

PROMOTING SOCIAL DIALOGUE IN THE POSTAL SECTOR IN AN ENLARGED EUROPE

Social Dialogue Committee for the European
Postal Sector

Final Report
VS/2017/0004



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Project

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With the support of the European Commission, DG Employment, Social Affairs and Inclusion,
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FOREWORD

The project “**Promoting European Social Dialogue in the postal sector in an enlarged Europe**” was implemented by the Training, Health & Safety working group of the European Social Dialogue Committee for the Postal Sector (SDC).

The project aimed at raising awareness and dissemination of the work of the SDC, in particular but not exclusively, in Central and Eastern European Member States and Candidate Countries, reinforcing the capacity-building and promoting a better knowledge and understanding of the SDC for the postal sector, its role and activity aiming also for more involvement of the social partners.

The project enabled the European social partners to raise awareness on the importance, role and opportunities of the SDC. It enabled the dissemination of the SDC rules, organization, participation, activities, joint outcomes as well as obtaining a better understanding of social dialogue practices at company level.

Another important goal of the project was to get a better understanding of the digital transformation of the postal sector by gathering information on how postal operators and trade unions are managing the increased digitalisation of their organisations in terms of products and services to the customers and its impact on jobs, work organisation patterns and competences as well as on training skills needs and training programmes. It also enabled the social partners to engage in discussions on the opportunities offered from the digital economy in terms of new activities development.

The project “Promoting Social Dialogue in the postal Sector in an enlarged Europe” is linked to the SDC postal sector evolution initiative “Mobilising Social Partners in a new context” where the role of the Collective labour agreements in supporting the deep changes of the postal sector was investigated together with a special focus on the role of training in the digital era.

Following this approach, the social partners in the postal sector are convinced that the project “Promoting Social dialogue in the postal sector in an enlarged Europe” can contribute to the impact assessment of the employment and social dimensions of two Flagship Initiatives of the Europe 2020 Strategy, namely the Digital agenda for Europe and the Agenda for New Skills and Jobs on the postal labour market.

The project was developed with the support of a questionnaire which results were assessed, presented in and discussed during three regional seminars hosted by the postal operators of Czech Post, Lithuanian Post and ELTA Post with the involvement and support of their Trade unions. The implementation of the seminars’ project was thus enabled by the active support of the social partners of these three countries as well as by the continuous involvement of the steering committee.

The outcomes gathered from the three regional seminars were presented and discussed in a Final Conference that was held in Brussels on 3rd December 2018. The final conference enabled to discuss the results with high-level representatives from social partners, external consultants and European institutions.

A booklet related to the project activities, presents a summary of the survey replies, includes points raised during the Regional Seminars and further describes social dialogue, digitalisation and training practices introduced by experts in the three Regional Seminars.

PROJECT METHODOLOGY

To better coordinate all the project' phases and reach the objectives of the initiative, a Project Steering Committee was created composed both from representatives of employers and trade unions to guarantee the implementation of all the project aspects and phases and to ensure it followed each step of the project. The Steering Committee, with the support of the Training, Health & Safety working group prepared and circulated a questionnaire to gather information and good practices on the Project subject-matters. The outcomes of the questionnaire were then assessed. The project Steering Committee, ensured in coordination with the social partners, that the three international seminars foreseen in the project, were hosted at regional level.

The project "**Promoting European Social Dialogue in the postal sector in an enlarged Europe**" was divided in 3 phases:

- Preparation of the Regional Seminars
- Staging of the Regional Seminars
- Final project report and staging of the Final Conference

During the preparatory phase, the Project Steering Group was able to finalise a common thematic template for the regional seminars and identified the relevant countries to intervene. The thematic areas included in the questionnaire were in line to the main areas of the project' investigation:

- Promoting the role, activities, opportunities of the SDC postal sector among the social partners
- Digitization of the sector, managing of the changes and consequences on product, services, work organization and e-commerce
- Training, retraining programmes, digital skills' needs to support and manage the changes

The survey was circulated amongst the respective membership of PostEurop and UNI Europa. The issuance and circulation of the survey enabled the Project Steering Group, moreover, to better detail the content of each regional seminar.

More concretely, the project phase dedicated to the preparation of the three regional seminars, permitted the preparation of a questionnaire to collect available data on the SDC activities which were presented during the seminars after assessment by the project Steering Group. Regarding the topic of digitalisation, the preparatory phase enabled the identification of relevant countries to intervene on each topic. Emphasis, given its economic importance, was put on e-Commerce activities and parcel delivery, , with a particular focus on their effects in social and employment terms. In this sense the regional seminars also addressed training needs of the postal workforce through changes in work practices / organisation brought about by the digital transformation.

Project's phase two, dedicated to the staging of the regional seminars, enabled the organisation of three international events to exchange on the main goals of the project. The Regional Seminars enabled to inform on SDC activities and to improve the coordination and effectiveness of European social dialogue through the exchange of good practices on training measures for the adaptation of the postal sector to the evolving digital workforce among others. It served to build-up networks of representative social partners in the postal sector by focussing on capacity-building activities and to raise awareness through the dissemination of the work of the SDC. The capacity-building aspects entailed presentations and explanations of the work and activities of the SDC and the dissemination of those through digital means. In this sense, it should be mentioned that the presentation of the MOOC (Massive Open Online Course) on e-commerce and new services, elaborated on the basis of the Training seminar of the 2015-2016 project, represented an additional tool to better explain the opportunities given by the SDC. The MOOC was presented in all three seminars, as an innovative digital tool to share the results of the SDC activities.

At the same time, in order to facilitate the interaction among presenters and participants in the regional seminars, a digital application called Mentimeter was used. Mentimeter allowed the stimulation of discussions by cross-checking in real-time environment the answers given to the questionnaires and the answers provided during the day to the same questions. In this way the debates were more animated and

richer in quality. Mentimeter was used in the seminars held in Vilnius and in Athens and enabled to increase interactivity and commitment.

Concerning the organisation of the three seminars, the project Steering Committee chose to group countries from all over Europe, following mainly geographical criteria (Eastern European countries, North European and Baltic countries, Southern Europe and EU candidate countries). The aim was to facilitate a better and fruitful exchange of good practices and experiences and to enable continuity throughout the project. The different level of development in social dialogue, digitization and training contributed to the success of the three Seminars.

Table summarising the countries invited in the three seminars, dates and places where the events took place:

Eastern Seminar	Baltic Seminar	Candidate country Seminar
Poland	Latvia	Albania
Slovakia	Estonia	Bosnia and Herzegovina
Slovenia	Lithuania	Montenegro
Czech Republic	Denmark	Serbia
Bulgaria	Sweden	FYROM
Romania	Finland	Greece
Hungary	United Kingdom	Spain
Germany	Ireland	Portugal
Belgium	The Netherlands	Italy
Austria	Luxembourg	Croatia
	France	Cyprus + Malta

Prague, 21 – 22 September 2017

Vilnius, 18 – 19 January 2018

Athens, 3-4 May 2018

As already mentioned above, the survey, which is annexed to this Report, was focused on three themes that enabled the Project Steering Group to develop a template for the organisation and staging of the regional seminars. Emphasis was placed on capacity-building in terms of social dialogue, and on strategic activities at the level of the postal operators and trade unions in terms of the digitalisation of the postal sector and the training practices put in place in order to adapt to the digitalisation of the sector.

In line with the matters included in the project for analysis, the survey questions were structured around three aspects:

- gathering information on the level of knowledge on the SDC from both the employers' and trade unions' perspective as well as their respective involvement in the work of the SDC;
- gathering information on how digitalisation impacts the postal sector. This part looked at collecting qualitative information around e-commerce and other e-services;
- gathering information on skills, competences and training programmes put in place to meet the digitalisation challenge. This part served to obtain a snapshot of training strategies of postal operators regarding e-commerce and new postal e-Services.

The survey was made available in four languages, German, French, English and Spanish. The results of the survey are presented within the different sections of this report along with the case-studies and inputs received during the three regional seminars. Before staging the first regional seminar, the Project Steering Group had received questionnaire replies from **19 countries for the postal operators and questionnaire replies from 12 countries for the postal trade unions**. Additionally, good practice examples were received both from postal operators and trade unions.

When selecting countries, particular care was taken to enable the presence of smaller postal operators alongside larger postal operators to facilitate the exchange and serve capacity-building in terms of the SDC work.

Regional criteria and the inclusion of postal operators and trade unions from different European regions according to availability, enabled the staging of seminars that brought forward interesting discussions and exchange of experiences. The regional focus of the seminars enabled to go closer to each region and to gather practices from several countries each time.

The 1st Seminar staged in Prague, Czech Republic, gathered 30 participants, including the Project Steering Group members. The 2nd Seminar took place in Vilnius, Lithuania with the active participation of 35 experts. The 3rd seminar was staged in Athens, Greece on 3-4 May 2018. The seminar gathered 45 participants and ensured the participation in the SDC works, for the first time, of the Albanian postal trade union. Despite the difficulty to participate for some of the Candidate countries, the Project Steering Group was able to engage the postal stakeholders in those countries. This is understood as a very positive signal for the SDC and contributed to raising awareness of the SDC work in those countries in particular.

Project phase 3 consisted of drafting the Final project report which documents the findings and outcomes of the Regional seminars and which “Europeanises” those results. The Final project report will enable the further dissemination of the identified good practices and project results. The project phase 3 was also dedicated to the assessment of the outcomes received through the three regional seminars. The Project Steering Committee gathered and discussed the different inputs and point of views that could be collected through the Regional Seminars. Project phase 3 was also dedicated to the organization of the Final Conference, a key step of the initiative. The Project Steering Group worked on the organization of the event where the project outcomes were presented and discussed, in the framework of a wider audience. The Final Conference was held in Brussels, Belgium on 3 December 2018.

Survey Executive Summary

The survey prepared by the project Steering Group and circulated amongst the European postal social partners enabled the Project’s Steering Group to collect significant information and practices which were then subsequently presented and discussed in the three regional seminars. The survey is annexed to this document. The Survey Executive Summary provides an overview of the main elements gathered through the analysis of the Questionnaire replies.

On the promotion of social dialogue, the survey analysis identified that there is a similar degree of understanding of the role and activities of the SDC between unions and employers. In general, there is higher participation and involvement from the trade unions. Employers see a more adequate implementation of Joint Declarations compared to the trade unions. Where implementation of SDC outcomes was identified, it is mainly integrated in best practices and collective labour agreements. Both, employers and unions consider the possibility for the SDC to cover other issues seen as important for the sector in the future. Topics to be covered by the SDC in the future could be service & customer orientation for the employers and work-life balance for the trade unions. One of the reasons brought forward to explain non-activity was the lack of resources to dedicate to the SDC. One reason put forward to explain the non-implementation of SDC outcomes was the lack of participation in European Social Dialogue.

On the digital transformation of the postal sector and the adaptation of postal operators’ activities regarding e-Commerce and parcels delivery, the survey analysis confirmed several trends also regarding postal operators’ strategies. These strategies are summarized below.

- There is an overall decrease in mail volume and at the same time a radical increase in parcel volumes.
- Digitalisation has in the majority of cases led to postal operators offering new digital services such as. online platforms for postal and financial services, mobile apps, the “digital document” – transforming physical letters in electronic documents and storage, digitalisation of public administration (e-government) and the implementation of Track & trace opportunities (notification of delivery via email, SMS and providing flexible pick up options).
- Technical upgrades such as the provision of new devices (e.g. Personal Digital Assistants)

- Changes in the physical infrastructure (e.g. digitalisation of sorting centres and fleet).

Due to the increasing activity of e-commerce, the survey also identified - at the level of some operators – an impact on working condition arrangements, summarised below.

- A tendency in shifting personnel from mail to parcel operations.
- Changes in the role profiles through the adaptation of delivery times to meet consumer demands.
- Reorganisation processes such as the adjustment of network operations, the creation of new parcel divisions and the acquisition of parcel subsidiaries and/or new corporate partnerships.

In terms of digitalisation's impact on employment, the survey identified significant changes of role profiles and on the levels of employment and the implementation of training measures to adapt to new services. In terms of stated e-commerce strategic activities, survey respondents identified new processes such as the delivery to parcel lockers/ boxes, SMS notification upon arrival, and the delivery to post offices/ pick-up points. Overall the growth of e-commerce has led operators to innovate and develop a range of alternative delivery solutions.

Digitalisation has meant the introduction of new technical devices (smartphones, PDAs) and the offering of return services. In terms of working conditions in the strategic operations of companies related to e-commerce, survey respondents identified an increase in part-time employment and the use by some companies of free-lance delivery workers. The most stated elements of the reorganization process were the change of delivery system / process, the change of delivery times, reorganization or restructuring, the provision of new technical devices, changes in the operation of the networks and the infrastructure (re-use of former mail sorting centres for parcels).

In summary, survey respondents identified several trends. There is a shift from mail to parcel volumes with key changes in operations through digitalisation. The shift is focused on new technologies (automation, new technical devices, digital services) and brings about changes in role/job profiles. Nearly all postal companies implemented e-commerce strategic activities which required the reorganisation of mail towards parcels operations. Digitalisation has led in the majority of cases to the implementation of new postal e-services.

Regarding the third theme “The postal sector in a digital age – The impact of digitalisation on training, up-skilling and cultural change”, survey participants identified that digitalisation has had an impact on training and re-training, as it created the need for dedicated training programs. Participants also identified a clear focus of training on IT and computer skills and on providing new digital services also through the cooperation with external training providers, scouting for internal digital competencies, and the involvement of employees in developing new technical devices.

Major redeployment programs towards parcels and digital services were not identified for many of the postal operators but a shift of personnel from mail to parcel and / or the alignment of mail and parcels activities was identified at the level of some postal operators. E-commerce activities have been accompanied by a 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 have been introduced. Digitalisation has also meant that the vehicles fleets have been upgraded due to new requirements (size, flexibility, sustainability, security) and most of postal companies provide new technical devices and tools.

In terms of future skills, it can be stated that most postal companies provide training to digitally up-skill the current workforce. Most companies do not provide redeployment options towards parcel activities or towards digital services, but some are considering it for the future. Most companies are recruiting new job profiles and all postal companies implement innovative delivery solutions to better answer customers' needs.

Summary of the Regional Seminars and Presentations

The organisation of three regional seminars to implement the project “Promoting Social Dialogue in the Postal Sector in an enlarged Europe” represented a joint effort of the social partners present in the Project Steering group as well as for the postal social partners of the Czech Republic, Lithuania and Greece that hosted the events. The cooperation with the SDC was very fruitful ensuring high level of organisation, debates and outcomes. The agendas of the three events are annexed to this Final Report.

General overview of seminars

For the three regional seminars the Project Steering Group gave similar presentations and shared the materials through a dedicated website. The presentations are available online and this report offers a summary of those. During the regional seminars, the Project Steering Group presented the working organization, work history and outcomes of the SDC and presented the main results of the questionnaires filled in by the project participating countries. The results of the questionnaires focused on the three topics as highlighted before. The project team also presented the main area of focus of the previous PSE project as well as the MOOC on e-commerce and new services. Participants received a presentation on the Postal European Social Dialogue, its role, its main objectives, its work organisation and its outputs. Participants were presented with the scope of the current project and the main outcomes of the previous PSE Project “Mobilising Social Partners in a New Context”, notably the conclusions on social dialogue and collective bargaining in a transformation context of postal activities. The interactive tool, Mentimeter, that every participant could use through its own smartphone was used for the two last seminars of the project. This enabled to get real-time answers from all participants on several questions of interest to the project and to thus enhance their involvement in the seminars.

The SDC was presented as a platform of exchange of good practices. Participants were advised that the SDC has a significant capacity of influence, notably on postal regulation and legislation. The SDC Post has become a recognized stakeholder in the sector. As the postal sector is one of the largest employers in Europe, the Post SDC can exert influence at European and national levels through the adoption of joint declarations, conclusions and joint statements. The SDC enables the social partners to conduct prospective work for anticipating major evolutions.

It was highlighted that the postal sector is at the heart of a triangular relationship between its employees, its consumers and society, with an important social responsibility. The postal sector has held a major historical role in the economic and social life of Europe and still today is one of the largest employers. The sector ensures a territorial presence and a service of proximity all over Europe.

These workshops were particularly successful in terms of participation in the sense that they attracted around 100 representatives from all over Europe. Among them several participated to SDC activities for the first time. Moreover, they enabled interactive exchanges between participants and exchanges of good practices. Several high-level representatives from the hosting countries took part to the workshops, including the CEO of Greek post, highlighting the importance of the role of the European SDC for the hosting organisations.

First seminar in Prague, 21-22 September 2017

The 1st Seminar was staged in Prague, Czech Republic, on 21-22 September 2017. The targeted countries were Poland, Slovakia, Slovenia, Czech Republic, Bulgaria, Romania, Hungary, Germany, Belgium, and Austria. It gathered 30 employers' and trade unions' representatives from **Austria, Belgium, Bulgaria, Czech Republic, Germany, Slovakia and Romania** as well as the Project Steering Group. The seminar, which was organized with the support of Czech Post and the trade unions, focused on capacity-building in terms of social dialogue, on training and on digitalisation with a rich exchange of good practices amongst participants.

Participants had the opportunity to hear a comprehensive presentation on social dialogue at the Czech Post given jointly by the hosting postal operator and the trade union representatives. The Czech Post, SOE,

considers the trade unions to be important partners, and maintaining a partner social dialogue and social cohesion within the company is a permanent effort of the management. Current concerns for both social partners were identified as the need to raise wage levels at the level of the national postal operator.

Participants had the opportunity to hear a comprehensive presentation on social dialogue at Bulgarian Posts Plc given jointly by representatives of the postal operator and the trade unions. The presenters assessed that there is good cooperation and efficient social dialogue at the operator level. To meet the new realities of the sector it is important to maintain good social partnership. The presenters also provided an overview of the degree of digitalisation in Bulgarian Posts Plc and its impact on working conditions. Identified trends included the automation of most postal operations and processes; the widening of the scope of services for bigger customers via the virtual private network of the company; offering web-based services; and the extension of e-commerce services. The presenters highlighted the digital training measures for the postal personnel (company training for operational purposes mainly on IT and new software) and the trade union training on digitalisation.

Participants had the opportunity to hear from a representative of the Austrian Post on the “E-Brief” an online one-stop platform for electronic invoicing, advertising, e-mail provision, receipt and electronic document handling as a good practice in digital services provision. Participants had the opportunity to hear about a digitalisation good practice from representatives of Deutsche Post DHL Group on the Smart-scanner. Before the introduction of the Smart-scanner a Registered letter delivery was a labour and time-intensive process which became leaner, less prone to errors and digitalised process where the Smart-scanner project was rolled out. Employees consider digital work equipment as a significant improvement. The provision of modern work equipment is seen as an appreciation of their work and leads to increased employee satisfaction. It was also reported that employees develop new ideas to support and improve the work processes on their own and are therefore included in the roll-out of new digital tools.

Participants had the opportunity to hear a comprehensive presentation from representatives of Slovakian Post and the trade union on Digitalisation in Slovak Post and the Training offerings to postal employees. Digitalisation has taken the form mainly of the introduction of modern technologies to offer new products and services. This introduction has been accompanied by a parallel development of digital training for the employees to increase their competencies in computer technology through e-learning and the specialised development of a combined virtual-physical teaching room. The presenters stressed the successfulness of the training measures and the satisfaction of the employees. The developed e-Learning modalities allowed the involvement of training experts from other sectors and enabled the training of many workers as it combined virtual teaching whilst limiting physical traveling.

Participants had the opportunity to hear a comprehensive presentation on Digitalisation at Romanian Post by representatives of the postal operator as well as a market overview of e-Commerce in Romania. Digitalisation at Romanian Post has meant the introduction of a new website and the extension of online service provision. Romanian Post’s website offers money transfer services and press subscription. Both services offer the card payment option. Other postal e-services available on Romanian Post’s website are: postal codes and offices lookup, electronic tracking of postal shipments. The business clients benefit from a dedicated platform for postal shipments management. The presenters also mentioned new service offers under construction: electronic payment (i.e. postal stamps selling and personalized postcards sending). The Romanian postal trade union representative presented the social dialogue situation in the country and summarised recent developments such as the significant reduction of postal employment, the difficult working conditions in the sector, notably in rural areas and the lack of investment in infrastructure, the car fleet, and automated sorting centres.

The 1st Seminar was successful in engaging national social partners with the SDC works and enabled the project steering group to raise awareness of and present the activities of the SDC to postal stakeholders in Slovakia, Czech Republic, Bulgaria, and Romania. Postal social partners were able to meet and exchange on the topics of social dialogue, the ongoing transformation of the postal industry and the digitalisation of the sector. Stakeholders were also able to discuss digital training measures in different national contexts. The main objectives of the project were met. It permitted 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. It enabled a better understanding and exchange on the programs of digital transformation put in place within companies also addressing training and cultural evolution aspects. Participants were able to exchange on the impact digital tools and new technologies have on the work organisation as well as the different opportunities that the digital economy represents in terms of postal diversification, notably parcels and e-Commerce. Finally, it engaged capacity -building activities to raise awareness and to disseminate the work of the SDC, in particular but not exclusively, in Central and Eastern Europe.

Second seminar in Vilnius, 18-19 January 2018

The 2nd Seminar took place in Vilnius, Lithuania on 18-19 January 2018. It targeted the following countries: Latvia, Estonia, Lithuania, Denmark, Sweden, Finland, the United Kingdom, Ireland, the Netherlands, Luxembourg, and France. It gathered 35 participants from **Latvia, Estonia, Lithuania, Sweden, Finland, the United Kingdom, Ireland, the Netherlands, and France**. The 2nd seminar was organized with the support of Lithuania Post and the trade unions. Like the first seminar in the framework of this project, the second seminar focused on capacity-building in terms of social dialogue and on digitalisation with a rich exchange of good practices amongst participants. It enabled to present the working organization, work history and outcomes of the SDC and to present the main results of the questionnaires filled in by the project participating countries. The project team presented the results of the previous PSE project as well as the MOOC on e-commerce and new services. Participants received a presentation on the Postal European Social Dialogue, its role, its main objectives, its work organisation and its outputs.

Participants were presented with the scope of the current project and the main results of the previous PSE Project “Mobilising Social Partners in a New Context”, notably the conclusions on social dialogue and collective bargaining in a transformation context of postal activities. Participants to the 2nd seminar heard the external contribution from Mr. Antonio Amaral, representing PostEurop on European regulatory and market developments following the digitalisation of the postal market. Mr. Amaral presented the main drivers of change in the postal sector and addressed postal portfolio diversification in a digitalised economy. He also presented PostEurop’s position on regulatory developments notably on the cross-border parcel delivery services Regulation.

Following a brief presentation of the current project’s scope, participants were presented with the survey results along the three project themes. Participants had the opportunity to hear a comprehensive presentation on the digital transformation of Lithuania Post given jointly by the hosting postal operator and the trade union representatives. The presenters highlighted the external and internal factors that influenced the postal market in Lithuania as well as the imperative to adapt the postal service in a digital age. Postman 3.0 is aimed at improving the postal employees’ professional skills to arrive at flexible and paperless service provision whilst upholding the operator’s social responsibility. Lithuania Post has invested significantly to purchase tablets, portable printers, various software and more importantly to offer training to its employees in IT literacy to be able to provide new processes and services. The presenters jointly concluded that the investments have brought benefits to the employees (new competencies and skills, increase in salary, employability opportunities), to the clients (improved delivery service and wider service portfolio), and to the company (net cost savings, increased efficiency, better quality control).

Participants had the opportunity to hear a comprehensive presentation on social dialogue at PostNL by a representative of the postal operator. The presenter explained the highly competitive nature of the Dutch postal market and described the collective bargaining conditions in the Netherlands at the level of PostNL. He presented the latest Collective Labour Agreement (CLA) negotiated in PostNL and valid from 2016 until 2020. Given the significant social consequences of the latest wave of restructuring, the adopted CLA is a phased model through which employees are offered training aimed at their internal and external mobility. The CLA also covers compensation schemes and several pension arrangements.

Participants had the opportunity to hear a comprehensive presentation on the Swedish postal market and the recent history of PostNord. The presenters described the digital transformation of PostNord and explained the trade union challenges in Sweden at the level of PostNord and Bring Citymail. Regarding digitalisation, the trade unions see the need to adapt. It is important to address the negative consequences

of digitalisation for the mail business and to harness the opportunities offered by the parcels business. For PostNord, the trade union representatives stressed the importance of integrating mail and parcels operations. For Bring Citymail the identified challenge was to integrate morning newspapers and more mail in operations. In terms of social dialogue, SEKO representatives described the current trade union priorities in collective bargaining: to ensure that there is no outsourcing of the core business, to pursue full-time employment arrangements, and to handle personal redundancies responsibly.

Under the theme of “The digital transformation of the postal sector and the adaptation of postal operators”, participants had the opportunity to hear a comprehensive joint presentation on ReturnPal given jointly by the representatives of An Post the Irish postal operator and the CWU trade union. Following a thorough presentation on the Irish parcels and e-Commerce market as well as the digitalisation’s impact on working conditions and the demands in terms of flexibility, the presenters described ReturnPal. ReturnPal is a mobile app that allows the customer to order a collection of an item to be returned for the following day. Collections can be arranged via the app as late as midnight on the day of collection. The collection point is determined by the customer (home, work etc.). Alternatively, the customer can drop the return item off at any Post Office. Payment is processed via the app as there is no cash transaction.

Under the theme of “Training in the Digital Age”, participants had the opportunity to hear the presentation from Simplon on internal training of French employees at La Poste. Simplon is a social and solidarity economy company which originally offers free and intensive training courses for jobs in the digital sector to vulnerable and excluded people. It has also enlarged its activities to assist companies to address the digital transformation challenges, through upskilling and reskilling trainings. In this framework, the presenter showcased how La Poste partnered with Simplon to develop postal workers’ skills in computer coding and web and mobile app development. The digital transformation of the French postal operator drives the creation of new businesses. In order to succeed in this transformation, and to meet the new internal competence requirements for the digital services, the postal operator rolled out a large-scale Training programme to upskill non-IT postal workers who have a keen interest in IT and who wish to evolve towards the web and mobile development professions. Thanks to a two-year dual-training, the selected postal employees can evolve internally in La Poste and get promoted to join the numerous available positions in the IT division of the company. The training provided is innovative in its pedagogical method, leads to certification with high success rates and drives internal promotion (e.g: postmen and sorting employees can become IT specialists), and was applauded by the operators’ representatives and the trade unions. Following the comprehensive presentation of the French good practice, participants had the opportunity to exchange further on training measures to meet the digital transformation of postal operators.

Third seminar in Athens, 03-04 May 2018

The 3rd Regional Seminar in the framework of the project took place in Athens, on the 2nd and 3rd of May 2018. It addressed members of PostEurop and UNI Europa Post & Logistics from the Southern region of Europe and in particular from Albania, Bosnia and Herzegovina, Montenegro, Serbia, FYROM, Greece, Spain, Portugal, Italy, Croatia, Cyprus and Malta. The seminar gathered a total of 43 participants, including, apart from the project’s steering committee: the Director of Minister’s Office (Hellenic Ministry of Digital Policy, Telecommunications and Media), the Chairwoman of the Board of Directors of Hellenic Post S.A. – ELTA, the President of the Pan-Hellenic Federation of Postal Association (ΠΟΣΤ), trade union and employer representatives from **Italy, Croatia, Spain, Portugal, Greece, Cyprus and Albania.**

In her opening speech, Ms. Efrosyni Stavragi – ELTA’s Chairwoman BoD, focused on the importance of Social Dialogue for postal operators, in promoting workability of workforce and supporting the constructive exchange of views among social partners, within an environment of global competition and technological evolutions that affect traditional postal business. In such an evolving postal market that calls for the development of e-commerce and digital services, postal operators need to develop modern flexible solutions for transforming their business activities, in order to meet the increasing customer demands. Mr. George Vasilopoulos, President of ΠΟΣΤ, in his opening speech, stated that digitalisation leads to the transformation of job profiles and labour relations not only in ELTA but also in the majority of the European postal labour market. In this direction, he highlighted the importance of an effective social dialogue in

national level, as the key factor to address such changes for both employers and employees in view of the radical transformation of the sector from the introduction of e-commerce and digitalisation.

Mr Brian Scott, Vice-Chair of the SDC welcomed all the high-level representatives and thanked all participants in the panel, stating the significance of their contribution to the 3rd Regional Seminar of the Social Dialogue committee for European Postal sector. Further on he stated that social dialogue in European level inspires social partners to exchange implementation practices of Social Dialogue outcomes at national level. In particular social partners have the opportunity to investigate the level of contribution at a European level, of trade union representatives and employers, to collective labour agreements, negotiations of working conditions and finally the development of training, as a mean of managing the challenge of digitalisation for postal operators. The 3rd seminar enabled the Project Steering Group to present the working organization, work history and outcomes of the SDC as well as the main results of the questionnaires filled in by the project participating countries.

The project team presented the results of the previous PSE project as well as the MOOC on e-commerce and new services. Participants received a presentation on the Postal European Social Dialogue, its role, its main objectives, its work organisation and its outputs. Participants were presented with the scope of the current project and the main results of the previous PSE Project "Mobilising Social Partners in a New Context", notably the conclusions on social dialogue and collective bargaining in a transformation context of postal activities. Participants to the 3rd seminar heard the external contribution from Mrs Sylvie Finné, representing the European Commission DG EMPL's Social Dialogue Unit on European social dialogue. Mrs Finné presented the history of European social dialogue, its development over time as well as the functioning modalities at different levels of European social dialogue, notably horizontal and sectoral social dialogue modalities. Following a brief presentation of the current project's scope, participants were presented with the survey results along the three project themes and participated in the Mentimeter, real-time online voting application. The real-time results confirmed the gathered survey results.

Participants had the opportunity to hear a joint and comprehensive presentation on social dialogue in Poste Italiane by Mr Barbaro Francesco Costa of Poste Italiane and the Italian Postal Trade Unions representatives. The presenters described the signed November 2017 Collective Labour Agreement (CLA) of Poste Italiane for non-managerial staff and explained that it contained official references to the SDC body and its activities. The CLA makes reference to the SDC and the European postal regulatory context in its article on Information and Consultation notably on employment matters, and in the activity of two Joint Bodies (Joint Body for Training and Professional Re-Training and the Committee for the implementation of the principles of Equal Treatment and Equal Opportunities).

Participants had the opportunity to hear the presentation of Mr. Renato Mucaj, President of SPPT, the Albanian postal and telecom trade union. Mr Mucaj thanked the SDC and the organisers for involving Candidate Countries in their work. He presented the industrial relations system in Albania as well as the current difficulties faced in national social dialogue. He also mentioned the difficulties faced in social dialogue at the level of the postal operator and welcomed again the invitation to the Seminar as it will be related back to the postal company with a request to continue supporting a social partnership and social dialogue within the postal company. Participants had the opportunity to hear a joint presentation delivered by Mr. Pavlos Pavlides, Vice-Chair Postal Services Dept. at Cyprus Post. He presented the postal environment in Cyprus and the recent waves of restructuring at the level of the delivery units at Cyprus Post. He also shared the ongoing developments in Cyprus Post social dialogue and presented some of the challenges and opportunities for the trade unions and Cyprus Post to modernize and adapt to the new and evolving regulatory and market postal environment.

Participants also had the opportunity to attend interesting presentations from Ms. Ioanna Theodorou, ELTA's HR Director, and Mr. Antonis Klironomakis (ΠΟΣΤ - Secretary for International Relations) regarding innovative training practices adopted by ELTA, notably through e-learning. ELTA's Vocational Training Center (KEK-ELTA) presented the Company's digital training initiatives (ex. e-learning platform, eco-driving through the use of 3D simulation, digital training courses, GDPR training). Ms. Afroditi Riga and Mr. Aristotelis Maragakis from Hellenic Post focused on ELTA's active participation in various EU Projects since 2004, noting especially: a) the "EXperiential TRaining in 3D Virtual Environment- ExTra 3D" project, aiming

at the development of an integrated training system for front-office desk postal employees through the use of new technologies and serious games and b) the “InnovAge” project, which deals with age management in the postal sector through the creation of an innovative training prototype valorized by multigenerational teams. The main asset of these two projects is that they serve as a change instrument for the company’s culture, as they have given Hellenic Post the opportunity to develop Voluntary Teams (VOLTs) of employees which act as internal communities of practice promoting knowledge and experience sharing, new methods of collaborating and collective learning.

Participants had the opportunity to hear a presentation from Mrs Grazia Maremonti, responsible for digital learning in Poste Italiane, on new digital training methods and tools piloted at the Italian Post level. The Italian Post Corporate University offers training to targeted groups of workers at Poste Italiane. The aim is to drive further the digitalisation of postal services, upskill in terms of digital skills entire postal functions and roles as well as anticipating and providing new job profiles. Mrs Maremonti also presented an innovative pilot project called “Chat-Bot” solution based on digital solutions linked to an interactive and continuous learning system during the daily work activity. Artificial Intelligence will offer guidance and assistance with various operational functionalities such as the Track and Trace software used in sorting and distribution centres. The approach used is a holistic approach combining on and offline training as well as formal and informal methods to deliver the digital training.

Participants heard joint presentations from representatives of Correos and the postal trade unions on the digital transformation strategy implemented in the Spanish postal operator along with key figures on e-Commerce in Spain and the efforts of the postal operator to upskill its current workforce in terms of digital skills. The digital strategy aims at developing knowledge and digital skills throughout the organization. It aims at defining and implementing different lines of work aimed at digital transformation. Correos offers specific training routes and solutions oriented to distinct target groups whilst monitoring their impact. Digital training is offered in different forms notably following the establishment of in-house training programmes. The training programmes are jointly managed with the trade unions and offer career paths adaptation and fixed-term employment contracts when completed successfully. The representative of CCOO for Correos presented the trade union managed training schools throughout the Spanish territory. At the level of the Spanish postal operator, it was explained that there is a regulated system of access to employment and promotion within the company. CCOO achieved the implementation of training schools through collective bargaining (3rd Collective Bargaining Agreement in 2011) which offer workers a professional itinerary in which training is key, by means of a training itinerary. The CCOO-CORREOS Training School has two main activities: it teaches courses which award points for the merit phase of the procedures for access to employment and professional promotion and prepares people for the examinations held by Correos for the purpose of selecting personnel. The Schools also offer discounted training in other fields. There is a combination of online and offline training with support from trade union delegates.

Furthermore, participants had the opportunity to hear the representatives of Croatia Post. They presented the digital transformation of Croatia Post as well as its strategic plan in terms of digitalisation of Croatian Post operations. Croatia Post representatives presented the multiple training offerings at the level of Croatia Post: The Croatian Post Academy ensures the transfer of knowledge for new job roles; Education offers for postmen to learn how to use new technology; E-learning offers for Front office workers to increase their knowledge of new services; and the offer of Scholarships for students in Logistics (new knowledge and fresh minds capture).

Final Conference Report
Brussels, 03 December 2018

The Final Conference gathered more than 60 participants from 22 countries, with in particular representatives from candidate countries, namely Albania and Serbia. Participants were warmly welcomed by Mr. José Oliveira, Vice-Chair SDC Postal Sector, Mr. Botond Szebeny, PostEurop Secretary General, Ms. Cornelia Broos, UNI Global Union - Post & Logistics as well as Mrs. Jutta Rawe-Baeumer, Chair of SDC Postal Sector. The speakers welcomed the participants and highlighted the importance of working in the framework of European social dialogue and emphasised the crucial role good cooperation amongst the social partners could play for the postal sector.

Mr. José Oliveira, Vice-Chair SDC Postal Sector opened the Final Conference. The project was implemented in a spirit of Social Dialogue reinforcement. The Vice-Chair noted that social dialogue needs to be strengthened all across Europe. He encouraged participants to see how far the sector's challenges could be addressed when companies and trade unions cooperate and discuss in a constructive social dialogue basis.

Mr. Botond Szebeny, PostEurop Secretary General, welcomed the opportunity to speak and to open the Final Conference. The project discusses social dialogue, digitalisation and skills. The project also looks at how we can transform postal operations together with postal employees. Postal operators are often one of the largest national employers. The sector enshrines the dimension of trust to European citizens. He reminded participants that recent studies report the biggest transformation of the sector in the last years. We witness a significant decline in letter volumes, a booming e-Commerce market translating into the increase of small prices. The booming e-Commerce volumes do not compensate however the declining letter volumes. Parcels indeed require other skills, other competences and other structuring of postal operations. He mentioned that Commissioner Ansip thanked the postal operators for the successful implementation of the interoperability industry initiative (track-and-trace; return services; customer feedback). He welcomed the opening of the SDC to Eastern Europe and EU candidate countries. The challenges of the industry are similar across regions and the project can assist the social partners in drawing conclusions and seeking appropriate responses to those challenges. He urged participants to look at training and health and safety aspects without omitting the larger context of postal transformation.

Ms. Cornelia Broos, UNI Global Union - Post & Logistics, thanked for the opportunity to address the final Conference. She wished to foster the close cooperation between the social partners in the future. The postal sector is unique. Through the postal networks we reach each postal address every day. Postal workers are dedicated notably in the delivery segments and this makes our social dialogue also very special. Like PostEurop, from a trade union perspective, we want to maintain good jobs in profitable companies that address the sustainability in the future. The trade unions see the need for change in terms of new technologies and digitalisation. Regulatory aspects are important challenges in the sector as e-Commerce and the ensuing competition necessitate changes in terms of work organisation and a focus on efficiency. Both sides of industrial relations understand the need to move towards a Post 3.0 but also towards a postal worker 3.0. Ms. Cornelia Broos pleaded for a joint approach as any change is met with reticence. In order to have the postal workers onboard as well in this transformative journey we need to foster our cooperation and exchange over good practices. It is important to work together and develop joint approaches to technological change and digitalisation. How do we adapt our operations to grasp the e-Commerce opportunities in the future? Postal diversification needs to include the workers' perspective and address aspects training. The identified need of accrued flexibility must be coupled with good working conditions and quality jobs. As many postal operators are faced with labour shortages notably for delivery drivers, we need to work together to render those occupations more attractive. How do we create the Post 3.0? We need to change our own structures as with declining letter volumes, parcels will be our new economy. We need to ensure that SMEs have access to the postal services. A crucial question for the future will be the degree of integration of parcels in the definitions of the Universal Service Obligation. How can we achieve a level-playing field in parcels? Can we bring the competitors on the table and discuss together as our operations will be more and more coupled with each other? Ms. Cornelia Broos, wished every success for the Conference and urged participants to foster social dialogue, work together to derive common positions and Joint Declarations that address our mutual challenges.

Georges Papasteriades, ELTA presented on behalf of the Project Steering Group the scope of the current project. He mentioned the Project's main objectives as follows:

- To get first-hand information on how postal operators and trade unions manage to support the increased digitalisation of their organizations with impacts on jobs and competences, on work organization as well as on training needs and methods.
- Better understanding on the programmes of digital transformation put in place within companies in terms of training, re-training and cultural evolution. In this framework, the acquisition of digital skills and new jobs will be a key area.

- Impact of the digital tools and new technologies on work organisation. The opportunities that the digital economy represents in terms of development of e-commerce activities, in particular parcels.
- In this framework the e-learning module Post my MOOC (digital training) on e-commerce and new services was presented as an output of the “Mobilising Social Partners in a new context” project.
- 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.

He explained that the project focussed on three topics:

1. The role of the SDC for social partners – the aim was to disseminate SDC Joint declarations and set examples of how to integrate them in national CLAs.
2. Impact of digitalisation – the aim was to analyze the stages of operational transformation and workplace diversification from e-commerce and e-services perspective amongst social partners.
3. Digitalisation and training strategies in social partners – the aim was to define respective training and retraining practices for promoting transformation.

The initial analysis stemmed from first-hand data collection through an extended questionnaire. The Project Steering Group received answers from 17 postal companies from 17 countries and from 14 trade unions from 12 countries.

On the role of Social Dialogue in the postal sector, the Project team presented the following results: Social dialogue is a key tool for anticipating major evolutions and contribute to the European regulation of the postal sector. Postal Operators and postal trade unions have a common understanding on the role of the SDC. Social partners have managed to establish an excellent platform of exchange of good practices on social issues and to further collaborate with other sectors to cover important aspects. Over time the SDC has become a recognized stakeholder in the postal sector. In this framework, a collection of good practices of the SDC was circulated amongst the participants as a tool to further spread the knowledge on the SDC. Service and customer orientation as well as work-life balance are priority issues for employers and trade unions.

On the impact of digitalisation, the Project team presented the following results: The postal sector is witnessing an important increase in new digital services through mainly online platforms (Post, financial services), mobile apps, digital documents, e-government documents. Digitalisation has spurred the implementation of a number of technical upgrades: Track and trace options and the provision of new devices (PDAs and changes in infrastructures, data bases). Digitalisation has impacted E-Commerce strategic activities of the postal operators with the enactment of re-organisation of mail processes towards parcels. Various initiatives were collected like the adjustment of networks and processes, the creation of new parcels divisions, the acquisition of parcel subsidiaries or new corporate partnerships. Digitalisation has also impacted working conditions in the sector albeit to different degrees. Through the project the following trends were identified: Shift of personnel from mail to parcels, change of role profiles, changes in delivery times, and adaptive flexibility in terms of working time requirements. Regarding digitalisation and the training strategies of the social partners, besides internal training which is the core of upgrading employee skills, postal operators developed other approaches to complement training processes for up-skilling employees.



The project showed that it is possible to have “classic” training programmes complemented by “new” training methodologies. Postal operators are engaged in scenario planning on market conditions and social evolutions in order to prepare training and re-training programs on a more digital base to support new products and services. The Project identified that there is a need to develop new competences through training and re-training of existing employees in a lifelong learning perspective, not least to meet skills mismatches in the future. Employers and trade unions agreed that the two required future skills will be flexibility in service delivery and customer orientation.

Mrs Sylvie Finné provided a comprehensive presentation on the role of the European Commission in supporting social Dialogue. The presentation is annexed to the Report. Participants subsequently engaged in a moderated discussion through a series of high-level interventions addressing the following questions:

1. In your experience, where do you see the added value of European Social Dialogue?
2. To complement, has European Social Dialogue contributed to social dialogue at national level?
3. In your experience, what has the added value of European postal social dialogue been for your company? Can you share a topic (initiative or joint document) that brought interesting outputs for your company?
4. In your experience, what has the added value of European postal social dialogue been for your trade union but also in your national context? Can you specify an initiative or joint document that generated discussions at national level?
5. How can we strengthen and enhance cooperation at European Social Dialogue level?

Following very interesting interventions on the above-mentioned open questions from Mrs. Jutta Rawe-Bäumer, Chair SDC Postal Sector, Mrs Margaux Meidinger, Groupe La Poste, Regino Martin, General Secretary for the Postal sector at CCOO-FSP, and Régis Crunchant, Departmental Secretary CGT-FAPT, participants pursued the Final Conference working day with high-level speakers on the remaining subject matters in the scope of the project, namely Digitalisation and Training.

Mr. Andrea Glorioso representing DG CONNECT of the European Commission presented his expertise and engaged the Conference participants in a very rich exchange on Digitalisation, digital skills and the new world of work. Digitalisation implies new work organisation patterns and new working time arrangements. To assess the impact of digitalisation on labour markets and the skilling needs thereafter, it is of crucial importance to view digitalisation under several perspectives: Digitalisation automates services and products processes, it has consequences on political and social life, and influences mega-trends such as climate change. Within the remit of European policies, the social partners and the European Commission adopted a political declaration in the form of the European Pillar of Social Rights. Under this initiative societal stakeholders have committed to upward convergence to achieve better social protection and social security for all forms of work.

In difference to the above political commitment, questions of skills, educational policy and social policy are outside the remit of competences of the European Union. Regarding digital skills, it was mentioned that they not only cover ICT skills but also encompass transversal or horizontal skillsets. 30% of Europeans have very basic digital skills. There is a 20-30% share of Europeans with no digital skills at all. Unfortunately, this gap is not reducing. There is a responsibility of the private economic spheres to upskill or re-skill the workforce. When it comes to skill anticipation, although STEM-ICT skills remain important, top skills for meeting future needs that should be focussed upon are group work, empathy, and critical thought. To address the low level of digital skills of the current workforce and to curb this mismatch, the European Commission has established the Digital Jobs Skills Coalition which is potentially for all sectors to foster cooperation and encourage pledges around digital skills acquisition with the commitment of private companies.

Digitalisation in terms of industrial relations implies the automation of particular jobs, tasks, and functions. It is unclear how many jobs will be created, changed and how many may disappear. Digitalisation implies also the acceleration of new forms of work. In the future, it is plausible that platforms will be responsible for matching skills to job offers. It is also known that the new forms of work will not be standard forms of employment in the sense of how we understand them today. There will also be the advent of new ways of working within the workplace with the rise of machines complementing human work. In some cases, assumption is that new work arrangements may result in a shift of employees. These developments could have important implications for the sustainability of our social protection and social security systems.

It was deemed important for social partners at horizontal and sectoral levels to be able to anticipate skills development and matching to firstly realise the importance digital skills will play in the future, secondly to use data with caution in skill anticipation exercises, and thirdly to not underestimate the importance of transversal and soft skills that need to complement digital skills acquisition. There were some doubts expressed as to the degree particular industries are able to anticipate future skills needs and to develop appropriate training practices for the new forms of work. It was also remarked that online platforms are not willing to invest in training programmes and are not willing to engage in industrial relations. This in turn diminishes the capacity of sector social dialogue stakeholders to anticipate sector skills needs for the future. It ultimately remains an open political question how far horizontal and sectoral social partners will advance on the negotiations around the social protection systems' sustainability implications of the new forms of work.

Mr Barbaro Francesco Costa, Chair of the SDC Working Group on Training, Health and Safety, thanked Mr Glorioso for his contribution and opened the "Digitalisation and Training in a transformation age for the postal sector" session. Mr Obi Abuchi, representing NKD, presented "Digitalisation, Skills & Training at Deutsche Post DHL Group". NKD worked with Deutsche Post DHL Group for over ten years and helped in shaping a comprehensive training and certification scheme within the Group. The presentation is annexed to the Report.

Participants had the opportunity to hear from Mr Nicolas Jouanneaud from the Groupe La Poste, on the strategy of the French postal operator regarding digital training. The strategy focuses on four axes of Digital and Data competences' development: Acculturation for all; Professionalisation and Development; New Orientation; Apprenticeship and Recruitment. Participants also heard from a representative of Simplon, which is the partner of the French Post in the third pillar mentioned above, namely career re-orientation with up-skilling of volunteering personnel so that they can get a diploma and related promotion in IT. Both presentations are annexed to the report.

Mrs Maria Koumanioti representing Hellenic Post S.A. ELTA presented the main features and situation of Digitalisation training and the need for digital skills within ELTA. The Greek operators' strategy on the acquisition of digital skills aims at reinforcing employability through the acquisition of new enhanced digital skills and competences. It seeks to exploit ICT business opportunities and their role in the continuous improvement of operations in terms of costs, job description and redeployment of employees. ELTA develops employees' new competencies through training & re-training and seeks to keep up with the pace of technology towards client needs and client satisfaction. ELTA has put in place a number of training methods and modalities to upskill postal employees in a digitalised context and the remit of training is negotiated through the Collective Labour Agreement. The presentation is annexed to the report.

Participants thanked all the presenters and engaged a discussion around the most effective way on how to harmonise training that meets the digital needs of the future at European level. Mr Glorioso agreed that one possible avenue is to standardise digital competences in a coherent way at European level although there are different standardisation ways. A categorisation of digital skills by economic sector is one way of devising appropriate training responses to meet the skills gaps of the future. One concern regarding European standardisation in terms of European Union competences is that the validation and certification of the acquired skills remains under national responsibility.

Participants asked panellists how they saw the future of classical and non-classical training? Mr Abuchi explained that e-learning methods facilitate the cascading of training faster. In his view social aspects will

maintain their importance but will be approached differently. Mr Jouanneaud observed that where digitalisation of methods is possible it will happen to facilitate as vast a training experience as possible. The idea is to harness the technological tools and opportunities to increase the effectiveness of learning - classical and applying it within the company. Mrs Koumanioti foresaw that a combination of classical and non-classical methods will be continued. Mr Glorioso agreed that education and training practices have to use and combine all training tools and methods that are available. There cannot be a one-size-fits-all approach as there are significant regional differences along with different needs. It is important to not only look at the labour market aspects but to also consider the societal implications of new technologies.

Final Conference remarks

Mrs. Jutta Rawe-Bäumer, Chair SDC Postal Sector, remarked that the Final Conference enabled the SDC participants to draw a number of conclusions as presented by external experts and helped to enlarge our perspectives notably with the interventions from DG EMPL and DG CNECT of the European Commission. Their interventions highlighted the importance and relevance of our sector in the digitalisation debate. It allowed participants to hear important insights in terms of training and answered questions on what issues the SDC can work towards in the future.

Mr. José Oliveira, Vice-Chair SDC Postal Sector, thanked the Conference organisers for bringing forward important discussions. The Final Conference exhibited the importance of staging discussions between the social partners. He welcomed the opening of the discussions and looked forward to pursuing those in the Social Dialogue Committee context to address some of the challenges we face in the sector. It was deemed important to pursue the discussions in the social dialogue framework.

Seminars Results and Project Outcomes

The project, jointly implemented by the European Social Partners for the postal sector, was organized in line with the SDC initiatives “Mobilising Social partners in a new context” and with the others SDC projects on Training implemented in the past (Matching Skills & Jobs in the European Postal Sector, in particular). For these reasons the project “Promoting Social Dialogue in the Postal Sector in an enlarged Europe” placed emphasis on training aspects and was also centred on two main Topics:

1. To build-up networks of representative social partners in the postal sector by focussing on capacity-building activities to raise awareness and disseminate the work of the SDC, in particular but not exclusively, in Central and Eastern European Member States and Candidate Countries. The capacity-building aspects entailed presentations, explanations, and discussions of the work and activities of the SDC as well as the dissemination of those through digital means via the SDC website. Furthermore, it enabled the engagement of respective social partners in European social dialogue activities giving to the participants a full overview on the European Social Dialogue and on the SDC postal sector activities, rules, organization and opportunities.
2. To analyse the digital transformation of the postal sector gathering first-hand information on how postal operators and trade unions manage the increased digitalisation of their organisations and its impact on work organisation patterns and competences as well as on training needs and methods. It allowed a better understanding of the programmes of digital transformation put in place within postal companies in terms of training and cultural evolution. It focused specifically on the needs in terms of digital skills. In this sense a particular focus was put on the training programmes put in place, in particular to support the digital evolutions. The project also served to obtain a better understanding of the impact digital tools have on work organisation patterns. The identified measures will inform future SDC activities and improve the coordination and effectiveness of European social dialogue through the exchange of good practices on training measures for the adaptation of the postal sector to the evolving digital workforce among others. The project enabled the identification and development of joint approaches by the SDC on the adaptation of postal operators and their activities regarding e-Commerce and parcel delivery.

With the three regional seminars, it was possible to have a high level of experiences exchanged and to hold debates both in terms of quantity and quality. The Final Conference, organized to present and share the

conclusions, represented an additional, important moment that contributed to draw the following conclusions.

Social Dialogue

Regarding the first part of the study on the promotion of the postal SDC and the social dialogue of the sector, both the results of the questionnaire circulated amongst the social partners, and the three organized seminars confirmed that employers and trade unions have a similar knowledge level of the European Social Dialogue Committee. It is probably necessary to improve awareness of the SDC's activities, of the signed joint declarations, and of the opportunities offered to the participants. Precisely for this reason in the three seminars all the participants were given a document that contained all the Joint Declarations of the postal SDC and were given presentations, also with the contribution of the European Commission itself, on the functioning of the European Social Dialogue and its importance.

It was also possible to state that, albeit to different degrees, the level of awareness on the importance of social dialogue and the experiences of social partners at national level have certainly increased compared to ten or fifteen years ago. In this sense, the debates that took place in the three seminars confirmed that the Social Dialogue Committee for the European postal sector is playing a role in the process of improving the overall level of social dialogue at national level. The exchange of point of views, bargaining and opportunities for employers and trade unions to discuss important issues have become more structured and strategic for the postal social partners at national level through time.

Furthermore, it can be stated that, even if slowly, the SDC is becoming increasingly important in the consideration of the social partners of the sector at national level. This can be also deduced from the answers given to the questionnaire but also from the experiences gained by the postal social partners. For example, during a seminar it was possible to learn how the national social partners have introduced, directly in the company labour contract, the commitment to provide information on what is carried out in the SDC. This is notably the case in the latest Collective Labour Agreement signed at the level of Poste Italiane.

The project also confirmed that it is necessary for the SDC in the postal sector to disseminate in every possible way the knowledge of its mission, role and activities. An effort that could also contribute to having new participants in the SDC meetings able to give new ideas and actively contribute to the life of the Committee. In this regard, the number of participants in all the three events (as well as in the Final Conference) confirm that the main aim of the project was met. It should also be mentioned that from the potential pool of candidate countries to the EU, experts were present for the first time in a meeting of the SDC: this was the case of the Albanian and Serbian postal social partners, something which demonstrates the keen interest of those countries to be actively involved and participate to European Social Dialogue in the postal sector.

Digitization Impact on Work organisation, Services and on Training

The second area of the project' investigation was on the impact of digitization on work organisation patterns, and the services implemented by the postal companies to face the digital transformation of the sector. This significant change and adaptation, in fact, needs to be supported by training and re-training measures and programmes able to accompany and support the transformation in the postal activities. Through the questionnaire and the seminars, the project, in line with the finalised SDC project "Mobilising Social Partners in a new context" addressed these important questions and gathered information on how postal operators implement digital transformation strategies. The rich and interesting debates that were held during the seminars confirmed the importance of digitalisation and its impact in the sector. From the seminars and the material collected a first conclusion is that postal companies, even if at different stages of transformation as regards digitalisation, are striving to and are fully aware of the need to develop new services and to enhance the digital skills of their employees.

Postal social partners have exhibited joint awareness around the crucial role digitalisation plays in the postal sector. Postal social partners are fully aware of the rapid change and adaptation requirements the sector faces. Another conclusion emerging from the project is the recognition that there is a mutual interest for

national social partners to pursue good and constructive industrial relations and social dialogue to address the digitalisation of the postal sector, the postal companies' digitalisation strategies, and to engage in comprehensive social dialogue on the effects of digitalisation on work organisation patterns and in view of digital skills development (training, upskilling, retraining) for the postal workforce. The presented and gathered good practices through the project confirm this trend and mutual realisation abovementioned.

The shift of employees from the mail sector to that of parcels and the growing development of e-commerce are seen by postal social partners not only as a challenge in the market but also and above all as an organizational challenge of adaptation to the new reality of the market and customer needs. Postal services' modernisation and diversification processes, e-substitution and market opening have impacted working conditions and work organisation patterns. Social partners work together to ensure that new services are coupled with good working conditions that adapted to the use of new technologies and that postal operators develop adequate training and re-training measures. Due to this general picture for the sector, it is clear that training, retraining, skills and jobs anticipation have and will continue to play a strategic role in the future. The project "Promoting Social Dialogue in the postal sector in an enlarged Europe" confirmed that all postal companies are looking at implementing solutions that address the changing market and are suitable in their national realities as there is no one-size-fits-all solution. Furthermore, it can be concluded that in coming years there will be a continuance at the level of the postal operators of a combination of classical training programs (for example training in the classroom) along with more advanced methodologies such as e-learning or even methodologies based on digital technologies tailored to the needs of employees to develop the digital skills of the existing employees but also to anticipate the skillset needs especially in the current changing environment. Precisely the retraining on new digital products and on proximity services as well as training programmes based on digital solutions already available seem to be the new frontier of training in the European postal sector.

Final Remarks

The project “Promoting Social Dialogue in the Postal Sector in an enlarged Europe” was structured following two main drivers: to analyse the situation on social dialogue and on digitalisation from a regional point of view whilst having the possibility to exchange experiences with social partners of different European countries and to structure this initiative in a consistent way with previous SDC projects. The previous project “Mobilising Social partners in a new context” had, amongst others, the objective of assessing how the sector’s digitalisation is managed from a training point of view. The “Promoting Social Dialogue in the Postal Sector in an enlarged Europe” project further disseminated the learnings and findings from the e-commerce seminar held in November 2015, ensuring a follow-up and continuity between different SDC projects. In this perspective and considering the high level of the experiences exchanged and the inputs received, the project met its initially set objectives.

The project allowed the further dissemination and comprehensive explanations by means of presentations and exchanges on the importance of SDC activities and work outputs. It also served a capacity-building endeavour by encouraging further participation of colleagues in SDC activities and assisted in improving the coordination and effectiveness of European postal social dialogue. This specific action was also key in contributing to reinforce the network of experts on social dialogue, human resources, industrial relations and training of the SDC. Mutual learning through capacity-building activities allowed to raise awareness and disseminate the work of the SDC particularly but not exclusively, in Central and Eastern European Member States and Candidate Countries. The participation of Albanian and Serbian postal social partners is considered as an added value of the project. The possibility to spread all the presentations exchanged during the three seminars as well as the outcomes of the final conference via the SDC postal website proved effective as an additional tool available to the social partners.

Overall the project contributed to the objectives of the call for proposals, namely measures and initiatives related to the adaptation of social dialogue to changes in employment and work-related challenges, such as addressing the modernisation of the labour market, quality of work, anticipation, preparation and management of change and restructuring, skills, health and safety at work, active ageing, healthier and longer working lives, active inclusion and decent work, among others. This project aimed, moreover, at contributing to the priorities and activities of European social dialogue, including the European Commission's commitment to relaunch and strengthen social dialogue, notably on a sector basis. It aimed at addressing the employment, social and economic dimensions of EU priorities relating to the recovery from the crisis, taking into account the need for social convergence between Member States, and to reaching the objectives and targets of the Europe 2020 Strategy and its flagship initiatives.

In parallel and as announced in the project proposal, the project engaged an analysis on the identification and possible development of joint approaches by the SDC on the adaptation of postal operators and their activities regarding e-commerce and parcel delivery. It gathered information on the impact the adaptation and transformation of postal operator’s activities and strategies around e-Commerce and parcel delivery have had on work organisation patterns and national collective bargaining. Of equal importance and as announced in the project proposal, it enabled SDC stakeholders to exchange good practices on training measures for the adaptation of the postal sector to the evolving digital workforce amongst others. The project associated the analysis of e-Commerce and parcel delivery operations to the anticipation of skilling needs of the postal workforce around the identified need to adapt it to the digital age which involves training measures in the use of new technologies as well as the adaptation of service provision to an ever-more digitalised user landscape.

This project which was proposed jointly by employers' and workers' organisations, implemented parts of the 2016-2018 work programme of the SDC, as well as fostered the implementation of European social dialogue outcomes, reinforced the SDC’s impact and visibility, supported previous related projects’ follow-up and reporting.