



The European Social
Dialogue Committee
FOR THE POSTAL SECTOR

Comité Européen du
Dialogue Social
POUR LE SECTEUR POSTAL

“PROMOTING SOCIAL DIALOGUE IN THE POSTAL SECTOR IN AN ENLARGED EUROPE”

Eastern Workshop
Prague, September 21st -22nd 2017

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Training, Health & Safety Working Group

The Training, Health & Safety working group of the postal SDC is composed both by companies and trade unions representatives.

The purpose of the working group is to investigate, also through projects funded by the European Commission, issues considered as important by the social partners. The areas of investigation are Training, Re-Training programs and models implemented in the sector, Skills anticipation and skills development. The working group also follows and spread information about the EC policies on training and skills development.

Health & Safety policies, also at European level, as well as programs and best practices implemented in the sector are part of the scope of the working group.

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Project Description

Project main objectives

- To get first-hand information on how postal operators and trade unions are managing to support the increased digitalisation of their organisations with impacts on jobs and competences, on the work organisation as well as on training needs and methods
- Better understanding on the programs of digital transformation put in place within companies in terms of training and cultural evolution. In this framework, the needs in terms of digital skills and new jobs will be a key area.
- Impact of the digital tools and new technologies on the work organisation. The opportunities that the digital economy represents in terms of development of new activities, in particular the parcels' ones, in view of the growing e-commerce market
- Capacity-building activities to raise awareness and disseminate the work of the postal services social dialogue committee, in particular but not exclusively, in Central and Eastern Europe.

The Project

- The project *Promoting European Social Dialogue in the postal sector in an enlarged Europe* is part of the Training, Health & Safety working group
- The funding for the project proposal has been signed off by European Commission in January 2017
- Duration of the project: 24 months split in three phases (2017 – 2019)
 1. Preparation of regional seminars
 2. Staging of regional seminars: September 2017, Eastern Seminar, Prague
January 2018, Baltic Seminar, Vilnius
Candidate country seminar, location *tbd*
 3. Presentation of final project report and conference in Brussels (2019)
- An extended questionnaire provided to postal employers and unions participating in the ESD.
- This presentation is based on the analysis of answers received by both sides, and will be the pivotal working document during the project phase.
- The results of the analysis and the outcomes of the regional seminars will be consolidated in a final project report, available for circulation among SDC members, European commission and further relevant European stakeholders.



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Questionnaire & Method

- Evaluation of questionnaire with 3 Parts:
 - Promoting Social Dialogue
 - Impact of Digitalization
 - Training
- Answers from 16 postal companies from 15 countries*
- Answers from 14 unions from 12 countries
- 42% of Countries represented on employers' and 36% on unions' side represented in the study
- Only information stated in the questionnaire were taken into consideration, no additional research was made
- Only the direct answer of each question was analyzed, answers from other questions even though the content could be related were not included to ensure a clean analysis

Overview - Answered Questionnaires

	Country	Postal Company (total 15)	Union (total 14)
Eastern Seminar	Slovakia	Slovenská pošta, a. s.	OZ PAL
	Czech Republic	Czech Post	OSZPTNS
	Bulgaria	Bulgarian Posts Plc	Trade Union Federation of communications
	Romania	Romanian Post	
	Germany	DPDHL Group	
	Belgium	bpost	CGSP ACOD
	Austria	Österreichische Post AG	
Baltic Seminar	Latvia		LSAB
	Estonia		ESTAL
	Lithuania	Lithuanian Post (Lietuvos paštas)	
	United Kingdom		UNITE
	Ireland		CWU
	Netherlands	Post NL *	
	France	Le Groupe La Poste	FO; CFDT
Candidate Country Seminar	Greece	HELLENIC POST S.A – ELTA	
	Spain	Correos	CCOO; FeSP-UGT
	Portugal		SNTCT
	Italy	Poste Italiane S.p.A.	
	Croatia	CROATIAN POST Inc.; MIPS d.o.o.	
	Cyprus + Malta	Cyprus Post	PASYDY UPEP



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PART 1

- PROMOTING SOCIAL DIALOGUE -

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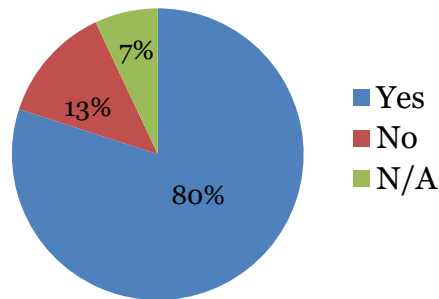
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Executive Summary Part 1

- Similar understanding of role and activities of the European Social Dialogue between unions and employers
- General higher participation and involvement on unions' side
- Employers see a more adequate implementation of Joint Declarations compared to unions
- Implementation mainly in best practices (Employers 42%) and collective labor agreements (Unions 29%)
- Both, employers and unions are considering the possibility for the SDC to cover other issues seen as important for the sector in the future
- No statistical relevant regional split between country clusters (Eastern, Baltic, Candidate Country Seminar)

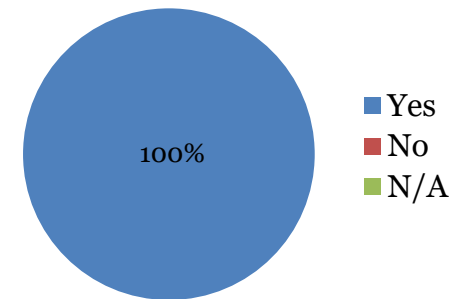
1.1 Do you know the role and main activities of the SDC?

Employers



- Cooperation between employers and trade unions in the postal sector
- Advisor role towards European Commission
- Contribute to the improvement of working conditions & sharing best practices

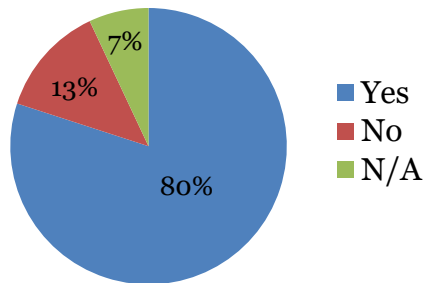
Unions



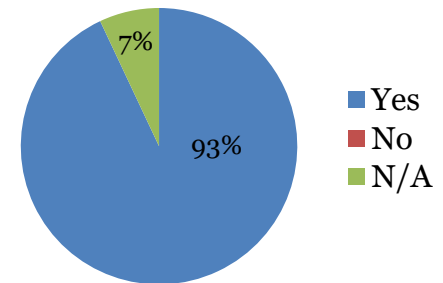
- Cooperation between Employees/Employers
- Employee involvement in decision-making, collective bargaining and wages
- Harmonize the sector in European countries

1.2 Is your company / trade union involved in SDC activities?

Employers

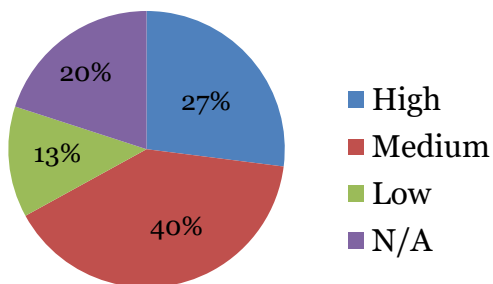


Unions



1.2 If you are involved in SDC activities, what is your level of participation?

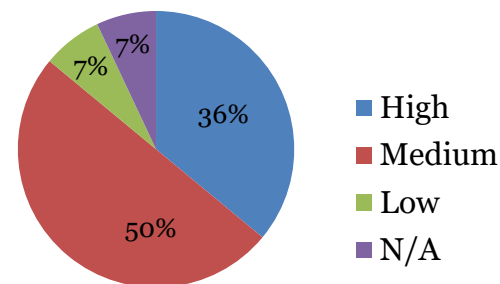
Employers



If you are not involved in SDC activities, could you please explain why?

- No personnel capacities to follow and cover the SDC activities

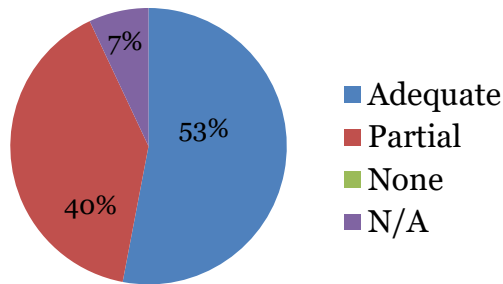
Unions



N/A

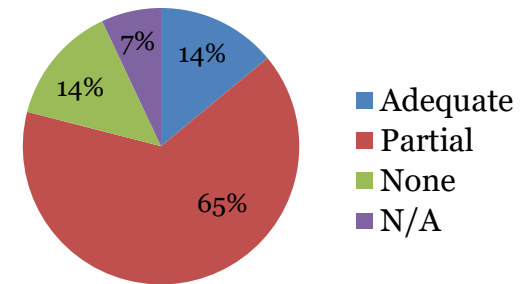
1.3 What is the level of implementation of Joint Declarations in your company/organization?

Employers



N/A

Unions

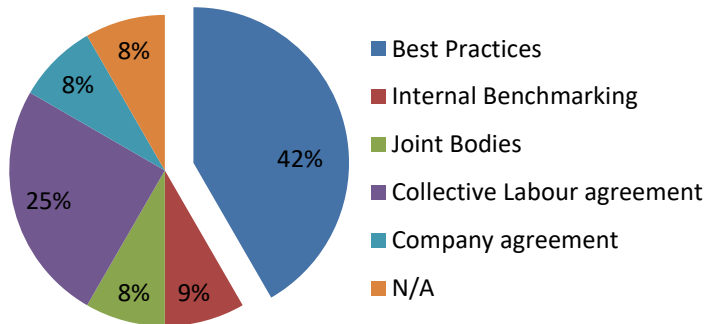


Reasons of non-implementation:

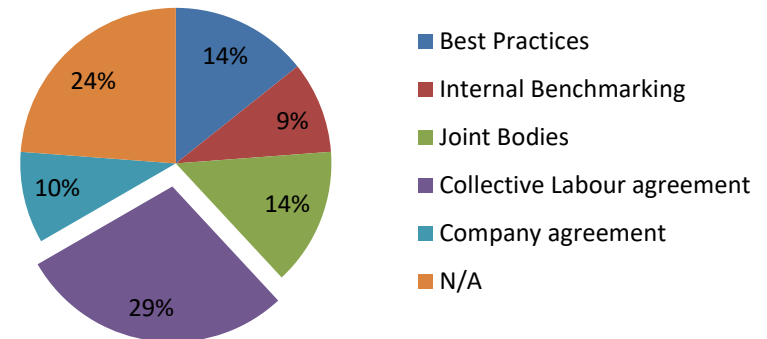
- Employer is not actively participating in discussions at European level, which makes it difficult to bring in the views of the company's level.

1.4 Have the outcomes of the SDC been integrated in the discussions and documents of the employers and trade unions in your company?

Employers



Unions



1.4 Have the outcomes of the SDC been integrated in the discussions and documents of the employers and trade unions in your company?

Employer:

- Integration of project results & best practices in internal discussions with key experts within the company
- Negotiation with the Unions concerning Collective Labor Agreement

Union:

- Relocation program for the delivery persons shifting from mail delivery to other duties
- "Memorandum for the social partners' cooperation in solving employment, remuneration and social employment policies

1.5 Is there any other matter/subject that you think should be covered by the SDC?

Employer:

- Service and Customer orientation
- Sharing methods aimed at achieving the commitment and on-the-job involvement of company workers between different postal operators

Union:

- Harmonization of professional and family life
- Training, health and safety, accidents and occupational diseases, emotional exhaustion
- Employment (precarity and precarisation, extension of part-time working days), pensions and social actions (financial assistance for students, health treatments, etc.)
- Impact of new technologies on the quantity and quality of employment, health and wages
- Gender gap (incl. gender pay gap) and ageing population



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Trends Part 1

- High knowledge of SDC, higher on unions' side (100%) vs. employers' (80%) **Q 1.1**
- Level of involvement in general high, with a average higher involvement on unions side (93%) vs. employers (80%) **Q 1.2**
- Level of participation higher on unions side (high + medium 86%) vs. employers (high + medium 67%) **Q 1.2**
- 1/3 of countries are highly involved in the SDC **Q 1.2**
- Employers see a more adequate implementation (40%) of Joint Declarations compared to unions (14%) **Q 1.3**
- Integration mainly in best practices (Employers 42%) and collective labor agreements (Unions 29%) **Q 1.4**
- Topics to be covered by SDC in the future could be service & customer orientation (employers) and work-life balance (unions) **Q 1.5**
- Reason for non-activity named as lack of resources
- Reason for non-implementation named as lack of participation in ESD



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PART 2

- DIGITALIZATION IMPACTS -

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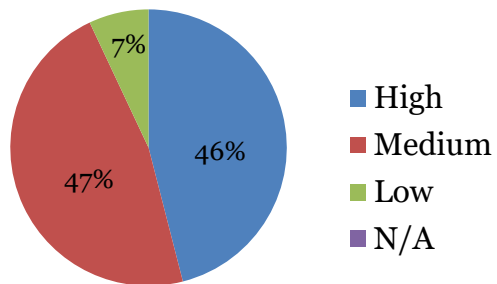
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Executive Summary Part 2

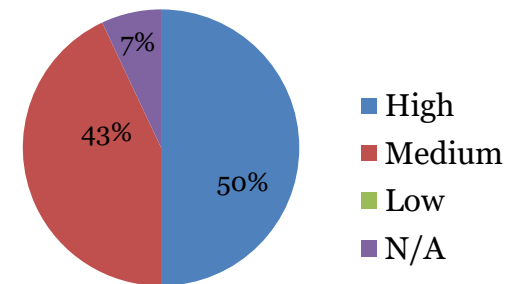
- Decrease in mail volume and increase of parcel volume
- Offering of new digital services – e.g. online platform for post and financial services, mobile apps, the “digital document” – transforming physical letters in electronic documents and storage, digitalization of public administration / e-government
- Track & trace opportunity – notification of delivery via email, SMS and providing flexible pick up options
- Technical upgrade – providing new devices e.g. PDAs and change of physical infrastructure (e.g. sorting centers, fleet)
- Impact on working conditions – shift of personnel from mail to parcel, change of role profile, change of delivery time
- Reorganization – adjusting network and processes, creating new parcel divisions, acquiring parcel subsidiaries or new corporate partnerships

2.6 How far has your company been impacted by digitalization?

Employers



Unions



2.6 – Top stated changes in company's operations

1. Decrease of mail volume (5 employers, 6 unions) and increase of parcel volume (3 employers, 3 unions)
2. New electronic/ digital services (7 employers, 3 unions)
3. Electronic communication with customers (4 employers, 4 unions)
4. Job impact – change of role profile, negative impact on quantity and quality of employment, training to adapt to new services (2 employers, 3 unions)
5. New technical devices/ equipment (3 employers, 2 unions)
6. Impact of e-government/ digitalization of public administration (2 employers, 1 union)



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Regional Reflections

Comment on methodology: Answers were counted individually and not aggregated on country level

Answers from participants from:	High	Medium	Low	N/A
Eastern Seminar	8	2	1	
Baltic Seminar	3	5		
Candidate Seminar	3	6		1



Highest Impact in Eastern Seminar

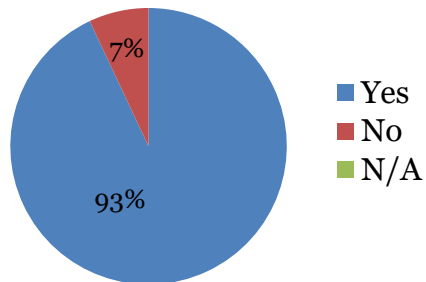
Answers from participants from countries joining the European Union in a year	High	Medium	Low	N/A
< before 2004	8	4		1
≥ in and after 2004	4	7	1	



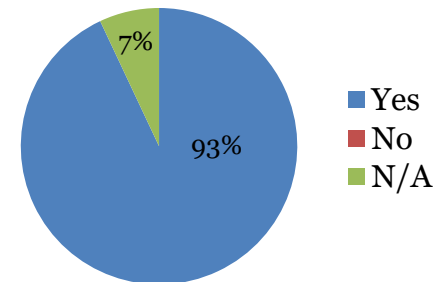
Higher impact by participants from countries before 2004

2.7 Has your company implemented e-commerce strategic activities, notably parcels activities?

Employers



Unions

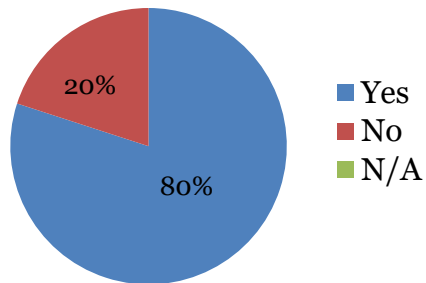


2.7 - Top stated e-commerce strategic activities

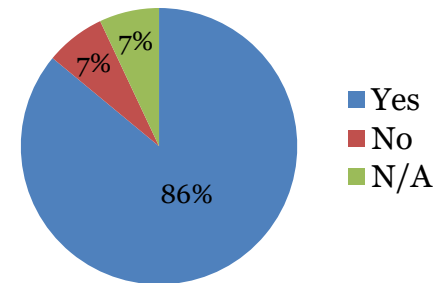
1. Delivery to parcel lockers/ boxes (4 employers, 4 unions)
2. SMS notification upon arrival (4 employers, 3 unions)
3. Delivery to post offices/ pick-up (4 employers, 2 unions)
4. Re-organization - creation of divisions, subsidiaries + partnerships with other companies (3 employers, 3 unions)
5. Technical devices - smartphones, PDAs (3 employers, 1 union)
6. Return services (3 employers)
7. Modification of working conditions - part time employment, usage of free-lance delivery workers (2 unions)

2.8 Has the development of e-commerce activities required the reorganization of mail operations with regard to parcel delivery operations in your company?

Employers



Unions

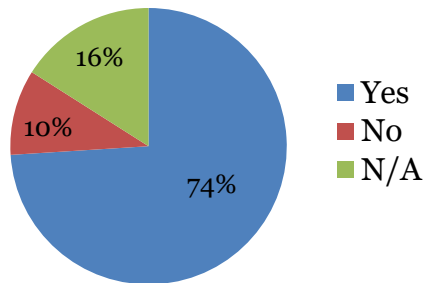


2.8 Most stated main elements of the reorganization process

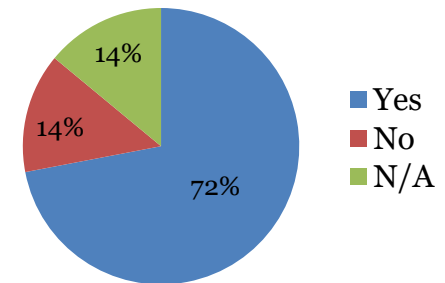
1. Change of delivery system/ process (7 employers, 2 unions)
2. Change of delivery time (3 employers, 4 unions)
3. Reorganization/ restructuring (3 employers, 4 unions)
4. Providing PDA/ technical devices (5 employers, 1 union)
5. Change of network, infrastructure (reuse of former mail sorting centers for parcels), fleet (5 employers)
6. Shifting personnel from mail to parcel (3 employers, 1 union)
7. Aligning mail and parcel activities (3 employers, 1 union)

2.9 Has digitalization led to the implementation of new postal e-services in your company?

Employers



Unions



2.9 Top stated new postal e-services

1. Online services – making postal services available on website, e-platform (11 employers, 3 unions)
2. Online/ e-document – transforming physical letter into a digital version, digital storage of documents (7 employers, 2 unions)
3. Mobile App (4 employers, 2 unions)
4. Track & trace and electronic notice on delivery via email, SMS (4 employers, 2 unions)
5. Financial services - banking and invoicing (4 employers)
6. E-commerce - online shop/ platform or web-services for SMEs (3 employers, 1 union)
7. Parcel lockers (1 employer, 1 union)

Trends

- Impact of Digitalization perceived similarly between unions (high 46%) and employers (50%) **Q 2.6**
- Shift from mail to parcel volume, key change of operations through digitalization, followed by focus on new technology (automation, new technical devices, digital services) for employers and changes of role/job profiles for unions **Q 2.6**
- Nearly all companies have implemented e-commerce strategic activities (93%) **Q 2.7**
- Development of e-commerce activities required the reorganization of mail towards parcels operations **Q 2.8**
- Digitalization led to the implementation of new postal e-services **Q 2.9**
- In the 1-2-1 comparison possible for 7 countries, employers and unions have the same perception of the development of digitalization in their company/country **Q 2.6-9**
- No correlation between the introduction of an e-commerce strategy, reorganization and new e-postal services and the impact of digitalization (high/ medium/low) **Q 2.6-9**
- Slight decrease in agreement from implementation of e-commerce strategic activities (**Q 2.7**) to requirement of reorganization (**Q 2.8**) to implementation of new postal e-services (**Q 2.9**)



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PART 3 - TRAINING -

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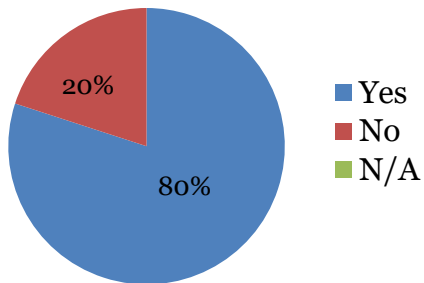
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Executive Summary

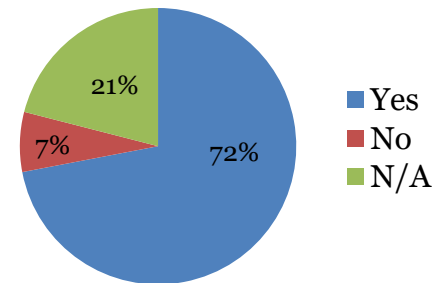
- Digitalization has an impact on training and re-training as it creates the need for dedicated training programs
- A clear focus of training on IT and computer skills and on providing new digital services, through cooperation with external training providers, scouting for internal digital competencies, involvement of employees in developing new technical devices
- No major redeployment programs towards parcels and digital services yet, but slight shift of personnel from mail to parcel and/ or alignment of mail and parcels activities
- Flexibilization of delivery, pick-up and return options to serve online consumers – e.g. time window delivery, evening and weekend delivery, parcel lockers
- Track & trace options via online portal, mobile apps and notification on delivery via SMS, email or app
- Upgrade of vehicles due to new requirements - size, flexibility, sustainability, security
- Providing new technical devices and tools (e.g. smartphones, PDAs)
- Employers and unions agree on top 2 required future skills – flexibility and service and customer orientation

3.10 Is your Company providing training and/or re-training programmes to up-skill the current workforce as regards digital skills?

Employers

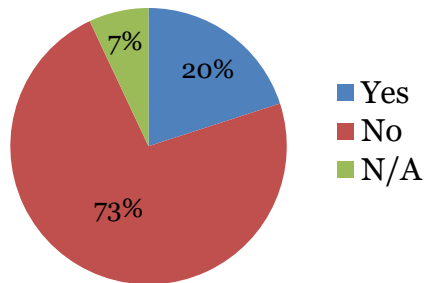


Unions

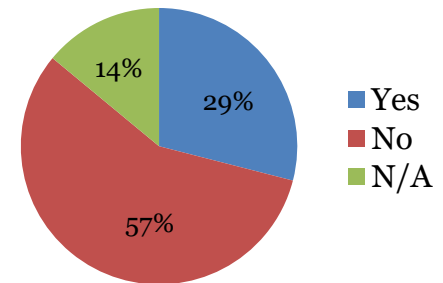


3.11 Does your company have programmes to provide internal redeployment options for postal workers to specialize in parcel delivery?

Employers



Unions



3.12 Are there internal redeployment options for postal workers to specialize in identified new digital Services?

Employer:

- Providing internal and external training on IT skills to up-skill workforce with perspective of future new assignment
- Redeployment under consideration in the future
- Scouting internally for digital competencies
- Training on providing digital services
- Involvement of employees in developing new technical devices
- E-learning

Union:

- Training courses to improve computer knowledge (MS Office)
- Seen as employers' responsibility
- Redeployment programs considered for the future

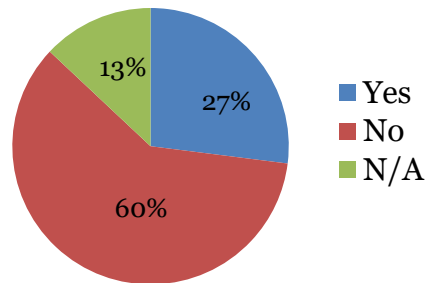


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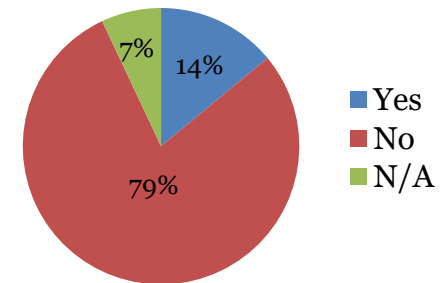
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3.12 Are there internal redeployment options for postal workers to specialize in identified new digital Services?

Employers



Unions



3.12 Are there internal redeployment options for postal workers to specialize in identified new digital Services?

Employer:

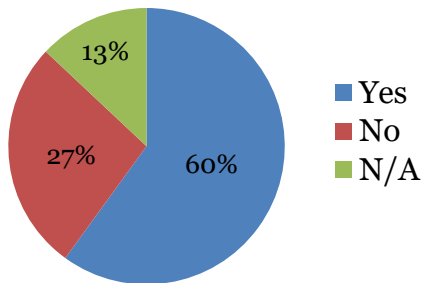
- Providing internal and external training on IT skills to up-skill workforce with perspective of future new assignment
- Redeployment under consideration in the future
- Scouting internally for digital competencies
- Training on providing digital services
- Involvement of employees in developing new technical devices
- E-learning

Union:

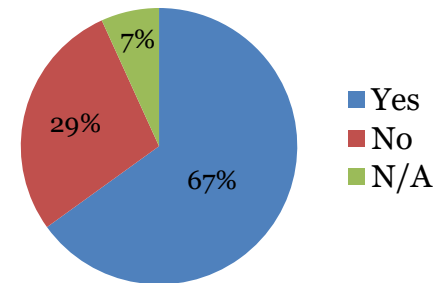
- Training on providing digital services, incl. e-government services
- Seen as employers responsibility
- General option to move between working areas
- Physical “walking” postman replaced by digital postman
- Redeployment under consideration in the future
- E-learning

3.13 Is your company recruiting new job profiles to better meet digital and e-commerce activities?

Employers



Unions



3.14 Do new flexibility demands of online consumers affect parcel delivery in terms of operations? What is put in place to meet these expectations at the level of the postal operator?

Employer:

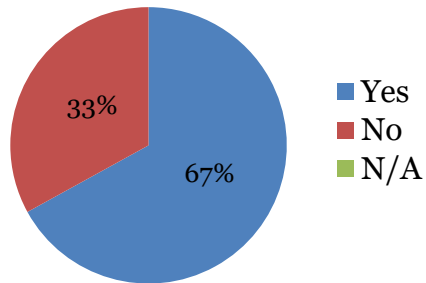
- Track and trace options
- Parcel lockers
- Fleet development – sustainability/ e-mobility, size
- Mobile devices (smartphones, PDAs, tools) for postwoman/postman
- New delivery and pick-up (and return) models
- Flexible delivery times / time window delivery – on demand, evening and weekend delivery
- Mobile apps and notification on delivery via email, SMS or app

Union:

- Track and trace options
- Fleet development – size of vehicles
- Mobile devices (smartphones, PDAs, tools) for postwoman/postman
- Parcel lockers
- Mobile apps and notification on delivery via email, SMS or app

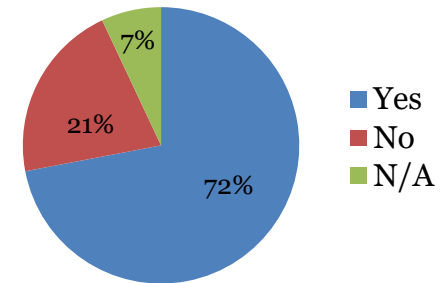
3.14 Are your postwomen/postmen equipped with digital devices?

Employers



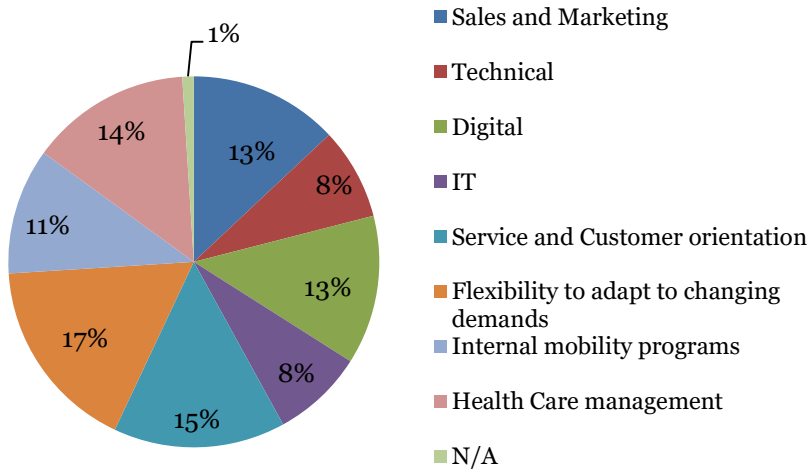
- Not yet, but available in Spring 2018

Unions

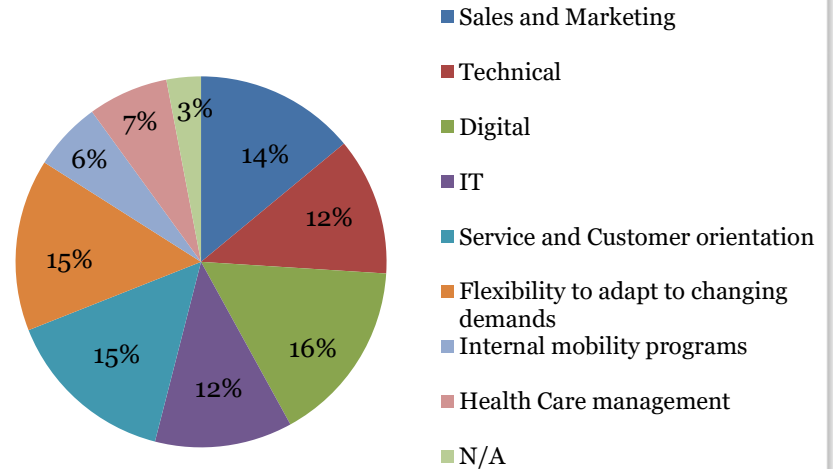


3.15 What kind of technical / functional and soft skills does your company believe will be most needed in the future in relation to digitalization?

Employers



Unions



3.15 What kind of technical / functional and soft skills does your company believe will be most needed in the future in relation to digitalization?

Employers

1. **Flexibility (17%)**
2. **Service & Customer Orientation (15%)**
3. **Health Care Management (14%)**
4. **Digital (13%)**
Sales & Marketing (13%)
5. **Internal Mobility programs (11%)**
6. **Technical (8%)**
IT (8%)

Unions

1. **Digital (16%)**
2. **Service & Customer Orientation (15%)**
Flexibility (15%)
3. **Sales & Marketing (14%)**
4. **Technical (12%)**
IT (12%)
5. **Health Care Management (7%)**
6. **Internal Mobility Programs (6%)**

Trends

up-skill current workforce (employers 80%, unions 72%) **Q 3.10**

options towards parcel activities (employers 73%, unions 57%) **Q 3.11** or digital services (employers
for the future

(employers 60%, unions 67%) **Q 3.13**

answer customers' needs **Q 3.14**

nnel with digital devices, e.g. PDAs (employers 67%, unions 72%) **Q 3.14**

skills – flexibility (employers 17%, unions 15%) and service and customer orientation (employers +