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Innovation & Markets



Smart & Collaborative

the last mile reinvented

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Dates

PostalPitch™ Start-up Day

October 9, 2018 in Hamburg, Germany at Post-Expo

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the Postal Innovation Platform (PIP) is a unique open platform and forum that focuses on innovative postal services and studies the future of the postal industry with a solution oriented approach. It provides a conference, think tank and research platform that is unique in the postal world and shall ease the implementation of new and innovative postal business solutions.

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Editorial

by Bernhard Bukovc

In our times, which are so much influenced and characterized by new trends and developments, we easily fall into the trap of using new terms or taking approaches that everybody talks about, without reflecting on their meaning or questioning their relevance. Just take the example of "smart city" concepts. This term is widely used, more or less for any innovation in the area of large urban centers. This not only doesn't make any sense, it's also counterproductive. Prof. Finger is thus critically analyzing the meaning of "smart city", putting it in a wider context and visualizing its scope as well as the opportunities. This is the first part of our "smart city" analysis, to be continued in our next newsletter with a deeper look into use cases and opportunities for the postal and logistics sector.

Lately, collaborative models for the last mile are widely discussed, and we can be quite sure that the level of this discussion will increase. The last mile in large urban centers is a huge challenge, with traffic jams, new regulations enacted by some cities with city center entry restrictions etc. Sooner or later, for business reasons or forced by public rules and regulations such collaborative models will become natural for the last mile. It seems to be logical to look at other network industries to find out what we can learn from them. But can we learn anything from them at all, or is our postal/logistics/supply chain business too different to make comparisons? Adam Houck and myself have analyzed this question and in his article he provides some answers.

While everybody always reiterates how important it is to be a forerunner in new technologies there is another important point as well. Being an early adopter of new technologies may be crucial, in particular if new technologies can provide new services customers ask for or help to reduce costs. But it can also be a good approach to be a fast follower. Accelerated innovation is the terminology that defines how it can be done, and if you want to learn more about it Paola Piscioneri's and Jessica Raines' article will give you the answers and guidelines for an "assembly line of innovation".

Andrew Butcher of Carnegie Mellon University analyzes the question whether there are opportunities to use postal facilities in order to increase community resilience. This is an increasingly important area of activity and research as posts traditionally own many facilities, very often well embedded in the local infrastructure.

The advantages of the "science of where" are analyzed by Rodney Conger of Esri who shares insights into GIS and the opportunities for the postal and logistics sector. Read about how postal and logistics companies can benefit from new technologies and why it is essential to build an optimal network design.

And, as always, we take a close look at the start-up landscape.

Have you ever asked yourself why it is possible that an email can follow you to the place wherever you are, but the goods you order on the internet will go to a specific address and will not find you at your actual location? Well, there is a solution. Check out Ship2MyID, a start-up that makes addresses "portable" so that parcels can follow people.

In our last article we will learn about Marketo, an early stage start-up with the aim to generate additional revenue through the provision of new services on the last mile.

Finally, mark in your calendars the dates of Post-Expo, October 9-11 in Hamburg. The Postal Innovation Platform and PostalPitch will organize on October 9th a start-up day with alternating pitching sessions and panel discussions. Check out on the last page of this newsletter our call for submissions.

Enjoy reading our PI Newsletter !



Smart city – hype and/or reality?

Matthias Finger *

In this article, I would like to discuss the recent enthusiasm for the concept of “smart city”. In particular, I would like to know whether this concept does have any substance, and, if it has, which substance exactly. Ultimately, I want to know whether the concept of smart city can be of any use, and, if so, for whom. If not, what would be required in order for “smart city” to become a useful concept.

This article is structured as follows: I will first highlight the hype about the concept of smart city, as well as the ensuing confusion around the concept. I will then try to identify the actors behind the concept of smart city, which is indeed a first step to examine, in a second part, whether the concept is capable of providing some useful substance. In a third part, I will offer my own analysis of what smart cities are all about and what would be needed for them to become a useful reality. In conclusion, I will discuss the application of the concept to the postal sector.

Hype and confusion

As of 2012, publications about smart cities started to explode, as can be seen from the below figure:

if one starts too look at the content of this literature, only to observe that most of it is not only identical, i.e., copied from one another, but also mostly promotional, celebrating the beneficial virtues of smart cities, not only for cities (obviously), but also for economic growth, environmental protection, human wellbeing and humanity more generally. Not astonishingly, critical article about smart cities are very hard to come by.

Quite logically, this leads to a big confusion, fueled by a proliferation of related concepts. Some of this conceptual innovation is simply due to the fact that authors must exist and thus must come up with new words so as to differentiate themselves in this increasingly crowded semantic space. But a more profound reason also has to do with the fact that authors of such articles come from different disciplinary backgrounds and therefore seek to highlight different features of what they think smart cities are. The following table gives an overview of the various perspectives on smart cities and corresponding conceptual innovations.

Numbers of Work on "Smart City"

Searching results within certain periods (annual) from GS (including patents and citations) and G with the keyword "smart city" OR "smart cities" OR "smart urban" OR "smart urbanization"

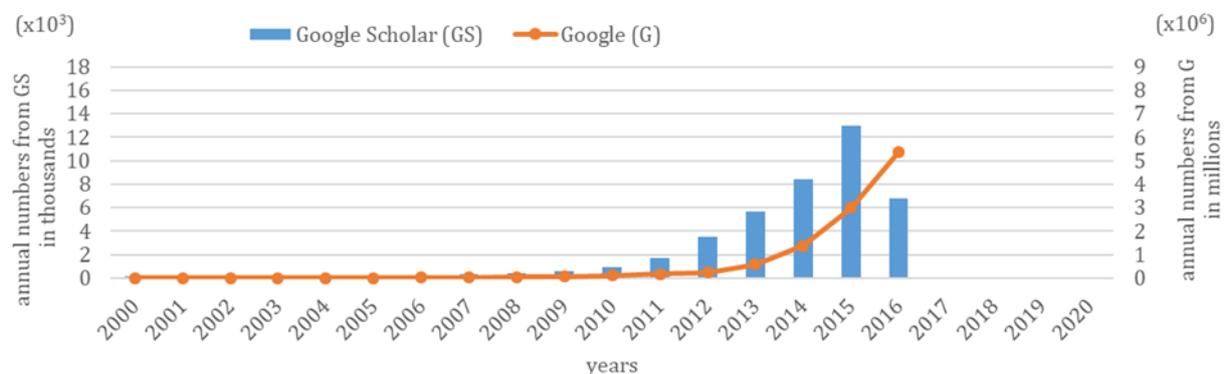


Figure No.1: exponential growth of smart city literature

This exponential growth of articles and books about smart cities in both academia and the trade literature in itself already points to a hype. This is even more the case

* Full Professor Management of Network Industries, EPFL

Table No.1: disciplinary perspectives on smart cities and related concepts

Disciplinary perspectives on smart cities	Related concepts
<u>Engineers'</u> perspective: omnipresence of network infrastructures, in particular digital infrastructures and digital technologies more generally	Digital city Ubiquitous city Wired city
<u>Economists'</u> perspective: business-led urban economic development, mainly due to (private) entrepreneurship and business intelligence	Entrepreneurial city Intelligent city
<u>Innovation economists'</u> perspective: urban development focused on high-tech and creative (art and design) industries (smart specialization, i.e., specialization on smart technologies)	Innovative city Smart growth city Creative city
<u>Public managers'</u> perspective: innovation in the way cities are governed, namely thanks to the ICTs (e.g., e-government)	Learning city Knowledge city
<u>Sociologists'</u> (and to a certain degree architects') perspective: community-building (and sharing) thanks to the ICTs	Sharing cities
<u>Human ecologists'</u> perspective: cities as a place of collective living based on human and ecological values, somewhat enhanced thanks to the ICTs	Humane city Sustainable city

Source: author

As one can see from the above table, there is clearly a confusion of concepts, not to mention the promotional dimension of these concepts, as all of them have positive connotations. This confusion, in turn, is due to the fact that authors from various disciplines try to jump on the smart city bandwagon, without really understanding the underlying technological evolution, that has made a certain "smartness" possible.

Reality of smart cities

But, smart city is not only a concept. There are indeed some practices associated with it, even though these practices are far from what the concept – and its different variation (see table 1 above) – promises. As of today, we can identify the following practices, which all come under the "smart city" label:

Smart transportation covers a series of smart city practices or rather applications, such as integrated electronic timetables or (more or less integrated) electronic ticketing.

Smart environment typically pertains to the monitoring of urban environmental conditions, thanks to sensors and other measuring devices.

Smart energy mainly refers to smart meters and the monitoring of electricity consumption, but one can also mention in this context smart street-lights.

Smart water basically means the same in the area of water and sometimes wastewater.

Smart building encompasses both above to designate buildings that monitor their own state along a set of parameters (consumption, states, etc.).

Smart safety and security designate basically surveillance devices (notably cameras) that monitor people and movement throughout a city.

Smart health care, sometimes also called e-health, pertains to the digitalization of health care services, such as diagnostics via the internet, but also a more efficient management of the highly fragmented health care systems.

Smart government/city-services, also called e-government, refers to the digitalization of the traditional paper-based government services, ultimately aiming at a purely digitalized interaction between the citizens and the public authorities.

Smart participation is broader than simply e-voting (which would be one of the smart government services), as it encompasses more innovative interactions between the citizens and the various public, but also private entities.

Connectivity, finally, is often mentioned in the context of smart cities, but basically means equipping cities with (tele-)communications infrastructures, be they wired or wireless.

All these practices are introduced in a very piecemeal fashion, owing to the fact that they are generally promoted by some of the city's administrative units without coordination with other units. Needless to say that there is typically no coordination among the different vendors of the various smart city technologies, let alone standards that would allow for an integrated approach to smart cities.

There is generally also a problem of metropolitan governance, given that metropolitan areas are composed of several cities, which are political entities of their own and typically do not coordinate among themselves, be it in matters of smart city, nor in any other matter.

In short, the introduction of smart city practices and corresponding applications is generally driven by vendors who are themselves specialized in certain technologies and solutions. The most widespread such vendors in the smart city arena are devices producers, such as in the area of sensors, meters, but also smart phones and others more. One can also find, in the smart city arena, telecom operators, for whom smart cities constitute an opportunity to install connectivity. Finally, the third type of vendors in the smart city arena are data integrators, data management and data analytics firms, typically offering more integrated services and solutions to citizens, but mostly to city governments.

It is therefore only logical, given the vendor-drivenness of smart city solutions, that the concept is before all a promotional one. This leads to the fact that even the smallest application – such as for example smart street lighting – is equated with a city now having become smart. And city governments and mayors go along with this, as such urban labelling contributes to the city's self-promotion.

In conclusion, we may say that there are indeed, in many cities around the world, bits and pieces of smart city practices, but these rarely warrant a city to be labelled a smart city, and even less so to be a smart city.

Analysis

Nevertheless, these practices, albeit piecemeal and uncoordinated, are real. As such, they point to an underlying movement of growing digitalization of the cities. Yet, such digitalization requires at least three elements so as to lead to smartness, namely, first, the generation of data (from all sorts of devices), secondly, the interconnection and exchange of these data (thanks to telecommunications infrastructures and the internet) and, thirdly, the analysis of the so generated and interconnected data (thanks to ever more sophisticated algorithms). Yet, vendors generally only provide one of these elements, and then, often, only for one of the sectors, such as energy or transport.

However, if combined intelligently in so-called “digital platforms”, these three dimensions of digitalization, integrating furthermore the different sectors, smart cities would have a huge potential, as illustrated by the figure below.

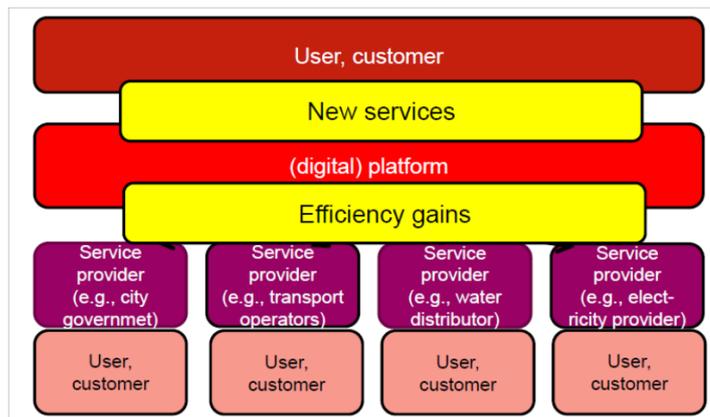


Figure No. 2: the potential of digitalization for cities (Source: author)

In particular, digital platforms, i.e., smart cities have, in our view, mainly two such potentials:

First, smart cities clearly have the potential of creating huge efficiency gains in and even across the various infrastructures. These gains are basically due to much more efficient coordination among the various actors involved in the provision of the respective services, be this in transportation, health care, energy, etc. This leads to reduced costs, as well as to less waste and therefore also to a more efficient resources use, something which can be seen as a contribution to sustainability.

Secondly, smart cities – in particular thanks to digital platforms – also have the potential to develop much more integrated services tailored to (individual) customers’ needs. This precisely results from the power of these digital platforms, which are capable to much better match supply and demand. On the other hand, such digital platforms also display a strong tendency, thanks to their indirect network effects, towards monopolization.

In other words, digitalization indeed does have a huge potential for both efficiency and improved services, and this is what, realistically, smart cities are or rather could be about.

However, in order for this potential to be unlocked several institutional conditions need to be created, something which the technology- and especially vendor-driven discourse about smart cities ignores or at least downplays. On the one hand, many of the technologically possible efficiency gains can only be brought to fruition if data are made available and exchanged, standards are defined and enforced, as well privacy and data security is guaranteed, all of which requires strong regulations and thus political will, vision and leadership, not to mention political coordination at the metropolitan level and beyond. On the other hand, the danger of digital platforms becoming powerful monopolies, interested in making money rather than in serving the urban public good, is more than real. This also requires strong regulatory institutions and therefore again political will, vision and leadership at all levels. To conclude, there is indeed a huge potential for digitalization to create smart cities, but the road to harnessing this potential is still long.

Application to the postal sector: smart city logistics

What does this all mean for the postal sector, i.e., what could be the potential of digitalization and the smart city movement for postal operators? In order to answer this question, one must recall that one of the main, if not the most important challenge cities face today pertains to traffic and ensuing congestion. Cargo being an important source of urban transport and congestion, digitalization clearly has the potential to make city logistics much more efficient (and thus less polluting), thanks to better coordinating the various operations and operators, as well as thanks to offering more integrated and more services-centered logistics to the various customers. But again, digital technologies are only one piece of the puzzle, the other, more difficult one being regulations and institutional arrangements – for example by restring urban freight transport – conducive to make optimal use of such digitalization. I will come back to the opportunities digitalization offers to postal operators in one of the next newsletters.

Why Lessons from Other Network Industries Fall Short in the Last Mile

Adam Houck*

Set against the backdrop of a global postal industry that has experienced significant letter volume declines, questions of viability, and vast physical infrastructures underutilized as a result of those declines, we are faced with key questions. Are there any lessons to be applied from cooperative models in other network industries to better understand whether posts have an opportunity to collaborate within last mile ecosystems even though the competitive environments and networks themselves are wholly different from other networks who have adopted such approaches?

The nuclear arms-like race for retailers to build and acquire warehousing and last mile delivery capabilities continues to reshape not only the e-commerce landscape, but the way citizens engage with the digital world. Target's acquisition of Shipt for \$550M, Walmart acquiring Parcel and Jet.com, and Amazon purchasing Whole Foods has confirmed at least for the time being markets are moving in a clear direction. Re-urbanization, changing demographics, new e-commerce fulfillment models, evolving customer expectations, and growing infrastructures are making the world bigger; simultaneously, technology ubiquity and enablement, the growth of intermediaries, drone delivery, Uber parcel delivery, infrastructure sharing, and strategic partnerships are making the world much smaller. Set against the backdrop of a global postal industry that has experienced significant letter volume declines, questions of viability, and vast physical infrastructures underutilized as a result of those declines, we are faced with key questions. Should asset heavy incumbents like the posts partner to increase delivery volume density in the last mile? Are posts even positioned to capitalize on the opportunities of the last mile ecosystem? Do new intermediaries move too quickly for posts to be good partners? Among myriad considerations, perhaps the most elemental question remains: are there any lessons to be applied from cooperative models in other network industries to better understand whether posts have an opportunity to collaborate within last mile ecosystems even though the competitive environments and networks them-

selves are wholly different from other networks who have adopted such approaches?

While traditional letter markets exhibit the classic attributes of network industries, parcel networks are quite different. In other network industries such as energy, cables and pipes create fixed network costs which create economies of scale and barriers to entry. Coupled with vast mail processing infrastructures, monopoly protection and a USO, postal letter markets behave in a similar fashion.

In other network industries one finds several incentives for partnering. One significant incentive is avoiding network duplication and market access: it is cost prohibitive to duplicate the required infrastructure. Through sharing, these costs can be avoided and it can indeed be beneficial to the one who invested in the infrastructure that already exists. For example, in the telecom industry, network sharing is becoming standard practice, especially with the move to 5G networks to speed deployment and improve quality across passive and active network equipment.

For parcels the story is quite different, especially when considering the last mile. In many countries, no USO exists. The competition for parcel delivery is fierce, unlike the monopolies that protected firms in the energy, telecommunications, and airline industries. New competitors frequently arise, delivery intermediaries such as Uber, Lyft, and Deliv appear, and the very notion of what constitutes a delivery agent is evolving.

Note: The following contains excerpts from an upcoming thought leadership piece co-authored with Bernhard Bukovc

* Senior Manager and IBM Academy of Technology Member
IBM Strategy and Analytics

Therefore, while parcel supply chains might resemble letter networks for long-haul transportation, the first and last miles differ significantly. As a result, one must question that as posts no longer hold a monopoly on trust in parcel delivery and agile business startups continue to experiment with new delivery models, have posts missed the swell and must paddle back into the lineup to try and catch the next wave?

If we cannot directly apply lessons from other network industries, what is the best strategy to determine the options posts have and the choices they should consider? For simplicity, we might quickly consider two scenarios: one where ex ante regulation might require a single last mile delivery provider to operate, and one where market forces determine an equilibrium notwithstanding explicit regulation.

In the former, one can imagine smarter city models where local authorities might only allow one last mile delivery company to operate in the market. This is quite likely in large urban centers with significant traffic and pollution such as Germany and France, where restrictions on diesel vehicles already determine whether it can enter the city. Several cities, such as London and Singapore, have already enacted measures and it is a very short walk until such limitations are applied to parcel delivery. Are posts the best choice as the delivery provider who possesses the infrastructure, scale, and trust to succeed in this regulated environment? Even if the immediate answer is 'yes, of course, posts have been fulfilling these duties for decades, if not centuries', several important challenges still need to be addressed.

I won't go through an exhaustive list of the challenges; rather I want to focus on only one: intra-day network flexibility. Same-day delivery and ship from store models require the network to flex to handle peak load delivery volumes in near real-time. They are not characterized by static routes. As many posts still do not operate separate parcel and letter delivery networks, this flexibility does not currently exist, even if the scale does indeed exist. Posts will have to partner to acquire this flexi-

bility to meet the high demands of today's customers. One must also consider if these significant actions are even in the DNA of such posts and whether such regulation will immediately set them up for failure. The risk and implications of such failure is significant as it will directly impact the customer experience for delivery. As several studies have confirmed, poor delivery performance impacts the retailer's brand more than the delivery provider's brand which means this is far from simplistic.

When I consider the scenario of market forces determining an outcome, my crystal ball gets quite foggy and I have more questions than answers. Can posts utilize their trusted brand status to enable new business model development in local ecosystems of commerce? Can the excess infrastructure capacity, from citizen vehicles to commercial delivery to postal vehicles, be used to accelerate new delivery model experimentation? Can this all be built upon the foundation of a reverse auction model where retailers, consumers, and posts could all benefit, with posts helping to turn the existing paradigm on its head? I still do believe posts possess distinct competitive advantages they can utilize to play the role of primary facilitators of the first and last mile in nearly every densely populated geography. However, it is not going to be easy.

We all must look further to understand what lessons, if any, from other network industries can be applied to the postal sector in a variety of regulatory frameworks. We must identify how potential actions will affect postal stakeholders, new entrants, technology firms, and intermediaries.

I still believe collaborative last mile models are the future in the postal industry and the elemental questions have yet to be answered, which make it such a compelling time. Before any regulation is enacted, posts must still decide whether to lead from the front, play the role of silent partner, simply contribute the excess capacity in last mile delivery vehicles through cooperative models, or lend their trusted status to technology platforms created by business partners. There is still much to be done.

When Fast Following is Too Slow: A Look at Accelerated Innovation

Jessica Raines & Paola Piscioneri *

When it comes to ideas, you're either first or a follower. In a world where innovation is synonymous with novelty, "follower" can seem like a dirty word. But being first doesn't mean that you are the best. The winner of a race is not determined by who was the first out of the gate – you have to be the first across the finish line.

The finish line is often determined by product quality and market share. Companies with a focus on being first often sacrifice quality in favor of speed. Research shows that “firsts” have a high fail rate and often do not capture substantial market share. Those who take a good idea and run with it, and improve upon it, may be the ones with the competitive advantage. They can benefit by learning from the first’s mistakes, and spend more time on product improvement. This is the principle of fast follower innovation.

However, the digital age may have brought about the end of the age of the fast follower. At Postal Vision 2020, held April 4 and 5 in Arlington, VA just outside Washington DC, John Hagert from Deloitte spoke about how there are no fast followers in digital innovation. Given the pace of change, the time it takes to proof and perfect a concept, especially once the idea is already public, takes too long – no one can be fast enough. So, if being first isn't sufficient, and fast following no longer works, what options are there? Enter accelerated innovation.

What is Accelerated Innovation?

Accelerated innovation is a solution predominantly developed by Chinese firms in order to innovate quickly — and cost effectively — under innovation-stifling organizational, financial, and regulatory constraints that are similar to those faced by postal operators. The approach is typified by three distinctive characteristics:

1. Simultaneous engineering: initial R&D and ongoing product development, phases that were traditionally handled sequentially, are

conducted at the same time. This allows products to be developed faster and in direct response to customer feedback. Moving quickly to market is preferred over product perfection, and companies produce many products at once in hopes that at least one will capture consumers' interest.

2. Rapid “launch – test – improve” development: concepts are brought to market quickly in a “functional-but-limited” form. The public’s reaction to these initial product offerings determines where additional development resources are allocated, with consumer feedback incorporated into each rapidly-released product iteration.
3. Task team management: typified by a loose horizontal structure of small teams, each focused on the completion of a small piece or step in the development of a product, that are led by a strong top-down project manager. The small task team structure speeds up the process while leveraging internal knowledge and ideas, distributing the workload, dispersing accountability, and creating an efficient and collaborative work environment.

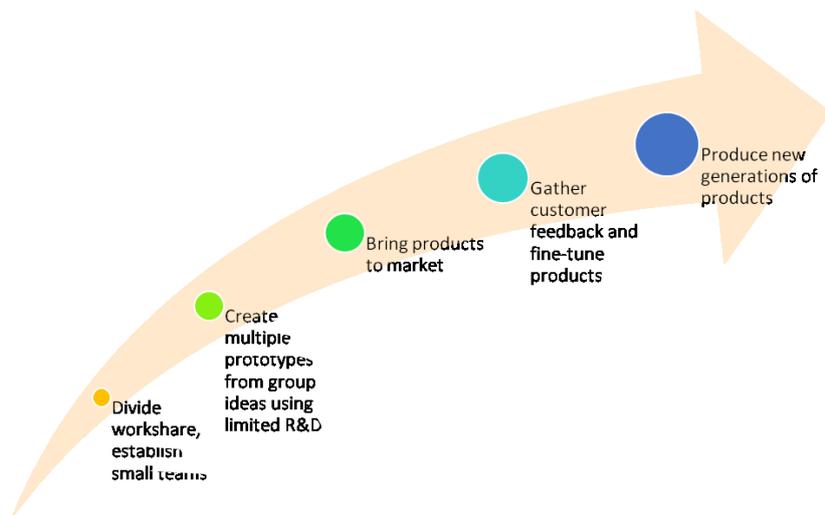
By combining these three principles, companies can create what is essentially an assembly line of innovation. Employees, who are each responsible for a small piece of the puzzle, can get products into customers' hands quickly and set up a real-world market test to spur further product development, improvement, and innovation.

* U.S. Postal Service Office of Inspector General Risk Analysis Research Center (USPS OIG)

The Complete Accelerated Innovation Process

The entire process of accelerated innovation, which is repeated to continually improve and develop products, is summarized in the figure below.

Figure 1



Involving the Customer in the Innovation Process

Underlying the principles of accelerated innovation is the greater role played directly by customers in innovating and developing products. After releasing the product, or several products at once, information is gathered from customers to determine what changes need to be made or issues need to be fixed in order to produce the next generation of the product. By performing a real-life market test, firms using accelerated innovation practices divert finances and time from R&D to improving the product to meet customer specifications based on crowdsourcing and other inputs. Although this may lead to various product iterations, crowdsourcing in this way allows companies to be more flexible and use the money saved on initial R&D to directly respond to customer needs and desires. Taking consumers' opinions into account can, in turn, increase their brand loyalty.

In this model, rather than product launch being the end goal, it is both an end (an idea coming to fruition) and a beginning (of a continuous improvement process). This idea was a focus of the keynote talk at Postal Vision, given by Paul Misener of Amazon. Misener said that Amazon innovates the same way today as it did when it was a small company

mostly operating out of Jeff Bezos' garage. Chief among the company's innovation principles include a relentless focus on the customer, a keen intuition about how to exceed customer expectations, and a willingness to experiment and even fail sometimes. Amazon has a history of launching a product or service on a small scale and perfecting it as they go.

If it does not work, the failure is small (e.g. Amazon's Fire Phone).

Potential Pitfalls of Accelerated Innovation

Although the strategy of accelerated innovation offers many opportunities to better use internal knowledge and meet customer expectations, it's important to note the potential pitfalls:

- Inflexibility caused by over-reliance on a few senior executives to set goals and make decisions with not enough judgement allocated to the task teams;
- The customer base could become fragmented due to a flooding of the market with too many product options;
- Initial inferior versions of products could lead to customer frustration and a damaged reputation;
- Poor communication between the technical and commercial sides of the business may result if goals and plans aren't shared across units;
- The release of an initial product to market with the expectation of future alterations could lead to loss of intellectual property, if not secured and protected, as competitors gain access to innovation; and
- Multiple product iterations could lead to more overall R&D being spent than under a conventional approach.

Keeping these potential drawbacks in mind is incredibly important as awareness allows a company to more effectively weigh the costs and benefits of accelerated innovation and implement the best strategy, addressing some of these concerns before they happen.

Accelerated Innovation and Posts

Some postal operators already seem to be trying accelerated innovation. Karlijn Krol, of PostNL (Netherlands) described their innovation process at the recent PIP/U.S. Postal Service Office of Inspector General event “The Future of Location and Last Mile Delivery” held on April 3. Working with the end user, PostNL validates ideas and determines customers’ willingness to pay for new products and services all within a short time span of 100 days. Innovation efforts also have a low budget, which Krol said was a blessing because it forces the company to be strategic and allows it to fail as cheaply as possible – failure only costs, at most, 100 days and 10,000 euros.

As competition increases, particularly in the package business, posts must become more nimble in developing new processes, products, and services, while continuing to protect their core business. Posts would be well-served by following a path similar to that of PostNL. This need for better innovation is, of course, no secret unknown to postal executives. USPS Postmaster General Megan Brennan declared “we will speed the pace of innovation,” when she assumed her role in 2015.¹

The intervening years have seen an increasing focus on innovation. The U.S., the Postal Service has pilot projects designed to test new delivery offerings such as same day and grocery delivery and new tools like informed delivery to better meet the digital and mobile expectations of our customers. Recent iterations of postal reform have included the creation of a Chief Innovation Officer to oversee the development and implementation of a strategy to create innovative postal and nonpostal services. The USPS’ size, well-ingrained corporate culture, funding structure, and bureaucratic constraints, however, hinder developing and implementing innovations quickly. This gives an advantage to the innovative startups that are dramatically transforming the market.

Postal operators can benefit from working with startups directly, and many of them do. Swiss Post, DHL and USPS all partner Plug and Play, an innovation platform that connects large companies to startups. Australia Post Accelerate acts as an incubator for small companies in the ecommerce, trust, and social inclusion sectors to grow and scale. For over fifteen years, La Poste has promoted open innovation and provided venture capital to startups, particularly in support of French Tech initiatives.

In a market that is moving increasingly quickly, especially as new competitors push for faster, cheaper, and more convenient delivery, partnering with startups and innovating through acquisitions might not be enough. It is certainly not the only way. While startups are often more nimble than large organizations, they do not by definition necessarily employ the principles of accelerated innovation and, once they expand, they tend to experience the same innovation hurdles as large organizations. It is important that posts develop their own internal innovation processes. Embracing an accelerated innovation model is an option worth consideration.

Related reading

<https://hbr.org/2012/06/first-mover-or-fast-follower>

<https://www.economist.com/node/21554500>

<https://www.forbes.com/sites/avaseave/2014/10/14/fast-followers-not-first-movers-are-the-real-winners/#7516de9314cc>

<https://sloanreview.mit.edu/article/accelerated-innovation-the-new-challenge-from-china/>

¹ Letter from Megan J. Brennan, Postmaster General and CEO of USPS, February 2015, http://about.usps.com/news/national-releases/2015/pr15_009pmgltr.htm.

Adapting Postal Facilities to Increase Community Resilience

Andrew Butcher *

Next time you go outside, try not to notice the physical presence of the Postal Service. Try not to notice mail boxes, post offices, mail trucks or mail carriers. Just try. If you live in any kind of urban area it is almost impossible. The Postal Service is everywhere (they aren't following you I promise). It is so ubiquitous it is almost invisible. But once you take note – it is astounding how this singular entity is present and pervasive in all aspects of our life.

Occupying over 35,000 facilities, the United States Postal Service controls over 200 Million sq ft of strategically located real estate throughout the country (It is also the most federally controlled real estate of any agency second only to The Department of Defense). From these facilities a fleet of over 300,000 vehicles navigate our streets and over 600,000 mail carriers and postal workers traverse our neighborhoods, handle our mail and deliver our packages. It is the only entity that visits every neighborhood in every town, almost every day. What's more is that postal facilities (post offices, distribution centers, services stations, etc) have a unique disposition policy – even mandate - to be located in proximity to where people live.

Yet despite that physical presence – there is little-to-no coordination and linkage of postal facilities and the distribution network with local government or communities. Even more surprising is how few communities seek to engage the postal service to align with local real estate, economic development or even public health initiatives. Again – the resource is so prolific it is almost invisible. Perhaps the only exception is when a post office is threatened to close or scale back hours.

Amidst rapid gentrification of urban areas, concerns of displacement of vulnerable populations, and increasingly isolated rural areas combined with the accelerated evolution of the ecommerce, parcel and logistics sectors, this disconnect between

postal services and places is especially surprising. In part because the Postal Service represents an unrivaled platform that could be leveraged to provide communities with what they need in the form of not just access to information, but even energy, food, social connection, and access to health services – all while not disrupting the fundamental charge of the postal service or the sanctity of mail.

The Rand Corp [defines community resilience](#) as “a measure of the sustained ability of a community to utilize available resources to respond to, withstand, and recover from adverse situations.” What are postal facilities if not perfectly designed, located and operated to serve this very relevant and critical function?

The time is right to investigate this opportunity. Starting in 2018 [The Heinz College of Public Policy and Information Systems](#) and [The Metro21 Smart Cities Institute](#) at Carnegie Mellon University in Pittsburgh, PA initiated a dedicated feasibility assessment to explore this linkage and potential opportunity. The scope of the effort is to evaluate how (and where) postal facilities and networks can be adapted to increase community resilience. Even further we seek to outline a pilot strategy utilizing the City of Pittsburgh as a living lab to leverage the city's [Resilience Plan](#) and robust community development system to apply the range of technological expertise brimming from Carnegie Mellon University.

* Andrew Butcher, is Executive Fellow at The Heinz College and the Metro21 Smart Cities Institute at Carnegie Mellon University. He helps communities around the country transition underutilized resources into platforms for community resilience and environmental justice. He is an internationally recognized social entrepreneur and resides in Portland, Maine. [Connect here.](#)

The effort kicked off in January with research and analysis of the concept by six graduate students who have benchmarked best practices, mapped postal facilities, and established a methodology to generate appropriate solutions for enhanced facility operations. [See updated research and findings on the project team's website here.](#) While fundamental constraints exist relevant to policy and practice with the USPS - the team has honed opportunities that support food banks, promote community wireless internet, expand renewable energy generation, and help collect environmental data such as air quality and infrastructure integrity.

In April 2018 - the team designed, organized and co-hosted a focus group and workshop with a network of postal real estate experts to define parameters and generate building blocks for a vision of what could happen at postal facilities. In collaboration with The Postal Innovation Platform and [The Schar School of Public Policy at George Mason](#) participants included multiple departments from USPS, The Office of the Inspector General, postal real estate experts, government accountants, postal logistics experts, academics, mail industry as well as labor representatives.

This multi-stakeholder approach to vision creation is just step one of a necessary process to bridge a divide between postal systems and place based economic development. The next step will seek to convene place based partners and postal system experts to co-design solutions and even specific pilot projects at specific locations. Starting in June 2018, the project team will begin organizing a gathering to craft possible projects, collaborations and

aspirations in a first of its kind "*Places and Posts Forum in the fall of 2018.*" Stay posted [here](#).

Utilizing input grounded in policy, data, viable enterprise strategies, and community need – the Carnegie Mellon team will craft a series of pilot project concepts to trial utilizing the City of Pittsburgh and postal locations therein as a testing ground for new concepts, solutions, partnerships, and processes that could be adapted at targeted locations throughout the country.

Now that you see the postal system at work all around - the time is right to join us in thinking about what else can be woven into the fabric of what will continue to be the next frontier of commerce and connected communities.

Please be in touch: AButcher@andrew.cmu.edu

The Science of Where Interview with Rodney Conger, Esri *

Interview conducted by Bernhard Bukovc, PIP

At the "future of location" workshop, jointly organized by the Postal Innovation Platform and the U.S. Postal Service Office of Inspector General on April 3 you talked about "the science of where". Location technology and solutions have considerably advanced over the past years. Can you briefly explain what those technologies today are capable of and what the opportunities for the postal and logistics sector are?

At the PIP/OIG forum, my message was around the "confidence of where", which has to do with being able to quantify the confidence you have in location. How comfortable are you when you send a courier out to do work at a specific location, that you know exactly where you are sending that person? The cost of being a little wrong to being a lot wrong can be huge for an organization that gets paid based on their time commitments. This is where technology can help with newly-realized methodologies for collecting massive amounts of GPS location data and machine learning to be able to process that data into predictive and prescriptive models.

Do postal operators and logistics companies grasp the opportunities of those new technologies and solutions?

They all seem to have some grasp, but seem to be having trouble prioritizing how to best use new technology and approaches. These organizations all seem to face a velocity problem as well. That is, there is rarely time to reflect, analyze what you could have done better in certain situations, and then improve. The conditions in which these organizations operate change too quickly.

In which areas does the logistics sector use location solutions, but what other areas of applications are there which could be useful for them?

Let's break this down by use cases then have a more detailed conversation about it. It might help to think about solutions in terms of where they fit in the planning and operating parts of an organization. Starting at the top with that model, it's strategic planning. Working your way all the way down to the bottom, it's tactical decisions. We are finding that these use cases are where organizations make or lose money at large scales. Strategic planning for logistics often has a component in network design, which equates to a governing model for how freight moves through the network. A suboptimal network design cannot be compensated for by an optimal last mile P&D plan. That's not to say that P&D does not contribute to operational effectiveness; the degree to which it contributes varies from company to company, but those are details for another day within a more holistic discussion topic of operational and tactical use of GIS. Back to the topic of strategic planning and network design, a good place to start with GIS analysis is simple visualization. Without GIS, many organizations don't have methodologies for seeing – all in one place – how their whole network functions under different conditions, how freight moves from location to location, at what intervals?, where does sorting happen?, where is freight consolidated?, is freight traveling unnecessarily away from logical paths between locations? Once this visualization is made available in a map context, suboptimal patterns, network weaknesses, and risks start to become apparent. Beyond such visualizations, adjustments, optimizations, and what-if analysis can then follow. The first step in the workflow is probably understanding though.

* Technical Advisor, Esri

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Can you give an example of a successful use case in the logistics industry?

The USPS maintains Prohibitive Mail Narcotics (PMN) database. In addition to the traditional illegal drugs, they also treat bulk cash shipments as an illegal item that may not be shipped through the Postal network. This has become an issue in states where Marijuana has been legalized. Because Marijuana remains illegal at a federal level, the financial services industry does not do any work with this Industry for fear of running afoul of federal banking / drug financing laws. So practically speaking what this means is that the marijuana industry is run on cash. Payroll is paid by cash, rent and utility bills paid by cash, etc. There was a use case recently where a Marijuana dispensary in Alaska attempted to mail a bulk shipment to Anchorage to pay their income taxes. This shipment was seized by the US Postal Service. Analysis to identify and intercept packages that potentially contain prohibited items is supported by GIS through spatial proximity of known locations of shippers and receivers and the combinations those origins and destinations. Analysis is also supported through map visualization of shipment over time. This is an example of how postal organizations use geographic information and GIS for safety, fraud, and security analysis.

Last year, Esri together with the Postal Innovation Platform organized a GIS summit which was very successful. This year there will be a follow up event. Can you provide some information on this upcoming event?

Indeed, at our GIS Postal & Logistics Summit last year in Helsinki it became clear that there is a tre-

mendous need in the logistics services sector to better use the power of location intelligence. Postal and logistics companies are starting to realize that most of the data they have in house has a location component, such as their logistics hubs, their warehouses, their retail locations, their lockers, pick up points etc. By adding the spatial component and start analyzing the data geographically, they understand that they can create new insights and see patterns. They recognize the enormous potential of the technology and want to learn more about it, exchange with their peers and analyze the advantages for their operations. This is the reason why we have decided to follow up on our event of last year and organize a Postal & Parcel Location Intelligence Summit, on the 11th of October, during which possible use cases will be showcased, innovation in the industry explored and we will drive a discussion that will ultimately create significant benefits for the postal and logistics sector. We will organize our event in Hamburg during the time of Post-Expo in order to allow interested organizations to find synergies when joining us for our Postal & Parcel Location Intelligence Summit. We will publish and send out details for this event very soon!

Mark the date !	
Postal & Parcel Location Intelligence Summit October 11th, Hamburg, Germany	To get regular updates follow the Parcel & Postal GIS group on LinkedIn

Redefining "Addresses" and the Importance of Post Offices in our Brave, New Digital World

Santosh Gopal *

Disruption begins with questioning the norm. Have we been using "Addresses" incorrectly for thousands of years? In this brave new world, driven by millennials, a seven year old boy's innocent question has led to a light bulb moment of realization which I strongly believe will change the way we use addresses and shipping. I have been following the various postal organizations, UPU and logistic companies (globally) and have come to realize the immense challenges in "addresses". We have built an incredibly powerful and patented platform, Ship2MyID.com, which solves the global problems of addresses perpetually and gives abundant new opportunities for postal communities, logistic companies, eCommerce, and most of all, Consumers.

The Beginning

Ship2MyID was born out of the expectations of a seven year old boy who was waiting on the shipment of his tablet. He received an email about the shipment while he was in Virginia, but the tablet shipped to his home address in California. He pondered: If email can find me in Virginia why can't my shipment come there too?

The Current Challenges in Addresses

An address is a physical location where people reside or a business operates from. Postal addresses (or delivery addresses) are locations where people and/or businesses receive their deliveries or packages. The fundamental challenge with this system is that a location is supposed to be "fixed, permanent and unique" where as people and businesses constantly move. Since addresses are part of our identity, like a driver's license, but over time it has lost its uniqueness. With the advent of Ship2MyID, we enable everyone to have addresses.

The top 5 challenges with addresses today are:

1. Without an address of the recipient, NO shipping is possible.
2. 50% of the world has improper addresses denying them of basic amenities such as water, power, gas and health care (Source UPU)
3. 30% of Millennials change their "home address" every year in the US. Essentially, it means that in three (3) years the address database is rendered obsolete.
4. Privacy - We all love to have 10,000 followers on

Twitter. However, in our "real lives", we don't want most people to "follow us" or know where we live. The recent Facebook debacle has exposed our privacy

5. World addresses have no standard structure or language which results in global shipping issues.

Addressing Alternatives and the Ship2MyID Solution

GIS - Addresses are currently represented by Street Number, Street Name, Unit #, City, County, State, Country and a Zip Code. In this digital world, any location can be tracked to a Unique GIS Code, which is a combination of longitude and latitude. As much as this is unique, it's widely impractical to store and share. Many companies have attempted to digitize the GIS code in representable formats of either "Three Words", or a 9 to 12 digit alphanumeric code, with no success. The fundamental challenges for any individual remain to be privacy, portability and uniqueness.

We need to understand the advantages of a digital or social ID which could include an email address, a mobile number, a Twitter or Facebook ID, all of which are owned by a unique individual. Social and digital ID's follow the user. These unique ID's can be accessed globally, wherever the user is. These ID's give anonymity, portability and uniqueness which could solve this global delivery and location problem.

* CEO, Ship2MyID

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The Ship2MyID Solution

Ship2MyID brings the best of both the digital and traditional world into one patented global platform. The Ship2MyID solution is based on these two simple mantras - Addresses need to be portable and packages need to follow people (or businesses) and not be tied down to a physical location.

- Each user creates their own unique identifier or "username" (user name aka lifetime unique identifier)
- The user can link their email address(es), mobile number, Facebook, Twitter or any digital ID to their username. This allows consumers to use their username or any of their digital ID's as a "mailing address".
- The user can create multiple delivery locations and name them such as HOME, WORK, Mom's house, Jessica's home or "my favorite beach location", etc.
- Each of these delivery locations can be mapped to a street address or an alternative address such as "3 words", a 9 digit code or directly to GIS code if there is NO street address available. This helps to solve the problem of new locations which don't currently have any standard address.
- Consumers or businesses can ship to each other by simply providing the digital ID's of the recipient.
- The sender doesn't need to know the destination address any more and hence we remove all the dependencies of addresses and we provide a safe and secure transaction from end to end.

Benefits of the Patented Ship2MyID Platform

An Address for Everyone - One of the core ambitions of UPU (Universal Postal Union) id to let each individual have an address. The Ship2MyID platform helps every individual have "unique" life time Digital address which consumer can map to any physical location by touch of a button.

Addressing New Locations Which Don't Have Structured Addresses - Consumers from the growing and ever expanding countries in Asia and Africa can have deliverable locations by simply using their unique ID which maps a unique GIS code. This code is protected and unseen along the route. This eliminates the need of conventional mailing addresses and solves our global shipping problem.

Privacy and Control – The Ship2MyID platform helps all recipients to control what ships to them, where and when; all based on rules around the relationships between sender and recipient. In many cases, the purchaser and recipient are the same. Consumers can define rules such as: if packages originate from family, friends of Facebook,

these packages will automatically be shipped to a "home" address. Packages shipped by LinkedIn connections will automatically be shipped to an "office" address, etc.

Data Privacy between multiple parties– The Ship2MyID platform ensures that each participant in a transaction from Sender > eCommerce Store > Supplier > First Mile > Logistics Company > Last Mile delivery, will only get minimum data which is required for the next step. The final address or GIS location is only known by the last mile delivery person. This helps towards GDPR as well.

True Social Commerce - Now consumers can ship to any unique ID or to their social ID without ever needing the recipient's address. Imagine 2 Billion users of Facebook can ship to other Facebook connections without the need of a mailing address as well as this enables privacy protection.

Delivery Management - For both parcels and regular mail, consumers can define where they want a product to be delivered with the touch of a button. Consumers can hold the mail or forward to any location of their choice or even receive at their real time location!

NO More Lost Packages - Solves address validation challenges and also has 100% visibility of all shipments.

Solving Cross Border Addresses and Language Issues – Your unique ID (username, email address, mobile number or social ID) is in English, the universal language. This removes all cross border barriers and creates a universal addressing system.

New Transactions - This will lead to billions of new transactions which were not possible before. They could be ecommerce or social commerce or simply packages sent between consumers.

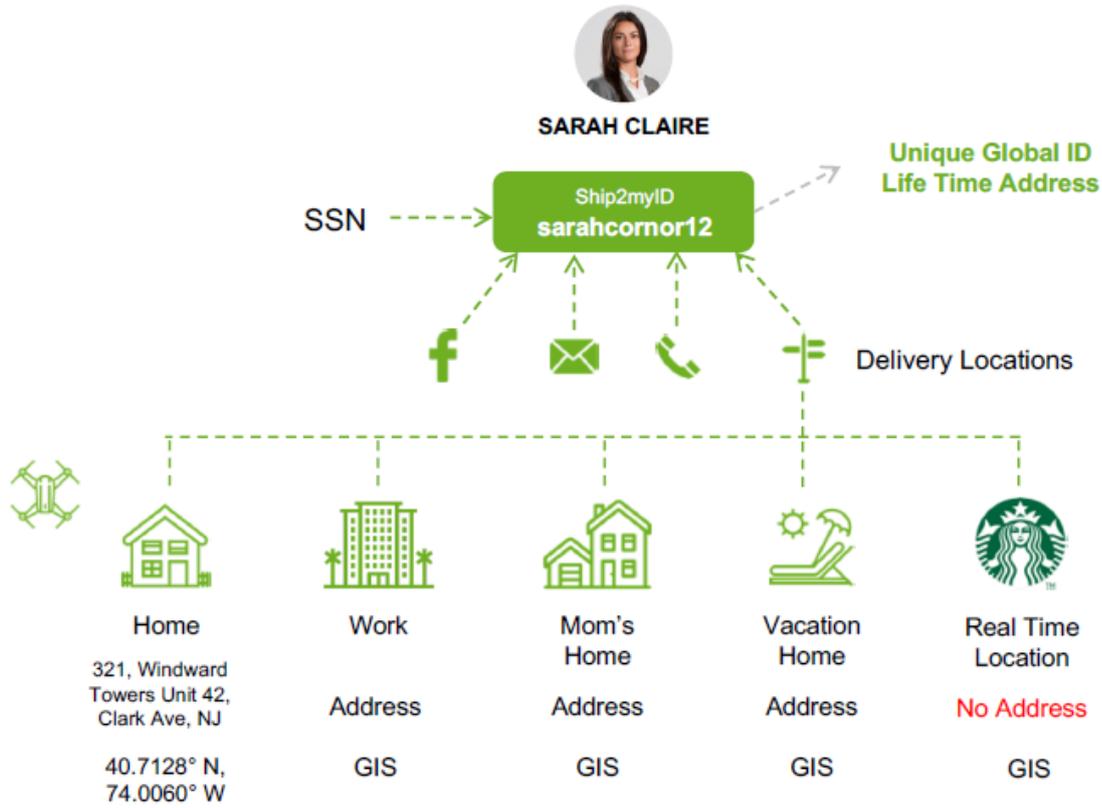
This is the perfect solution for post offices globally to digitize their entire addressing problem in their respective countries. The patented Ship2MyID platform solution can become the backbone for eCommerce, shipping, addressing and logistic industries, enabling consumers to feel more secure as they have an option to control every aspect of their privacy and yet send and receive packages. This could trigger additional orders and shipments and contribute to the growth of eCommerce and logistics.

Conclusion

We @ ship2MyID strongly believe that our solution can solve the issues around "addresses" and provides a strong and safe opportunity for consumers and others to do real life transactions without compromising their privacy. This could lead to new transactions which were not possible before. They could be ecommerce, social commerce, some yet-to-be-conceptualized form of commerce or simply packages sent between consumers.

Ship2MyID

OUR SOLUTION



Meet Marketo, the power of postal workers for geo-tagged real-time market data collection

The opportunities of the new additional last mile service

Gorgi Kokinovski *

With a workforce that already visits citizens and businesses almost every day of the week, and their track record of public trust, postal workforce is ideally placed to offer more than mail and parcels. Most of the postal operators have already diversified in different businesses such as banking, silver economy and etc. What new role could the postmen play?

Postal operators around the globe continue to face important challenges such as the ongoing decline of traditional mail, increased competition on markets, the rise of digital communication and new media. Postal operators have been increasingly looking to transform their businesses by realigning and streamlining operations and expanding into new areas of growth.

With a workforce that already visits citizens and businesses almost every day of the week, and their track record of public trust, postal workforce is ideally placed to offer more than mail and parcels. Most of the postal operators have already diversified in different businesses such as banking, silver economy and etc. However postal operators can still seize diversification opportunities not yet fully exploited. Postmen may no longer be seen as the last link in the postal mail process chain. Instead, they could be recognized as the heart of postal work, by providing additional, value-based services.

Postal operators must approach the development of new services as if they are launching a new business—one that happens to be using their existing postmen.

Harnessing its delivery workforce postal operators have a unique opportunity to reshape the market

and redefine their role in the digital economy with new platforms such as Marketo.

Marketo platform

Marketo is a web and mobile platform which enables collection, aggregation and reporting of geo-tagged market research data.

The basis of the idea is how to use postmen who are on the field almost every day of the week for collecting of geo-tagged real-time market data for a given geographic area based on a request of the company through the web platform. With this platform companies will be able to open researches/campaigns for data collecting that will help them in making better business decisions.

Through the web platform company-researcher will define research based on the selected geographic area, collecting time, min/max number of data points, etc., and will choose one of the offered packages (basic, standard or business) for research. Each of the packages is based on number of attributes per geo-tagged data point that the postmen will collect from the field. After choosing the attributes and defining geo fence area, postman when he gets into the geo-fenced zone he receives on his mobile device notification for doing research and he is starting to collect the requested data. All these data gathered from the field, customer can see in real time on his dashboard.

* IT business consultant

Market research

Market research today is very expensive (10's of thousands of Euro), and is non-transparent (customer can't check where and when data was collected). Serious market research is only affordable for big corporations. Market research are mostly done to show a snapshot of aggregated data at certain point of time, but rarely to discover/track an ongoing trend in real time in the off-line phenomenon realm. Also big marketing agencies have "feet on the ground" in most of the big markets, but lack presence in smaller regions, where the postal operators are present.

With Marketo

Marketo offers an alternative to paying costly market research, by bringing together Requesters (companies in need of market data, marketing agencies, real estate agencies etc), which will provide customized data based on exactly what the clients are looking for, but at significantly lower price compared to traditional approach. Unique position of the postal workers makes the service more economical than if companies or authorities did it themselves.

Companies will be able to get market data that cannot be found on Google and can only be obtained if and when postmen gets immersed into the physical world and record the wanted info. Also the companies will have control over when and where the data was collected and will be able to feel the pulse of its brand experience in the "real world" in real time. The collected data will be available only to the company ordering the market research. With this platform market research data collection will become affordable for smaller companies.

Marketo is a platform that offers the necessary flexibility and adaptability to different needs and at

same time to obtain reliable and direct knowledge of the market in an efficient and inexpensive way, while keeping full ownership of the process and its results.

Usage scenario

Research for flower shop distribution and density

A real estate company wants to be able to advise a client seeking to open a flower shop in a town in the country and provide arguments for its positioning, e.g.

"We recommend this part of the town, because there is no flower shop within 2km radius!

Example of data point with attributes:

(Text) Flower shop name

(Checkbox) Big mall/market in the vicinity

(Number) Number of employees Min:1 Max:3

(List) Square meters Min:5 Max:20

(Number) Number of customers in peak time (18pm) Min:0 Max:20

To see the mock up of the product please click [here](#)

Interested postal operators or other interested parties to make the proof of concept please contact me at: gorgi.kokinovski@gmail.com

PostalPitch™ StartUp Competition

October 9, 2018

at Post-Expo in Hamburg, Germany

- Call for Submissions -

PostalPitch and **Postal Innovation Platform** invite StartUps to present innovative products or solutions with a unique value proposition that may have the potential to change the postal and logistics market or even create a new market. StartUps can present their idea, product or solution to a wide audience, and a jury of postal and logistics experts will select the StartUp that ranks best according to the award criteria.

- StartUps can apply as of now to participate at PostalPitch -

Among all applications, a panel of jurors will select the finalists that will get the opportunity to present their idea, product or solution during Post-Expo taking place from October 9-11, 2018 in Hamburg, Germany. The PostalPitch sessions will take place on October 9th during the entire day and only StartUps that will be present at the event will be eligible for the award. Therefore, we urge only such StartUps to submit a proposal that are prepared to be present at the PostalPitch sessions at Post-Expo on October 9th, 2018.

Among the short-listed StartUps, the judges will select a winner, who will be awarded the **StartUp Innovation Award** in the evening of the same day during the PostalPitch and Post-Expo award ceremony.

If you are interested in presenting your idea, product or solution at PostalPitch, please send us your submission (to both email addresses provided below) or contact us for any questions you might have:

bernhard.bukovc@epfl.ch and
jcallan@ursamajorassociates.com

Deadline for submissions: August 19th, 2018

Format: Word Document, max 300 words + max 2 images | a link to a website and/or video can be added

Award Criteria: Your submission shall ideally reflect on the award criteria listed below

Innovation	Value	Impact
The innovation is a new and innovative idea offering an exciting new product or solution. It has identified new, so far unmet customer needs and is able to address those needs.	The innovation has a unique value proposition and differentiates itself from other products or solutions. It has a good cost - benefit ratio and provides a robust business model and market entry strategy. It has a significant value proposition.	It has the capability to change (part of) the market or can even create a new market. The innovation has the capability to impact the way things are done within its area of application in the future (game changer). It will have an impact on the industry, the environment and society.

Find more information and all updates at
<https://postalpitch.com/home>

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