



The European Social  
Dialogue Committee  
FOR THE POSTAL SECTOR

Comité Européen du  
Dialogue Social  
POUR LE SECTEUR POSTAL

# PSE project “Trend research for the postal sector in 2030”

**POST EUROPE**  
YOUR LINK TO POSTAL EXPERTISE

**UNI** europa  
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global  
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## Project main elements

- 18 month project from December 2017 to June 2019
- Objective : 3 to 5 scenarios on what will be the postal sector in Europe in 2030
- Supported by the foresight consultancy Z\_Punkt

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## Project implementation

- Paris workshop on 29-30 May
- Bonn workshop on 1-2 October
- Warsaw workshop on January-February 2019
- Final conference in Spring 2019



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## Paris workshop, 29-30 May

- A successful meeting:
  - 38 participants from 20 countries
  - Interactive exchanges
- Alternate plenary sessions and work in smaller groups
- Main objective: establish the list of key factors

# Approved Shortlist of Key Factors

1. Communication patterns
2. Consumption patterns and consumer protection
3. Competition and regulation in the postal sector
4. Economic development
5. Innovation dynamics
6. Data management and infrastructures
7. Changing world of work
8. Change of (further) education systems
9. Societal divide
10. Climate change and ecological distortions
11. Development of social dialogue
12. Traffic infrastructure

# Example of work on key factor at the workshop

## Key Factor #1



## Communication patterns

**Definition**

The diversity and usage intensity of different digital communication formats (e.g. e-mail or messenger services such as WhatsApp) and the development of B2C advertising (decline of direct marketing via letters), also compared to non-digital communication formats (e.g. letters)

# 1. Communication patterns

- Definition : diversity and usage intensity of different digital communication formats (e.g. e-mail or messenger services such as WhatsApp) also compared to non-digital communication formats (e.g. letters)
- Digitalisation and changes in communication patterns will automate some jobs, others will be created (▮ training is needed)
  - Communication can be **both inclusive and exclusive** ▮ communication could close gaps in the future
  - Communication goes **platform economy** ▮ new platforms, new players ▮ regulation has to adapt
  - On a European level, regulation is not changing in same direction ▮ **regional differences**
  - Social, regional, gender, age and urban/rural **differences** must be taken into account in regard to communication patterns
  - New regulation in regard to data protection
  - New communication patterns due to new **innovations** ▮ e.g. order food without personal interaction
  - Challenge of multicultural environments ▮ cultural management and education is important
  - **No decline of “traditional” B2C advertising via letters** in some markets
  - Universal service obligation important aspect of communication infrastructure and its maintenance

## 2. Consumption patterns and consumer protection

- Definition: manner and degree of change of end consumer expectations (e.g. same-day delivery), lifestyles and developed mindsets/habits and purchasing behavior (e.g. e-commerce); quality of standards of legal regulations for consumer protection and information (e.g. labeling of goods, customers' rights, etc.)

- **Who is consumer?** End consumer? Customer in chain? Citizen?
- **Consumer information:** ▸ want to know more BUT not always transparency in supply chain
- Do consumer act on their knowledge? (e.g. of worker conditions)
- Question of what response to take if no action (e.g. regulation? Better consumer education?)
- Hard to keep track of what influences consumers (e.g. YouTube)
- Overall consumer expectations increase around **convenience (faster, cheap, seamless)** but in some areas **trust, securing, guarantees** are still important
- Potential for **asymmetry of information**
- **Flexibility 24/7** becomes expected
- Consumer purchase journey is changing with **more e-commerce** but **physical stores are still important** (e.g. showrooming)
- Potential for **societal splits** ▸ generational (if older generations not digitally active) ▸ btw tech-savvy & less digital confident consumers
- **Post has advantages** ▸ USP ▸ already good at offering different types of secure options and trusted services
- Organisation move into new spaces ▸ no longer clear what their core competence is
- Regulation has to keep up with developments



### 3. Competition and regulation in the postal sector

- Definition: quality of competition in the sector in regard to potential new competitors such as Uber (last mile delivery), Alibaba, Amazon and other USPs and degree of state interlinking in the sector; level of national, European and international legal regulation of letter and parcels, including competition policy & standardization of products and services.

- (De-)regulation important to deal with new developments/ Clearer regulation needed?
- **Competition will increase** due to technological developments
- Political will/choice: Postal sector in service of the people or total liberation (USA)?
- State intervention on **hiring practices** (e.g. hiring freeze in Greece)
- Postal services demand by the state
- Traditional operators could **further improve** in terms of competition (service quality, e.g. delivery time)
- Traditional operators ▣ **USO requirements** ▣ unequal regulation btw old & new players in the sector
- Standardization: 1) Customer needs/journey, 2) **Standards developed and set by competitors** like Amazon ▣ How to organize/set own standard?
- Public awareness needs to impact regulation ▣ e.g. working conditions (social fairness)
- Will the **social role of the postal sector** change? ▣ USP ▣ employment
- USP as a given in the timeframe of 2030?
- Role of employees ▣ **Labour regulation ?**

## 4. Economic development

- Definition: development of real GDP growth, both globally and regionally, the European single market and the Eurozone as well as employment rates.

- Global growth is **cyclical**
- Employment is decisive / Is there still a connection between GDP and employment?
- GDP is not a good indicator anymore ▣ new indicators needed (e.g. quality of jobs)
- **Recession has more impact** than growth
- Impacts from outside of Europe will affect European economic development (e.g. climate refugees)
- Different national expectations regarding GDP
- Economic development in the postal sector highly depends on national governments
- Strong connection of growth and **adequate wealth distribution** ▣ interaction with factor “Societal divide”
- Private postal companies will not grow
- What is the driver of growth? Productivity?
- Innovation cycles are accelerating
- Factor also includes growth in financial sector

## 5. Innovation dynamics

- Definition: intensity (e.g. number of patent applications) and quality of the innovation activities of companies (e.g. highly disruptive technologies), average duration of innovation cycles as well as societal openness to technology and disruption.

- **High-speed** continuous challenge
- Further training must go new ways: Combination of traditional and new forms of training (e.g. digital)
- Digital background is needed – not be passive
- **Society will be open** (different generations)
- Role of postal services in society? Role of USO?
- The biggest challenge is **disruption**: Will the sector be killed?
- Another challenge: **how to anticipate and adapt?**
- Ongoing disruption (Google glass, blockchain etc.)
- **Social dialogue as an answer** to innovation dynamics
- Better use of human networks: Use of “brains” in innovation solution findings
- “Innovation dynamics” is a complex factor: How to handle it?
- Huge **uncertainty around innovation** (clearly important) ▀ What kind of innovation? What shape? What is its impact? How fast will it be? Can we describe innovation in 2030?

## 6. Data management and infrastructures

- Definition: availability and performance capabilities of IT systems against the backdrop of continued expansion of communication networks and greater bandwidth; progress in intelligent knowledge-based systems (Big Data, AI), automation technologies, drones and robotics, IoT as well as encryption and decryption technologies and other cybersecurity issues such as data protection.

- **Jobs taken by robots** ( ▮ Training for employees **or** ▮ replacement of jobs)
- New requirements for employees (training), for prospective employees (employ engineers?), for organisation as a whole (now change, bring in external resource) ▮ Adapt social dialogue to work with it
- **AI needs to be at the service of humans**
- Performance management software could identify **stress & other health conditions** ▮ employer can be proactive and offer support
- Need to ensure **checks and balances** (control, limit exploitation)
- Aware of **risks**/vulnerability/exploitation ▮ consumer response ▮ leave social network ▮ harder if concerned about data as employee
- Risk of dehumanising service (currently an area of strength for the post)
- Postal companies have data ▮ use it as a source of insight ▮ responsibility to protect data
- **Post has strategic assets** in face of potential risks ▮ large networks (with real people) ▮ trusted
- Environmental impact of digital (not to be ignored)

## 7. Changing world of work

- Definition: degree of change in corporate cultures (e.g. flatter hierarchies, agile working principles, high complexity), new forms of work/ working conditions (flexibilisation, gig economy and flexible contracts), and skilled worker shortages (in some countries).

- **Different stages** of work/ more fluctuation
- Change of **employees' expectations** (Millennials!) ▸ Less loyalty towards company
- Outcome of **gig economy** (e.g. delayed/postponed family planning)
- Geographical distance due to globalisation and outsourcing
- Intercultural management
- Able to cope with change also thanks to trade unions
- Topic will raise new social issues
- Shortage of interest of younger academics in entry-level positions
- High level of emigration in poorer countries (brain-drain)
- Postal services remain local
- Multiple number of working sites ▸ create co-working spaces
- **New skills' needs** due to new business models

## 8. Change of (further) education systems

- Definition: degree of change in education systems and access to (advanced) training offers and emergence of new forms of further training (e.g. microlearning certificates) against the backdrop of dynamic competence requirements.

- New types of services in postal services ▫ employment may also go up
- **Competence acquisition on company level** ▫ training ▫ hiring
- Social responsibility to train the workforce
- Question of **employability**, matching jobs and skills
- **Mobility** as a requirement (both within postal sector and between sectors)
- Focus on training ▫ special competences vs. general competences ▫ customized training
- Education needed to make use of new technologies
- **Recognition of acquired skills** ▫ in terms of both responsibility and remuneration
- Need for **certification** that is generally accepted
- **New education modes** and tools ▫ apply innovation
- Changing role of leadership
- Share knowledge freely ▫ more autonomy for workers
- Create a **network of knowledge** inside the organisation ▫ P2P learning
- Look at the needs of training in broader way

## 9. Societal divide

- Definition: dimension of social equality in terms of disposable income, wealth distribution, access to affordable housing, qualification and access to (higher) education; urban-rural divide, supply of everyday necessities, including digital infrastructure.

- **Generational divide** is an important aspect
- Increased **digital divide**?
- Inner-city divide, urbanisation (including the suburbs) important aspect ▫ city of the future?
- **Urban-rural divide** decisive for future development of postal sector
- Italy: Being a good employer and easy access to credits for poorer people as an answer
- Postal companies as enablers for digital infrastructure, Polish Post as enabler for e-government services
- **Big regional/national differences**
- Particular **social responsibility** of postal companies? Role as a “social player” depends on country
- Postal services as **social touchpoints**: in Greece on islands, in France
- New proximity services as social touchpoints ▫ new ecosystems
- Narrow path between business orientation and social responsibility
- City of the future will be shaped by services



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## 10. Climate change and ecological distortions

- Definition: impact of climate change and other ecological issues, in particular in terms of new regulation forms (e.g. driving bans in cities) and new conscience among companies (e.g. CSR/ecological footprint)

- **Fleets are changing**
- **Smart vehicles**
- Entire transport sector is about to change; Push to move forward
- Ban Diesel vehicles in city centres
- **Drones** do need new corridors
- Local people are existing resources for delivery (walk, bike tec.)
- Higher **costs**
- **New skills** and competences are needed, new opportunities for drivers (e.g. eco-friendly driving)
- Stock pooling should consider environmental and ecological effects
- Could create **new jobs**
- Postal sector has to sell an “eco added value” ▸ integrate environmental criteria in business models
- Post has to adapt to trend of local consumption
- **Health and safety** need to be considered



## 11. Development of social dialogue

- **Definition:** relevance of social partners and social movements in knowledge societies with special regard to changing role of unions (e.g. emergence of new negotiation patterns and forms of agreements) and the emergence of new professional groups.

- **Balance of power** between employers and employees
- **Productive collaboration**
- Social dialogue is key to productive development of the system ▫ exchange of viewpoints
- Opportunity and necessity to understand each other
- New jobs in postal sector ▫ **new rules have to be negotiated** (e.g. rights of freelancers)
- **New forms** of communication and negotiation
- Digitalisation makes negotiations more complicated
- Faster negotiations
- **Co-construction** as a goal ▫ joined journey
- Regional **differences** in social dialogue in Europe
- Range of collective agreements could change (company – network)
- 2030: Leapfrogging for negotiation processes
- **Complexity of negotiation** ▫ content-wise & ▫ process-wise

## 12. Traffic infrastructure

- Definition: the condition and density of transport infrastructure (roads, waterways, railways and airports) against the background of high maintenance costs.
  - Approved as an additional factor by Steering Committee



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## Next steps

- Bonn workshop : „Future Scoping“- Workshop
  - 1-2 October
  - Invitations to be soon sent out
- Warsaw workshop : “Future Stories“-Workshop