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## ANALYTICAL SURVEY ON THE INTERNATIONAL EXCHANGE OF CROATIAN LETTER MAIL

### SUMMARY

1991 was the first year of operation of the Croatian Post and Telecommunications (HPT) in the independent state of Croatia.

The public corporation HPT - Croatian Post and Telecommunications was established by a resolution brought by the Croatian Parliament followed by a decree pronouncing the Act on founding of the public Croatian postal and telecommunication corporation.

This survey has studied, analysed and evaluated the international exchange of Croatian letter mail with the rest of the world from 1991-1996.

Based on the analytical indications, conclusions have been made about the direction, intensity and characteristics of the modifications in dynamics and structure of Croatian letter mail.

### 1. INTRODUCTION

The group of international letter services in keeping with the UPU-Convention is formed of the following types of postal items:

- letters;

Table 1. Exported letter items 1991 - 1996

(000)

	continents	91	92	93	94	95	96	TOTAL
1.	Europe-total	10991	14739	16494	10116	13972	9665	75977
1.1.	Austria	786	1417	1401	954	1210	673	6441
1.2.	France	728	706	439	444	515	355	3187
1.3.	Italy	1013	1275	951	823	1216	777	6055
1.4.	Holland	365	623	287	274	319	204	2072
1.5.	Germany	4811	5712	6239	2881	3938	2424	26005
1.6.	Slovenia	1	1466	2414	1293	1776	1085	8035
1.7.	Switzerland	620	790	631	544	751	457	3793
1.8.	U K	713	662	604	522	736	545	3782
1.9.	Other countries	1954	2088	3528	2381	3511	3145	16607
2.	Asia - total	84	132	154	94	174	126	764
3.	Africa - total	45	67	76	82	105	75	450
4.	America - total	2195	3049	2438	2260	2028	1868	13838
4.1.	Canada	486	975	793	841	549	571	4215
4.2.	USA	1533	1812	1514	1308	1246	1154	8567
4.3.	Other countries	176	262	131	111	233	143	1056
5.	Australia - total	72	960	847	899	601	707	4086
5.1.	Australia	57	934	787	827	508	625	3738
5.2.	New Zeland	15	26	60	72	93	82	348
	TOTAL	13387	18947	20009	13451	16880	12441	95115

HPT PI for period 1991 - 1996

- postcards;
- books, newspapers and magazines
- dry points,
- small parcels.

According to the survey groups the letter mail considers the characteristics of their content and purpose, following the usual procedure of analytical dynamics and structure enquiry.

The analysed period, 1991-1996, provides sufficient exemplification which enables the determination of the basic Postal services development parameters.

Data used in the survey have been taken from the HPT annual reports (HPT PI) during the period 1991-1996.

The paper discusses, analyses and estimates the international letter exchange between Croatia and the rest of the world over the period from 1991-1996.

The aim of the study is to obtain some relevant information concerning postal-traffic indications of quantity, structure, as well as dynamics among international letter services in times of massive transformations happening in practically every segment of social activities, including post and telecommunications, influenced by the new information era.

Such information, in terms of commercial behaviour of the economic participants, are indispensable for making truly adequate business decisions in accordance with the demands of users and satisfying their needs.

## 2. PHYSICAL VOLUME OF LETTER SERVICES

### 2.1. Letter mailing (export)

Data concerning physical volume of letter mailing is presented in Table 1.

Analytical review of dynamics of handling is expressed through index numbers and placed into Table 2, (chained index).

Average growth rate of export traffic for the entire period was +2.3% per year.

In spite of the export growth rate of +2.3%, the observed period indicates a disproportion so that, for example, the chained index for 1994 increased from 61 to 138 in 1995, and then came down to 69 in 1996.

Analytically observed through all continents, the chained index oscillations between 1994 and 1996 are

**Table 2. Dynamics of exported letter mail 1991 - 1996 (Data from Tab. 1.) chained index**

	continents	91	92	93	94	95	96
1.	Europe-total	100	134	112	61	138	69
1.1.	Austria	100	180	99	68	127	56
1.2.	France	100	97	62	101	116	69
1.3.	Italy	100	126	75	87	148	64
1.4.	Holland	100	171	46	95	116	64
1.5.	Germany	100	119	109	46	137	62
1.6.	Slovenia	100		165	54	137	61
1.7.	Switzerland	100	127	80	86	138	61
1.8.	U K	100	93	91	86	141	74
1.9.	Other countries	100	107	169	67	147	90
2.	Asia - total	100	157	117	61	185	72
3.	Africa - total	100	149	113	108	128	71
4.	America - total	100	139	80	93	90	92
4.1.	Canada	100	201	81	106	65	104
4.2.	USA	100	118	84	86	95	93
4.3.	Other countries	100	149	50	85	210	61
5.	Australia - total	100	1333	88	106	67	118
5.1.	Australia	100	1639	84	105	61	123
5.2.	New Zeland	100	173	231	120	129	88
	TOTAL	100	142	106	67	125	74

Average growth rate for period 1991-1996 is 2,3%

even more noticeable, making that aspect interesting for further detailed enquiry and searching for reasons for such rapid decrease related to preliminary, as well as the subsequent period.

Graphical presentation of dynamics of letter mail international traffic has been presented in Figure 1.

In traffic dynamics at the end of the last year, the mailing (export) has been marked by index number 74, which confirms the export traffic stagnation.

The geographical structure of letter mail has been established by observing the continents. Concerning the exceptional share of Europe in trading with our country - up to 80% - its structure has been presented through countries. (Tab. 3.)

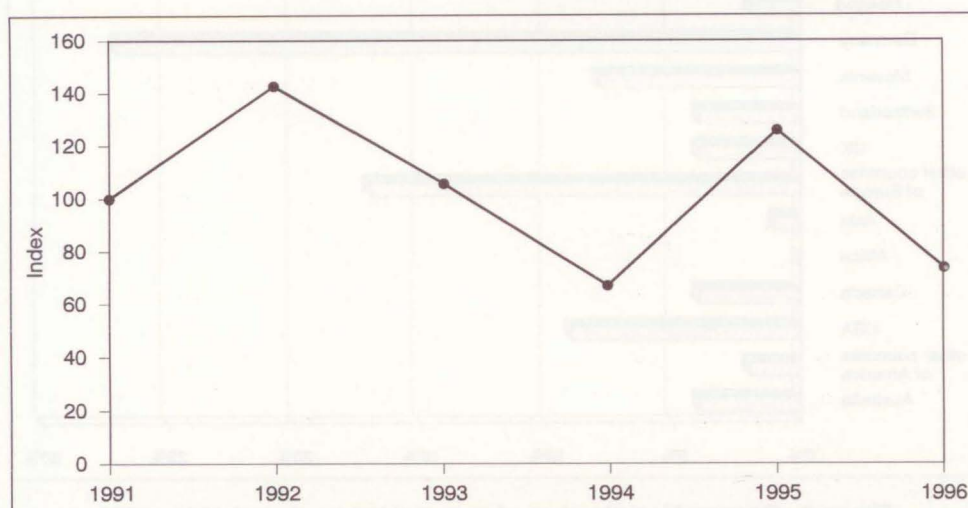


Figure 1 - Dynamics of exported letters abroad 1991 - 1996

Tab. 3. Geographical structure of exported letter mail 1991 - 1996 (%)

	continents	91	92	93	94	95	96	TOTAL
1.	Europe-total	82	78	83	74	82	77	80
1.1.	Austria	6	7	7	7	7	5	7
1.2.	France	5	4	2	3	3	3	4
1.3.	Italy	8	7	5	6	7	6	7
1.4.	Holland	3	3	1	2	2	2	2
1.5.	Germany	35	31	32	21	24	19	27
1.6.	Slovenia	0	8	12	10	11	9	8
1.7.	Switzerland	5	4	3	4	4	4	4
1.8.	U K	5	3	3	4	4	4	4
1.9.	Other countries	15	11	18	17	20	25	17
2.	Asia - total	1	1	1	1	1	1	1
3.	Africa - total	0	0	0	1	1	1	0
4.	America - total	16	16	12	17	12	15	15
4.1.	Canada	4	5	4	6	3	5	4
4.2.	USA	11	10	8	10	8	9	9
4.3.	Other countries	1	1	0	1	1	1	2
5.	Australia - total	1	5	4	7	4	6	4
5.1.	Australia	1	5	4	6	3	5	4
5.2.	New Zeland	0	0	0	1	1	1	0
	TOTAL	100	100	100	100	100	100	100

Graphical presentation concerning geographical structure of letter mail exportation has been represented in Figure 2.

Figure 2 shows extremely high European share, especially German, in mailing letters to foreign countries.

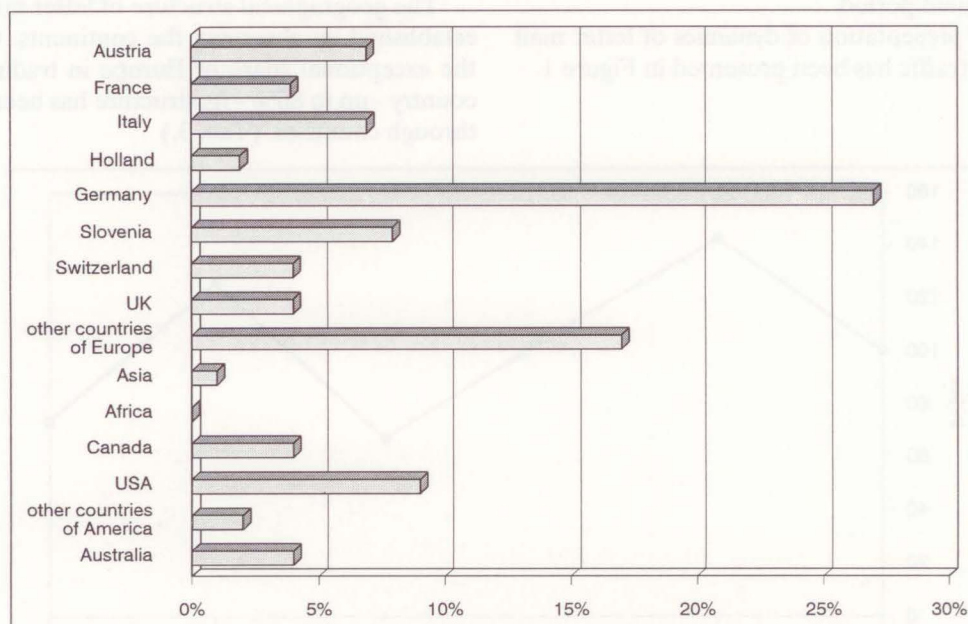


Figure 2 - Geographical structure of exported letters abroad 1991 - 1996

Tab. 4. Letter income from abroad 1991 - 1996

(000 pcs)

	continents	91	92	93	94	95	96	TOTAL
1.	Europe-total	11941	15940	20089	20559	16711	16723	101963
1.1.	Austria	1012	1412	1451	1094	1515	1345	7829
1.2.	France	1244	1035	1073	771	679	640	5442
1.3.	Italy	885	1245	1198	1473	1246	1258	7305
1.4.	Holland	1155	1386	1821	1421	865	1131	7779
1.5.	Germany	5449	5788	5384	6335	4804	4329	32289
1.6.	Slovenia	0	1062	2343	2197	1454	1702	8758
1.7.	Switzerland	1389	1092	0	1295	962	983	5721
1.8.	U K	0	1138	1938	1657	1421	1853	8007
1.9.	Other countries	807	1782	4881	4116	3765	3482	18822
2.	Asia - total	28	77	214	723	280	134	1456
3.	Africa - total	34	43	39	29	79	25	249
4.	America - total	736	2459	4026	3082	2287	3203	15793
4.1.	Canada	8	976	1642	1149	530	934	5239
4.2.	USA	681	1321	2329	1874	1585	2193	9983
4.3.	Other countries	47	162	55	59	172	76	571
5.	Australia - total	28	970	1926	2032	727	809	6492
5.1.	Australia	20	959	1926	1959	590	726	6180
5.2.	New Zeland	8	11	0	73	137	83	312
	<b>TOTAL</b>	<b>12767</b>	<b>19489</b>	<b>26294</b>	<b>26425</b>	<b>20084</b>	<b>20894</b>	<b>125953</b>

HPT PI for period 1991 - 1996

**Table 5. Dynamics of letter income from abroad 1991 - 1996 (Data from Tab. 4.) chained index**

	continents	91	92	93	94	95	96
1.	Europe-total	100	133	126	102	81	100
1.1.	Austria	100	140	103	75	138	89
1.2.	France	100	83	104	72	88	94
1.3.	Italy	100	141	96	123	85	101
1.4.	Holland	100	120	131	78	61	131
1.5.	Germany	100	106	93	121	74	90
1.6.	Slovenia	100	!	221	94	66	117
1.7.	Switzerland	100	79	!	!	74	102
1.8.	U K	100	!	170	86	86	130
1.9.	Other countries	100	221	274	84	91	92
2.	Asia - total	100	275	278	338	39	48
3.	Africa - total	100	126	91	74	272	32
4.	America - total	100	334	164	77	74	140
4.1.	Canada	100	12200	168	70	46	176
4.2.	USA	100	194	176	80	85	138
4.3.	Other countries	100	345	34	107	292	44
5.	Australia - total	100	3464	199	106	36	111
5.1.	Australia	100	4795	201	102	30	123
5.2.	New Zeland	100	138	!	!	188	61
	TOTAL	100	153	135	100	76	104

Average growth rate for period 1991-1996 is 11,3%

## 2.2. Letter services income (import)

Data about the physical volume of incoming letter mail are presented in Table 4.

Analytical survey of its income (import) dynamics has been expressed in index numbers and presented in Table 5 (chained index).

The average growth rate of import traffic for the entire period was +11.3%.

The Table shows traffic reduction in 1995 for all the European countries, as well as continents, followed by a mild increase of postal services through 1996, also on all continents.

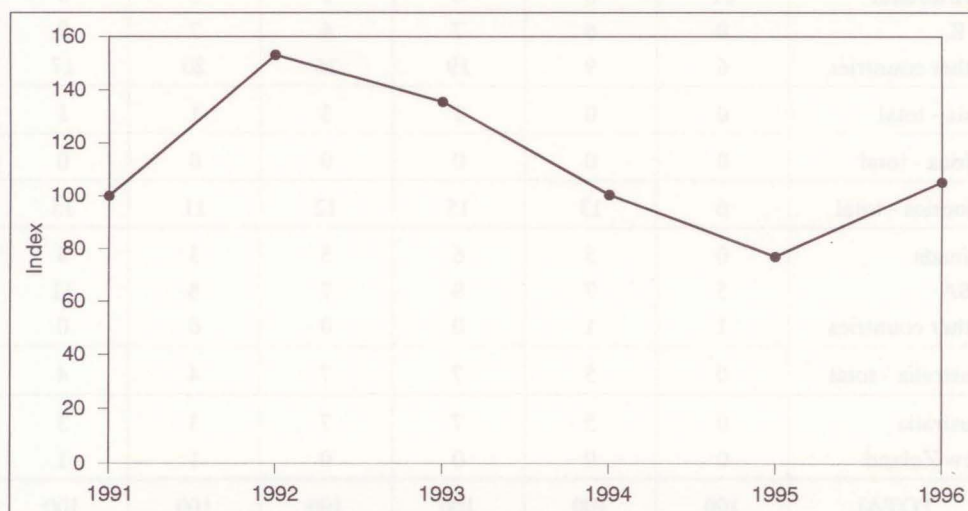


Figure 3 - Dynamics of imported letters from abroad 1991 - 1996

The unbalance over the observed years is keeping average values of export, which provides good basis for conducting a detailed research about the causes of this phenomenon.

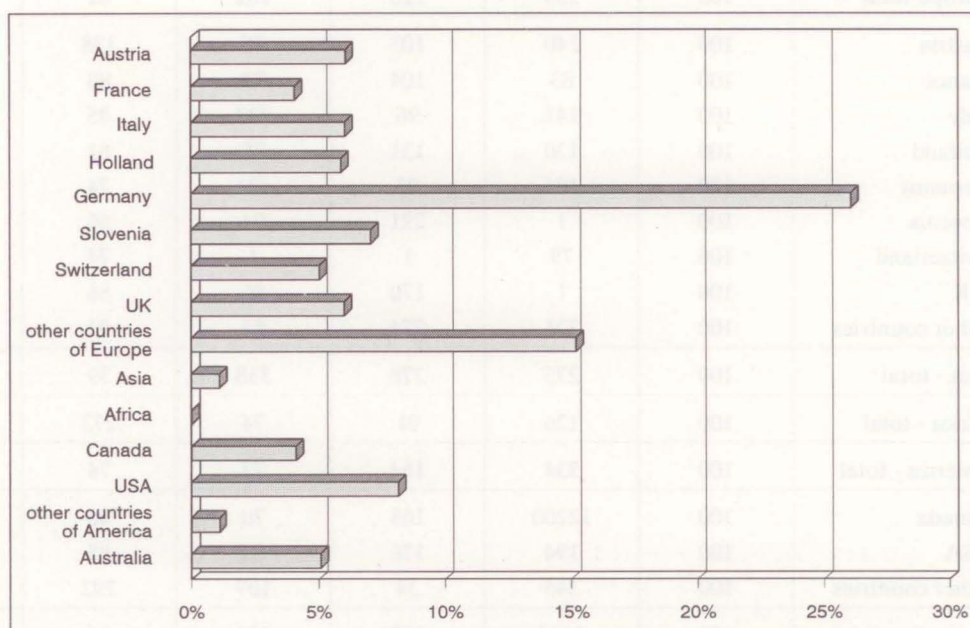


Figure 4 - Geographical structure of imported letters from abroad 1991 - 1996

Tab. 6. Geographical structure of letters from abroad 1991 - 1996 (%)

	continents	91	92	93	94	95	96	TOTAL
1.	Europe-total	94	82	77	78	84	80	81
1.1.	Austria	8	7	6	4	8	6	6
1.2.	France	10	5	4	3	3	3	4
1.3.	Italy	7	6	5	6	6	6	6
1.4.	Holland	9	7	7	5	4	5	6
1.5.	Germany	43	30	20	25	24	21	26
1.6.	Slovenia	0	6	9	8	7	8	7
1.7.	Switzerland	11	6	0	5	5	5	5
1.8.	UK	0	6	7	6	7	9	6
1.9.	Other countries	6	9	19	16	20	17	15
2.	Asia - total	0	0	1	3	1	1	1
3.	Africa - total	0	0	0	0	0	0	0
4.	America - total	6	13	15	12	11	15	13
4.1.	Canada	0	5	6	5	3	4	4
4.2.	USA	5	7	9	7	8	11	8
4.3.	Other countries	1	1	0	0	0	0	1
5.	Australia - total	0	5	7	7	4	4	5
5.1.	Australia	0	5	7	7	3	3	5
5.2.	New Zeland	0	0	0	0	1	1	0
	TOTAL	100	100	100	100	100	100	100

The graphical dynamics presentation of letter mail income in the international traffic is presented in Figure 3.

Within income (import) dynamics at the end of the last year, traffic has been marked by an index number 104, which confirms the traffic stagnation of import.

The geographical structure of the letter mail has been established through continents, but due to high European participation of 81% of the entire exchange with our country, its structure has been presented through countries (Table 6).

Graphical presentation of the importing letter mail geographical structure for the entire observed period has been presented in Figure 4.

Figure 4 also shows a very high European participation, with the dominating role of Germany concerning the income of letter mail in our country.

### 3. CONCLUSION

The elaborated material concerning Croatian letter exchange over the analysed period (1991-1996) leads to the following conclusions:

1. Letter traffic dynamics in both ways (dispatch - exporting and incoming - importing) proves the stagnation equally in both directions. Causes of stagnation have not been researched in detail, but it is most significant, according to information on international traffic activity (not explicitly presented and examined in this survey), that there has been simultaneous intensive increase and growth of contemporary automated telecommunication services group, which clearly points at a strong developing tendency of substituting among groups of postal and telecommunication services, usage of which is enabled by a very intensively expanded and technically modern design of telecommunication network.
2. Presentation of a wide geographical letter traffic circulation (Figure 2) indicates a very high level of participation of the European countries - 80% of the entire traffic.  
Figure 3 shows the highest proportion of Germany in letter exchange with our country.  
Therefore the European countries, and especially Germany represent our most significant postal partner in the world.
3. During the observed period (1991-1996) balance between import and export was 1:1.3 in favour of import, which in the entire international letter

traffic has a certain influence on positive international account or financial balance of these services.

It is concluded that the stagnation of international letter exchange has been caused by a tendency of substituting certain types of services under the conditions of fast spread and modernisation of telecommunication network.

Observed in that way, basically, the postal services are no longer competitive to the modern telecommunication services, as they were in the earlier days of the feeble telecommunications development.

Therefore, during the postal development, internal programs of rationing and adjustments especially in postal traffic, to the new technical and technological demands of time and market claims for suitable services are becoming imperative.

Undoubtedly, these facts will have a major role in the new structure of services.

Dynamics of changes is already visible through increasingly available telecommunication network towards the users.

Based on these knowledge continuing stagnation of postal services is to be expected.

#### SAŽETAK

#### ANALITIČKO ISTRAŽIVANJE MEĐUNARODNE RAZMJENE PISMOVNIH POŠILJAKA DRŽAVE HRVATSKE

1991. je prva poslovna godina Hrvatske pošte i telekomunikacija (HPT-a) u neovisnoj i samostalnoj državi Hrvatskoj.

Naime, javno poduzeće HPT - Hrvatska pošta i telekomunikacije osnovano je odlukom triju vijeća Sabora Republike Hrvatske, a 10. listopada 1990. godine. Ukazom je proglašen Zakon o osnivanju javnog hrvatskog poštanskog i telekomunikacijskog poduzeća.

U ovom radu je sistematizirana, analizirana te ocijenjena međunarodna razmjena pismovnih pošiljaka države Hrvatske sa svijetom u vremenskom razdoblju 1991-1996. godine.

Na temelju analitičkih pokazatelja zaključuje se o snazi, smjeru i značajkama nastalih promjena u dinamici i strukturi pismovnih pošiljaka države Hrvatske sa svijetom.

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