“PROMOTING SOCIAL DIALOGUE IN THE POSTAL SECTOR IN AN ENLARGED EUROPE”

Athens Workshop
Athens, May 3rd – 4th 2018
Questionnaire

- Questionnaire structured around 3 Parts:
  - Promoting Social Dialogue
  - Impact of Digitalization
  - Training
- Answers from 17 postal companies from 17 countries
- Answers from 14 unions from 12 countries
- Not all employers and not all unions replied to the questionnaire

**NO 1 to 1 comparison for countries possible**
(only 9 countries with answers from companies and unions)
<table>
<thead>
<tr>
<th>Country</th>
<th>Postal Company (total 17)</th>
<th>Union (total 14)</th>
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<tr>
<td>Eastern Seminar</td>
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<td>Trade Union Federation of communications</td>
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<td>Österreichische Post AG</td>
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<td>PASYDY UPEP</td>
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PART 1
- PROMOTING SOCIAL DIALOGUE -
Do you know the role and main activities of the SDC?

• Cooperation between employers and trade unions in the postal sector
• Advisor role towards European Commission
• Contribute to the improvement of working conditions & sharing best practices
• Facilitate the sharing of employer and worker views on employment and social topics
• Inform the European Commission on relevant developments and issues relating to employment conditions

• Cooperation between Employees/Employers
• Employee involvement in decision-making, collective bargaining and wages
• Harmonize the sector in European countries
Is your company / trade union involved in SDC activities?

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<tr>
<th></th>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>Employers</td>
<td>88%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Unions</td>
<td>93%</td>
<td>7%</td>
<td>0%</td>
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What is the level of implementation of Joint Declarations?

Employers

- Adequate: 47%
- Partial: 6%
- No: 14%
- N/A: 7%

Unions

- Adequate: 65%
- Partial: 14%
- No: 14%
- N/A: 7%

Reasons of non-implementation:

- Employer is not actively participating in discussions at European level, which makes it difficult to bring in the views of the company's level.
Have the outcomes of the SDC been integrated in the discussions in your company?

**Employers**

- Best Practices: 42%
- Internal Benchmarking: 11%
- Joint Bodies: 8%
- Collective Labour agreement: 7%
- Company agreement: 8%
- N/A: 27%

**Unions**

- Best Practices: 14%
- Internal Benchmarking: 9%
- Joint Bodies: 24%
- Collective Labour agreement: 14%
- Company agreement: 10%
- N/A: 29%
Have the outcomes of the SDC been integrated in the discussions in your company?

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

**Union:**
- Relocation program for the delivery persons shifting from mail delivery to other functions
- Memorandum for the social partners' cooperation in solving employment, remuneration and social employment policies
Is there any other subject that you think should be covered by the SDC?

**Employer:**
- Service and Customer orientation
- Sharing methods aimed at achieving commitment and on-the-job involvement of company workers between different postal operators
- Not necessarily

**Union:**
- Better reconciliation of professional and family life (better achieving work-life balance)
- Training, Occupational Health & Safety, accidents and occupational diseases, emotional exhaustion/psycho-social stress
- Employment (Precarious work and deterioration of working conditions, extension of part-time working arrangements), pensions and social actions (financial assistance for students, health treatments, etc.)
- Impact of new technologies on the quantity and quality of employment and wages
- Gender gap (incl. gender pay gap) and ageing population
Trends Part 1

- Similar understanding of the role of the European Social Dialogue between unions and employers
- High knowledge of SDC activities and role between the social partners
- Level of involvement is generally high - on average higher involvement on unions side vs. employers
- Level of participation is higher on unions side vs. employers
- 1/3 of countries are highly involved in the SDC
- Employers see a more adequate implementation (47%) of Joint Declarations compared to unions (14%)
- Implementation mainly through the integration in best practices (Employers 42%) and collective labour agreements (Unions 29%)
- Key topics to be covered by SDC in the future: Service & customer orientation (employers) and work-life balance (unions)
- Reason for non-activity named as lack of resources (employers)
- Reason for non-implementation named as lack of participation of counterpart in ESD and no follow-up at company level (trade unions).
Part 2

-Digitalization Impacts-
How far has your company been impacted by digitalization?

**Employers**
- High: 35%
- Medium: 6%
- Low: 6%
- N/A: 59%

**Unions**
- High: 50%
- Medium: 43%
- Low: 7%
- N/A: 7%
Main changes in postal operations

1. Decrease of mail volumes and increase of parcel volumes
2. New electronic/digital services
3. Electronic communication with customers
4. Job impacts – change of role profiles, negative impact on quantity and quality of employment, training to adapt to new services
5. New technical devices/equipment
6. Impact of e-government/digitalization of public administration
Has your company implemented e-commerce strategic activities, notably parcels activities?
Identified e-Commerce strategic activities

1. Delivery to parcel lockers/ boxes
2. SMS notification upon arrival
3. Delivery to post offices/ pick-up
4. Re-organization - creation of divisions, subsidiaries + partnerships with other companies
5. Technical devices - smartphones, PDAs
6. Return services
7. Modification of working conditions - part time employment, usage of free-lance delivery workers
8. Automation/ partial automation of the sortation of parcels and packets
Has the development of e-commerce activities required the re-organisation of mail operations with regard to parcel delivery operations?

Employers

- Yes: 82%
- No: 18%
- N/A: 0%

Unions

- Yes: 86%
- No: 7%
- N/A: 7%
Main factors in the re-organisation process

1. Change of delivery system/ process
2. Change of delivery time
3. Reorganization/ restructuring
4. Providing PDA/ technical devices
5. Change of network, infrastructure (reuse of former mail sorting centers for parcels), fleet, closing postal offices
6. Shifting personnel from mail to parcel
7. Aligning mail and parcel activities
Has digitalization led to the implementation of new postal e-services in your company?

**Employers**
- Yes: 88%
- No: 12%
- N/A: 0%

**Unions**
- Yes: 72%
- No: 14%
- N/A: 14%
Main identified new postal e-services

- **Online services** – making postal services available on website, e-platform
- **Online/ e-document** – transforming physical letters into a digital version, digital storage of documents
- **Mobile App**
- **Track & trace** and electronic notice on delivery via email, SMS
- **Financial services** - banking and invoicing
- **E-commerce** - online shop/ platform or web-services for SMEs
- **Parcel lockers**
- Possibilities to design own postage stamp and postcards
• Digitalization has improved offerings of new digital services: online platforms (Post, financial services), Mobile apps, Digital Documents, e-Government;
• Digitalization led to the implementation of technical upgrades: Track & trace options and provision of new devices (PDAs and changes in infrastructure)
• Digitalization led to the implementation of new postal e-services through diversification
• E-Commerce strategic activities development led to reorganisation of mail towards parcels
• Reorganisation has meant adjusting networks and processes, creating new parcel divisions, acquiring parcel subsidiaries or new corporate partnerships
• There is a different perception on the imperative to implement e-commerce strategic activities, to reorganise mail and parcels operations, and to implement new postal e-services, between employers and trade unions
• Digitalization impacted working conditions: Shift of personnel from mail to parcel, change of role profiles, changes in delivery time, adapted flexibility in terms of working time requirements
PART 3
- TRAINING -
Is your Company providing training and/or re-training programmes to up-skill the current workforce on digital skills?

Employers
- Yes: 82%
- No: 18%
- N/A: 0%

Unions
- Yes: 72%
- No: 7%
- N/A: 21%
Does your company have programmes to provide internal redeployment options for postal workers to specialise in parcel delivery?

Employers

- Yes: 6%
- No: 65%
- N/A: 29%

Unions

- Yes: 29%
- No: 57%
- N/A: 14%
Internal redeployment programmes and options on parcels?

**Employer:**
- Providing internal and external training on IT skills to up-skill workforce with perspective of future new assignment
- Redeployment under consideration in the future
- Scouting internally for digital competencies
- Training on providing digital services
- Involvement of employees in developing new technical devices
- E-learning
- Mobility program with internal and external opportunities
- “From postman to courier”- company partly covering cost of driving licenses

**Union:**
- Training courses to improve computer knowledge (MS Office)
- Seen as employers’ responsibility
- Redeployment programs considered for the future
Are there internal redeployment options for postal workers to specialise in new digital services?

**Employers**
- Yes: 29%
- No: 59%
- N/A: 12%

**Unions**
- Yes: 79%
- No: 7%
- N/A: 14%
Redeployment options towards (new) e-services?

**Employer:**
- Providing internal and external training on IT skills to up-skill workforce with perspective of future new assignment
- Redeployment under consideration in the future
- Scouting internally for digital competencies
- Training on providing digital services
- Involvement of employees in developing new technical devices
- E-learning
- Data entry

**Union:**
- Training on providing digital services, incl. e-government services
- Seen as employers responsibility
- General option to move between working areas
- Physical “walking” postman replaced by digital postman
- Redeployment under consideration in the future
- E-learning
Is your company recruiting new job profiles to better meet digital and e-commerce activities?

**Employers**

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

**Unions**

- Yes: 67%
- No: 29%
- N/A: 7%
Do new flexibility demands of online consumers affect parcel delivery? How to meet these expectations?

**Employer:**
- Track and trace options
- Parcel lockers
- Fleet development – sustainability/ e-mobility, size (e.g. electric mopeds)
- Mobile devices (smartphones, tablets, PDAs, tools) for postwoman/postman
- New delivery and pick-up (and return) models
- Flexible delivery times / time window delivery – on demand, evening and weekend delivery
- Mobile apps and notification on delivery via email, SMS or app
- Parcel robots in last mile delivery
- New services to facilitate cross border online shopping

**Union:**
- Track and trace options
- Fleet development – size of vehicles
- Mobile devices (smartphones, PDAs, tools) for postwoman/postman
- Parcel lockers
- Mobile apps and notification on delivery via email, SMS or app
Are your postwomen/postmen equipped with digital devices?

**Employers**

- Yes: 76%
- No: 24%
- N/A: Not yet, but available in Spring 2018

**Unions**

- Yes: 72%
- No: 21%
- N/A: 7%
What kind of skills will be most needed in the future?

**Employers**
- Sales and Marketing: 18%
- Technical skills: 10%
- Digital Skills: 14%
- IT Skills: 8%
- Service and Customer orientation skills: 14%
- Flexibility to adapt to changing demands: 12%
- Internal mobility programs: 12%
- Health Care management: 15%

**Unions**
- Sales and Marketing: 15%
- Technical: 14%
- Digital: 14%
- IT: 12%
- Service and Customer orientation: 15%
- Flexibility to adapt to changing demands: 12%
- Internal mobility programs: 16%
- Health Care management: 3%
What kind of skills will be most needed in the future?

**Employers**

1. Flexibility (18%)
2. Service & Customer Orientation (15%)
3. Health Care Management (14%)
4. Digital (14%)
5. Sales & Marketing (12%)
6. Internal Mobility programs (10%)
7. Technical (8%)
8. IT (8%)

**Unions**

1. Digital (16%)
2. Service & Customer Orientation (15%)
3. Flexibility (15%)
4. Sales & Marketing (14%)
5. Technical (12%)
6. IT (12%)
7. Health Care Management (7%)
8. Internal Mobility Programs (6%)
Trends – Part 3

- Digitalization impacts training and re-training: development of dedicated training programmes
- Emphasis of training on IT/Computer skills and on new digital services (cooperation with external training providers, scouting for internal digital competencies, involvement of employees in developing new technical devices)
- No major redeployment programmes towards parcels and digital services yet, but slight shift of personnel from mail to parcel and/or alignment of mail and parcels activities
- Increased Flexibility in delivery, pick-up and return options to serve online consumers: time-window delivery, evening/weekend delivery, parcel lockers
- Track & trace options (online portal, mobile apps, notification upon delivery via SMS, email/app)
- Upgrade of vehicles due to new requirements - size, flexibility, sustainability, security
- Providing new technical devices and tools (e.g. smartphones, PDAs)
- Employers and unions agree on top 2 required future skills – flexibility in service delivery and customer orientation
Trends – Part 3 (continued)

• Most companies offer training to digitally up-skill the current workforce
• Most companies do not provide redeployment options towards parcel activities or digital services, but some consider it for the future
• Most companies recruit new job profiles
• Innovative delivery solutions are put in place to better answer customers’ needs
• Most postal companies provide their personnel with digital devices, e.g. PDAs
• Employers and unions agree on top 2 required future skills – flexibility (employers 18%, unions 15%) and service and customer orientation (employers + unions 15%)