"PROMOTING SOCIAL DIALOGUE IN THE POSTAL SECTOR IN AN ENLARGED EUROPE"

Baltic Workshop
Vilnius, January 18th – 19th 2018

Questionnaire

- Questionnaire structured around 3 Parts:
  - Promoting Social Dialogue
  - Impact of Digitalization
  - Training
- Answers from 17 postal companies from 17 countries
- Answers from 13 unions from 11 countries
- Not all employers and not all unions replied to the questionnaire

NO 1 to 1 comparison for countries possible
(only 8 countries with answers from companies and unions)

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	Eesti Post	ESTAL
	Lithuania	Lithuanian Post (Lietuvos paštas)	
	United Kingdom		UNITE
	Netherlands	PostNL	
	Ireland	An Post	CWU
	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.	
	Cyprus + Malta	Cyprus Post	PASYDY UPEP

PART 1
- PROMOTING SOCIAL DIALOGUE -

Executive Summary Part 1

- There is similar understanding of the role and activities of the European Social Dialogue between unions and employers
- There is generally higher participation and involvement on the unions' side
- Employers see a more adequate implementation of Joint Declarations compared to unions
- Implementation mainly via best practices and collective labor agreements
- Both, employers and unions are considering the possibility for the SDC to cover other issues seen as important for the sector in the future
- The questionnaire analysis does not show a statistically relevant regional split between country clusters (Eastern, Baltic, Candidate Country Seminar) on SDC implementation.
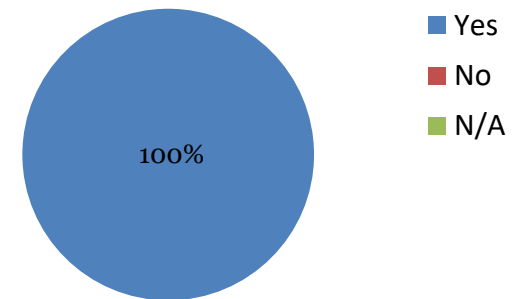
1.1 Do you know the role and main activities of the SDC?
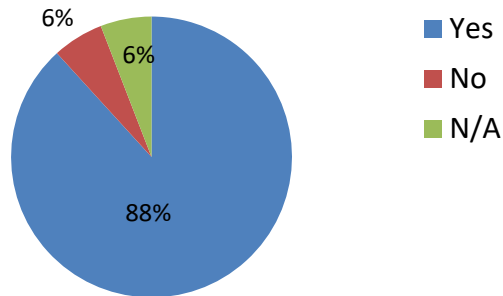
Employers

Pie chart:
- Yes: 88%
- No: 6%
- N/A: 6%

- 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
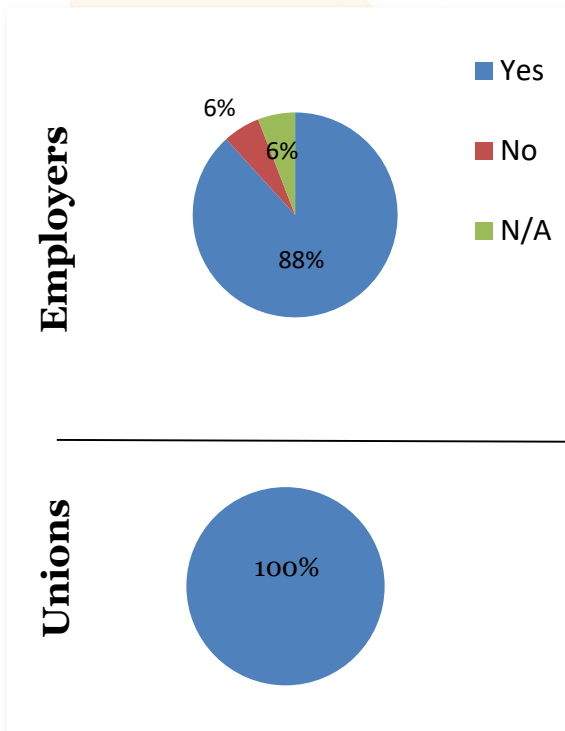- Facilitate the sharing of employer and worker views on employment and social topics

Unions

Pie chart:
- Yes: 100%
- No
- N/A

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

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

Employers

6%

6%

88%

- Yes
- No
- N/A

Unions

100%

- 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
- Facilitate the sharing of employer and worker views on employment and social topics
- Inform the European Commission on relevant developments and issues relating to employment conditions
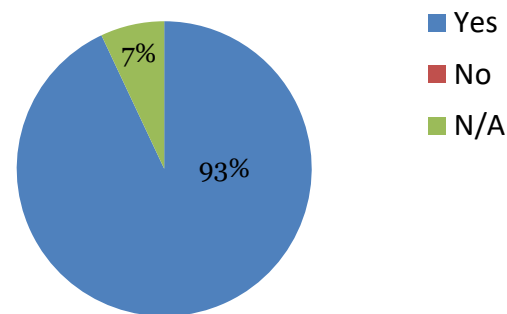
- Cooperation between Employees/Employers
- Employee involvement in decision-making, collective bargaining and wages
- Harmonize the sector in European countries

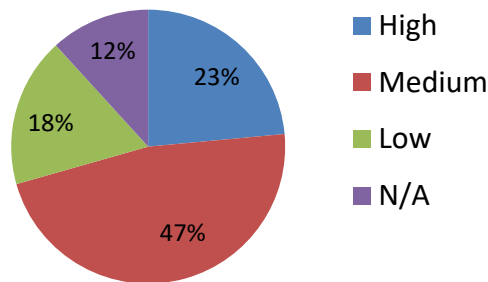# 1.2 Is your company / trade union involved in SDC activities?

Employers

6% 6%

88%

- Yes
- No
- N/A

Unions

7%

93%

- Yes
- No
- N/A
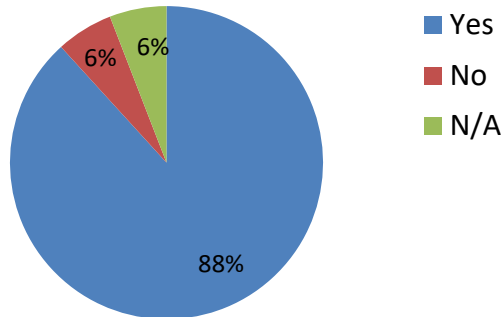
1.2 If you are involved in SDC activities, what is your level of participation?

Employers

Pie chart legend:
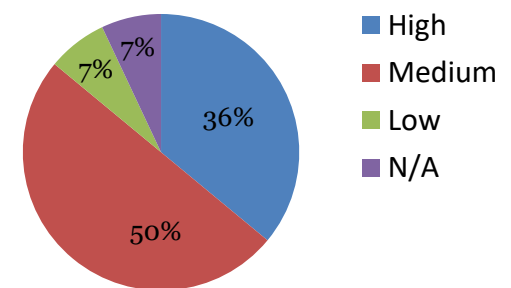- High — 23%
- Medium — 47%
- Low — 18%
- N/A — 12%

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

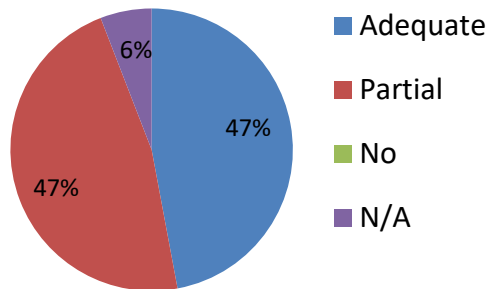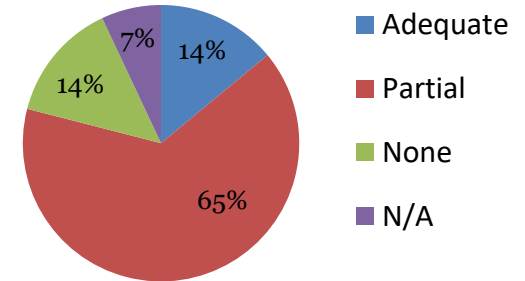- No personnel capacities to follow and cover the SDC activities

Unions

Pie chart legend:
- High — 36%
- Medium — 50%
- Low — 7%
- N/A — 7%

N/A

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

Employers

- Adequate
- Partial
- No
- N/A

47% Adequate
47% Partial
6% N/A

N/A

Unions

- Adequate
- Partial
- None
- N/A

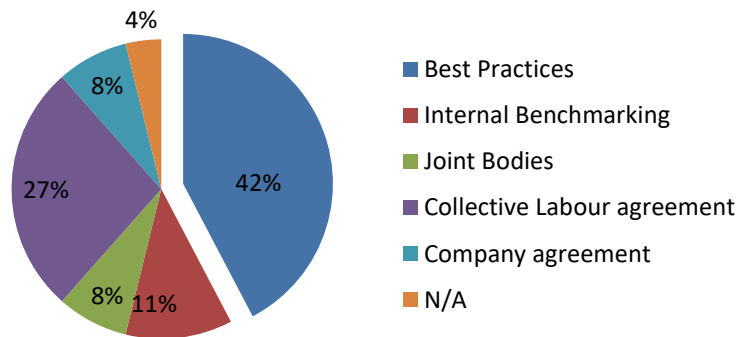14% Adequate
65% Partial
14% None
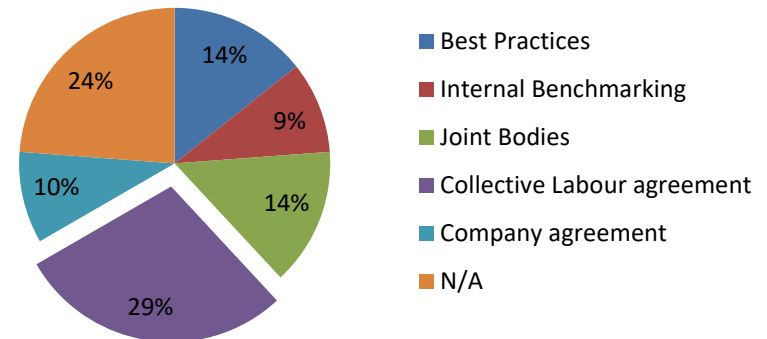7% N/A

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

- Best Practices — 42%
- Internal Benchmarking — 11%
- Joint Bodies — 8%
- Collective Labour agreement — 27%
- Company agreement — 8%
- N/A — 4%

Unions

- Best Practices — 14%
- Internal Benchmarking — 9%
- Joint Bodies — 14%
- Collective Labour agreement — 29%
- Company agreement — 10%
- N/A — 24%

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

<u>Employer:</u>

- Integration of project results & best practices in internal discussions with key experts within the company
- Negotiation with the Unions concerning Collective Labor Agreement
- Best practices examples have been dispensed in the company
- Mobility and employability programs are integrated in the CLAs

<u>Union:</u>

- Relocation program for the delivery persons shifting from mail delivery to other functions
- 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
- Not necessarily

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 safety, and wages
- Gender gap (incl. gender pay gap) and ageing population

Trends Part 1

- High knowledge of SDC activities and role - higher on unions' side vs. employers'
- Level of involvement is generally high, with on average higher involvement on unions side (93%) vs. employers (88%)
- Level of participation higher on unions side (high + medium 86%) vs. employers (high + medium 70%)
- 1/3 of countries are highly involved in the SDC
- Employers see a more adequate implementation (47%) of Joint Declarations compared to unions (14%)
- Implementation mainly through the integration in best practices (Employers 42%) and collective labor agreements (Unions 29%)
- Topics to be covered by SDC in the future could be service & customer orientation (employers) and work-life balance (unions)
- Reason for non-activity named as lack of resources (employers)
- Reason for non-implementation named as lack of participation in ESD and no follow-up at company level.

Group Discussion

PART 2
- DIGITALIZATION IMPACTS -

Executive Summary Part 2

- Decrease in mail volume and increase of the parcels 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, adapted flexibility in terms of working time

- Reorganization – adjusting network and processes, creating new parcel divisions, acquiring parcel subsidiaries or new corporate partnerships
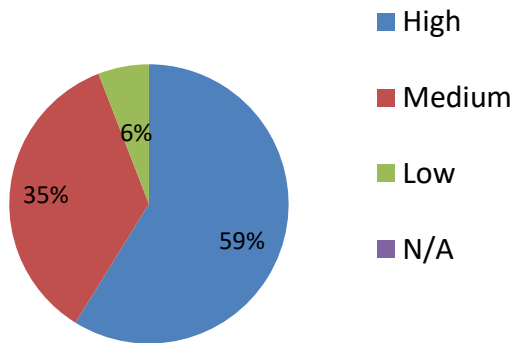
2.6 How far has your company been impacted by digitalization?

Employers

- High
- Medium
- Low
- N/A

6%
35%
59%

Unions

- High
- Medium
- Low
- N/A

7%
43%
50%
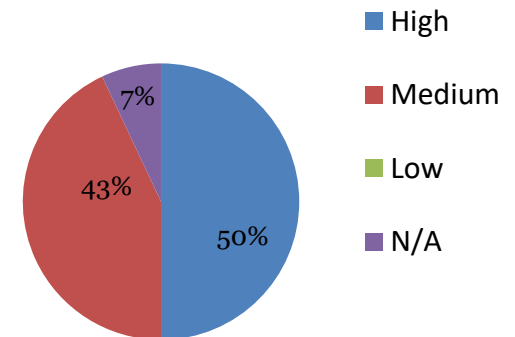
Top declared changes in company's operations

1. Decrease of mail volume (7 employers, 6 unions) and increase of parcel volume (4 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 (5 employers, 2 unions)

6. Impact of e-government/ digitalization of public administration (2 employers, 1 union)

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

Employers

- Yes
- No
- N/A

100%

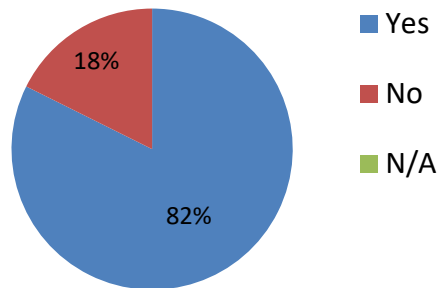**Unions**

- Yes
- No
- N/A

7%

93%
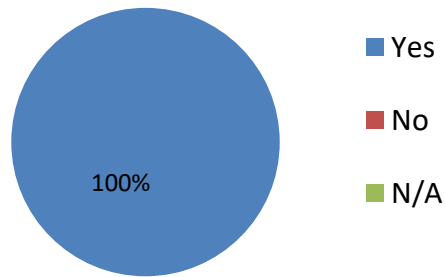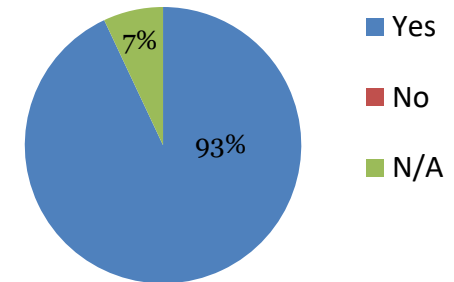
Top stated e-commerce strategic activities

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)

8. Automation/ partial automation of the sortation of parcels and packets (1 employer)

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

- Yes
- No
- N/A

18%

82%

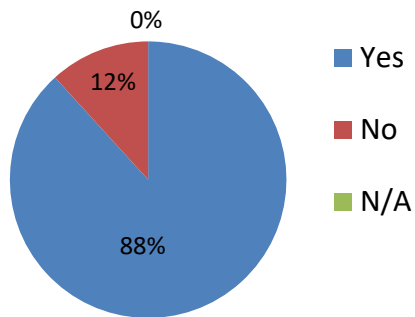**Unions**

- Yes
- No
- N/A

7%
7%
86%
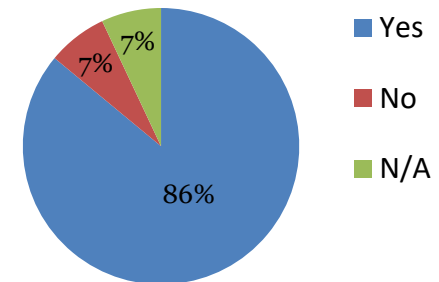
# Overview of declared elements of the reorganization process

1. Change of delivery system/ process (9 employers, 2 unions)

2. Change of delivery time (4 employers, 4 unions)

3. Reorganization/ restructuring (4 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, closing postal offices (6 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

- Yes — 88%
- No — 12%
- N/A — 0%

Unions

- Yes — 72%
- No — 14%
- N/A — 14%
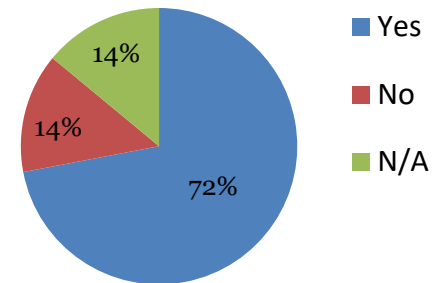
Top stated new postal e-services

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 (8 employers, 2 unions)

3. **Mobile App** (4 employers, 2 unions)

4. **Track & trace** and electronic notice on delivery via email, SMS (5 employers, 2 unions)

5. **Financial services** - banking and invoicing (5 employers)

6. **E-commerce** - online shop/ platform or web-services for SMEs (3 employers, 1 union)

7. **Parcel lockers** (1 employer, 1 union)

8. Possibilities to design own postage stamp and postcards (1 employer)

Trends

- Impact of Digitalization perceived similarly between unions (high 46%) and employers (59%)
- 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
- All companies have implemented e-commerce strategic activities (100%)
- The development of e-commerce activities required the reorganization of mail towards parcels operations
- Digitalization led to the implementation of new postal e-services
- In the 1-2-1 comparison possible for 8 countries (recently Estonia), employers and unions have the same perception of the development of digitalization in their company/country
- No correlation between the introduction of an e-commerce strategy, reorganization and new e-postal services and the impact of digitalization.
- Different perception of the imperative to implement e-commerce strategic activities, to reorganize mail and parcels operations, and to implement new postal e-services, between employers and trade unions.

Group Discussion

PART 3
- TRAINING -

Summary

- Digitalization impacts training and re-training offers as it requires developing dedicated training programmes.

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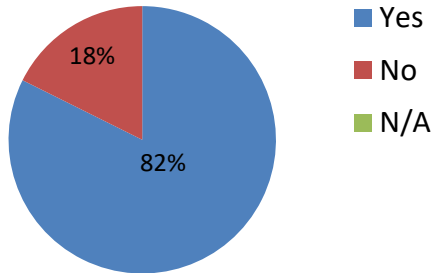
3.10 Is your Company providing training and/or re-training programmes to up-skill the current workforce as regards digital skills?

Employers

- Yes
- No
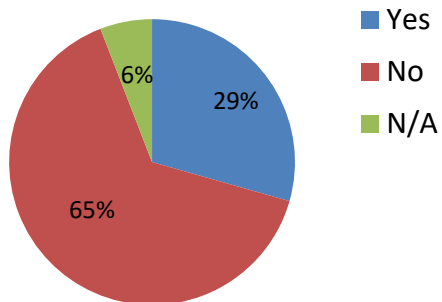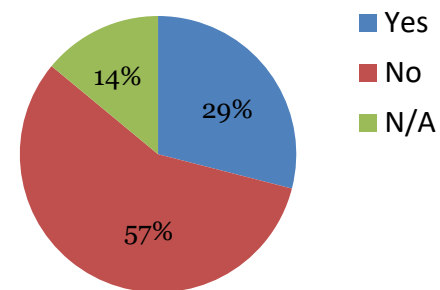- N/A

18%
82%

Unions

- Yes
- No
- N/A

21%
7%
72%
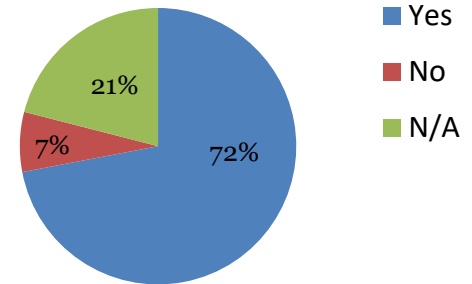
3.11 Does your company have programmes to provide internal redeployment options for postal workers to specialize in parcel delivery?

Employers

- Yes
- No
- N/A

6%
29%
65%

Unions

- Yes
- No
- N/A

14%
29%
57%

If yes, please briefly describe and internal redeployment programmes and options with regard to parcels.
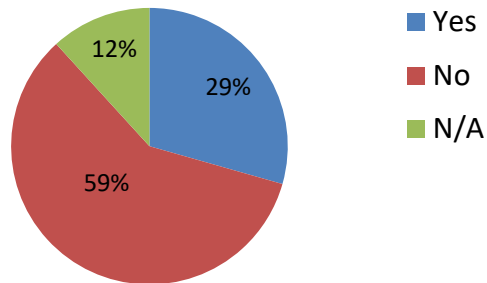
Employer:

- 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
- Mobility program with internal and external opportunities
- "From postman to courier "- company partly covering cost of driving licenses
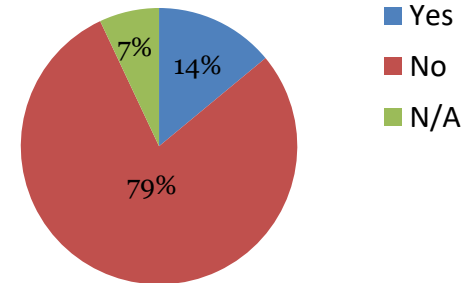
Union:

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

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

Employers

- 29% Yes
- 59% No
- 12% N/A

Unions

- 14% Yes
- 79% No
- 7% N/A

If yes, could you describe redeployment options and to which e-services, employees are redeployed?
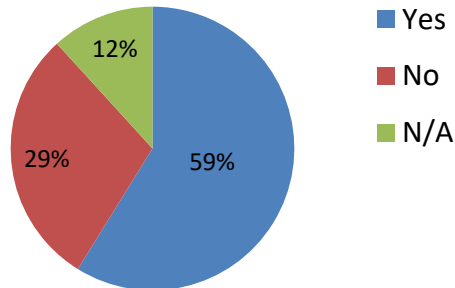
Employer:

- 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
- Data entry

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

12%
29%
59%

- Yes
- No
- N/A

Unions

7%
29%
67%

- Yes
- No
- N/A

The European Social
Dialogue Committee
FOR THE POSTAL SECTOR

Comité Européen du
Dialogue Social
POUR LE SECTEUR POSTAL
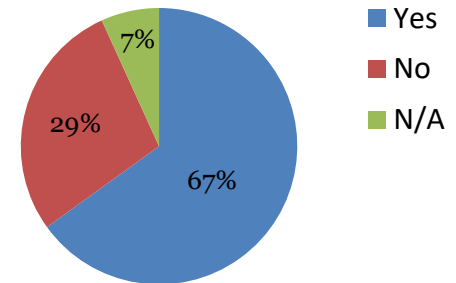
3.14 Do new flexibility demands of online consumers affect parcel delivery in terms of operations? What is put in place to meet these expectations at the level of the postal operator?
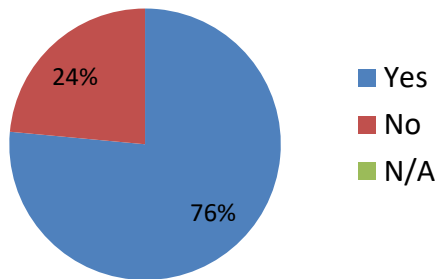
Employer:

- Track and trace options
- Parcel lockers
- Fleet development – sustainability/ e-mobility, size (e.g. electric mopeds)
- Mobile devices (smartphones, tablets, 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
- Parcel robots in last mile delivery
- New services to facilitate cross border online shopping

Union:

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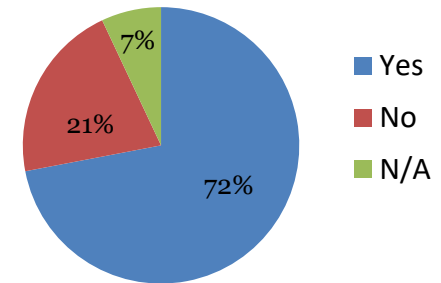- Mobile apps and notification on delivery via email, SMS or app

3.14 Are your postwomen/postmen equipped with digital devices?
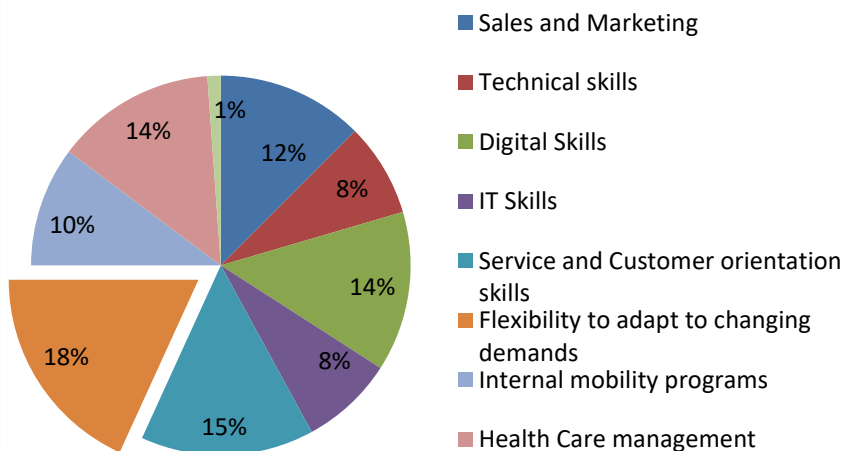
Employers

- Yes — 76%
- No — 24%
- N/A

- Not yet, but available in Spring 2018

Unions

- Yes — 72%
- No — 21%
- N/A — 7%

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

Legend:
- Sales and Marketing
- Technical skills
- Digital Skills
- IT Skills
- Service and Customer orientation skills
- Flexibility to adapt to changing demands
- Internal mobility programs
- Health Care management

Values: 1%, 12%, 8%, 14%, 14%, 10%, 18%, 8%, 15%

Unions

Legend:
- Sales and Marketing
- Technical
- Digital
- IT
- Service and Customer orientation
- Flexibility to adapt to changing demands
- Internal mobility programs
- Health Care management
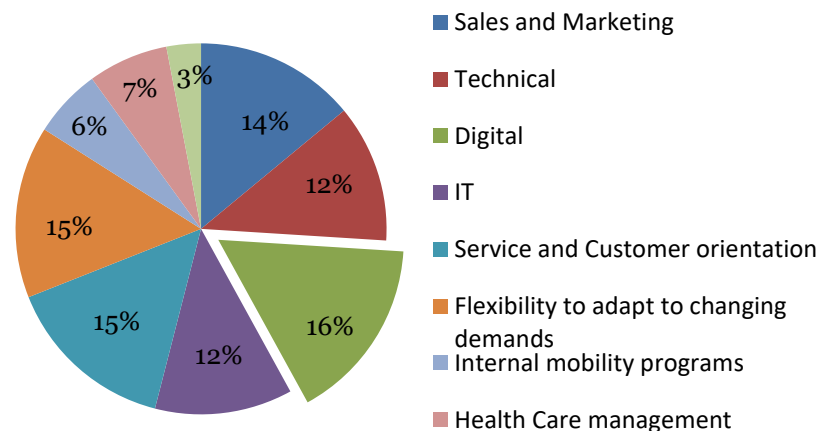
Values: 3%, 7%, 6%, 14%, 12%, 15%, 16%, 12%, 15%

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 (18%)**
2. **Service & Customer Orientation (15%)**
3. **Health Care Management (14%)**
   Digital (14%)
4. Sales & Marketing (12%)
5. Internal Mobility programs (10%)
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

- Majority of companies offer training to digitally up-skill current workforce (employers 82%, unions 72%)

- Majority of companies do not provide redeployment options towards parcel activities (employers 65%, unions 57%) or digital services (employers 59%, unions 79%) but some consider it for the future

- Majority of companies recruit new job profiles (employers 59%, unions 67%)

- Innovative delivery solutions are put in place to better answer customers' needs

- Majority of postal companies provide their personnel with digital devices, e.g. PDAs (employers 76%, unions 72%)

- Employers and unions agree on top 2 required future skills – flexibility (employers 18%, unions 15%) and service and customer orientation (employers + unions 15%)