

LOGISTICS SOLUTIONS FOR E-COMMERCE: THE CASE OF THE INPOST SA CAPITAL GROUP

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The paper aims to present logistics solutions in Poland's e-commerce market using the example of the rapidly growing InPost SA Group. The group's development strategy focuses on the e-commerce market and the expansion of services including innovative solutions. The subject literature, and documents and information provided by the research subject, the InPost SA, are the sources used in this study. The paper presents the specificities of the e-commerce sector, especially courier services, express and parcel deliveries. Receivers of shipments in the e-commerce market are a demanding group of customers, who continually pressure the courier market operators to expand their range of services. The study also identifies drivers of competitive advantage in the changing logistics services sector associated with e-commerce.

Keywords: E-commerce; B2C e-commerce market; logistics services; courier, express and parcel sector; InPost; Parcel Lockers; E-commerce Registered Mail

1. Introduction

This paper presents logistics solutions of entities operating in e-commerce market, such as Parcel Locker deliveries, courier deliveries and InPost E-commerce Registered Mail based on services provided by InPost SA Capital Group (Group). Based on Group's financial reports from 2013 – 2016, changes in its revenue structure have been analyzed, that are mostly the result of the evolution of the Group's strategy. Since 2015 the Group has been predominantly focusing on

servicing the e-commerce market, which involves receiving, transporting and distributing deliveries based on network of the Group's departments, Customer Service Offices and network of Parcel Lockers.

Furthermore, in order to analyze the Group's business environment, the author has presented specificity of e-commerce industry in Business to Customer (B2C) market (below also named as e-commerce market, e-trade market, internet trade market) and related logistics services sector (so called TSL – Transport, Shipping, Logistics), focusing principally on courier, express and parcel sector (CEP). It is underlined, that the intensive growth of e-commerce and consequently CEP sector has resulted in increased competition. The drivers of competitive advantage on the dynamically changing market of logistics services related to e-commerce have been indicated with innovation being one of the most crucial factors.

2. Research purpose, scope, methodology

The purpose of this paper is to present the specificity of the e-commerce market and CEP sector in Poland and to recognize logistics solutions for the e-commerce market in B2C sector on the example of dynamically growing InPost SA Capital Group.

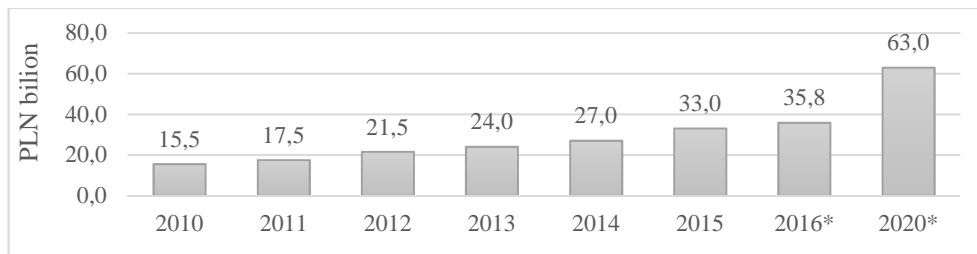
The research covers the e-commerce market between 2010-2020, the CEP sector between 2011-2018 and the Group between 2013-2016.

Based on the case study, innovative logistic solutions for the e-commerce market and changes in revenue structure of the object were analyzed. Research topics related to the object, the e-commerce market, the CEP sector and the logistic concept has been discussed and implemented based on content analysis of secondary sources.

3. Information regarding the e-commerce in B2C sector and the CEP industry

Continuous technological advancement and improving access to the Internet result in a steady increase in its user numbers. In 2016 there were 25.8 m Polish internet users, representing 76,6% of the population [1]. Web users are at the same time potential customers of e-commerce market in B2C.

According to an estimate (*Barometr e-commerce 2016*), at the end of 2016 the e-trade industry in Poland was valued at PLN 35.8 bn (more than double the 2010 figure), whereas in 2020 it will exceed PLN 63 bn [2]. The growth of e-commerce industry is also forecast in estimations related to retail sector, in which the share of products sold on the Internet will double, reaching 10% by 2020 [2]. The development of the Polish e-commerce market, in terms of value, is shown in Figure 1.



* Forecast

Figure 1. Poland e-commerce market volume from 2010 to 2020 (PLN bn)
 Source: own preparation on the basis of [2]

The sale of products on the B2C e-commerce market can occur via different organizational forms, among others internet stores functioning as independent entities not related to conventional retail channels, internet stores set up by conventional distributors with the purpose of diversification of sale channels, advertising websites, group buying, m-commerce, social commerce and auction websites. Online auctions are a particularly important part of the Polish e-trade market, accounting for around 65% of its turnover [3]. Internet stores, with their growing numbers and a more attractive and diversified offer, control a large share of internet shopping. In 2016, over 23,500 internet stores are expected to be operating in Poland [2], a 2.5-fold growth in relation to 2010, whereas by 2020 the figure will settle at a level exceeding 30,000 [4].

Among 25.8 m internet users, a growing proportion uses this medium to shop. Results presented in *E-commerce w Polsce 2016. Gemius dla e-Commerce Polska* report show, that 48% of internet users (a 5% growth in relation to 2015 [2]) have used e-trade services at least once in their lifetime. Internet users participating in the research see numerous benefits of this form of shopping, the most important of which are: convenience, time- and cost-saving and also bigger choice of products in comparison with traditional brick and mortar stores. The main factors indicated by the interviewed consumers as having potential to induce them to shop online more often are related to costs, that are borne by the buyers [1].

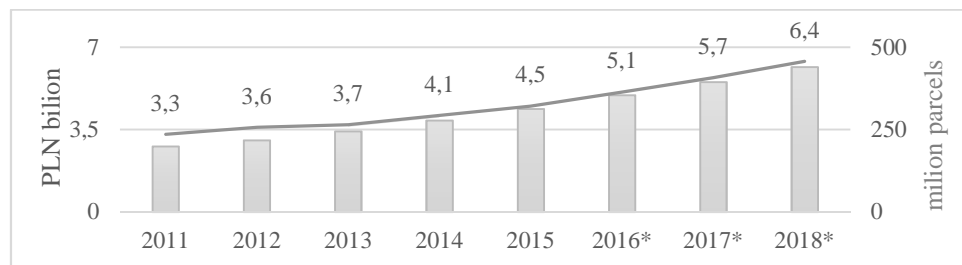
The presented forecast figures unanimously indicate continued, intensive growth of the segment, and consequently steady increase of number of transactions made with use of the Internet. This means more innovative logistics solutions are needed to meet constantly increasing demands of e-customers.

In management theory, Logistics, as an interdisciplinary science, is perceived as the ability of combining all of the organization elements in an efficient and reliable functioning whole. In addition to minimizing operating costs, it emphasizes maximizing cost-effectiveness and optimization of all flows. Due to the specificity of the logistic concept, it is often treated as a management category, and in this way its management aspects and ability to apply to different levels of the

organization are emphasized. Sometimes, it is seen as a concept which primarily concerns the problems in the operational area. In that case, it shows such an area associated with the processes and information related to the movement of physical goods. This is usually reflected in taking care that the right product of the right quality and quantity is delivered to the right place at the right and the right level of cost. Moreover, Logistics can also be identified as a concept connected with strategic solutions [5]. In the world, there are companies which have built strategic competitive advantages around unique logistics solutions.

Logistics is a key area of every business. In an era of increasing competition in the e-commerce market, it can be a decisive factor for the success of entities selling online. Nowadays, attractiveness of the product and the quality of its promotion, are not enough guarantee success. The right time, price and the quality of product delivery to the final consumer, are also critical [6].

Consequently, e-trade development translates into growing logistics services industry and primarily its biggest and the most competitive sector - courier, express and parcel deliveries [7]. According to advisory firm PwC (*Perspektywy wzrostu rynku KEP w Polsce do 2018 r.*), CEP sector was worth PLN 5.1 bn in 2016 with 355 m parcels sent and delivered. It represents a 14% growth in relation to 2015 and a two-digit growth rate is expected to persist over following years. It is estimated, that in 2016 around 35% of revenues and around 46% of the market volume depended on B2C sector of e-commerce. These figures are expected to grow steadily. According to experts' estimations, by 2018 this industry will be valued at PLN 6.4 bn with around 440 m parcels delivered [8]. The development of the Polish CEP is shown in Figure 2.



* Forecast

Figure 2. Poland CEP sector development from 2011 to 2018

Source: own preparation on the basis of [8]

With intensive growth comes an increasingly stiff competition. Currently, in Polish CEP industry there are around 200 foreign entities varying in size, scope and geographical range of services [9]. In *Branża przesyłek kurierskich, ekspresowych i paczkowych. Wpływ na polską gospodarkę* report specific factors were presented, that are necessary for acquiring and retaining a competitive position in the CEP

sector, including elasticity (considered as the ability to adapt to surrounding changes), potential in terms of modification, widening and improvement of the set of offered services (adaption of solutions to customers' needs), cost reduction and rationalization as well as the ability to implement innovative solutions (e.g. technological). The report states that innovative solutions and equipping customers with convenient ways of collecting deliveries are as important as success factors in the CEP sector as timeliness and reliability of deliveries [10].

The recipients of e-commerce deliveries constitute a specific, conscious and especially demanding group of customers, which intensifies competition and leads logistics companies to invest in modern and innovative solutions and services. These innovations relate to the many areas of the organization, including the implementation of new services, the use of latest technologies and the creation of new business models.

Innovative services in logistics, including a focus on e-commerce market, are in line with trends observed in the other service companies. For example simpler product returns, demand forecasting, automated restocking, additional services (e.g. the installation of electronics / domestic electrical appliances during delivery) or a greater flexibility of services as a standard (e.g. to allow a change of date and time of delivery in real time). Technological innovations include issues associated with delivering and receiving packages (e.g. the use of drones, particularly in areas difficult to access), automation of warehouse processes (e.g. computer modelling of processes and the use of robots) and further development of existing technologies (e.g. replacing traditional scanners with mobile devices or using electric courier vehicles). Innovations in the area of business models include the increasing popularity of shared services (delivery service performed by the customers), the expansion of public network of service points for B2C (self-service machines used for delivery and receipt of shipments) and the implementation of logistics services to the standard operations of large multinational companies (international trade companies building their own supply chains) [11].

4. Activities of InPost SA Capital Group directed at e-commerce

One of the most innovative and dynamically developing entities operating in e-commerce industry offering logistic support of transactions made on the Internet is InPost SA Capital Group. The company specializes in delivery services for corporate and individual clients. Since 2015 the Group has been focusing mostly on e-commerce services. InPost implements cutting-edge solutions for personalized customer services and IT [12].

Table 1 presents changes in InPost's sales revenue structure resulting changes in the Group's activity profile. This information is based on InPost's mid-year shortened consolidated financial reports. Data in the Table include the period

between 2013 and 2016. Financial results of the Group in preceding years are not in the public domain (in 2015 the Group became listed on the Warsaw Stock Exchange, therefore it has been obliged to publish financial reports since then). In InPost's revenues structure following customer groups have been specified: public administration, big enterprises, collection agencies, small and medium enterprises, e-commerce and other distribution channels.

In 2013 big enterprises (56%) accounted for the biggest share of the Group's revenue structure. In the following year the revenue structure changed significantly with public administration having the greatest share (45%). Such a shift was the result of a deal, according to which since January 1, 2014, InPost SA Capital Group has been receiving, distributing and delivering mail and returning undelivered mail for Polish courts. The revenues from sales to public administration continued to be the biggest source of income until the end of 2015 (41%). The situation changed in the first half of 2016, when the share of customers from this group dropped significantly to 19%. This was caused by the termination of the deal for providing deliveries for courts on February 29, 2016. Since 2015 there has been major increase of e-commerce share in revenues from sales.

Table 1. Revenues from sales in different groups of customers in 2013 – 2016 (mln PLN)

	Pub. adm. *	Big enter. **	Coll. agenc. ***	S&M enter. ****	E-commerce	Others *****	Total
2013	6,18	103,64	10,01	37,94	21,38	6,00	185,15
Share in total	3,34%	55,98%	5,40%	20,49%	11,55%	3,24%	100,00%
1H2014	99,47	55,23	4,51	16,90	10,37	26,00	212,48
Share in total	46,81%	25,99%	2,12%	7,96%	4,88%	12,24%	100,00%
2014	198,55	104,84	10,25	56,99	30,96	41,79	443,38
Share in total	44,78%	23,65%	2,31%	12,85%	6,98%	9,43%	100,00%
1H2015	120,53	52,34	7,80	46,81	30,48	11,85	269,81
Share in total	44,67%	19,40%	2,89%	17,35%	11,30%	4,39%	100,00%
2015	231,93	90,94	16,87	105,28	113,85	14,51	573,38
Share in total	40,45%	15,86%	2,94%	18,36%	19,86%	2,53%	100,00%
1H2016	45,24	31,32	7,99	28,5	124,86	-	237,91
Share in total	19,01%	13,16%	3,36%	11,98%	52,49%	-	100,00%

* Public administration, ** Big enterprises, *** Collection agencies, **** Small and medium enterprises, ***** Other distribution channels

Source: own preparation on the basis of [13]

The e-commerce category, as specified in the reports, includes services provided for units operating in internet sales sector, such as internet stores and auction websites. In 2013 revenues in this category included mostly logistic support of the Parcel Lockers network. After a deal with Allegro Group in 2014, the category also includes income from deliveries generated by Allegro users. In relation to the widening of range of services provided by the Group by courier deliveries and InPost E-Commerce Registered Mail, this position also includes revenues from these categories from 2015 [12].

Marketing actions, new contracts, success in the courier deliveries sector, the addition E-Commerce Registered Mail to the range of services and a surge in customer interest in Parcel Lockers packages translated into high volume of deliveries provided by the Group. From January 2016 to May 2016 the Group shipped 16 m deliveries for e-commerce. Among the customers, the most preferred way of delivery was InPost Parcel Lockers. In the analyzed period this form of delivery gained 78.6% in relation to the same period in previous year. Increase of the courier deliveries' volume was equal to 70.6% in relation to period January 2015 – May 2015. For the third most important service provided by InPost and dedicated for e-commerce, which is E-Commerce Registered Mail, growth dynamics in analyzed period was 317.5% year-to-year [14]. The high volume of deliveries provided by InPost in the internet trade sector was a reason why in the first half of 2016 e-commerce accounted for 53% of overall revenues of the Group [13]. What is stressed by the Group's CEO, Sebastian Anioł, InPost offer will be expanded and the Group's strategy will continue to focus mostly on e-commerce – *“We are still expanding our offer and focus on the promising e-commerce sector. In our opinion this sector currently has the biggest growth perspective on Polish market and as such is a potential source of increasing the company's sale value in the upcoming quarters”* [21].

5. Services offered by InPost SA Capital Group dedicated to e-commerce

In the Group's offer directed mostly at e-commerce market participants, the following services can be specified: Parcel Lockers, courier services bundle and E-Commerce Registered Mail. Above-mentioned services have been described in the subsections below.

5.1. InPost Parcel Lockers

This service was introduced in 2009. The idea is to create a solution that allows the entities in the e-trade and mail-order sale sectors to independently send and pick-up at a convenient time and place. A parcel locker is a system of mail lockers (in varying sizes), where one can send or receive parcels 24/7 [10] . Thanks

to this solution logistics costs can be decreased through bulk delivery to a given Parcel Locker instead of every recipient individually [15]. At the moment of parcel delivery to a Parcel Locker indicated by recipients they are informed about this fact by a text message, which contains a code allowing them to open the corresponding locker in the device. This service has the benefits of both mail services (e.g. numerous pick-up locations) and courier services (e.g. quick delivery at a relatively low cost) [16]. Parcel Lockers are located mainly in shopping centres, at petrol stations and 24/7 car parks. At the moment of the service implementation on the Polish market the devices were planned to be located in the 20 largest Polish cities. Nevertheless, the demand for the service was so large, that its range has been expanded to a larger number of cities. A thousand of new devices are planned in 2016, which will result in their number increasing to 2600 [14].

The innovative idea of Parcel Lockers is based on advanced logistics solutions, cutting-edge information, communication and automation technologies and is precisely adapted to customers' needs. The system is based on the following key assumptions: a developed distribution network and a fully automated process, which allows for a significant service cost reduction and hence competitive rates for customers. In principle, the system was supposed to be simple and convenient, making the final phase of internet purchases easier. Customers expect quick and reliable deliveries at a convenient time – in the evening, night, often within a few hours from order placement, which is allowed by the system of Parcel Lockers. Therefore Parcel Lockers is a customer-oriented project. It is a new, as yet unknown way of satisfying identified human needs in terms of deliveries reception. This pioneering solution is an innovation designed and implemented following research, targeted at finding technologies to replace the traditional ways of conducting mail and courier services [10].

Innovative nature of Parcel Lockers has been received numerous awards, including E-commerce Paris 2015 (Logistics category), Engage Awards 2015 (Socially Devoted category) or Ekomersy 2014 (third consecutive distinction in the "Product/services supporting international expansion of e-shops" category) [17].

5.2. Courier services

Courier services offered by InPost SA Capital Group since 2015 have been targeted at individual and corporate clients. Courier services in connection with Parcel Lockers and a vast network of over 8,300 post offices is the only offer in Poland providing a complex and complementary range of logistic services domestically and abroad. The new solution helped expand the cooperation with the biggest Polish e-trade platform Allegro and many other significant e-commerce entities.

Courier services offered by InPost cover parcel deliveries to anywhere in Poland. All of the options in the domestic service are realized to a recipient's door

or one of the InPost Parcel Lockers [12]. Courier services introduced in 2015 immediately proved to be successful. During the first 7 months of operation 3.2 m deliveries were performed. It's worth noting that in the past similar courier operators attained such results after 7-8 years of operation. Such a result confirms, that in the Polish e-commerce market there was demand for an integrated solution allowing customers to order all services at one place. This fact significantly simplifies operations on the e-trade market, mostly through 'Manager Paczek' software, that is used for sending parcels, invoicing and handling returns. Thanks to *Manager Paczek* the sender chooses one of delivery options: door-to-door, which is pick-up of delivery at the sender's and delivering it to recipient's door, or collection from a specified place and delivering to recipient's door, e.g. from InPost Customer Service Offices [14].

Additionally, in 2016 a dynamic forwarding service was introduced. It enables free of charge modification of delivery pickup place, which, depending on client's preferences, can either be an indicated Parcel Locker or a Customer Service Office. This service is in line with the strategy of multichannel supplies and their optimization, what is one of the key objectives of InPost. According to the Group's data (published on InPost website) a quarter of courier deliveries is redirected to Parcel Lockers or Customer Service Offices, which confirms the demand for such services [18].

5.3. InPost E-commerce Registered Mail

In 2015 apart from introduction of courier services, InPost added another solution to its offer of e-commerce services – InPost E-commerce Registered Mail. This offer guarantees customers performing online purchases quick 'to-door' delivery within three working days. E-commerce Registered Mail is an alternative to courier deliveries in the case of small size of shipped products (up to 1 kg, e.g. jewellery, CDs, beauty products, games or books) at a competitive price (PLN 4.99 net). The low price and high quality attract customers looking for good value for their money, who do not want to overpay for a logistic service, especially when the value of the goods is low. The service includes delivery notifications for customers and return to sender free-of-charge if the parcel is not collected by the recipient. E-commerce Registered Mail allows for monitoring of the delivery at each phase of the process – by the sender in 'Manager Paczek' software and by the recipient on the website [19]. This solution can surely be found attractive by entities in the e-commerce industry. This service is cheap, convenient and safe for both e-sellers and e-customers.

InPost E-commerce Registered Mail was implemented in response to current internet trade market needs. Shipping cost minimization is the service's key advantage for consumers shopping in e-stores. The Gemius report shows that lower shipping costs would entice 69% of consumers to buy online more often [1].

Forrester Research (FR) also confirms this claim. According to FR, excessive shipping costs are the most common reason why consumers refrain from shopping online [19].

6. Conclusion

Booming e-commerce directly translates to a growing logistics services' sector, particularly courier, express and parcel delivery industry. E-trade delivery recipients are a conscious, and exceptionally demanding group of customers, which intensifies competition in the CEP market. The analysis of drivers of competitiveness in logistics services has found that innovative solutions and equipping customers with convenient ways of collecting deliveries are becoming as important as success factors as timeliness and reliability of deliveries.

One of the most innovative and dynamically developing entities operating in e-commerce industry offering logistic support of transactions made on the Internet is InPost SA Capital Group. The company specializes in delivery services for corporate and individual clients. InPost as the operator who revolutionized Polish e-commerce industry, systematically realizes its strategy in terms of internet trade solutions. Based on in-depth consumer preferences analyses and as part of optimization process of solutions dedicated to e-commerce, the Group takes actions to increase the functionality and quality of its services.

To 2013 the Group's offer related to e-commerce comprised mostly the logistic support of Parcel Lockers network. In the subsequent year, in relation to establishing cooperation with Allegro Group, InPost expanded its offer by services dedicated for Allegro clients. In 2015, the range of services provided by the Group was expanded by introducing courier services and InPost E-Commerce Registered Mail. These new services in relation to Parcel Lockers and broad network of post offices constitute the only offer providing a complex and complementary scope of logistic services in Poland.

The success of solutions offered by InPost SA Group to e-customers, is mainly reflected in increase in the volume of shipments serviced by InPost, but also in consumer research. Research carried out in 2015 (within the Polish-Norwegian Project GRASS, the contractor – Maritime University in Szczecin) concerning InPost customers' opinions about the Parcel Lockers services showed that 75% of users rated it "much better" or "better" than traditional courier services. At the same time, 89% of respondents were prepared to recommend the terminals to their friends. Among the proposed factors driving the choice of this form of delivery, 75% of respondents cite the ability to receive shipment 24/7 as a reason. Over 70% of respondents considered that the service is competitively priced. Approximately 59% of respondents indicated that their decision to use the Parcel Lockers was driven by a convenient location of the terminals [20].

The InPost SA Capital Group management emphasizes that one of its priorities is the systematic tracking of the needs of online customers and creating a product mix that reflects those needs. According to the current Group's development strategy, its activity will be focused around the e-commerce sector in the near term. The logistical servicing of Parcel Lockers, courier services and the delivery of registered letters for online customers will be the main source of growth and diversification of sales in the years to come, and the pace of development in this sector will have a direct impact on the financial results of the Group [12].

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