WHAT ECONOMIC AND SOCIAL IMPACT OF DIGITALISATION ON THE POSTAL SECTOR?
The point of view of the European social partners

Liaison Forum, 22 January 2018

Margaux MEIDINGER, La Poste Groupe
Brian SCOTT, UNITE the Union
Digitalisation strongly impacts the sector

- Strong and continuous decline of mail volumes

Source: International Postal Corporation, Global Postal Industry Report 2017
A fast growing parcels’ market...

Source: International Postal Corporation, Global Postal Industry Report 2017
... which is however highly competitive

Domestic parcels & express market share, selected countries, 2016, %

Source: International Postal Corporation, Global Postal Industry Report 2017
An increased diversification of activities

Source: International Postal Corporation, Global Postal Industry Report 2017
Has your company implemented e-commerce strategic activities, notably parcels activities?

**Employers**
- 100%

**Unions**
- 93%
- 7%
- N/A

Source: SDC Post, Project « Promoting Europolig social dialogue in an enlarged Europe », 2017-2018
A quantitative and qualitative social impact

• A general decrease of employment within the postal sector

Source: International Postal Corporation, Global Postal Industry Report 2017
A quantitative and qualitative social impact

- New activities for employees

Source: International Postal Corporation, Global Postal Industry Report 2017
Has the development of e-commerce activities required the reorganization of mail operations with regard to parcel delivery operations in your company?

**Employers**
- Yes: 82%
- No: 18%
- N/A: 7%

**Unions**
- Yes: 86%
- No: 7%
- N/A: 7%

Source: SDC Post, Project « Promoting Europing social dialogue in an enlarged Europe », 2017-2018
The impact of parcels’ delivery on work organisation

• On the e-commerce value chain, the last kilometre delivery is of key importance for the customer
  – Postal operators need to better answer customers’ needs in terms of flexibility, rapidity and delivery choice.
  – For this purpose, it appears that there is a development of flexible working arrangements which impact work organisation.
    • Within several postal operators, an increased combination of mail and parcels delivery
    • Tendency to extend delivery time across the day and at the week-end.
• Competition on this activity occurs not only through cost-cutting but also via quality of service provision.

Source: SDC Post, Project « Mobilising social partners in a new context », 2017
How far has your company been impacted by digitalisation?

Employers

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

Unions

- High: 50%
- Medium: 43%
- Low: 7%
- N/A: 7%

Source: SDC Post, Project « Promoting Europing social dialogue in an enlarged Europe », 2017-2018
Impact of digitalisation

1. Change of delivery process
2. Change of delivery time, adapted flexibility in terms of working time
3. Reorganization/ restructuring
4. Providing PDA/ technical devices for postmen
5. Adjustment of network, infrastructure, fleet and closing postal offices
6. Shifting personnel from mail to parcels
7. Aligning mail and parcel activities
8. Change of role profile
9. Creating new parcel divisions, acquiring parcel subsidiaries

Source: SDC Post, Project « Promoting Europing social dialogue in an enlarged Europe », 2017-2018
Managing the social impact of digitalisation

- Providing internal and external training on IT skills to up-skill workforce with perspective of future new assignment
  - Partnership with IT schools for upskilling internal employees. An opportunity to train non-IT postal workers who are interested in IT and wish to evolve towards the web and mobile development functions
- Scouting internally for digital competencies / Training on providing digital services
- Involvement of employees in developing new technical devices:
  - Internal consultations, intra-entrepreneurship
- Physical “walking” postman replaced by digital postman
Making the most of DIGITALISATION for the European social partners of the postal sector

1. THE POSTAL SECTOR CONTEXT
2. E-COMMERCE OPPORTUNITIES
3. NEW PROXIMITY SERVICES

3 HOURS, VIDEOS, INFOGRAPHICS, QUIZZES...
WITH THE CONTRIBUTION OF THE EUROPEAN COMMISSION, POSTEUROP, UNI, BPOST, DPDHL, LA POSTE, POCZTA POLSKA, POSTNORD REPRESENTATIVES

http://www.postsocialdialog.eu/MOOC