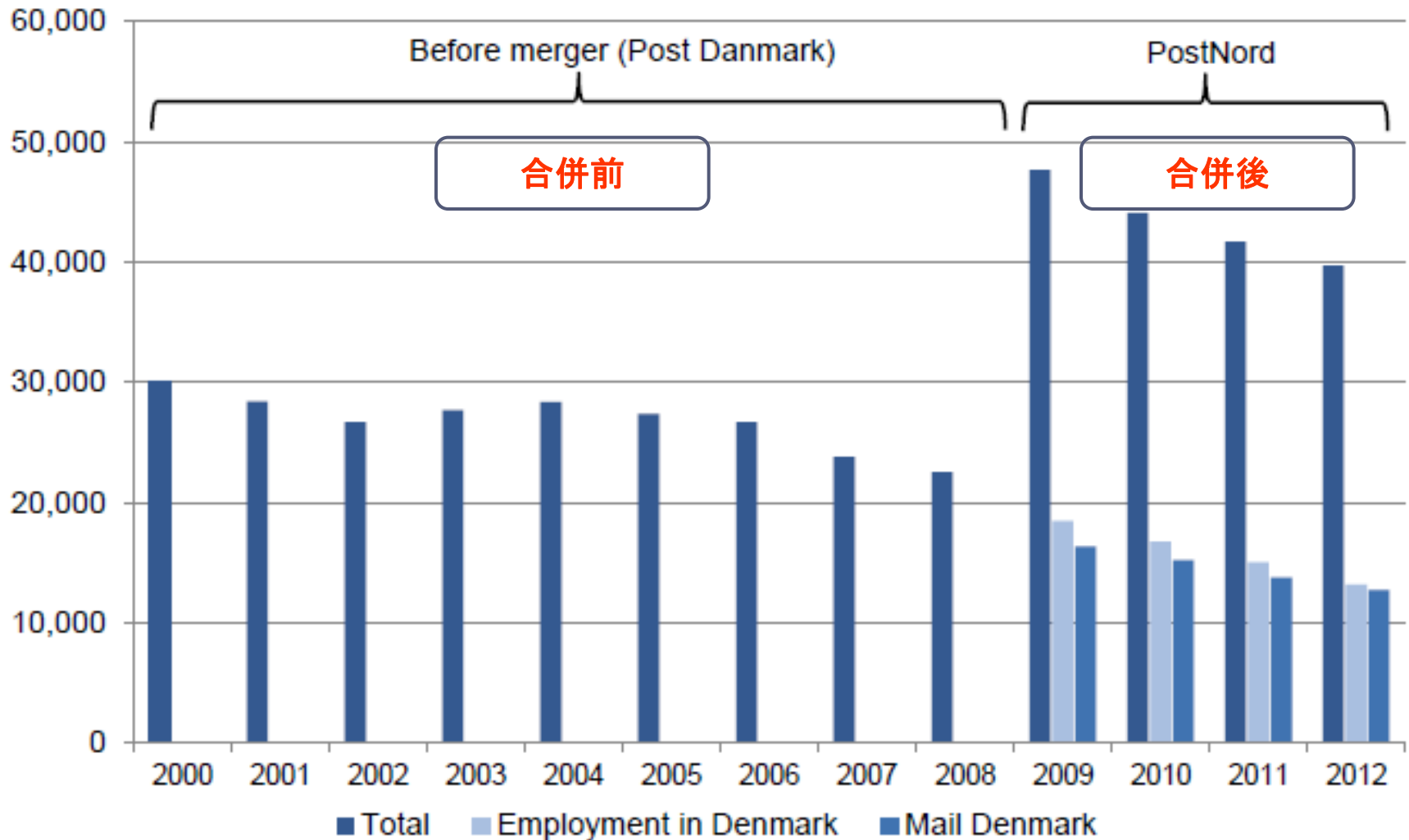
(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.82.





# Post Danmark の雇用者数

(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.90.



# Post Danmark の郵便部門

(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.91.

<b>Postal volume</b>	Mail items: 2.6 million Parcels: 0.16 million	郵便・小包量
<b>Collection points</b>	7,400 post boxes 93 postal outlets operated by Post Danmark 625 post shops (agencies) 97 pick-up/ drop-off locations 156 Døgnpost self-service stations (parcel lockers) 300 service points (in a supermarket chain)	収集地点
<b>Sorting centres</b>	3 mail sorting centres 2 parcel sorting centres 1 sorting centre for international mail	ソーティング・センター
<b>Delivery offices / bases</b>	153 delivery offices for mail, of which 55 delivery offices are for mail and parcels (combined) 13 delivery bases for parcels	配達拠点
<b>Delivery routes</b>	~2,750 mail delivery routes ~800 delivery routes for parcels ~1,500 delivery routes jointly used for mail and parcels	配達ルート
<b>Addresses</b>	~2.2 million delivery places ~3.2 million delivery addresses (households and businesses)	届け先
<b>Labour</b>	Mail operations: ~10,200 of which 2,200 are in sorting centres and 8,000 in delivery Parcel operations: 620 in parcel sorting centres (delivery: n.a.)	雇用者

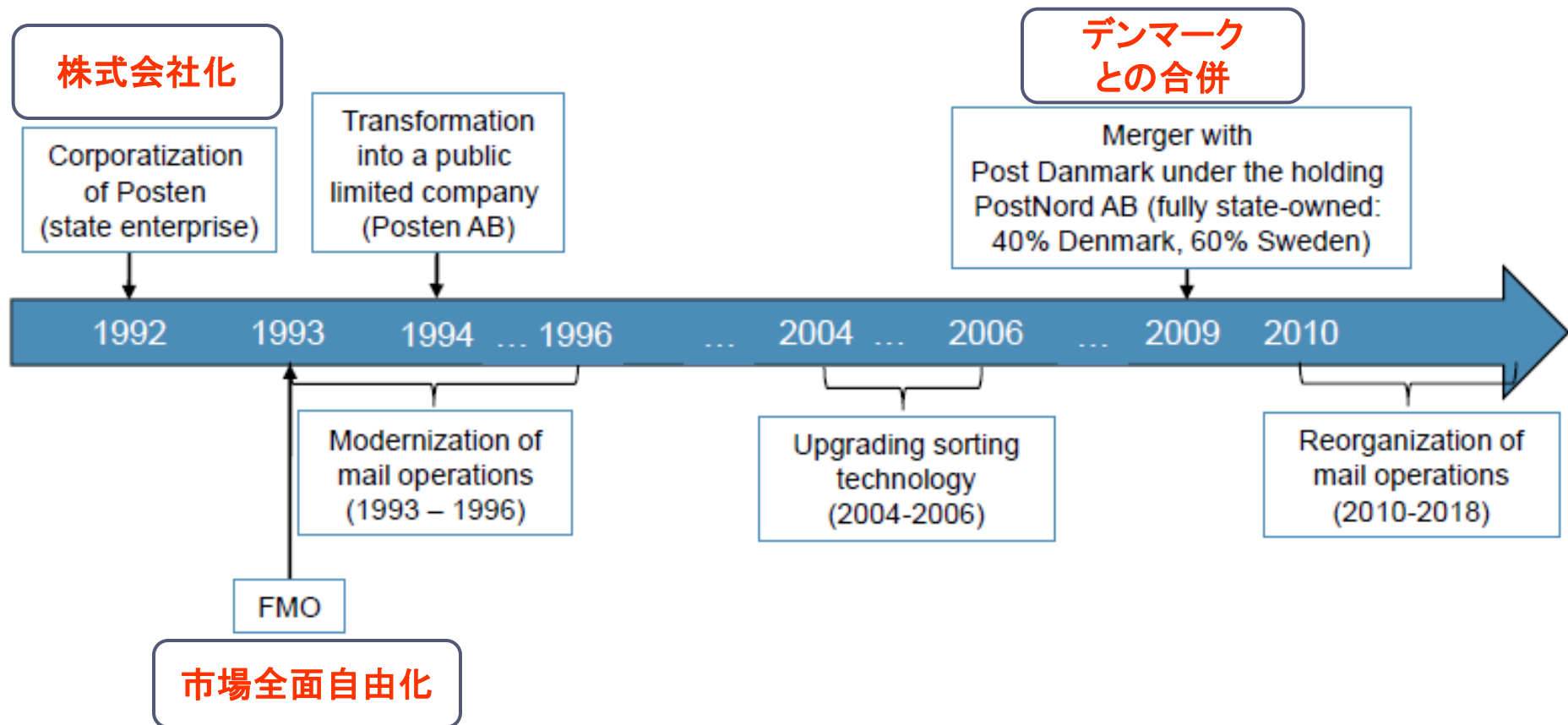
# Post Danmark のソーティング・センター

(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.92.



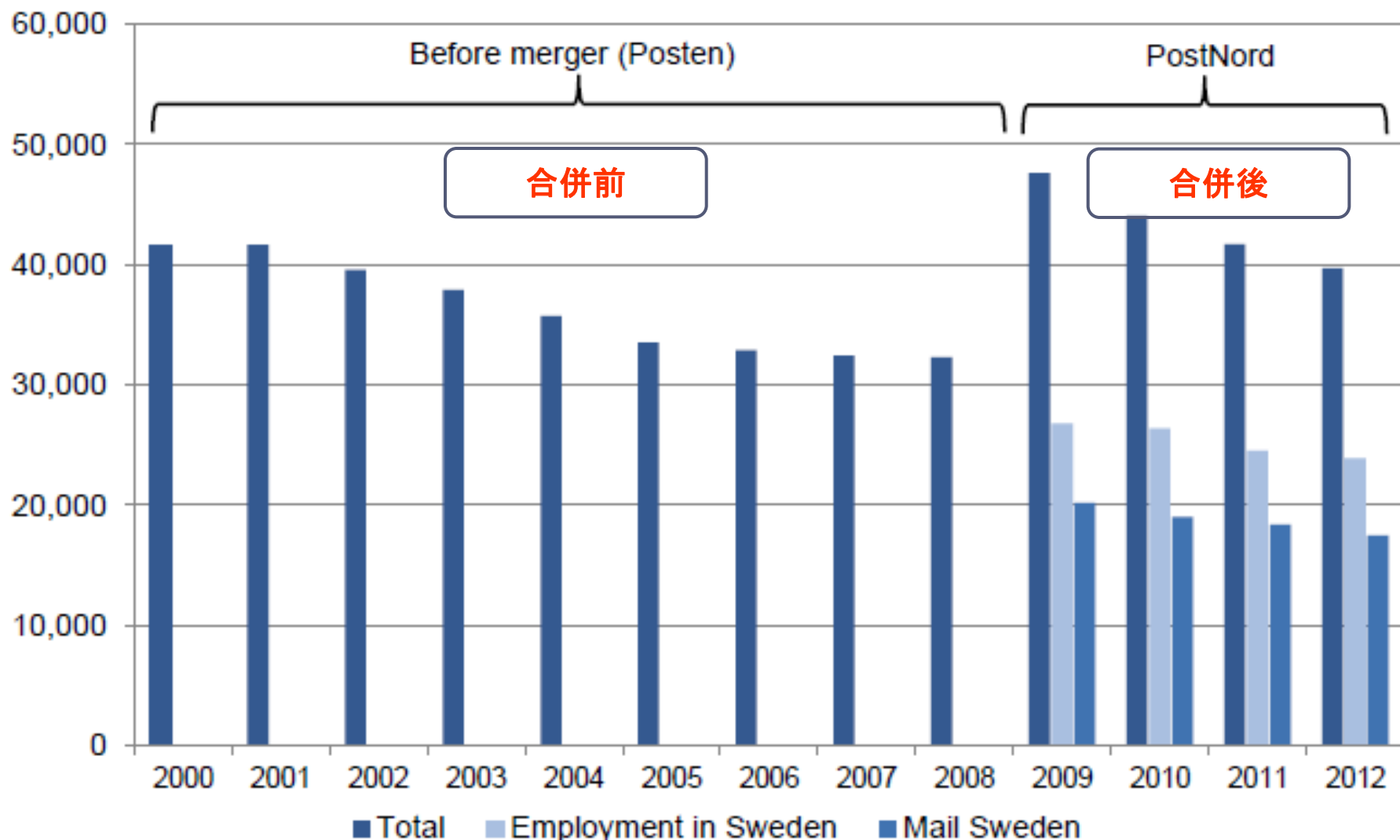
# スウェーデン郵政改革の歩み

(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.151.



# Posten の雇用者数

(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.158.



# Posten の郵便部門

(出所) Wik [2013], *Review of Postal Operator Efficiency*, p.91.

Daily volume	Mail items: 9.2 million Parcels: 0.3 million	郵便・小包量
Collection points	~24,000 street letter boxes 1,800 service points of which 1,547 are postal outlets (100% agencies) 290 business centres	収集地点
Sorting centres	11 mail sorting centres (under transformation) 9 parcel sorting centres (of which 4 small centres with limited functions) 1 sorting centre for international mail and parcels	ソーティング・センター
Delivery offices / bases	~400 mail delivery offices 70 dedicated delivery bases for parcels	配達拠点
Delivery routes	~5,900 mail delivery routes Variable number of delivery routes for parcels (depending on volume) ~2,500 delivery routes jointly used for mail and parcel delivery (in rural areas)	配達ルート
Addresses	4.6 million households 800,000 businesses (incl. SMEs)	届け先
Labour	Mail operations: ~15,000 (full-time equivalents) of which ~3,000-3,500 work in sorting and 11,000-11,500 are delivery staff Parcel operations: ~5,000 of which ~2,000 are in processing and ~3,000 in delivery	雇用者

# スウェーデン郵便市場シェア

(出所) Swedish Post and Telecom Authority [2013], Service and competition 2013:  
The postal services market in Sweden, p.16.

	Number of distributed letters (millions)	Share of distributed letters
Posten AB	2 305.3 (2 427.7)	87.2% (87.7%)
Bring Citymail	331.8 (333.7)	12.5% (12.1%)
Other	7.9 (6.3)	0.3% (0.2%)
Total	2 645.0 (2 767.7)	100%

ライバル企業

参入者のシェア

# フィンランド郵政会社の歩み

(出所) Itella [2013 b], *Your first choice in postal, logistics and eCommerce services.*

2011

The new Postal Act takes effect in June

2007

The parent company's name is changed to Itella Corporation

2003

The early morning newspaper delivery business acquired from Sanoma Osakeyhtiö

2001

Internationalization begins with acquisitions in the Nordic countries

1998

Postal and telecom services are demerged into separate companies

1990

Posts and Telecommunications of Finland becomes a state-owned enterprise

株式会社化

1927

The Telegraph is merged with the Finnish Post to form Post and Telegraph

1811

A central postal administration is established for the postal services of autonomous Finland

1638

Governor-General Per Brahe establishes postal services in Finland



# Itella の組織構成

(出所) <http://www.itella.com/about/company/organization/>



# Itella の業務内容

(出所) Itella [2013 b], *Your first choice in postal, logistics and eCommerce services.*

## Itella Mail Communications

- Letter, publication, and direct mail delivery solutions
- Domestic and international parcel services
- Posti shops, postal agency shops, pickup outlets, and SmartPOST automatic parcel terminals
- Comprehensive solutions for online commerce
- Electronic postal services, Netposti
- Online tools for marketing communication
- Analysis, target group, and register corrections services

郵便配達・  
郵便局業務・  
オンライン・ビジネス

## Itella Logistics

- International & domestic Air, Sea and Road freight
- International & domestic Road express
- Warehousing and other contract logistics
- Integrated supply chain information management

物流業務

## OpusCapita

- Outbound services
- E-invoice operator
- Finance and accounting services
- Outsourcing
- OpusCapita cash flow automation
- Electronic order-supply chain

決済業務

# Itella の雇用者内訳 1

(出所) Itella [2013 b], *Your first choice in postal, logistics and eCommerce services.*

Women 41%, Men 59%



■	Itella Mail Communications	17 800
■	Itella Logistics	7 400
■	OpusCapita	2 200
■	Others	400

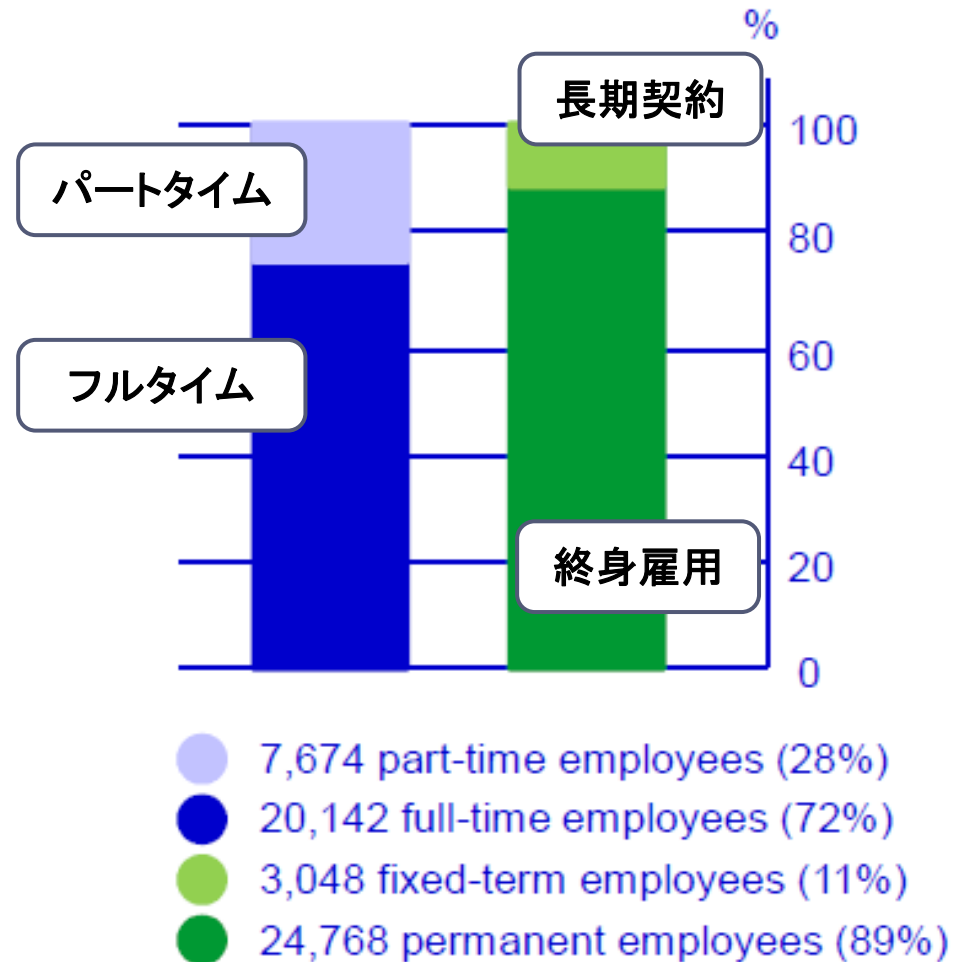
Number of Personnel

27,500

# Itella の雇用者内訳 2

(出所) Itella [2013 b], *Your first choice in postal, logistics and eCommerce services.*

• Finland	21,820
• Russia	3,700
• Poland	560
• Sweden	400
• Estonia	390
• Norway	250
• Denmark	220
• Latvia	220
• Lithuania	120
• Germany	100
• Slovakia	20



# Itella の拠点とグローバル展開

(出所) Itella [2013 b], *Your first choice in postal, logistics and eCommerce services.*



# Posti オンライン・ショッピング HP

(出所) <https://verkkokauppa.posti.fi/PublishedService?theme=9>

**posti** Online shop

Stamps Postcards Stamp products Moomin products For a collector Souvenirs My Services

**New STAMPS 3.3**

**Suomi Finland 1 lk kl**  


**SUOMI FINLAND**  


**SUOMI FINLAND 1 lk kl**  


**Garden fruits - three (3) 2nd class stamps**  
  
2,70 € / items  
▶ Order now!

**Easter Surprise 1st class stamp**  
  
1,00 € / items  
▶ Order now!

**Sprint men gold 1st class stamp**  
  
18.00€ / items  
▶ Order now!

**Congratulations! 5x1st class stamp**  
  
5,00 € / booklet  
▶ Order now!

**Design and order postcards**

Personalize your stamp and add the final touch to cards and letters – or give personalized stamps as a gift!

**Design and order personalized stamps of your own picture >>**



# Itella の経営戦略

(出所) Itella, Group Presentation.

## Our vision 2020

Your first choice in postal, logistics and eCommerce services.



### MEGATRENDS

- Postal industry turmoil
- eCommerce explosion, while consumer decides
- Russia as a growth market
- An era of slow growth in Europe



### STRATEGIC GOALS

- High value solutions for the customer
- Market leader with profitable growth in Finland and in Russia
- The engine of eCommerce
- Step ahead in postal industry transformation
- Best workplace



### Warehouse and delivery services

### CUSTOMER PROMISE

Easy, fast, reliable and responsible

### MISSION

Our mission is to provide smooth flow of trade and ease of everyday life.



### Services for senders

### Services for receivers

### VALUES

Succeeding with the customer  
Driving for improvement and innovation  
Taking responsibility  
Winning together



### FOCUS AREAS

- Safety
- Customer experience
- Operational efficiency

OpusCapita is an essential part of the Group, with a role to increase shareholder value, and having its own vision.



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