



The European Social
Dialogue Committee
FOR THE POSTAL SECTOR

Comité Européen du
Dialogue Social
POUR LE SECTEUR POSTAL

PSE PROJECT “MOBILISING SOCIAL PARTNERS IN A NEW CONTEXT”

MAIN OUTCOMES

Postal Sector Evolution working group

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CONTENT

- 1. Main elements of the projects**
- 2. Project's main findings**
- 3. Projects' main outputs**

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1. Main elements of the projects



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1. Main elements of the project

- An EU co-funded project of 18 months :
 - December 2014 to June 2016
- Project focusing on two topics:
 1. Social dialogue and CLAs to accompany the change process
 - Analyse of labour agreements signed within 16 postal operators
 2. E-commerce and new proximity services
 - Led to a MOOC on new services
- Support by an external consultant, Ecorys

Topic 1: study on collective labour agreements (CLAs)

- Objectives: identify the key topics dealt with in social dialogue at national level and better understand the process of social dialogue
- A selection of 16 national postal operators:
 - Austria, Belgium, Denmark, Estonia, Germany, Finland, France, Ireland, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, UK
- Two main sources of information:
 - First-hand data
 - collected by means of questionnaires disseminated to all the 28 Member states
 - completed by phone interviews done with the respondents from the 16 selected countries to get complementary information
 - A desk research with an analysis of CLAs' content through a detailed grid of analysis for each of the 16 countries

Topic 1: study on CLAs, final conference

- A successful conference organized on 24-25 May 2016 in Bucharest
- A good level of participation:
 - 52 participants from 18 countries
- A variety of presentations based on the study's outputs
 - Transversal presentation made by the consultant
 - Presentation of national case studies by companies' and union's representatives



Topic 1: study on CLAs, final conference

- Organized around seven thematic sessions
 - Session 1: Employment
 - Session 2 : Wage policies
 - Session 3 : Work organisation
 - Session 4 : External and internal mobility
 - Session 5 : Career planning and training
 - Session 6 : Searching for a new social and economic equilibrium
 - Session 7: What role for social dialogue in the transformation and future trends?



Topic 2 : E-commerce and new proximity services

- Objectives:
 - Provide social partners with a better understanding of these new markets thanks to the input from selected external experts
- Took the form of a two-day training on new services organized in Brussels on 17-18 November 2015
 - With 58 participants from 21 countries, it was particularly attractive to SDC members as it focused on growing activities for the postal sector.
 - An opportunity for interactive discussion and learning on initiatives being developed within the postal industry in the areas of new services, particularly the e-commerce, which are of importance to the sector.
 - A particular attention given to the new competences required and the role of training

Training seminar on new services

- Content of the seminar:
 - Interventions from key representatives from the Commission (DG Growth), PostEurop and UNI Europa
 - Case studies presentations from Deutsche Post DHL, Poczta Polska, La Poste, PostNord, bpost, Postkom
 - Transversal presentation on developments in e-commerce and new services by the consultant





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2. Project's main findings

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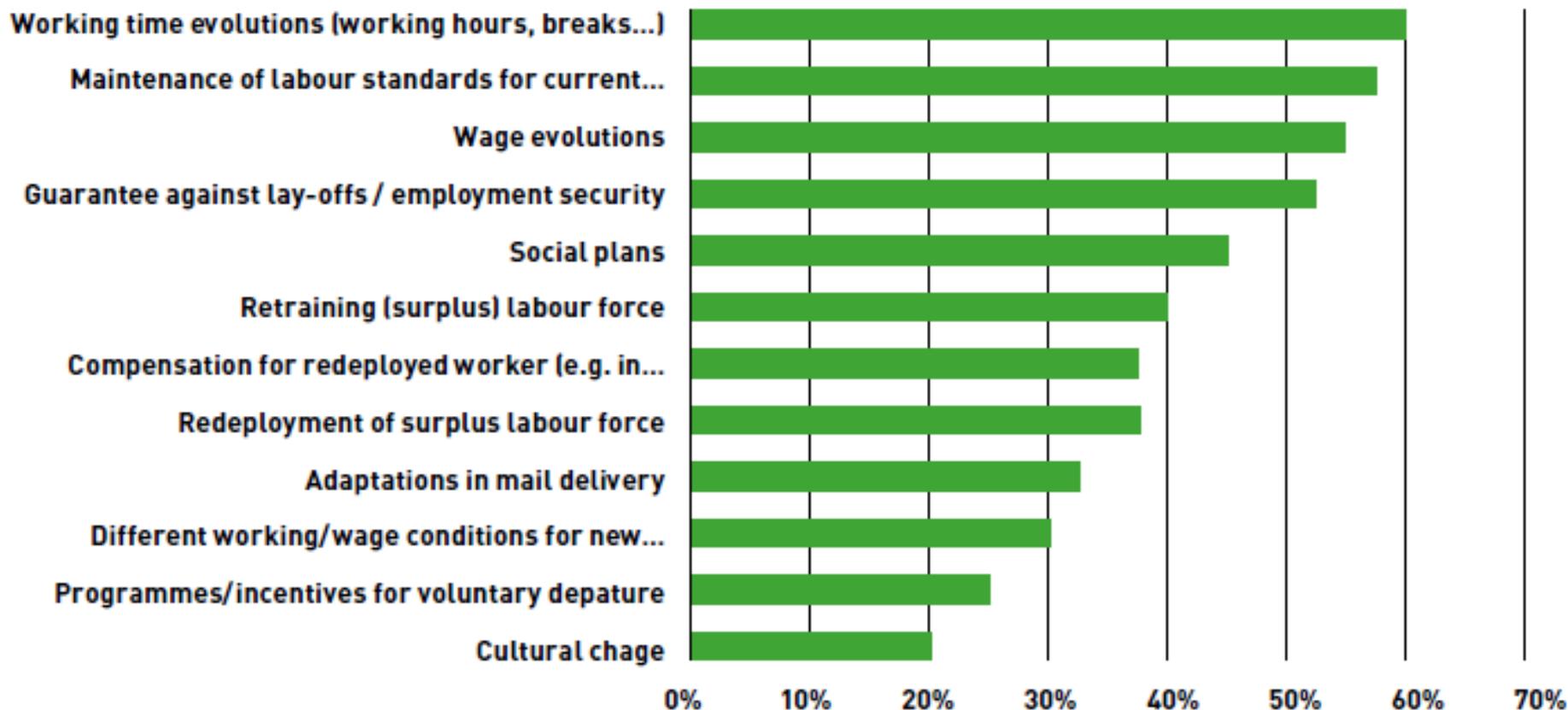
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Topic 1: main findings on CLAs' analysis

- Collective labour agreements (CLAs) as a key tool to manage the change process:
 - NPOs face common challenges but at different stages of transformation
 - Social partners have managed to support well the transformation and mitigate its impacts, in particular through the signature of CLAs
- The content of the CLAs differs significantly between the EU Member States
 - Different national contexts, regulatory and industrial relations framework, companies at different stages of transformation



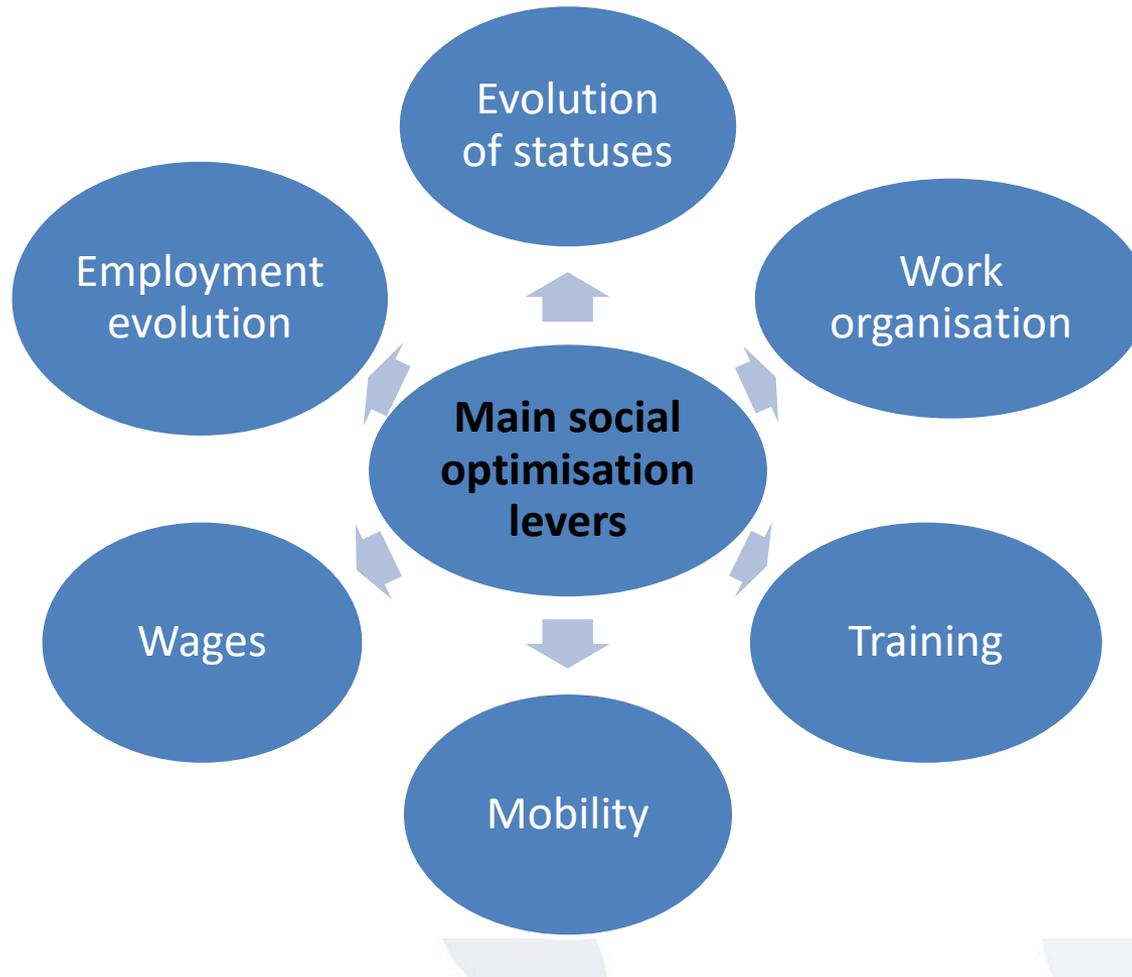
Topics covered in postal operators' CLAs



CLAs' analysis main findings

- Social partners try to find a balance between flexibility in working arrangements and employment security
- CLAs constitute central elements of the social change process in most NPOs
 - Measures in the CLAs do not only aim at limiting the impact of the transformation
 - Positive measures to enable employees to benefit from the transformation have also been put in place
 - Training has in particular become an increased priority in most operators.
- However CLAs do not contain all the measures implemented to support the change process

Main identified factors shaping the operators' social transformation



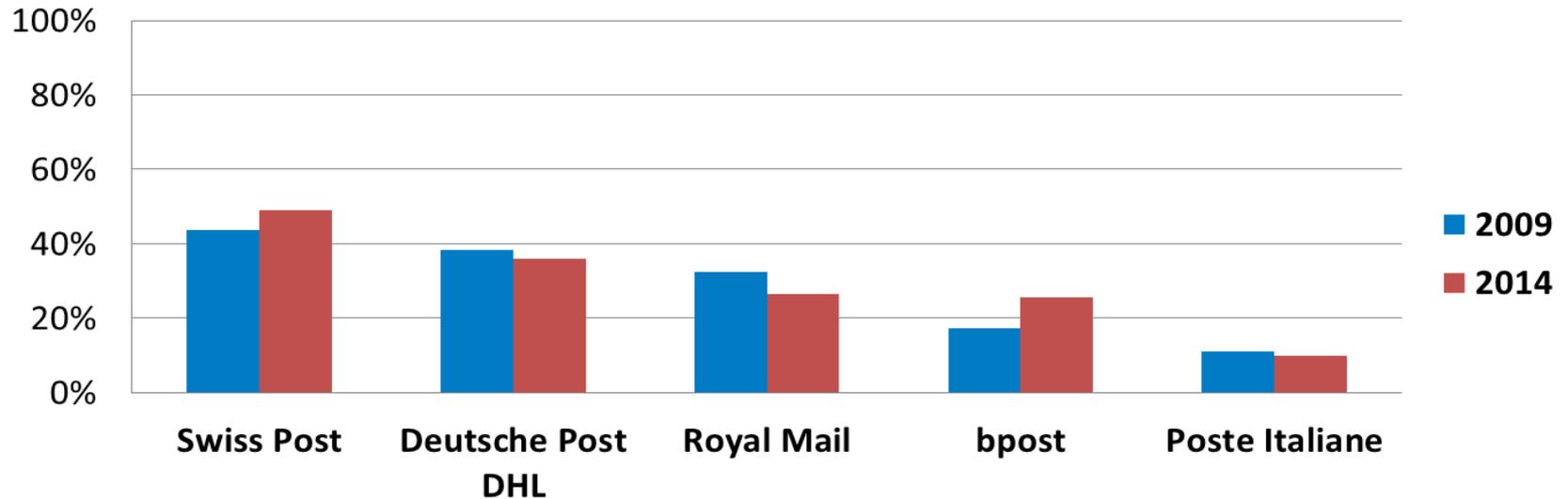
- These levers are non-exhaustive and have been used at different levels by postal companies and usually in combination

Main conclusions

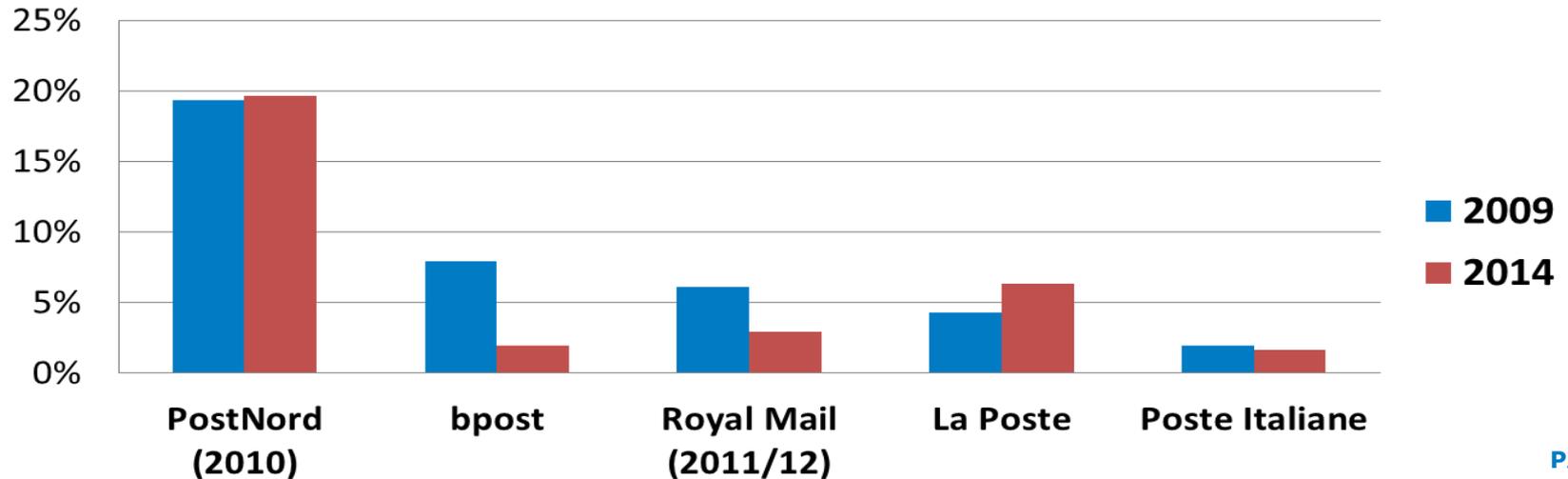
- **Employment:** important decrease in employment levels
 - Mainly via natural attrition supported in some case by voluntary leave
- **Wages:** simplification of salary packages
 - Less allowances, in some countries lower wages for new employees
- **Work organisation adaptation:**
 - Modulation of working time, adaptation of USO, increased combination of mail and parcels' delivery
- **Mobility:** internal and external one
 - Voluntary leave and early retirement programs to support natural attrition
 - Support to external mobility: financial incentives, career counselling
- **Training:**
 - few references in CLAs
 - Support to maintain employability

Evolution of statuses

Evolution of the part-time employment rate



Evolution of the short term contracts rate



Other measures in CLAs

- Different working conditions for current vs. future employees
 - Maintenance of statuses and wages for existing staff while offering different conditions for newly recruited employees with lower wages or more flexible statuses.
- Social partners have also put in place several positive measures to support the transformation
 - The development of new jobs together with the need for new skills has required the development of further training programmes to enable up-skilling and re-skilling of employees
 - Essential to develop staff employability and support its redeployment through internal and/or external mobility
 - In this fast developing environment at the digital age, postal operators also need to hire new competences and attract the younger generations.

Main conclusions

Key role of social dialogue:

- Social dialogue has enabled to mitigate the negative consequences of the transformation on employment and working conditions in the sector
 - Collective Labour Agreements constitute central elements of the social change process in all EU Member States

Examples of trade-offs :

Employment security existing staff versus lower conditions new staff

Maintenance labour conditions existing staff versus forced redundancies

Wage freezes and decreases versus increase employment levels

Draft typology of social transformation strategies

1. A strategy geared towards employment security with **no forced redundancies in exchange of negotiated wage freezes or moderation**
 2. A strategy geared towards the **maintenance of labour conditions** in terms of **wages and work organisation stability** which entails a **reduction in employment and in some cases externalisation** of operations (last-mile delivery).
 3. A strategy aimed at **preserving wages' and employment levels** whilst entailing **increased flexibility in work organisation** patterns.
- These social transformation strategies:
 - can vary over time or be combined according to the operators' or the national context,
 - are closely linked to the diversification strategies of postal operators



Topic 2: Opportunities and challenges for postal operators in e-commerce

- A fast-growing but also highly-competitive market: opportunities of development for NPOs but at the same time a more competitive market.
- Besides delivery which is their core business, incumbents can develop other services on the e-commerce value chain through backward integration to stand as comprehensive partners along this chain:
 - Sales with the provision of online market places, facilitation of payment through online solutions, provision of fulfilment solutions with storage and pick & pack.
- The development of these services relies on the postal operators' know-how, their position as trusted companies and their customers' knowledge.
- The analysis of the actors on the e-commerce value chain shows that some companies whose core competences are at the beginning of the chain tend to develop a new offer of services with forward integration.
 - Market places are increasingly looking at offering delivery services so that they can also become comprehensive partners relying on their own services all along the value chain.

Opportunities and challenges for postal operators in e-commerce

- On the e-commerce value chain, the last kilometre delivery is of key importance for the customer.
 - In this activity, an increased operational externalisation can be observed in some countries
 - Postal operators need to better answer customers' needs in terms of flexibility, rapidity and choice of delivery. For this purpose, it appears that there is a development of flexible working arrangements which impact work organisation.
 - Within several postal operators, there is thus an increased combination and complexity of mail and parcels delivery.
 - Moreover the evolutions of the work organisation show a tendency to extend delivery time across the day and at the week-end.
- The project has highlighted that competition on this activity occurs not only through cost-cutting but also via quality of service provision.

New proximity services

- NPOs have been transforming their businesses into hybrid organizations, providing a range of business such as parcels and logistics but also non-mail services – called ‘proximity services’:
- These proximity services can be divided into five categories:
 - Extending the product range in delivery (e.g. groceries, pharmaceutical products)
 - Targeted solutions for a specific sector (e.g. welfare)
 - New services in postal offices (e.g. banking services)
 - Proximity to the public space (e.g. road quality)
 - In-house visits and services (e.g. towards elderly people, collection of contracts, reading meters, collection of electric appliances or PET bottles for recycling etc.)

New proximity services

- There is a high diversity of new proximity services tested or implemented by postal operators.
 - These services are characterized by a personalisation of the relationship and are fully in accordance with emerging societal needs like silver economy, rapid delivery of fresh products, optimisation of public services
- The project highlights that there is potential for incumbents to develop new services to individuals based on their extended network and the relationship of trust with consumers.
 - National postal operators have a unique added-value in terms of proximity and physical link in the digital economy.
 - This development creates opportunities in terms of employment
 - There is a need to develop new competences through training and re-training of existing employees in a lifelong learning perspective and attract skilled labour



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Project final report

- Content of the final report
 - Project's main findings, key messages from European social partners, consultant analysis and all material presented during the final conference and the training seminar
- A large dissemination:
 - Final report in English, French & German:
 - 150 ENG + 75 FR + 50 DE
 - Dissemination to internal and external stakeholders:
 - PostEurop members, UNI members
 - Institutions:
 - European Commission, Parliament, Eurofound, ILO
 - Cross-sectoral social partners
 - Bussinesseurope, CEEP, ETUC



Joint Declaration ‘The role of social dialogue in the transformation’

- The project led to a Joint Declaration signed on 1 December 2016
- Enables to formalize some joint messages of the European social partners on social dialogue:
 - Sets the main principles on how an effective social dialogue at all levels can be an essential lever for anticipating and supporting the transformation process.
 - Social dialogue should find the balance between the modernization of their work structure, increased flexibility and good working conditions.
- Also underlines the need to enhance the awareness and competencies of all social partners on the developments and overall e-commerce strategy



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Elaboration of an e-learning module : POST MY MOOC

- MOOC, on e-commerce and proximity services
 - Follow-up to November 2016 training seminar
 - 3 main parts:
 - Main challenges in the postal sector today
 - The e-commerce value chain
 - New proximity services
 - Enables an innovative, wider and long-lasting dissemination