

FEDERATION OF EUROPEAN PHILATELIC ASSOCIATIONS

HOW TO CHANGE DIRECTION

PROJECT REPORT

Madrid, 5 October 2013



GIANCARLO MOROLLI, FEPA Director

HOW TO CHANGE DIRECTION

- **The Project**
- **The Present: Societies and Members**
- **The Present: Postal Operators**
- **The Present: Exhibitors and Exhibitions**
- **The Future (2023)**
- **What Now?**

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Member Federations participating: 30

Active Delegates: 29

AUSTRIA

BELGIUM

BULGARIA

CROATIA

CYPRUS

CZECH REP.

DENMARK

EGYPT*

FINLAND

FRANCE

FYROM

GERMANY

GREECE

HUNGARY

ISRAEL

ITALY

LIECHTENSTEIN

LUXEMBOURG

NETHERLANDS

POLAND

PORTUGAL

ROMANIA

SERBIA

SLOVAKIA

SLOVENIA

SPAIN

SWEDEN

SWITZERLAND

TURKEY

U.K.

*The delegate appointed by the federation of Egyptian did not submit any input

Project Team and other Contributors

- **Project Team:**

- Giancarlo Morolli, FEPA Director (*project manager*)
- Ari Muhonen, president, Finnish Federation
- Franz-Karl Lindner, vice-president, German Federation
- Denes Csirik, board member, Hungarian Federation
- Stasa Bracic, board member, Slovenian Federation
- Paolo Guglielminetti, board member, Italian Federation

- **Contribution from:**

- Hans Hohenester, ASCAT President
- Wolfgang Maaßen, AIJP President
- Patrick Maselis, Club de Monte-Carlo President
- Henk Slabbinck, AEP President

Actions Taken

- Asked Federations for appointment of Delegates
- Selected Project Team members
- Prepared and validated questionnaires
- Circulated questionnaires to delegates
(as well as to all other Federations)
- Received questionnaires
- Consolidated questionnaires by groups (team members)
- Final consolidation and elaboration (Paolo)
- Report to the Congress (Giancarlo)

Questionnaires received have been consolidated and elaborated. Federations' answers are the base for this presentation.

- ❑ The answers have been accepted on «**as is**» basis.
In case important data are missing, they will be asked at a later stage.
- ❑ The reports presents the results in terms of percentages related to the number of Federations sharing the same characteristic.
When applicable, multiple answers have been allowed.
- ❑ Most answers have been supplement with comments.
Only a part of them has been analysed summarized hereafter.
- ❑ **This is not a personal presentation**, but the report of the data submitted.
- ❑ Only the German Federation sent additional material,
namely a very import document on its planning for the future (2010)
Its content will be considered for the various points id addresses.
- ❑ The Swiss Federation is also involved in a project looking into the future.
We welcome a specific input from its delegate
and we hope to receive similar input from any other FEPA members.
- ❑ Other contributions (ASCAT; AIJP, AEP, Club de Monte-Carlo)
will be take into account in the next steps of the project.

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The large majority of Federations (79%) have societies as their members. Three Federations unite Regional federations of societies.

Federations composed of

- Regional federations 11%
 - Germany, Poland, Spain
 - Societies 79%
 - Individual philatelists 11%
 - Lichtenstein, Slovakia, Fyrom
 - Individual philatelists can be direct members in 32% of national federations of societies (1 NA)
 - *In Germany they may be direct members of national Federations*
- % refers to the number of answering Federations

Total number of Societies: 5.258

**About two thirds of Federations have up to 5,000 members.
Some societies are open to numismatic and postal cards collectors.**

- **Members of societies federated**

• >1.000	18%
• 1.001-2.000	18%
• 2.001-5.000	25%
• 5.001-10.000	14%
• > 10.000	25%

- **Society's members are interested in**

• Philately only	82%
• Philately and numismatics	5%
• Philately and postcards/others	14%

- % refers to the number of answering Federations

Currently only a small minority uses direct membership.
In more of 50% of the federations
philatelists belong to at least two societies.
Presence of women and youth is quite limited.

❑ Total number of members: 224,500

- ❑ Societies 216,608
- ❑ Direct members 7,892

❑ The same philatelist is member of

- ❑ 1 society 43%
- ❑ 2 societies 25%
- ❑ 3 societies 14%
- ❑ > 3 societies 14%

Presence of	A certain %	Very low	NA	% of total of members
Youth	36%	50%	14%	4%
Women	36%	50%	14%	5%

% refers to the number of answering Federations

Not federated societies are an almost negligible minority in most countries. Most collectors are not members of any society.

❑ Societies not federated

(percent related to the current number of federated societies of the country)

❑ <10%	68%
❑ 11-25%	14%
❑ 25-50%	7%
❑ NA	11%

❑ Uncommitted (not associated) collectors:

8 – 25 times the associated members??

% refers to the number of answering Federations

A significant number of societies have reduced or totally eliminated some activities. However, activities dropped in a Federation have been increased in another one.

Activity	Increased	Decreased
% Federations*	3%	42%
Conferences and Lectures		-
Seminars and Meetings	+	-
Activities for youth/in schools	+	
Exhibitions (mainly local)	+	-
Visit to exhibitions	+	
Exchange of stamps		-
Auctions		-
New issues services		-
Publications	+	
Websites	+	
* Stable 55 % , answer weighted on number of Federation societies		

Specialized societies at national level (study units, working groups, etc..) have been less impacted.

They also exploit Internet better than the local societies.

Activity	Increased	Decreased
% Federations*	9%	25%
Website	+	-
Forums	+	
Auctions	+	
Publications and Bulletins	+	
Exhibitions and Meetings (society)		-
* Stable 66 % , answer weighted on number of Federation societies		

Impact of Internet site on efficiency and effectiveness of operations

Societies	Yes	No	NA-Napp
Local	36%	50%	14%
National	46%	25%	29%

Aging and health of the members, as well as the economic difficulties are the main reasons for decrease of the number of societies. Furthermore, a number of societies had to close their premises.

❑ **Causes of decrease:**

(percent related to the current number of federated societies of the country)

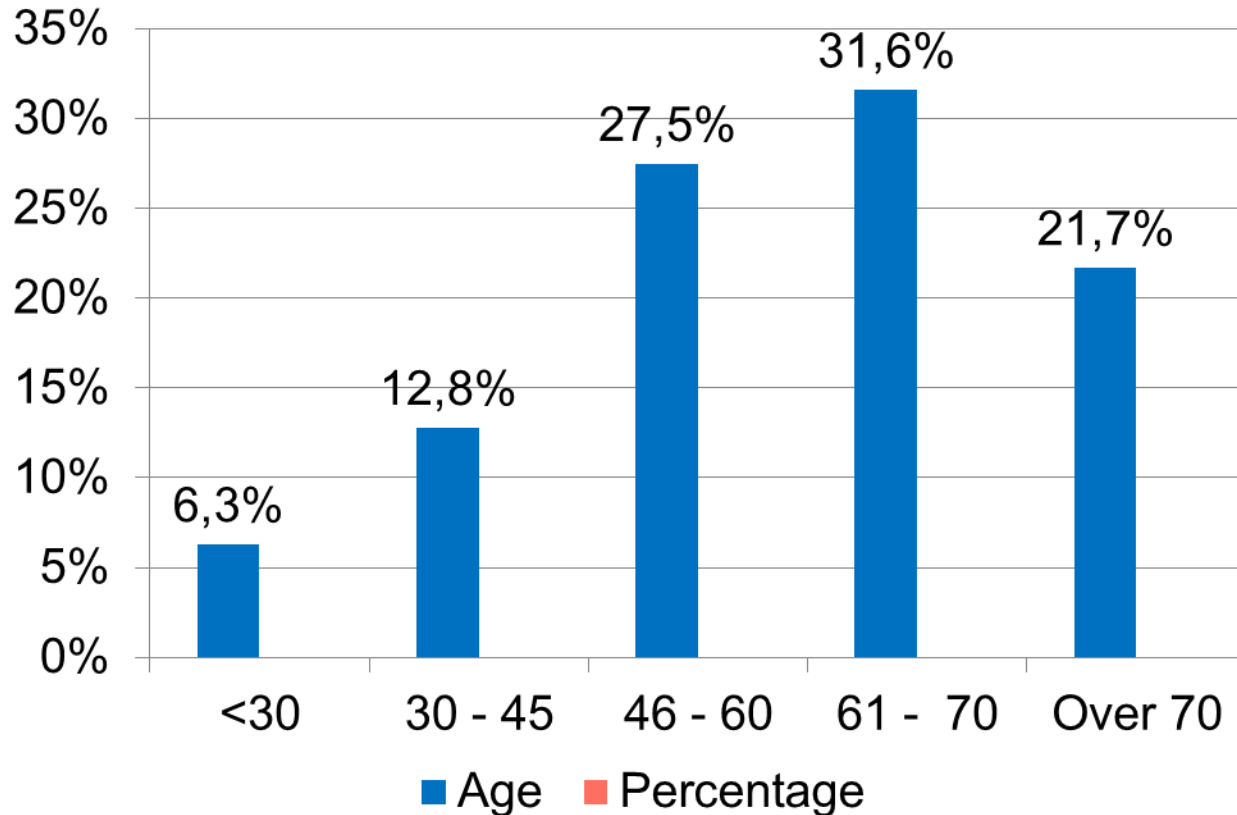
- ❑ Aging/Health of members 80%
- ❑ Lack of interest in philately 20%
- ❑ Economic difficulties 50%

(% of Federations affected – multiple answers allowed)

Societies	Closed	Stable	Not Appl.	NA
Local	21%	21%	43%	15%

% refers to the number of answering Federations

Most members of federated societies (59%) are over 60 years old. Those under 45 years are just 19%.



% refers to the number of answering Federations

Over the last 5-10 years members have decreased in almost all countries. Specialized societies are less affected (- 8%) than local ones (-20%).

Societies	Increased	Stable	Decreased	NA - NApp
Local	7%	41%	85%	4%
<i>How much?</i>	3-30%	-----	22%	
Specialized	18%	21%	46%	14%
<i>How much?</i>	13%	----	19%	

(% of Federations affected)

Membership has decreased in average:

- Local societies - 20%
- Specialized societies - 8%

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The issuing policy of one third of the postal authorities favours the increase of issues, which are often accompanied by philatelic products .

Quantity of issues	Decreased	Stable	Increased	NA
Postal Administrations	0%	61%	36%	4%

Stamps available at post offices:

- All recent issues 39%
- Only in mini-sheets 7%
- Mainly definitive issues 22%
- No 21%
- NA 11%

Replacement with labels

- Yes 74%** **No 26%** **NA 4%**

*☞ Mainly for special services (registered letters, parcels),
but in some countries also for private and business letters*

% refers to the number of answering Federations

Stamp issues are often accompanied by philatelic products. They are quite popular, but do not bring much support to our hobby.

	Yes	No	NA
FDCs	82%	4%	14%
Cards	54%	18%	29%
Maximum Cards	75%	18%	21%
Folders	71%	4%	25%
Other*	46%	54%	0%

* *Stamp packages, catalogues, pre-stamped envelopes , presentation packs, self-adhesive stamps version, philatelic “cards”, thematic lots, kiloware, cancelled stamps, “smilers“ and personalized stamps, prestige booklets, CDs, ecc.*

	Yes	No	NA
Popularity	50%	43%	7%
Attraction	25%	71%	4%

% refers to the number of answering Federations

Other types of stamps and methods for payment of postage are used. Their popularity varies and they seem not to attract many new followers to philately.

		YES	NO	NA
Personalized stamps		75%	18%	7%
	Popularity	71%	24%	5%
	Attraction	24%	62%	14%
Electronic stamps		36%	54%	11%
	Popularity	30%	69%	10%
	Attraction	10%	80%	10%
Stampless postage		36%	48%	10%

% refers to the number of answering Federations

A number of private postal operators issue their own stamps, sometimes they are of commemorative or thematic nature. Their popularity is not great and they do not bring any attraction to our hobby.

	Yes	No	NA
Private Operators	57%	39%	4%
Release own stamps	38%	67%	0%
Commemorative/thematic	33%	67%	0%
Popularity of these stamps	33%	67%	0%
Attraction to the hobby	0%	100%	0%

% refers to the number of answering Federations

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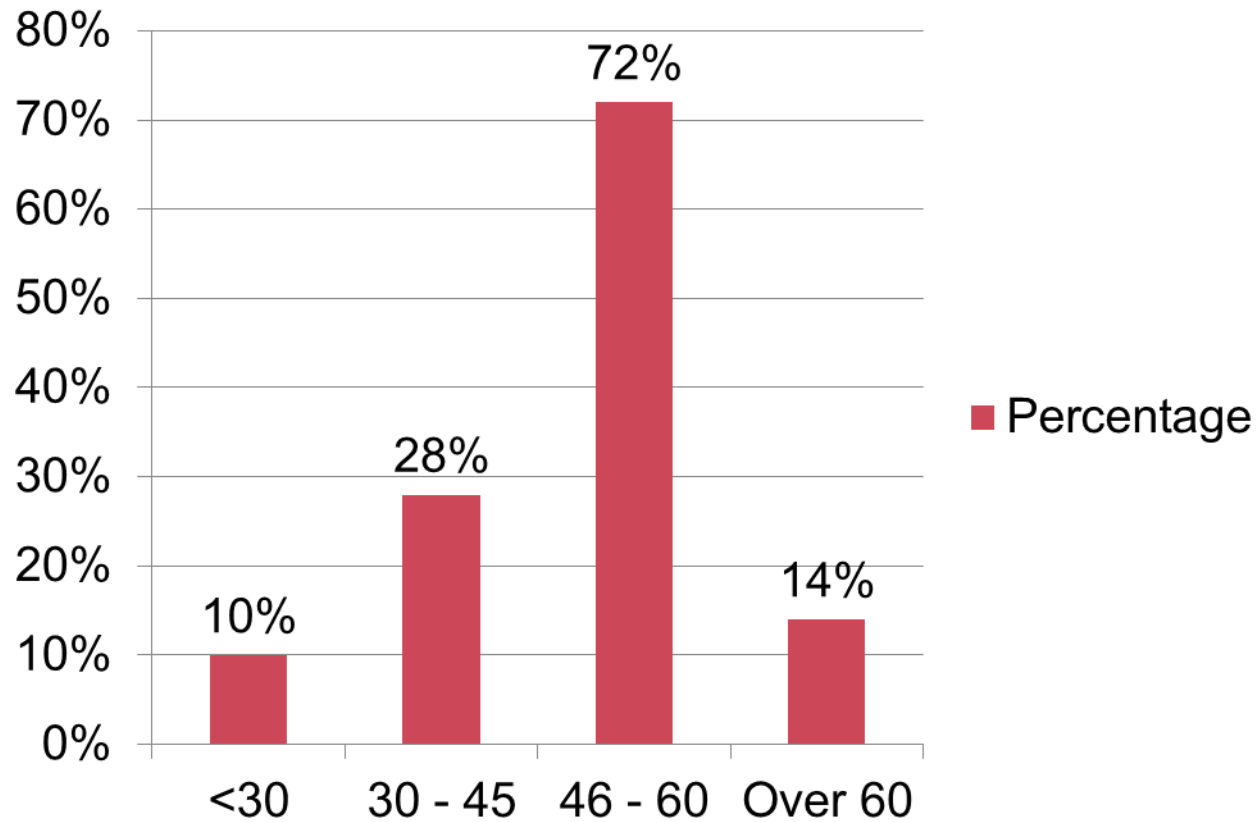
The number of exhibitors (all types and levels) has gone down slightly in the last period.

<input type="checkbox"/> Increased	in 10% of the Federations
<input type="checkbox"/> Stable	34%
<input type="checkbox"/> Decreased slightly	41%
<input type="checkbox"/> Decreased significantly	3 %

Main reasons for decrease:

<input type="checkbox"/> Age/Health	92% of those Federations with decrease
<input type="checkbox"/> Economy	23% (multiple answers possible)

The typical age for new exhibitors is from 45 to 60 years.



% refers to the number of answering Federations – multiple answers allowed

Exhibitors' participation has increased at national , regional and continental events, and decreased at FIP exhibitions.

Exhibitors	Increased	Stable	Decreased	NA
FIP	14%	38%	45%	3%
Continental	24%	55%	17%	3%
Other international	21%	38%	28%	14%
National	34%	38%	21%	7%
Other in the country	28%	34%	17%	21%

% refers to the number of answering Federations

86% of the Federations have a national exhibition

- ❑ This events is yearly (51%), 17% biennial, or with irregular frequency (24%).
- ❑ 62% of the Federations have at least 300 frames
- ❑ Two third of the Federation use 16 sheets frames
- ❑ The most common free fee is 11-15 €; in 14% of the respondents frames are free, whereas in 7% they cost over 30€
- ❑ The number of national exhibitions is almost stable (45%), with increase in 24% and decrease in 28%
- ❑ Major reasons for the reduction are the lack of organizational support, the age of the volunteers, and the lower interest
- ❑ Sponsors have financial problems, also due to the increased rental of the exhibition venue and the related costs (security, insurance, fitting)

% refers to the number of answering Federations

In order to make exhibitions more appealing, the most common initiatives have been:

- **Enhance the philatelic side**
 - Treasure room
 - Non-competitive exhibits
- **Add events on site**
 - Guided tours
 - Involve families
- **Add non-philatelic objects (and involve relevant trade)**
 - Postcards exhibits, also as a competitive class
 - Numismatic exhibits (or competitive class)
 - Books, photographs, memorabilia...
- **Change the “environment” for the exhibition**
 - Shopping centres, airports (non-competitive, focused exhibits)
 - Held the yearly exhibition in a different town

The limited level of interest for some classes makes them very exposed, as they are becoming only for specialized people. And they include also youth...

	Almost no interest	Few specialised exhibitors	Mild interest	Large participation	No answer
Traditional	0%	21%	34%	38%	7%
Postal History	0%	7%	21%	69%	3%
Thematic	0%	3%	31%	62%	3%
Aerophilately	28%	31%	38%	0%	3%
Maximaphily	34%	34%	10%	10%	10%
Postal Stationery	10%	45%	31%	7%	7%
Youth	17%	31%	28%	14%	10%
Astrophilately	62%	17%	14%	0%	7%
Revenue	45%	38%	10%	0%	7%

% refers to the number of answering Federations

One frame class and open philately have been successfully implemented. Most Federations support modern philately, some as a dedicated class.

	Yes	no	No answer
Open philately	79%	17%	3%
One frame	97%	0%	3%
Modern philately	66%	31%	3%

	Almost no interest	Few specialised exhibitors	Mild interest	Large participation	No answer
Open philately	14%	17%	45%	17%	7%
One frame	0%	0%	45%	52%	3%

- **Picture Postcards** are shown as a competitive class in a number of Federations
- Other non-FIP competitive classes: **modern philately, cinderella, polar philately**

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By 2023 the number of members has decreased in 60% of the Federations and increased in about 20%; national societies are by far more stable and also their activities have been less impacted.

	Has increased	Has remained stable	Has decreased	Not applicable	No answer
Members	18%	14%	61%	0%	7%
Local societies	7%	29%	54%	0%	11%
National societies	14%	39%	11%	29%	7%
Activity level local societies	11%	32%	46%	7%	4%
Activity level national societies	18%	32%	11%	32%	7%

By 2023 activities developed at national level are deeply Internet-based and exploit social networking

- Active Web pages of the Federation
- Web based journal
- Virtual exhibitions
- On line repository of past exhibits
- Internet based judging preparation
- Juror training
- Active education
 - Also focused (beginners, senior people, etc.)
- Guided forums
- Network of philatelic libraries
- On line library of magazines (old issues)
- Publications in e-format
 - **Events in non-philatelic framework**
 - **More international exhibitions – “regional” scale**

By 2023 about two thirds of the Federations have kept the 2013 structure; Federations having direct membership are one third of the total.

Federation structure in 2023:

- | | |
|---|-----|
| <input type="checkbox"/> Direct membership only | 14% |
| <input type="checkbox"/> Direct membership + national societies | 21% |
| <input type="checkbox"/> As today | 61% |
| <input type="checkbox"/> Other structures | 4% |
- ▶ several small clubs
- a) resigned from the Federation,
as **“it cares mainly of exhibitors”**, or
 - b) merged with other clubs of the area.

By 2023 local societies have developed new approaches and activities.

- ❑ Closer contact and cooperation with local institutions
 - Focused exhibitions
 - Attention to local themes and history
- ❑ Small, non-competitive exhibitions
 - also in non-philatelic areas
- ❑ Increased cooperation with other societies
- ❑ Improved website

By 2023 national specialized societies have strengthened and widened their international relationships.

- ❑ Internationally shared projects
 - ❑ Dissemination of information (e.g. Wiki)
 - ❑ Complementary contribution to a common subject
 - ❑ Network of national societies
- ❑ At national level:
 - Collectors meetings and specialized exhibitions

By 2023 no new areas of specialisation have been established, but some trends are visible around the countries.

- ❑ Popular philately, simple and understandable
- ❑ Postal history of modern postal system
- ❑ Modern Philately
- ❑ Private Operators' issues
- ❑ Picture Postcards

Two approaches are of interest:

- Starting with a limited scope of effort (one-three frames)
- Multi-documents perspective (open philately)

By 2023 Postal Operators continue issuing stamps and related products. Private Operators have increased their offer.

- Stamps are issued directly by the postal operator(s) without any ministerial decree in 40% of the countries
- The main postal operator continues to issue commemorative stamps and related philatelic products , with emphasis on personalized stamps
- Private operators offer stamps in 54% of the countries, with a balanced offer of commemorative and pictorial stamps, personalized, and electronic items.

By 2023 Postal Operators' support of philately has decreased and become part of their marketing budget

- The current (2013) **the main postal operator** continues its support as today in 36% of the countries, but in a slightly greater number of countries (39%) support has become a part of the general marketing budget (philatelists are just a subset of customers).

In some countries (14%) support has been stopped.

- In half of the countries (49%) postal operators support philately as a component of their general marketing strategy. Very little direct support to philately (7%).

By 2023 no new significant competition class has been launched. Postcards class has been accepted in a larger number of countries. Consideration is given to merging or dropping some of the current competitive classes.

Merging under consideration or already started are:

- ❑ Traditional Philately: with Postal Stationery and Revenues
- ❑ Postal History: with Aerophilately
- ❑ Thematic Philately with Open Class
 with Open and Youth
- ❑ Aerophilately with Astrophilately
- ❑ Maximaphily with Postcards

By 2023 the exhibitors' participation is concentrated on three classes. A few are in a critical position, whereas one frame exhibits are going quite strong. Open philately is also well accepted.

	Level of participation	Remarks (% of countries)
Traditional Philately	★ ★ ★ ★ ★ ★ ★ ★	
Postal History	★ ★ ★ ★ ★ ★ ★ ★ ★ ★	
Thematic Philately	★ ★ ★ ★ ★ ★ ★ ★ ★ ★	
Aerophilately	★ ★ ★	
Maximaphily	★ ★ ★	stopped in 11%
Postal Stationery	★ ★ ★ ★ ★	
Youth	★ ★ ★ ★	stopped in 11%
Astrophilately	★	stopped in 50%
Revenues	★ ★ ★	stopped in 11%
Open philately	★ ★ ★ ★ ★ ★ ★	
<i>One frame</i>	★ ★ ★ ★ ★ ★ ★ ★	
Postcards	★ ★ ★ ★	

By 2023 regulations have been changed, not only to fit the new structure of the classes but also to attract new entries mainly using simplified rules.

- ❑ Literature class has new regulations that consider digital literature (79%)
- ❑ Changes have been implemented for all frame classes (29%) or for some of them (36%), but some Federations assume that no change has been introduced in frame classes (11%)
- ❑ The main reasons for changing the regulations is “simplification”, also to attract new entries.
- ❑ Simplification has been applied also to GREX, aiming at reducing costs and making operations easier.

By 2023 virtual exhibitions have been implemented in two different ways.

- ❑ As a supplement of frame exhibitions, to reduce costs (39%)
- ❑ As an Internet duplicate of frame exhibitions, for reaching a larger audience and “perpetuating” the show (25%)
- ❑ They have not raised much acceptance in a number of Federations (29%)
- ❑ No Federation sees them as a full replacement of existing exhibitions.
- ❑ They are considered interesting for enthusiast people, as most philatelists want to see the real thing.

By 2023 Philatelic E-Books are published exclusively as companions of the paper edition. Online catalogues are becoming popular, but they require a heavy investment.

- ❑ **Paper books** are still the most common form (92%)
- ❑ In half of the countries (46%) they are supplemented by an e-book version.
- ❑ **Online catalogues** have become quite popular (57%), in most cases (46%) in parallel to the paper ones
- ❑ Paper (only) catalogues have still a large base (39%)
- ❑ The success of online catalogues is driven by the direct experience of the users, who have to assess the benefits “hands-on” before moving from paper ones..

By 2023 Publishers of philatelic magazines have reacted by moving to digital technology.

The mayor hurdles have been the costs and the age of several users.

- Paper publications were stopped and only a digital magazine is published (11%)
- Added digital format to the paper one (43%)
- Improved the web site with daily news and interactive contact with readers, but kept the paper magazine (25%)
- Some Federations magazines have become more important after the closing of a number of society magazines, stopped because of costs.

By 2023 Philatelic Trade has evolved as an Internet based business. However several collectors want to see the real items and are still fascinated by browsing through the boxes and the albums.

Main sales channels	% countries
Auctions	86%
Internet sales (companies)	57%
Internet sales (private)	61%
Philatelic Shops	32%
Bourses, Fairs, Post Office, etc..	18%

- ❑ Auctions are mainly via Internet (89%) even if a large majority (64%) uses the sales room as well.
- ❑ Auctions catalogues are almost exclusively paperless, on the Auctioneer's website.
- ❑ Dealers participation at stamps exhibitions is considered important in 68% of the countries.

By 2023 Internet sales and high sophisticated technology have boosted the risk of forged and faked items. Federations have reacted differently, without any major international cooperation.

- ❑ Doubtful material is fought regularly in about half of the countries, mainly with a permanent “watch” committee
- ❑ In the other countries the only check is at national exhibitions
- ❑ In spite of the many complaints and expert claims, Internet players (e.g. E-bay) have not taken significant actions to prevent frauds..

International cooperation of the Federations has improved, mainly with neighbour countries.

There is still a lack of international shared projects, beside the regulatory work.

Partners	Level of interest
Neighbour countries	★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★ ★
Other FEPA countries	★ ★ ★ ★ ★ ★ ★ ★ ★
Non-European countries	★ ★ ★ ★ ★

The main activities performed are:

- Exhibitions (rotation)
- Exchange of jurors
- Seminars

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After the analysis of the answers, some conclusions can be offered to the consideration of FEPA member federations

1. In spite of some limitations, the project has enabled to collect a **substantial amount of data**. Some areas need a deeper analysis, but finally FEPA and its members can use **facts rather than feelings**.
2. The way Federations answered the questionnaire shows **a different degree of awareness** of the problems to come. Many initiatives seem a different way of “business as usual” rather than a step towards the future.
3. Some Federations have already developed ideas and initiatives, some of them shared with other FEPA members. They are the cornerstones for the further development of the project.
4. FEPA has no execution role, but must stimulate members to take care of the initiatives that are necessary to change direction. The Board, along with the Project team (from FEPA members) can provide guidance and control, and use all FEPA communication resources to circulate the outcome of such initiatives among its members.

Now we have a four years' timeframe for performing our actions. How?

- ❑ Analyse and prioritize areas of potential development
- ❑ New project team
- ❑ Complete this presentation
- ❑ Propose working teams for each selected area – 2014
- ❑ Define action plan in view of 2014 Congress
- ❑ Present conclusions of working teams and 2015 plan to the 2014 Congress
- ❑

The areas of potential development could be:

- Federation's structure
 - Direct membership experience
- Federation's communications
 - Internet site
 - Digital magazine
 - Social network
- New models of exhibitions
 - Postcards
 - Modern philately
 - Virtual exhibitions
 - Exhibitions for the general public
- Reduce Exhibitions costs
 - As Organizers
 - As Participant
- Experience in merging *classes*
- Judging
 - Internet based seminars
 - Pre-judging
- International watch guard for Internet forgeries
- Cooperation among philatelic libraries
- FEPA Commissions
-

The outcome makes no reference to Statutes. It is not the right time!

- The current way of operations of FEPA and FIP has concentrated on reviewing and modifying statues and regulation, with most attention devoted to international exhibitions.
- Their business meetings had cover very little, if any, of the development of philately, which is the main reasons if their existence.
- The further development of the project shall address this objective, considering the **whole pyramid of philately**:
 - **International exhibitors** **1**
 - **National Exhibitors** **10-15**
 - **Societies' Members** **500-1.000**
 - **Collectors** **5.000-40.000**
- Once we will have established the relevant initiatives, we can define the relationships needed at international level and derive the most appropriate business rules (statutes and regulations) to govern them.