



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”

Vilnius regional workshop 18-19 January 2018

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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
 2. E-commerce and new proximity services
- Support by an external consultant, Ecorys

Topic 1: study on collective labour agreements (CLAs)

- Objectives: identify the key topics dealt with by 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
- Research and analysis with two main sources of information:
 - First-hand data
 - A desk research with an analysis of CLAs' content

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
- A two-day training in Brussels on 17-18 November 2015
 - 58 participants from 21 countries
 - Particularly attractive to SDC members as it focused on growing activities for the postal sector



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2. Project's main findings

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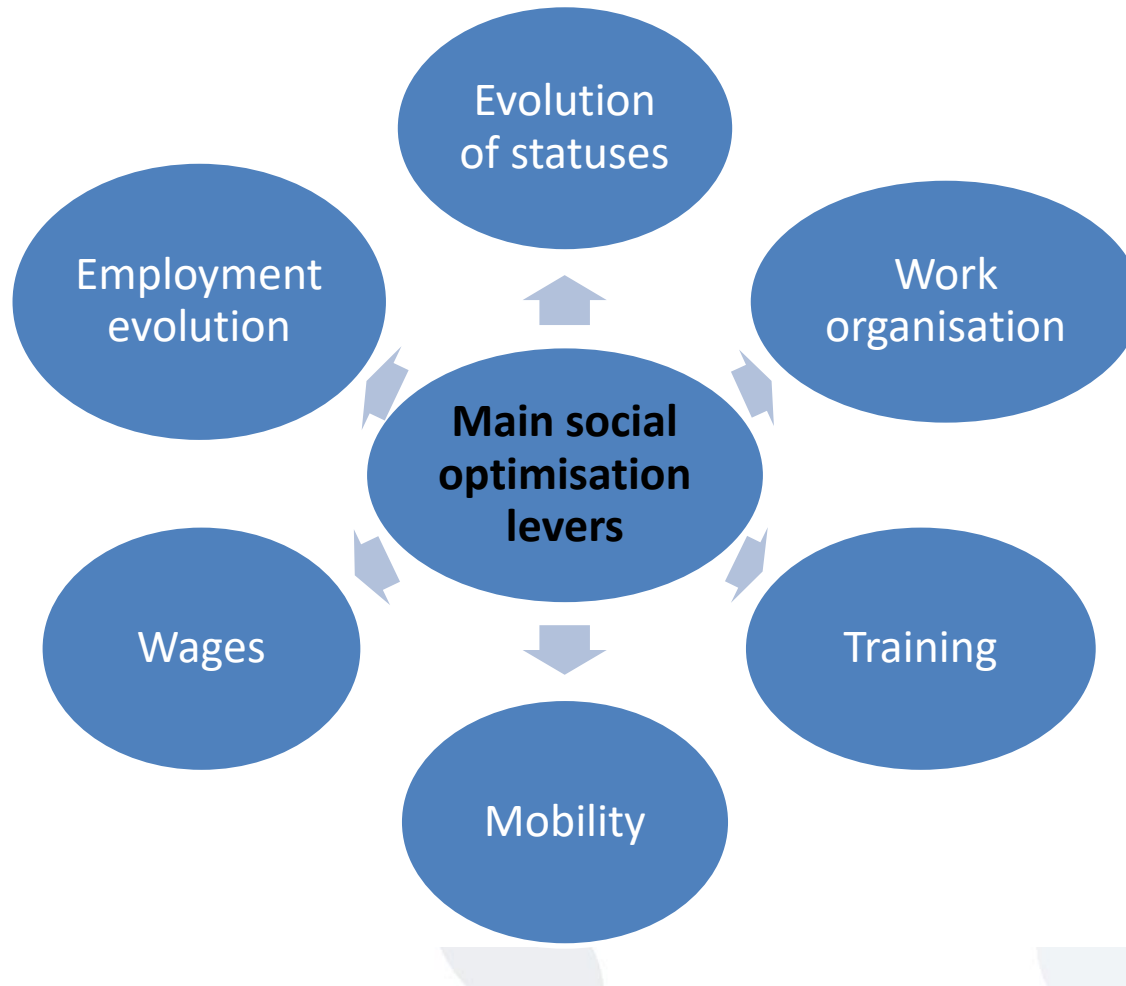
Topic 1: main findings of CLAs' analysis

- 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
- CLAs are 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 (e.g: Training)
- Social partners try to find a balance between flexibility in working arrangements and employment security

Topic 1: main findings of CLAs' analysis

- However CLAs do not contain all the measures implemented to support the change process
- The content of the CLAs differs significantly between EU Member States
 - Different national contexts, regulatory and industrial relations framework, companies at different stages of transformation

Main identified factors shaping the operators' social transformation



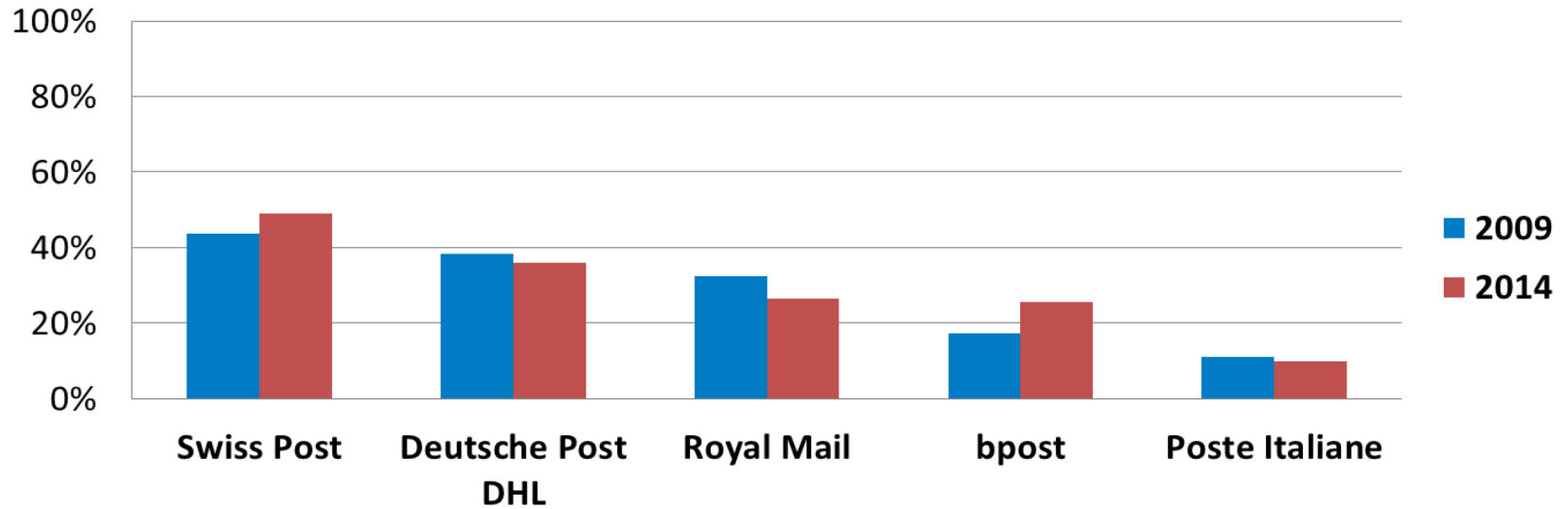
- These levers are non-exhaustive and have been used at different levels by postal companies and usually in combination

Main conclusions

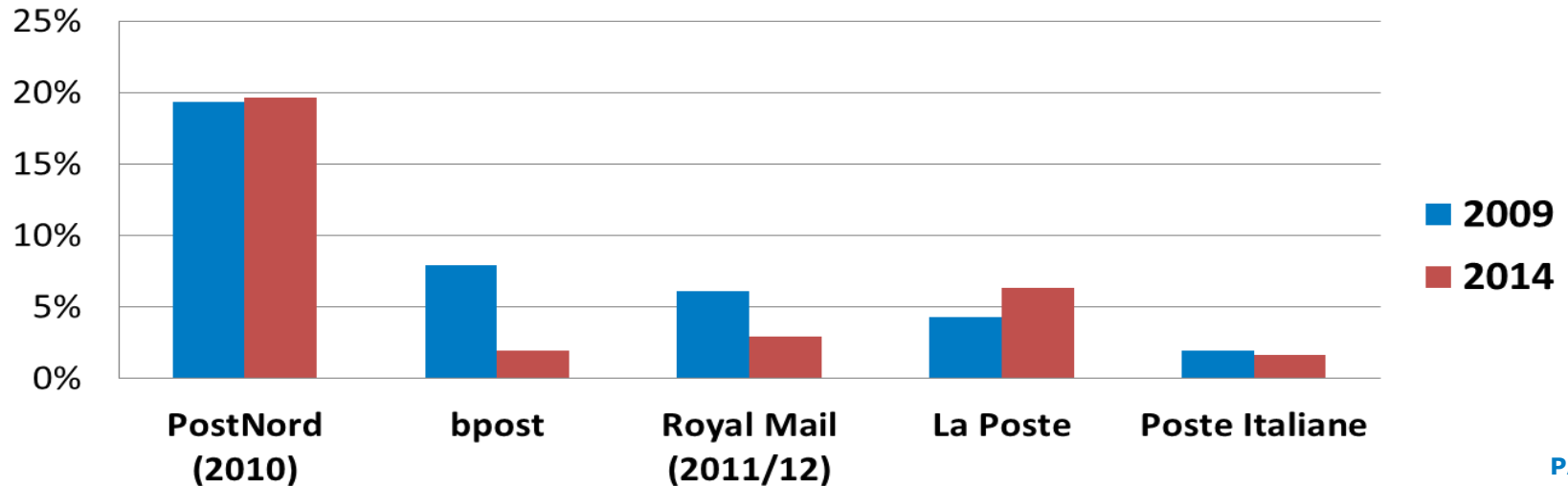
- **Employment:** important decrease in employment levels
 - Mainly via natural attrition supported in some case by voluntary leave
- **Wages:** simplification of salary packages
 - Less allowances, in some countries lower wages for new employees
- **Work organisation adaptation:**
 - Modulation of working 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 new 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 and the need for new skills require further training programmes to enable employees' up-skilling and re-skilling
 - Develop staff employability and redeployment through internal and/or external mobility
 - Postal operators also need to hire new competences and attract the younger generations, in particular at the digital age

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

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.

Topic 2: New services in e-commerce

- A fast-growing but also highly-competitive market
- Besides delivery, NPOs can develop other services on the e-commerce value chain :
 - Sales with online market places, online payment solutions, 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
- Some e-commerce companies tend to develop a new services offer
 - Market places are increasingly looking at offering delivery services so that they can rely on their own services all along the value chain.

New services in e-commerce

- On the e-commerce value chain, the last kilometre delivery is of key importance for the customer
 - Postal operators need to better answer customers' needs in terms of flexibility, rapidity and delivery choice.
 - For this purpose, it appears that there is a development of flexible working arrangements which impact work organisation.
 - Within several NPOs, an increased combination of mail and parcels delivery
 - Tendency to extend delivery time across the day and at the week-end.
- 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
 - 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:

Types of services	Examples
Extending the product range in delivery	<ul style="list-style-type: none"> • Groceries • Pharmaceutical products
Targeted solutions for a specific sector	<ul style="list-style-type: none"> • Welfare
New services in postal offices	<ul style="list-style-type: none"> • Banking services
Proximity to the public space	<ul style="list-style-type: none"> • Road quality
In-house visits and services	<ul style="list-style-type: none"> • Towards elderly people • Collection of contracts • Reading meters • Collection of electric appliances/ bottles for recycling

New proximity services

- High diversity of new proximity services tested or implemented by NPOs
 - Services characterized by a personalisation of the relationship
 - Fully in accordance with emerging societal needs like silver economy, rapid delivery of fresh products, optimisation of public services
- A potential for incumbents to develop new services to individuals
 - Based on their extended network and relationship of trust with consumers
 - NPOs have a unique added-value in terms of proximity and physical link in the digital economy
- These new services create opportunities in terms of employment
 - A need to develop new competences through training and re-training of employees and attract skilled labour



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3. Project's main outputs



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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
 - Dissemination to internal and external stakeholders:
 - PostEurop members, UNI members
 - Institutions:
 - European Commission, Eurofound



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

- The project led to a Joint Declaration signed on 1 December 2016
- Formalizes European social partners’ joint messages on social dialogue:
 - Sets 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 the work structure, increased flexibility and good working conditions.
- Also underlines the need to :
 - Enhance the awareness and competencies of all social partners on economic developments and e-commerce

The e-learning module : POST MY MOOC

- MOOC on e-commerce and proximity services
 - Follow-up to November 2015 training seminar
- Objectives of the MOOC:
 - A wider dissemination of the seminar's main findings to postal operators and trade unions
 - Have an innovative and dynamic tool to communicate on SDC activities

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The MOOC

3 main sessions

1. Main challenges in the postal sector
2. The e-commerce value chain
3. Developing new proximity services



© 4 Minutes

The regulatory challenges

Camilla OLMUS,
European Commission

The MOOC: session 1

1. Main challenges in the postal sector

- Botond Szebeny (PostEurop) on opportunities for the postal industry
 - https://www.youtube.com/embed/4h9BaI7hQ_8
- Stephen de Matteo (UNI Global Union) on social challenges
 - <https://www.youtube.com/embed/BRwNYpcrbIA>
- Camilla Olivius (DG Growth) on regulatory challenges
 - <https://www.youtube.com/embed/rper2HYOiVQ>

<http://www.postsocialdialog.eu/MOOC>



Opportunities for the postal industry

Botond SZEKENY,
PostEurop

© 3 Minutes



The social challenges

Stephen DEMATTEO,
UNI Post & Logistics Global Union

© 3 Minutes



An integrated solution for e-retailers

© 2 Minutes

Wiesława MAZARSKA,
Pocztą Polska



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The MOOC : session 2



Customizing parcel delivery

© 5 Minutes

Ralph WIECHERS,
Deutsche Post DHL Group

2. The e-commerce value chain

- Ralph Wiechers (DPDHL) on Developing new sales and payment solutions
 - <https://www.youtube.com/embed/H7sxYZcnqco>
- Wiesława Mazarska (Poczta Polska) on an integrated solution for e-retailers
 - <https://www.youtube.com/embed/ZmoBOTUhGmU>
- Daniel Charon (La Poste) on Adapting the delivery organisation to parcels
 - <https://www.youtube.com/embed/CstpDfh6rBI>

<http://www.postsocialdialog.eu/MOOC>



© 3 Minutes

Adapting the delivery organisation to parcels

Daniel CHARON,
Le Groupe La Poste



3 Minutes

Offering welfare services

Jeppé VESTERGAARD TRIER,
PostNord Denmark



The MOOC: session 3

3. Developing new proximity services

- Jeppé Trier (PostNord Denmark) on offering welfare services
 - <https://www.youtube.com/embed/6yDHzyQ9lHo>
- Hans Maris (bpost) on a wide range of proximity services
 - <https://www.youtube.com/embed/R2i4u9MZwPc>



3 Minutes

A wide range of proximity services: the example of bpost

Hans MARIS,
bpost

<http://www.postsocialdialog.eu/MOOC>

POST MY MOOC

Get inside e-commerce and new postal services

The ONLINE TRAINING TOOL to know more about...

- ✓ THE POSTAL SECTOR CONTEXT
- ✓ E-COMMERCE OPPORTUNITIES
- ✓ NEW PROXIMITY SERVICES

3 HOURS , VIDEOS, INFOGRAPHICS...

WITH THE CONTRIBUTION OF THE EC, PostEurop, UNI, BPOST, DPDHL, LA POSTE FRANCE, POCZTA POLSKA, POSTNORD REPRESENTATIVES

SHARE IT LARGELY WITHIN YOUR ORGANIZATION !

<http://www.postsocialdialog.eu/MOOC>



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Get inside e-commerce and new postal proximity services with the POST MY MOOC online training...

Project co-funded by the European Commission

