EUROPEAN SOCIAL DIALOGUE COMMITTEE FOR THE POSTAL SECTOR

GRANT AGREEMENT 2017/2019 VS/2017/0374

PROGRAMME 2017-2019 SDC

Postal sector evolution working group

TREND RESEARCH FOR THE POSTAL SECTOR IN 2030

FINAL REPORT

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CONTENTS

USB Stick: Elements from the different workshops: list of participants, agenda, pictures, Mentimeter results

INTRODUCTION

The European Social Dialogue Committee for the Postal Sector (SDC) was established in 1999 as a joint committee for postal employers and trade unions. Following the adoption on 22 June 2007 of a "Joint Statement on Postal Sector Evolution", the SDC launched the "Social Observatory of the postal sector" initiative. In this framework, several EU co-funded projects aiming at better understanding the main social evolutions in the European postal sector have been conducted from 2009 to 2016 by the Postal Sector Evolution working group. In a context of profound transformation of the sector, the successive projects focused especially on change management within the national postal operators (NPOs) with in particular the evolution of the work organisation in several key activities for the sector. They have also analysed the evolution of the wider postal sector social environment.

An important milestone in this process was the "New Joint Declaration on Postal Sector Evolution" signed on 18 April 2012 to present a shared assessment of the situation and to define key principles to accompany the ongoing evolution of the postal sector. In this framework, the last project conducted in 2015-2016 enabled the European social partners to assess some key findings on how dialogue between social partners, at all levels, supports the change process. Through the analysis of the collective labour agreements signed within 16 NPOs, the project has shown that agreements are a lever of transformation through a wide range of measures related to employment, working conditions, wages as well as employees' status. Given the high pace of change, it became evident that there is a real need for raising the awareness of social partners on new activities and trends in the sector and exploring challenges and opportunities from the digital transformation.

This led to the signature on 1 December 2016 of a "Joint declaration on the role of social dialogue in the transformation" which formalises the common view of social partners, employers and trade unions, on how social dialogue can effectively support change. Significantly, the declaration also underlined that with employers and trade unions negotiating these trade-offs a "race to the bottom" of employment levels and labour conditions has been avoided in the EU. It is thus essential that European social dialogue can fully embrace all the aspects of this transformation.

The project under focus aims at bringing the reflection forward on the basis of the outcomes from past projects and joint positions. It consists in a prospective study on the future of the postal sector, in particular from a social perspective. Trends impacting the postal industry have been identified and respective future scenarios created jointly by European social partners. In this sense it has enabled to implement the SDC 2017-2019 work programme.

The 5 scenarios created in the framework of the project are the output of a common and consistent work of the European social partners. The project consisted in a highly innovative exercise both in terms of content and of work process that will have long-lasting impact in the work of the European social dialogue committee.

ACKNOWLEDGEMENTS

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SNTCT

PROJECT'S
MAIN OUTPUTS

MAIN OUTPUTS

The project "Trend research for the postal sector" was successfully implemented thanks to the involvement of several stakeholders among European social partners. The outputs of the project were accomplished and most of the objectives set were reached. The main outcomes of the project were multiple.

5 JOINT SCENARIOS TO HELP STIMULATE THINKING ABOUT THE FUTURE IN A UNIQUE WAY

From a content-perspective, the project enabled the group to elaborate 5 plausible scenarios on possible futures of the postal sector in 2030. These scenarios were built jointly by the European social partners who actively contributed to each step of the scenario planning process. These 5 scenarios are very different one from another and also depict some more and some less desirable futures. All of them are, nevertheless, balanced with positive and negative aspects in order to portray possible and realistic futures. On this basis, initial recommendations were elaborated by the European social partners. This very concrete output is an opportunity to:

• Identify how the postal sector may potentially look like in the future thanks to 5 diverse scenarios.
• Follow and anticipate the main trends in terms of economy, technology, environment, employment and society with an impact on the postal sector. A specific attention was given to the impact of digitalisation on the workforce in terms of skills and work environment.
• Allow a joint learning experience for the social partners as an eye-opener, exploration of the challenges and opportunities for the postal sector.
• Allow for further ideas to draw actions so all can better prepare for the future. Indeed the scenarios which seem less desirable are very useful to draw actions and encourage thoughts on steps to avoid them while the desirable ones enable all to set recommendations for an aim to reach them.

In addition to the detailed final report, a dedicated booklet with short versions and the visuals of each scenario has been published so that the SDC members can present the different scenarios within their respective organisations. This booklet will enable to disseminate the scenarios among social partners at the national level, to the main stakeholders of the sector or even a wider audience.

AN INNOVATIVE WAY OF WORKING AND BRAINSTORMING TOGETHER

From a process and working methodology perspective, the project was a real success as it set a different and innovative way of working among European social partners with very interactive sessions in smaller groups. Due to the step-by-step process and the numerous break-out brainstorming sessions at each meeting, social partners were very engaged in the elaboration of the scenarios. This allowed for the following benefits:

• Gather the different views from both employers' and trade unions' sides as well as diverse perspectives from countries in order to build joint scenarios.
• Allow for interactive workshops where each social partner can express his/her views and actively contribute to the discussions and debates.
• Encourage social partners to think outside of the box, be more creative and envisage different alternative futures.
• Strengthen the link between European social partners and enable a better appropriation of the topics under discussion.

In terms of lasting impact, this new way of working in co-construction and ideation has set a precedent in the work of the Committee; all participants enjoyed this exercise and felt involved in the process. It will have a long-time impact in the sense that future workshops will incorporate more of this new way of working.

CONTRIBUTING TO THE DEBATE ON THE MAIN EVOLUTIONS IN THE SECTOR

This report presents the results of the PostEurop and UNI Europa Post & Logistics project on the development of forward-looking scenarios for the postal sector by 2030.

This work should encourage sector stakeholders, postal employers, trade union organisations, but also the European Commission and the governments of EU countries, to consider the likelihood of different scenarios, challenge the various options proposed and help sharpen their vision and reflections of the postal sector's future.

This material is a working tool that we make available to all stakeholders and through which we wish to engage in closer exchanges about the sector's future, whether it is opportunities or threats identified.

In the scenarios expressed, for example the "vicious cycle society" is more pessimistic about the future of our society and shows the risks that such a reality would pose to the postal sector and its employees. Others, such as "innovative society," on the contrary, imagine a more inclusive and innovative society in its practices. Between these two extremes, modulations exist.

We have an opportunity to consider and influence how our ideas and actions today can impact the postal sector tomorrow. With our collective choices, we can build through social dialogue a society that we wish for.

That is what we are working for. To offer a reading of potential future scenarios in order to better prepare our actions towards building a more positive common future together. The European Union has a significant role to play, in consultation with all players in the postal sector, in shaping a dynamic and successful future of the postal sector, which employs millions of employees at the service of citizens and consumers.

"The future will not be what will happen, but what we will do"
Henri Bergson

SHORT VERSION
OF SCENARIOS
AND VISUALS

SHORT VERSION OF THE SCENARIOS

GREY SCENARIO: "STANDARDISED SOCIETY"

Renewal of social dialogue with new forms of labour organisation and bargaining in a society that is transforming rapidly by leveraging digital technologies to manage disruptive technological and ecological change.

PINK SCENARIO: "ECHO CHAMBER SOCIETY"

The end of the traditional social dialogue between unions and employers in the postal sector in a highly digitalised and individualised niche society and economy, in which new players in the postal sector set the tone.

BLUE SCENARIO: "ADAPTABLE SOCIETY"

Attempt to perpetuate existing social dialogue formats through incremental adjustments in a slowly reacting society and economy, in which new realities are gradually integrated.

PURPLE SCENARIO: "VICIOUS CYCLE SOCIETY"

Slow deterioration of social dialogue in a society marked by tension and a decline of solidarity amidst economically hard times.

ORANGE SCENARIO: "INNOVATIVE SOCIETY"

Reinvigorated social dialogue using new approaches as a key driver for managing difficult societal and economical transitions in an innovative and socially conducive way.
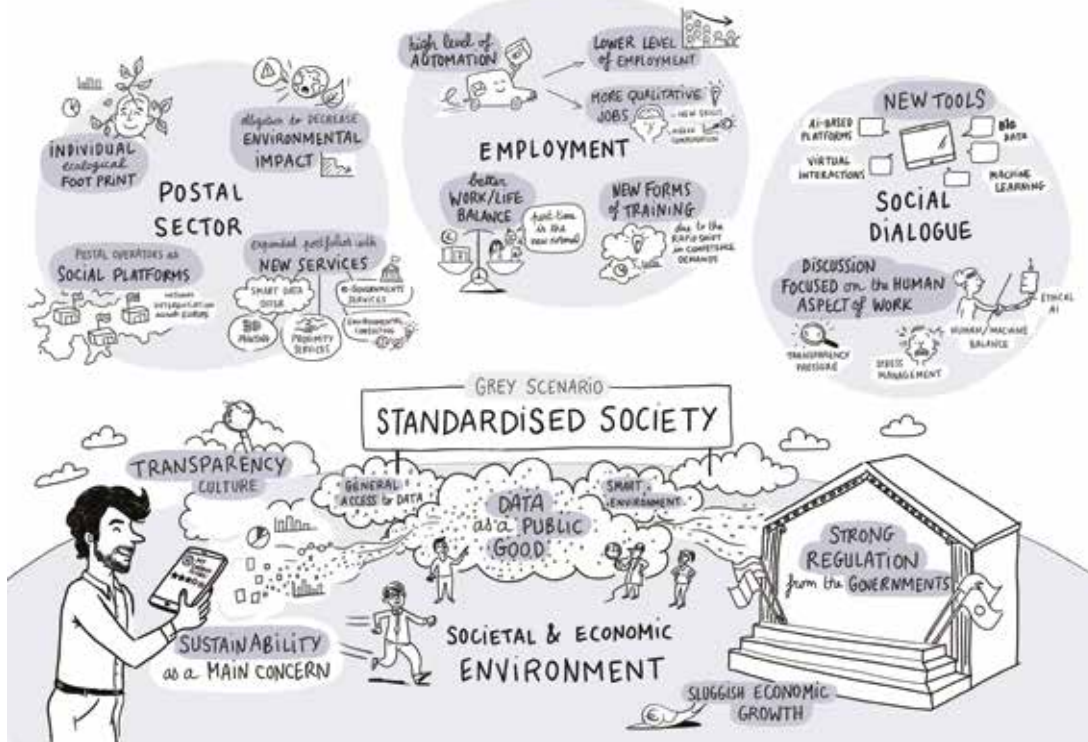
GREY SCENARIO: "STANDARDISED SOCIETY"

SOCIETY AND POLITICS	ECONOMY	POSTAL SECTOR	EMPLOYMENT	SOCIAL DIALOGUE
• Transparency and sustainability are the new guiding principles of society • Shift from individualist to more communal values • Stark and rapid technological change • Technology and algorithms permeate everyday life • Highly interventionist policies • Politics relies on management by algorithm to achieve efficiency gains	• Focus on sustainable business models and employment • Carbon taxes and individual carbon budgets strongly influence consumption patterns • Data is seen as a common good, public data trusts organised data usage • Open access to data drives a new wave of entrepreneurship • Focus on the human side of automation • Less concentration of economic power	• Radical transformation of the sector's activities • Fleets have become utterly electric • Expanded definition of USO requires the offering of socially-relevant (proximity) services • New services such as smart data offers and e-government services • Enabling services for environmentally-friendly supply chains • Incumbent companies benefit from new regulatory conditions	• Part-time is the new normal • Many jobs have become more complex, compen-sation has increased • Continuing task automation requires constant retraining • Virtually everyone has access to further training because of public financial support • Decrease in process flexibility due to more complex technical environment	• Key role in negotiating new standards for the radically changed world of work • New forms of labour organis ation and collective bargaining through AI-platforms • Questions of ethical AI and management by algorithms as ongoing topics of debate • Little discussion about facts and figures due to data transparency • Focus on the human aspect of labour conditions

PINK SCENARIO: "ECHO CHAMBER SOCIETY"

SOCIETY AND POLITICS

- Dynamic technological change, distinct consumerist behaviour (also towards new technologies)
- Strong individualisation and dissolution of classical societal milieus
- Strong polarisation in society and politics, retreat into private niches
- No effective mitigation of climate change due to lack of consensus in politics and society
- Strong urban-rural contrasts

ECONOMY

- Moderate growth, but very unevenly distributed
- Massive gaps between "winners" and "losers" of transition
- Reluctant regulation enables the rise of new, aggressive rulebreakers in the market
- Contrasts in society (high vs. low skilled, urban vs. rural) are also reflected in the economy

POSTAL SECTOR

- High degree of automation and technology diffusion, mail and postal offices at a new record low
- E-commerce providers have become stronger, whereas incumbent postal companies focus on rural areas
- USO is kept to a minimum with only one Universal Service Provider per country and a small range of services
- Business models of postal companies (and e-commerce providers) are increasingly questioned by climate change

EMPLOYMENT

- Strong change in the world of work through ongoing automation agile working methods
- More complex jobs are increasingly demanding for employees
- Rise of low-threshold and cost-effective digital micro-learning opportunities, lifelong employability as a new paradigm
- Winners and losers of widespread flexibilisation, massive gaps among workforces with weak representation of interests of low-skilled workers

SOCIAL DIALOGUE

- Decreasing solidarity among workforces, weakened unions
- Centrally managed social dialogue is ever more being replaced by decentralised formats on company level
- Instead of collective bargaining, micro bargaining platforms and new non-binding channels for the articulation of interest emerge
- No standard is the new standard
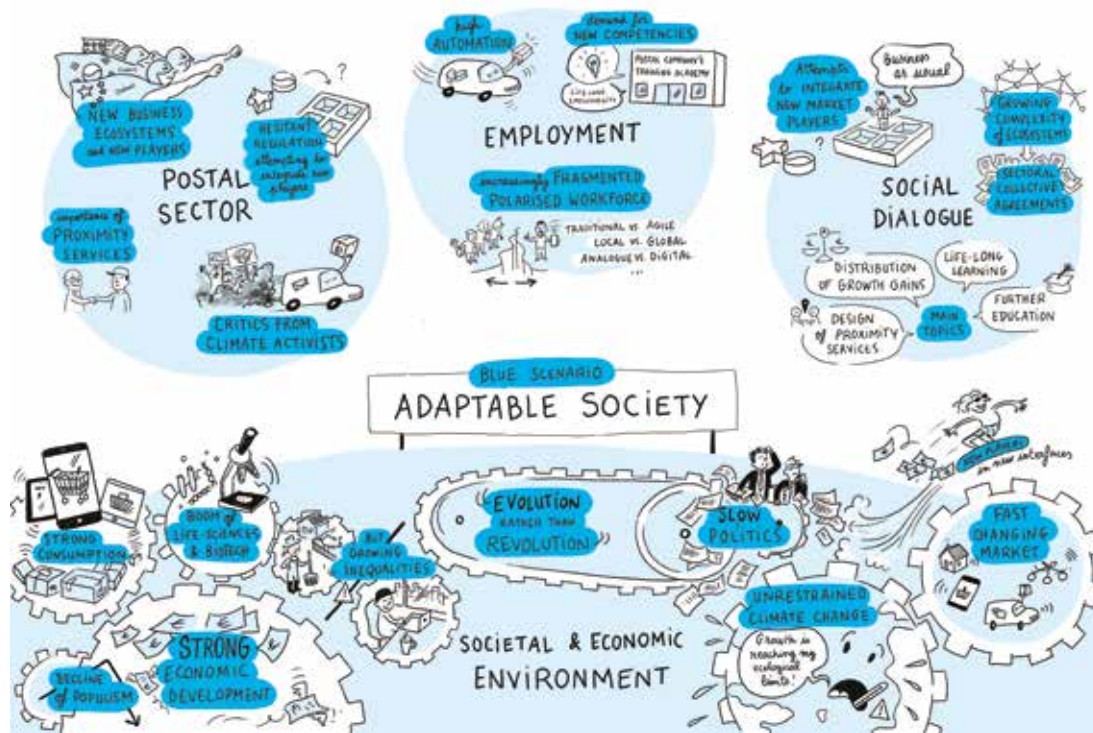
BLUE SCENARIO: "ADAPTABLE SOCIETY"

SOCIETY AND POLITICS

- Booming economy curbs radical social forces, nevertheless only low-level social cohesion
- Politics adapts only gradually to new dynamic conditions, often using "old tools" to cope with new phenomena
- Strong consumption, but also holistic health as a social "megatopic"
- Widespread technology scepticism
- Intensifying climate change awakens protests, especially from younger generations

ECONOMY

- Strong economic growth due to breakthroughs in biotechnology
- Resting on good economic data leads to a certain innovation inertia in Europe
- Downside of strong economic growth and consumption is a worsening of climate change and a significant deterioration in the quality of life in many places

POSTAL SECTOR

- The postal sector is characterised by the emergence of new business ecosystems and new players, as non-European tech companies pushed into European markets
- Distorted competition in the 2020s due to slow regulation of these new players
- In 2030, attempts to regulate them similarly to incumbent postal companies
- USO is extended to all relevant players in the postal sector, including proximity services

EMPLOYMENT

- Massive differences in the workforces with regard to payment, integration of new technologies into work, job profiles and work organisation
- Better-qualified employees can choose locations where they want to work while being connected to company clouds, whereas this form of location flexibility is largely withheld from lower-skilled workers
- Since lifelong employability becomes more important, postal companies are setting up own further training academies

SOCIAL DIALOGUE

- Strong will to organise in trade unions, in particular among lower-skilled workers
- New players are tried to be integrated slowly but gradually into the existing formats (which does not always cover their entire business models)
- Trend towards industry-specific solutions
- Sectoral collective agreements have become more important than ever

PURPLE SCENARIO: "VICIOUS CYCLE SOCIETY"

SOCIETY AND POLITICS

- Highly conflictive, protectionist and security-focused society
- Due to security focus, any citizens are quite prone to authoritarian tendencies
- Cooperation between EU Member States has become much more difficult
- Fear of cybercrime, espionage and sabotage
- Consumers are extremely careful with their data and sceptical about digital business models

ECONOMY

- Protectionism and national egoisms in trade
- Technology backlash, deconstruction of cross-border digital infra-structures ("Splinternet")
- Extended period of economic hardship and high unemployment
- Local SMEs benefit from the weakness of large companies
- Infrastructures are ailing due to underinvestment, so are public education systems
- Informal economy has grown significantly

POSTAL SECTOR

- Digital scepticism drives a "revival" of mail business, e-commerce business is stagnating
- Competition in the postal sector has decreased drastically, only one major player in many European countries
- Difficult business environment with ailing infrastructure and budgetary limitations
- Shift from post offices to postal services being offered in retail stores
- Lower service quality and range of networks

EMPLOYMENT

- Fear of job losses shapes the working atmosphere
- Temporary job guarantees are frequently linked to hard conditions such as lower starting salaries or wage sacrifices
- Due to a general lack of investment in new automation technology, manual, often repetitive and simple activities have regained importance
- The proportion of employees working in the low-wage sector has risen massively

SOCIAL DIALOGUE

- Social dialogue has deteriorated amidst the overall tensions in society
- Due to growing polarisation in society, solidarity has become a rather tribal or niche-oriented approach
- Fear of dismissals dominates activities on the company level
- Social dialogue deals mostly with issues of socially acceptable job cuts and employment guarantees

ORANGE SCENARIO: "INNOVATIVE SOCIETY"

SOCIETY AND POLITICS

- Digitally hyperconnected world with rapid technological change
- Inclusive society with less inequalities and more equally distributed opportunities
- Future-oriented policy-making and proactive regulation
- Focus on inclusive solutions
- Citizens are more politically active and engaged
- Consumers are well-informed and purpose-oriented

ECONOMY

- Strong economic growth, lower income inequality
- High public investment in infrastructure, education, and climate change mitigation
- Governments rely on public debt to finance investments
- Build-up of traffic and digital infrastructure with focus on regional cohesion
- As a shadow on the horizon, the cost of living has begun to grow faster than household incomes

POSTAL SECTOR

- Postal operators have diversified their service portfolio
- Fragmentation of the sector on the European level has increased
- Increase in the small parcel business and logistics, but also in proximity services and e-government solutions
- Many of the new services have become part of USO
- Number of active competitors is lower, traditional operators benefit

EMPLOYMENT

- Forms of employment have diversified, but come with comparable rights and access to social security
- Focus on collaborative robotics and forms of automation that do not displace workers
- Competence require-ments are changing continuously
- Governments and businesses have massively increased their investment into further training
- Increased mobility between activities

SOCIAL DIALOGUE

- Social dialogue has seen both an expansion and a renewal
- Social dialogue covers a wider range of topics
- More actors have become involved in social dialogue, such as platform companies
- Solutions agreed upon by the social partners have spilled over into the wider societal and political arena
- Use of digital tools that foster dialogue and of innovative means for engagement

METHODOLOGY

METHODOLOGY

A) PROJECT IMPLEMENTATION

The objectives of the project were several. In terms of concrete outputs, it aimed first of all at elaborating 3 to 5 scenarios on what will be the postal sector in Europe in 2030. In order to have a large spectrum of future possibilities, there were some challenging or more desired scenarios. This was made possible through an overview on landscape of main change factors, main stakeholders in relation to economic, regulatory, societal and social evolutions. This project also aimed at bringing in a new working method into the processes of the Committee. It was considered as an innovative exercise of common reflection and brainstorming among European social partners. The objective was to have a confrontation of different viewpoints, also depending on national situation. Eventually one of the priorities was to push participants to think out of the box in order to have an eye-opener.

The project has been conducted by a team composed of social partners from PostEurop, Elaine Bermingham, Jurgen Joos, Lana Mamone and Margaux Meidinger and from UNI, Stéphane Chevet, Sylvie Joseph and Dimitris Theodorakis. All its members worked in close cooperation throughout the project in order to organise the different workshops and validate each step. An external consultant team led by Christian Grünwald together with Cornelius Patscha supported the project during each phase. It has been very important to have an agency with an expertise in prospective work and scenario planning as this was a topic which was totally new to the European social dialogue committee for the postal sector members. The facilitation of the workshops was also supported by these two consultants together with Oihana Hernaez and Eleanor Cooksey. Regular phone meetings were organised between the project team and the consultant to ensure its smooth implementation. The PSE working group was informed during its meetings on the advancement of the project and validated each steps.

The project was implemented through four main important events running from May 2018 to June 2019 (see process overview). The first workshop took place in Paris on 29-30 May and aimed at building the list of key factors that would influence the future of the sector. The second workshop was organised in Bonn on 1-2 October in order to describe the possible evolutions of these key factors. The third workshop was staged in Warsaw on 22-23 January in order to build the scenarios. Through all these steps, the European social partners were actively involved in the discussions as breakout sessions and small working groups were organised during each workshop. They enabled constructive exchanges and all participants to make their voices heard. The interactive nature of the discussions was really an innovative exercise for the European social partners and enable to put in practice social dialogue. The final step of the project was the final conference organised in Brussels on 18 June. The objective of this event was to disseminate the project outputs to a wider audience. It consisted of the presentation of the scenarios and two high-level round-tables, one on regulatory and strategic issues and the second one on employment issues. A particular attention was brought to maintain the interactive nature of the project also at this final event. The participants were thus split in 5 groups so that each of them could reflect on opportunities and risks of each scenarios as well as draw recommendations.

The consultant support has been essential throughout the project. It was important to remind participants at each step of the project about the scenario planning methodology and encourage them to think out of the box about future issues.

B) METHODOLOGICAL APPROACH: SCENARIO PLANNING

In times of growing uncertainty and complexity, demands for strategic planning are also changing. More than ever, it is important to be prepared for disruptions, surprises and alternative outcomes. Scenarios are a proven tool from the foresight practice's toolbox of methods to promote thinking in alternatives. In the context of project "Trend research in the postal sector 2030", a key-factor-based explorative scenario approach was chosen, which was supplemented by participative workshop formats and expert interviews. Scenario development is at best process and dialogue oriented. In particular, participative workshop formats on the way to developing the end scenarios enable the integration of knowledge from external and internal experts and stakeholders.

Scenarios are not forecasts but plausible possible future images that contain various strategic implications. Therefore, scenario planning is not so much about forecasting the future as in making sure that an organisation has contingency plans in place to cope with any eventuality. The changes that European societies, politics and the economy have undergone in recent decades are immense and also astounding in retrospect. Much of what was considered highly unlikely or pure fantasy a decade ago is now a reality. Scenarios must anticipate this dynamic of change and embed it in plausible future worlds. For this reason, they must consistently question existing assumptions and describe developments that look beyond the horizon.

Plausible scenarios are based on possible germ cells of future developments, which can already be identified today in the form of weak and strong signals - according to a quote by Canadian science fiction author William Gibson: "The future is already here. It is only distributed very unevenly". Scenarios are springboards for both communication and the derivation of strategic implications. They make the future tangible and allow concrete aspects of possible futures to be discussed. Although the future is in principle uncertain, its range of possibilities becomes concrete through scenarios.

"Begin challenging your own assumptions.
Your assumptions are your windows on the world.
Scrub them off every once in a while,
or the light won't come in." Alan Alda, Actor

A scenario represents a possible future world, including the development paths leading to this future world. Thus, a scenario also describes the developments, dynamics and driver logic from which a particular vision of the future emerges. A scenario does not present a comprehensive picture of the future, but should consciously focus perception on certain, defined aspects of future reality. Scenarios do not claim to represent the "future" as a whole, but rather to focus on certain aspects of interest. Scenarios are carefully constructed snapshots of the future and ways in which an issue might evolve. They help to reframe complexity and focus thinking on the most important factors driving change in a particular area. By taking into account complex interactions between these factors, one can improve the understanding of how change develops.

Process overview

STEP 1 ENVIRONMENTAL ANALYSIS	List of 21 Factors on global and European Level	360 degree scanning for factors influencing the future development of the postal scetor along the fileds of STEEP (Society, Technology, Economy, Ecology Politics)	
STEP 2 KEY FACTOR ANALYSIS	List of 12 Key Factors	Assessment of influencing factors regarding their impact and their critical uncertainty until 2030, selection of key factors	**Paris Workshop: Agreeing on key factors**
STEP 3 KEY FACTOR PROJECTIONS	Morphological Box	Identification of possible and plausible alternative future develoments of the individual key factors	**Bonn Workshop: Agreeing on scenarios and enrichments of scenarios** **4 Experts Interviews**
STEP 4 SELECTING RAW SCENARIOS	5 Raw Scenarios	Consistency analysis of projection pair of all projections of all key factors, identification of possible inconstencies, selection of raw scenarios by menas of morphological box	
STEP 5 SCENARIO CONSTRUCTION	Final 5 Scenarios	Elaboration of final scenarios, including enrichment in coordination with the Steering Committee for each scenario	**Warsaw Workshop: Agreeing on scenarios and enrichments of scenrios**
STEP 6 STRATEGIC DERIVATIONS	Policy Recommendations	Identifications of strengths and risks for the postal sector in each scenario, derivation of policy recommendations	**Brussels Final conference: Agreeing on risks and strenghts of scenarios, first recommendations**

C) SHORTLIST OF KEY FACTORS

There are numerous factors that will influence the future where we live in. The objective of the 1st workshop in Paris was therefore to prioritise these factors in view of their importance and establish the short-list of the key factors whose evolution can affect the postal sector.

As a result, 12 factors were selected.

D) THE MORPHOLOGICAL BOX

Each of the factors can evolve in different manners. These evolutions were discussed and put forward by the participants at the workshop organised in Bonn. The morphological box is the output of this workshop, it summarises the diverse possible evolutions for each factor. The scenarios are then built on the basis of the combination of the different possible evolutions of each factor.

COMMUNICATION PATTERNS	CONSUMPTION PATTERNS AND CONSUMER PROTECTION	COMPETITION AND REGULATION IN THE POSTAL SECTOR	ECONOMIC DEVELOPMENT	INNOVATION DYNAMICS	TRAFFIC INFRASTRUCTURES	DATA MANAGEMENT AND INFRASTRUCTURES	CHANGING WORLD OF WORK	CHANGE OF (FURTHER) EDUCATION SYSTEMS	SOCIETAL DIVIDE	CLIMATE CHANGE AND ECOLOGICAL DISTORTIONS	DEVELOPMENT OF SOCIAL DIALOGUE
Digital high culture	Mainly conspicuous consumption, low consumer protection	Strong competition (new players as leaders), reluctant regulation	New growth dynamics (average EU growth above 3%)	Incremental change, incremental acceptance	Ailing infrastructure due to underinvestment	Hyperconnected world, Internet of Everything	Hybrid working world, growing variations/ differentiations	Low access, predominantly traditional structures	Growing societal divide and tensions	High temperature rise, rapid deterioration of ecologic conditions	Business as usual (incremental adjustment)
Digital fragmentation, hybrid use	Mainly conscious consumption, high consumer protection	Strong competition (new players as challengers), high political will to regulate	Continuing growth path (average EU growth between 2% to 2.5%)	Disruptive change, forced technological openness	Lighthouse projects while other infrastructure is ailing	Mostly closed systems (Splinternet)	New work prevails, diminishing variations/ differentiations	Broad access, evolution of traditional structures	Closing gap, new forms of coherence	Paris agreement world: containment of climate change, high regulation	Renewal and new forms of social dialogue
Digital fatigue	Mainly individualized consumption, low interest in consumer rights	Reduced competition (traditionals with niche share), reluctant regulation	Slowed growth and stagnation in Europe	Slowing innovation dynamics, technological scepticism	Good infrastructure in cities, mostly ailing in countryside	Expanding digital gaps between countries and regions	New work prevails, growing variations/ differentiations	Broad access, new approaches	Fragmented societies (differentiated living worlds), mostly tolerant	(Surprising) Mitigation of climate change, lower regulation	Deterioration of social dialogue
	Mainly service-oriented, high interest in consumer rights	Reduced competition (withdrawal of new players), high regulation	Worsening economic framework conditions, new economic indicators		Infrastructure boom with high investments				Fragmented societies (differentiated living worlds), mostly indifferent		End of social dialogue

**LONG VERSION
OF THE SCENARIOS**

LONG VERSION OF THE SCENARIOS

In the context of the Project "Trend research in the postal sector 2030", a total of five alternative scenarios have been developed, covering a broad future opportunity space. Since foresight is not only a methodology but also a continuous process, assumptions contained in the scenarios also have to be reviewed from time to time in strategic planning and adjusted if necessary. In the course of this, it should also be checked whether signals for a possible future development have strengthened or weakened. The scenarios generated in this explorative scenario process are neither normative visions nor the extrapolation of personal expectations. They are value-neutral descriptions of possible futures.

Both the postal sector and social dialogue are mirrors of society. Therefore, the starting point of the scenario description is the societal world in 2030: Five different future worlds that describe five different societal development possibilities.

The scenario construction (by combining projections of key factors) can also be displayed in a morphological box.
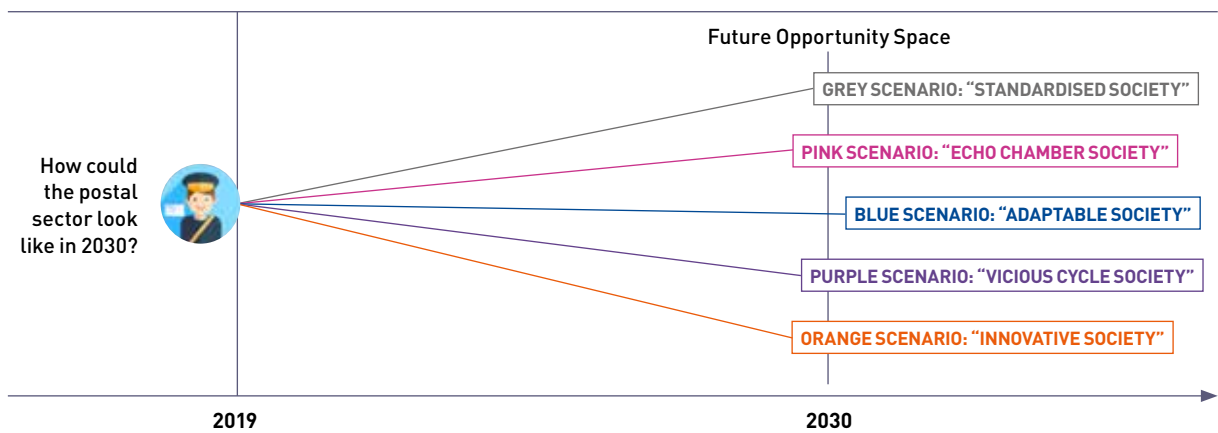
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GREY SCENARIO: STANDARDISED SOCIETY

SCENARIO IN A NUTSHELL

Renewal of social dialogue with new forms of labour organisation and bargaining in a society that is transforming rapidly by leveraging digital technologies to manage disruptive technological and ecological change.

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Digital fatigue	Mainly individualized consumption, low interest in consumer rights	Reduced competition (traditionals with niche share), reluctant regulation	Slowed growth and stagnation in Europe	Slowing innovation dynamics, technological scepticism	Good infrastructure in cities, mostly ailing in countryside	Expanding digital gaps between countries and regions	New work prevails, growing variations/differentiations	Broad access, new approaches	Fragmented societies (differentiated living worlds), mostly tolerant	(Surprising) Mitigation of climate change, lower regulation	Deterioration of social dialogue
	Mainly service-oriented, high interest in consumer rights	Reduced competition (withdrawal of new players), high regulation	Worsening economic framework conditions, new economic indicators		Infrastructure boom with high investments				Fragmented societies (differentiated living worlds), mostly indifferent		End of social dialogue

STORYLINE: SOCIETAL ENVIRONMENT

Over the past decade, the rapid digital transformation of economy and society has led to fast changes in the traditional patterns of working and living in Europe. With politics, businesses, and workers struggling to adapt to a constantly changing environment, social challenges and tensions were growing. This was exacerbated by more apparent and increasingly costly impacts of climate change. It had become clear that new approaches such as carbon taxes and a willingness to change were needed at every level of society to find solutions to the multitude of global and local challenges. Searching for such solutions, governments have embraced big data and e-government and adopted a management by algorithm approach to public administration and regulation. Powerful machine learning systems have been put in place that integrate empirical findings from psychology and behavioural science with policy making and enforcing. Governments follow a strict top down logic of implementing solutions to increase sustainable practices in business and every-day life. This includes a focus on the human side of technological change between the poles of economic, societal and individual needs. A shift has occurred towards more communal values rather than the pronounced individuality of earlier decades.

Data plays a crucial role in every aspect of daily life. In a drastic move, all data have been defined as a public good. Data is collected and stored in publicly administrated data trusts that provide almost complete transparency. Walking a fine line between surveillance and transparency, governments are connecting data transparency with regulations and incentive schemes to effectively address the tragedy of the commons. Encouraging people to make decisions that benefit both themselves and society is accompanied by stark monetary incentives. Incentives include tax benefits or penalties on wide range of activities such as consuming within a strict carbon budget to choosing a course of study or a field of work. Referring to

tax transparency in Norway and Sweden – but also the social-scoring-project in China – as role models, individual incomes and ecological footprints are now updated in real time and made publicly available. Income inequality has been reduced. In a constantly changing economy, current competence profiles have become more relevant for one's income than one's education history. At the same time, access to training opportunities has been expanded for virtually everyone.

ECONOMIC ENVIRONMENT

The global economy has experienced a rocky period of adapting to what some call the fallout of the digital transformation. Labour market mismatches created by technological change and automation resulted in sluggish demand, slower growth, and lower resilience to shocks. As the economic situation and future outlook turned more dull, governments intervened in a concerted effort with support programs and decisive regulation aimed at remodelling the structure of the economic system. Regulatory measures have aimed at promoting sustainable business models and employment, internalizing external effects, and preventing socially and economically unhealthy concentrations of economic power. At the core of these reforms is equal access to data and increased transparency, while also trying to protect the creation of socially conducive intellectual property and sensitive personal data. Businesses have to report on a number of indicators measuring their social responsibility, especially their environmental and climate impact.

Dynamic pricing models, linked to carbon taxes, are widespread. This has drastically increased the level of transparency about the impacts of a companies' activities along their complete value and supply chains. Rapid technological change and quick implementation of new technologies is challenging companies to strike a balance between investing in automation potentials and the human potential. Finding qualified workers is a constant challenge in this economy of change. With increased data availability, internalizing external effects has become feasible and widely implemented. This has caused a shift in the pricing of goods and services and changed consumption patterns. General access to data for all economic participants has equalis ed the playing field between larger and smaller players. The problem of power concentration and monopoly structures that had developed in many fast growing sectors is much less pronounced and new forms of services and business models have arisen. The renewal of competition has also led to a newly increased speed of innovation.

THE POSTAL SECTOR

The postal sector has been radically transformed due to the changes in communication, consumption patterns and regulation. Traditional postal services have seen a strong shift to parcels and the service portfolio has expanded significantly with smart data offers and e-government services.

Like all businesses, companies active in the postal sector are under strict regulatory obligation to minimise the environmental impacts of their processes. This has required significant investments into further efficiency increases and carbon neutral processes. Fleets have become utterly electric. New innovative delivery services have been implemented and postal operators are experts in biodegradable packaging. Postal operators have also leveraged their expertise to enable other companies to reduce their carbon footprints through highly efficient and effective logistics solutions, the 3D printing of parts close to the place of use or by simply offering their knowledge via consulting services. In many countries, postal operators have also been chosen to track the carbon expenditure of companies and consumers, as many of the necessary data are collected during logistics processes in smart environments. Building on the social role of the postal sector, policy-makers have redefined postal networks as platforms for the delivery of socially-relevant services on the basis of an expanded definition of universal service provision. This has strongly reduced the activities of new players, as under the changed regulatory environment many of these services tend to be natural monopolies. Market consolidation took place. With national interests and requirements differing, the service portfolio offered by postal operators across Europe has become even more differentiated than a decade earlier. Many postal companies are now providing a range of proximity services and financial services for vulnerable shares of the population have regained importance. Overall, the service quality between standard and premium services is not far apart.

EMPLOYMENT IN THE POSTAL SECTOR

Widespread task automation has impacted the majority of jobs in the postal sector, but new and more demanding and complex tasks have arisen. The rise of autonomous long-distance transport has reduced the demand for drivers and physical work is executed or supported by machines. For example, parcel delivery workers are generally supported by light-weight exoskeletons. Overall, automation and the reduction of mail volumes have led quantitatively to a lower level of employment in the postal sector, although new and more qualitative jobs have also been created in the wake of the new services that are offered by postal operators. Wherever possible, companies try to fill these new positions in-house through training and lateral shifts. Upskilling initiatives are well established in the postal sector and the whole economy. The rapid shift in competence demands and qualification requirements has led to major frictions in the labour market. Traditional training and education approaches were overwhelmed with filling a quickly growing skills gap. Both employers and employees are equally interested in adapting to the dynamic development of skills and new forms of delivering training have emerged. Due to automation, working hours have been reduced. Part-time is the new normal. Paradoxically, increased productivity and more complex task profiles for qualified workers have also translated into higher compensation. There are less precarious contract situations. Work-life balance has increased on average, although many use the additional free time for educational purposes and further training. Management by algorithm has increased efficiency and transparency. But there has also been a noted decrease of process flexibility and adapting technical infrastructure has become even harder.

SOCIAL DIALOGUE

Social dialogue has played a key role in negotiating new standards adequate for the radically changed world of work. It is also a means to reconcile efficiency with effectiveness and to refocus discussion on the human side of the tech-business equation. Technological transparency increases the pressure on the individual employee, the question of ethical AI permanently accompanies social dialogue. The processes of social dialogue have evolved with widespread use of new digital possibilities. AI-based platforms have become a tool used for new forms of labour organisation and collective bargaining, thus revitalizing social dialogue in an age where classical boundaries of industrial sectors and work organisation have become highly flexible. Social dialogue takes place not only in physical meetings, but increasingly also virtually. Supported by machine learning tools, it is receiving surprising impulses and there is a higher level of interaction among the social partners. The strong presence of technology has changed the topics that are being negotiated. Ubiquitous data collection in society has led to a change in the perception of data protection, thus privacy only plays a minor role. The relationship between human workers and automated processes is a core topic, as is the continued development of solutions for life-long learning. Another important topic is health and stress management in a high performance work culture. Collective bargaining is focusing more on the human aspect of work and a redefinition of the meaning of work in an age of seemingly ever-increasing automation potential.

USO IN THIS SCENARIO

The definition of the USO has been radically expanded, but a strong differentiation between the actual extend of services contained in the USO remains between European countries. Policy-makers have redefined postal networks as platforms for the delivery of socially-relevant services spanning from delivery to proximity services to data collection and analysis.

USO Level

| Low | Medium | High |

PINK SCENARIO: ECHO CHAMBER SOCIETY

SCENARIO IN A NUTSHELL

The end of the traditional social dialogue between unions and employers in the postal sector in a highly digitalised and individualised niche society and economy, in which new players in the postal sector set the tone.

COMMUNICATION PATTERNS	CONSUMPTION PATTERNS AND CONSUMER PROTECTION	COMPETITION AND REGULATION IN THE POSTAL SECTOR	ECONOMIC DEVELOPMENT	INNOVATION DYNAMICS	TRAFFIC INFRASTRUCTURES	DATA MANAGEMENT AND INFRASTRUCTURES	CHANGING WORLD OF WORK	CHANGE OF (FURTHER) EDUCATION SYSTEMS	SOCIETAL DIVIDE	CLIMATE CHANGE AND ECOLOGICAL DISTORTIONS	DEVELOPMENT OF SOCIAL DIALOGUE
Digital high culture	Mainly conspicuous consumption, low consumer protection	Strong competition (new players as leaders), reluctant regulation	New growth dynamics (average EU growth above 3%)	Incremental change, incremental acceptance	Ailing infrastructure due to underinvestment	Hyperconnected world, Internet of Everything	Hybrid working world, growing variations/ differentiations	Low access, predominantly traditional structures	Growing societal divide and tensions	High temperature rise, rapid deterioration of ecologic conditions	Business as usual (incremental adjustment)
Digital fragmentation, hybrid use	Mainly conscious consumption, high consumer protection	Strong competition (new players as challengers), high political will to regulate	Continuing growth path (average EU growth between 2% to 2.5%)	Disruptive change, forced technological openness	Lighthouse projects while other infrastructure is ailing	Mostly closed systems (Splinternet)	New work prevails, diminishing variations/ differentiations	Broad access, evolution of traditional structures	Closing gap, new forms of coherence	Paris agreement world: containment of climate change, high regulation	Renewal and new forms of social dialogue
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	Mainly service-oriented, high interest in consumer rights	Reduced competition (withdrawal of new players), high regulation	Worsening economic framework conditions, new economic indicators		Infrastructure boom with high investments				Fragmented societies (differentiated living worlds), mostly indifferent		End of social dialogue

STORYLINE: SOCIETAL ENVIRONMENT

European societies are mainly characterised by rapid technological change. This also requires a high adaptability to ever new technologies for the population. Willingness to try out new digital technologies and integrate them into everyday life is quite widespread among the population. Conversely, this fuels the efforts of tech companies to bring new products and technologies to market quickly. As technology also changes the way people interact with each other, rapid technological change goes hand in hand with a strong social change, which manifests itself in particular in the redefinition of social organisation. While traditional mass organisations are losing importance, individualisation is on the rise, and, thus, fragmented polarisation and social isolation.

There is hardly any mixing of milieus. The ongoing dissolution of classical milieus and mass organisations also entails a general fatigue towards state institutions. Cynical attitudes towards current politics are as widespread as a clear reluctance to engage politically. This has led to a consumerist society where people try both to find distraction in excessive consumption and to find identities in niches. This is also reflected in societal patterns of communication: people communicate primarily in echo chambers of social media platforms, with the effect of reproducing and solidifying existing opinions. Thus, polarisation of society as a whole increases. Populists and unorganised protesters are strong, which in turn leads to more volatile politics. Instead of arguments and visions, political debates are dominated by side issues, provocations and scandals. Society as a whole is not able to find an answer to important questions like climate change, which is why global warming is not contained. It is rather a muddling through of individuals who are stuck in multiple identity crises, desperately looking for coherent identity patterns. Excessive consumption leaves environmental protection issues behind.

Politics promises improvements after every environmental catastrophe, but they usually remain lip-service before quickly moving on to daily business again. Thus, as global warming progresses, vulnerability of critical infrastructures and weather extremes due to climate change are increasing. The ongoing expansion of digital infrastructures also contributes to this. The risk awareness of the population does not rise to the same extent as average global temperatures and sea levels do.

ECONOMIC ENVIRONMENT

Growth of recent years was very unevenly distributed, not only along companies, but also along industries and regions. There are massive gaps between "winners" and "losers" of transition. Reluctant regulation has contributed to the rise of new players in markets. As a result, the number of competitors has increased with significant distortions of competition to the disadvantage of incumbent suppliers. Oligopolies did emerge. The motto of the new market forces with data-gathering business models is "make first, then ask if it's alright". Some commentators complain about a race to the bottom.

Although possibilities for networking through the expansion of digital infrastructures are stronger than ever, customers are increasingly withdrawing into private sphere. At the same time, customer interest in privacy is low, more importantly, digital infrastructures provide a gateway to communicate with like-minded people.

Good access to digital infrastructure has become vital for many companies, especially because Internet of Things is gradually spreading. This also raises the question of who owns the data. The cautious regulation is an advantage for companies able to collect and analyse data on a large scale. Furthermore, since digitisation has progressed very unequally, the urban-rural contrast in many European countries has intensified. Regions with poor digital infrastructures continue to be economically depleted year after year. As a result, also future investments will go where a good infrastructure already exists. This creates a niche market that can be filled by market players who are unable to compete against the top dogs in the economically strong regions.

THE POSTAL SECTOR

In light of the stronger competition in the postal sector and societal changes, e-commerce providers have become stronger and incumbent postal companies, which fulfil a stronger social function by focusing on structurally weak regions have become weaker. Autonomous and electrified vehicle fleets are common, although the degree of digitisation between the respective postal companies is still very different. In rural areas in particular, where the old frail 5G network is still prevalent, manually controlled delivery vehicles are often used. Analog communication is the exception, digital communication the norm. Mail is diminished to a minimum, and so do postal offices.

As a result of the decline in analog communication and the political decision, USO is kept to a minimum with only one Universal Service Provider per country, which is usually a loss-making venture for the company. "Postal only" companies are facing an uncertain future. In most European countries, remaining small amounts of letters are delivered a maximum of once a week. Mainly all services can now be done online, new interfaces, for example to infrastructural ecosystems or public administrations, have emerged. For example, postal and logistics companies are involved in the planning of new neighborhoods in order to ensure optimal last-mile delivery. Degree of automation is fairly high, as is technology diffusion. However, it has become evident that wherever automation is required, new human skills are needed again. However, these skills are ever more complex.

Overall, there is a trial and error mentality, trying to integrate very quickly new technologies in the daily business. But, business models of postal companies are increasingly threatened by climate change, such as the disruption of supply chains due to weather extremes or the vulnerability of smart infrastructures.

EMPLOYMENT IN THE POSTAL SECTOR

In parallel with the transformation of economy and society, the world of work is undergoing a radical transformation. Agile working principles in management, administration and innovation centers are on the rise, also flexibility. While the better-skilled benefit from more freedom in how to organise their workdays, the number of fixed-term workers in the low paid sector has risen sharply. Here too the competition for still existing jobs has increased strongly, digital control of "work performance" and zero-hour contracts are widespread. The number of long-term unemployed remains at a constantly high level. Decreasing solidarity and individualisation in society are also mirrored among workforces in the postal sector where willingness to organise or pay for parties or trade unions has significantly decreased. Temporary, fluid, virtually organised representation of interests by local self-organised employee groups dominates the scene. The working conditions of the respective work place are not determined by negotiated conditions and social standards among social partners, but solely by work culture in the respective company.

High degree of automation and a rapidly changing economy require continuing education. The rise of easily accessible and cost-effective digital micro-learning opportunities contributes to this. Lifelong employability becomes a new paradigm in the world of work. More complex jobs and the pressure for further training are increasingly demanding for employees in the postal sector. Therefore, balance and health programs are becoming more and more important in the work context. Man-machine collaboration and cloud working have become commonplace in the postal sector, also integration of artificial intelligence and robotics into almost all jobs. Fully autonomous areas, for example in logistics centers, have increased strongly, too.

SOCIAL DIALOGUE

The communication in echo chambers has also left deep marks in social dialogue. Often, it is no longer about real dialogue and debate, but only about emotions and one's own point of view without responding to arguments of the other side.

Digitisation and niche formation have led to a centrally managed social dialogue being replaced by a decentralised logic. Social dialogue only takes place at company level. Instead of collective bargaining, micro bargaining platforms and new non-binding channels for the articulation of interest have prevailed. This reduces the binding nature of agreements and discussions. The social willingness to seek and find collective solutions exists, if at all, only at the local level. This also leads to omission of "traditional" representation and new forms of articulation of interests. The binding nature of the rules negotiated by the social partners decreases significantly, which leads to a massive distortion of competition and a significant worsening of working conditions. No standard is the new standard. Above all, market participants who are not interested in high social standards benefit from this in terms of competitive advantage and productivity gains.

USO IN THIS SCENARIO

USO is challenged in many ways and kept to a minimum as regards the range of services. It is only applied to former state-owned postal companies, as politicians regard USO as a political tool to mitigate urban-rural gaps. Therefore, new competitors are not considered to be Universal Service Providers.

USO Level

Low	Medium	High

BLUE SCENARIO: ADAPTABLE SOCIETY

SCENARIO IN A NUTSHELL

Attempt to perpetuate existing social dialogue formats through incremental adjustments in a slowly reacting society and economy, in which new realities are gradually integrated.

COMMUNICATION PATTERNS	CONSUMPTION PATTERNS AND CONSUMER PROTECTION	COMPETITION AND REGULATION IN THE POSTAL SECTOR	ECONOMIC DEVELOPMENT	INNOVATION DYNAMICS	TRAFFIC INFRASTRUCTURES	DATA MANAGEMENT AND INFRASTRUCTURES	CHANGING WORLD OF WORK	CHANGE OF (FURTHER) EDUCATION SYSTEMS	SOCIETAL DIVIDE	CLIMATE CHANGE AND ECOLOGICAL DISTORTIONS	DEVELOPMENT OF SOCIAL DIALOGUE
Digital high culture	Mainly conspicuous consumption, low consumer protection	Strong competition (new players as leaders), reluctant regulation	New growth dynamics (average EU growth above 3%)	Incremental change, incremental acceptance	Ailing infrastructure due to underinvestment	Hyperconnected world, Internet of Everything	Hybrid working world, growing variations/ differentiations	Low access, predominantly traditional structures	Growing societal divide and tensions	High temperature rise, rapid deterioration of ecologic conditions	Business as usual (incremental adjustment)
Digital fragmentation, hybrid use	Mainly conscious consumption, high consumer protection	Strong competition (new players as challengers), high political will to regulate	Continuing growth path (average EU growth between 2% to 2.5%)	Disruptive change, forced technological openness	Lighthouse projects while other infrastructure is ailing	Mostly closed systems (Splinternet)	New work prevails, diminishing variations/ differentiations	Broad access, evolution of traditional structures	Closing gap, new forms of coherence	Paris agreement world: containment of climate change, high regulation	Renewal and new forms of social dialogue
Digital fatigue	Mainly individualized consumption, low interest in consumer rights	Reduced competition (traditionals with niche share), reluctant regulation	Slowed growth and stagnation in Europe	Slowing innovation dynamics, technological scepticism	Good infrastructure in cities, mostly ailing in countryside	Expanding digital gaps between countries and regions	New work prevails, growing variations/ differentiations	Broad access, new approaches	Fragmented societies (differentiated living worlds), mostly tolerant	(Surprising) Mitigation of climate change, lower regulation	Deterioration of social dialogue
	Mainly service-oriented, high interest in consumer rights	Reduced competition (withdrawal of new players), high regulation	Worsening economic framework conditions, new economic indicators		Infrastructure boom with high investments				Fragmented societies (differentiated living worlds), mostly indifferent		End of social dialogue

STORYLINE: SOCIETAL ENVIRONMENT

Given the economic development they are undergoing in the wake of a global upswing, European societies seem to be in a comfortable situation. However, commentators complain about the lack of innovation in comparison to other leading regions of the world. Good economic conditions and relatively high approval rates for most European governments helped to push back populist and protectionist tendencies successfully. But further aspiration for new social coherence remains challenging in a strongly individualised and consumerist society. The high degree of individualisation is also reflected in the different media usage habits. While in urban areas digital lifestyles are quite widespread, there are also enough people who are either not connected to the digital infrastructure or have deliberately chosen a non-digital lifestyle due to privacy or health concerns. Thanks to breakthroughs in life sciences, health has become a central social issue.

The good economic situation helps to cover up existing social conflicts and not let them come to the surface. Despite growing inequality, no major social conflicts are apparent in everyday life. But, the ever more worsening climate situation is slowly beginning to change this. In particular, younger people (Generation Alpha) start to remember the "Fridays for Future" protests a decade earlier that had not led to a true change in politics at that time. But, politics of slow adaptation remains the predominant pattern. This is successful in some areas, but in the face of unrestrained climate change and resource consumption, it is proving increasingly dysfunctional.

Growth is reaching its ecological limits. The downside of strong economic growth and consumption is a worsening of climate change and a significant deterioration in the quality of life in many places. In addition, there are always higher costs for the repair of damaged infrastructures. Sustainability issues are becoming increasingly important. However, the dependence on fossil fuels is still relatively high and the consumerist, resource-intensive lifestyles of most people is a recurrent theme in public debates and political talkshows.

ECONOMIC ENVIRONMENT

The global economy booms, fuelled by a new growth cycle based on breakthroughs in life and material sciences, high investments in infrastructure and strong consumption. Within this economic frame, competition was long distorted by the oligopolies that had formed as a result of breakthroughs in life and material sciences. European politics started walking a fine line between regulatory containment of oligopolies and simultaneously boosting new business potentials. However, it often turns out that politicians are often struggling to fully grasp the business models of new market entrants. This sometimes leads to delays and discrepancies between actual willingness to regulate and effective results of the regulatory legislation. Therefore, calls for an independent are becoming more frequent.

Business ecosystems are changing also. And so does competition due to new players which find entrance into markets through new interfaces. For example, cloud hosting companies who networked global supply chains and autonomous cars began building their own physical delivery networks after a while. In this way the markets are changing - and also the "gateways" for regulatory approaches. But, this happens very slowly and often only when market distortions have emerged in favour of innovative new players. Players not yet covered by the regulation have the opportunity to gain great clout and generate high profits in a short time. This occasionally forces established players to merge. Thus, gradual adaption creates a distorted image of a continuous "business as usual". Increased competitive pressure is forcing established companies to reorganise themselves.

THE POSTAL SECTOR

Like other sectors, the postal sector is characterised by the emergence of new business ecosystems and new players. The degree of digitisation of postal companies in Europe varies widely. Major American, Korean and Chinese tech companies pushed forward into the European market, hindering competition and progress through strategic occupation of key technologies. After watching this development, regulators tried to act, also by means of antitrust law. Overall, there is now an attempt to successively integrate new players into the formats of social dialogue to maintain sort of "business as usual", even if they don't fit into these formats. The policy pattern is aiming at hedging but not strangling the booming economy. Critics of this policy say that attempts being made only squeeze new realities into old formats, creating dysfunctionalities, while advocates of this policy consider this as a sign of flexibility of existing formats and as one of the reasons for the good economic situation.

Thus, the postal sector is shaped by a larger number of competitors, occasional mergers of postal companies and hesitant regulatory attemtps to curb the market without restricting it too much. Growth gives politics and companies room for manoeuvre, but, like in politics and society, "evolution rather than revolution" is the predominant pattern. Following the strategy of continuing to pursue existing business models and integrating new ones, proximity services that have become increasingly important in the postal ecosystem are now part of a larger definition of USO. However, in the postal sector, too, sustainability discussions are becoming stronger, in particular against the backdrop of ongoing growth of e-commerce-related deliveries in recent years. Postal and e-commerce companies are increasingly becoming targets of criticism from climate activists.

EMPLOYMENT IN THE POSTAL SECTOR

The differentiation of ever more changing working worlds progresses among the poles of agile vs. traditional, global vs. national/local and highly digital vs. analogue. Workforces in the postal sector are increasingly fragmented and polarised, too, also due to automation. While the well-educated have made significant income gains, the real wages of the low-skilled have de facto stagnated or fallen. Work itself has also changed: while the better-qualified can choose the place where they want to work while being connected to company clouds, this form of location flexibility is largely withheld from lower-skilled workers. Willingness to organise in trade unions is increasing, particularly among the lower-qualified.

As working world and competition changes, also demand for new, ever more complex competencies emerges. In this context, education and training play essential role while lifelong employability becomes ever more important. The incremental adaptation of education systems to the new realities of lifelong learning leads to a wider access of large parts of the population to further education. Between those in the workforce who succeed in adapting to the dynamic acquisition of skills and those who do not, the gap is widening. However, public educational infrastructures do not adapt as quickly as the demand for new competencies. For this reason, postal companies are setting up their own further training academies. The increasing urban-rural contrasts are also evident in the world of work. Not only knowledge-intensive jobs in postal companies are ever more concentrated in cities, but also very different job profiles (e.g. community service manager) are in demand in the countryside.

SOCIAL DIALOGUE

Social dialogue is characterised by the overall attempt to successively integrate new market players into the already existing formats of social dialogue to maintain sort of "business as usual". However, in reality, this actually means that both the market and the "business as usual" are changing as a result due to the new players. The predominant pattern of "continuing as before until it cannot continue" also occurs as regards social dialogue. Thus, new players are tried to be integrated slowly but gradually into the existing formats. But, there are always distortions and contradictions, since neither the new complex ecosystems of the postal sector nor the new players fit completely into the existing formats. Thus, dysfunctionalities arise.

In order to master this growing complexity and to achieve industry-specific solutions, sectoral collective agreements have become more important than ever. In addition to integrating new strong players into social dialogue and distributing growth gains, further education and lifelong learning have become important topics among the social partners. Since proximity services are considered to be a political tool to mitigate social and urban-rural gaps, discussions about the concrete design of proximity services have become stronger.

USO IN THIS SCENARIO

The definition of USO is gradually extended, proximity services are more and more integrated in the definition. Universal service provision is also applied to new players in the market.

USO Level

Low	Medium	High

PURPLE SCENARIO: VICIOUS CYCLE SOCIETY

SCENARIO IN A NUTSHELL

Slow deterioration of social dialogue in a society marked by tension and a decline of solidarity amidst economically hard times.

COMMUNICATION PATTERNS	CONSUMPTION PATTERNS AND CONSUMER PROTECTION	COMPETITION AND REGULATION IN THE POSTAL SECTOR	ECONOMIC DEVELOPMENT	INNOVATION DYNAMICS	TRAFFIC INFRASTRUCTURES	DATA MANAGEMENT AND INFRASTRUCTURES	CHANGING WORLD OF WORK	CHANGE OF (FURTHER) EDUCATION SYSTEMS	SOCIETAL DIVIDE	CLIMATE CHANGE AND ECOLOGICAL DISTORTIONS	DEVELOPMENT OF SOCIAL DIALOGUE
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Digital fragmentation, hybrid use	Mainly conscious consumption, high consumer protection	Strong competition (new players as challengers), high political will to regulate	Continuing growth path (average EU growth between 2% to 2.5%)	Disruptive change, forced technological openness	Lighthouse projects while other infrastructure is ailing	Mostly closed systems (Splinternet)	New work prevails, diminishing variations/differentiations	Broad access, evolution of traditional structures	Closing gap, new forms of coherence	Paris agreement world: containment of climate change, high regulation	Renewal and new forms of social dialogue
Digital fatigue	Mainly individualized consumption, low interest in consumer rights	Reduced competition (traditionals with niche share), reluctant regulation	Slowed growth and stagnation in Europe	Slowing innovation dynamics, technological scepticism	Good infrastructure in cities, mostly ailing in countryside	Expanding digital gaps between countries and regions	New work prevails, growing variations/differentiations	Broad access, new approaches	Fragmented societies (differentiated living worlds), mostly tolerant	(Surprising) Mitigation of climate change, lower regulation	Deterioration of social dialogue
	Mainly service-oriented, high interest in consumer rights	Reduced competition (withdrawal of new players), high regulation	Worsening economic framework conditions, new economic indicators		Infrastructure boom with high investments				Fragmented societies (differentiated living worlds), mostly indifferent		End of social dialogue

STORYLINE: SOCIETAL ENVIRONMENT

Following the growing protectionist tendencies of the late 2010s, the world has fallen into a downward spiral of tension and national egotism. On an international level, atmosphere is very tense between a variety of blocs, traditional alliances have largely dissolved. The new world order is a disorder. Several regional powers fill the vacuum created through a lack of a real global power of order. Cooperation between the EU states has also become much more difficult.

Tensions not only appear between states, but are also reflected in societies. Social and identity conflicts increase and contribute to a strong polarisation. Political culture and public debate are characterised by personal hostility and provocation. In this heated social climate, voters tend to prefer politicians with a law and order program. In almost all European democracies many citizens are quite receptive to authoritarian tendencies. Complementary to national, regional identities also play a major role, which causes additional conflicts in some states. "Buy local" is a new societal guiding principle.

The world is experiencing a deconstruction of cross-border digital infrastructures, journalists are writing about the "analogue re-transformation of digitisation". Instead of a worldwide Internet, regional networks with different standards are created. As a result of several data leaks and hacker attacks, the technology skepticism of the population has risen sharply, data protection is experiencing a revival and contributes to the growing need for safety. The law and order policy, however, does not help make people feel safer. On the contrary, the uncertainty is constantly emphasised in the public debate and increases the mistrust in the population.

As a result of the economically strongly diminished economic activity worldwide, CO_2 emissions have declined significantly and the global temperature increase has slowed significantly. Apart from short peaks in media coverage in the aftermath of extreme weather events, climate change only plays a minor role in societies.

ECONOMIC ENVIRONMENT

Growing protectionist tendencies of the late 2010s and early 2020s have led to the situation, that most European countries have to deal with an extended period of economic hardship, high unemployment rates and dismal budget situations. In many places, infrastructures are ailing due to underinvestment, as are education systems and social security systems. One impact of the ongoing crisis is that informal economy has grown significantly.

Hoping that their nations would profit from one-sided trade barriers, protectionist governments soon found their economies falter and international relations souring as trade conflicts escalated. In some cases they have led to minor military hostilities. Security is the dominating political topic, closely followed by the ailing economy. After several major incidents of foreign powers maliciously interfering with data networks and industrial plants, protectionism and isolation also took over the internet, now being called "the splinternet". Data exchanges have reduced drastically, many companies and government agencies have their own isolated data networks. Consumers have become extremely careful with their data and sceptical about digital business models. Platform economy is in decline, privacy concerns have become an important economic factor. "Winners" of this development are often local companies that enjoy a high level of trust.

In this tough economic environment, companies' ability to innovate has declined massively, also because there is hardly any market for innovations. Instead, attempts are often made to maintain or expand existing business models. Expenditure on research and development by the public sector has also fallen sharply.

THE POSTAL SECTOR

Due to the security focus, competition in the postal sector has decreased drastically, with many European countries choosing one major player. Unexpectedly, due to budget considerations these were sometimes chosen from among new players that had been seriously challenging the traditional operators. This of course led to massive protests from the former state-owned companies which also reduced workforces in the course of this development. Temporary job guarantees are frequently linked to hard conditions such as lower starting salaries or wage sacrifices. For the postal companies, which were not selected by the government as a provider of universal services, only operating in less lucrative niche markets remains an option. However, it shows that where new providers dominate the market, citizens' reluctance to divulge their data is high. The former state-owned enterprises still enjoy a much higher level of consumer confidence.

Service quality and networks has decreased also. This also has a lot to do with the ailing infrastructure, many postal companies are struggling with difficult delivery conditions. Another reason is the difficult budgetary situation that is causing more and more post offices to close. Their function, even in urban areas, are often taken over by retail stores that try to build up a second foothold. Mail volume has remained stable over the years as digital communication is seen as increasingly insecure. What is important is sent by letter. Postmen are present in the streets. By contrast, e-commerce has been stagnating for years and has even repeatedly recorded declines. However, the economic conditions are forcing the postal companies to constantly search for potential savings. Also the fleet was largely electrified for cost reasons.

EMPLOYMENT IN THE POSTAL SECTOR

The overall situation in the labor market reflects the economic development. The long-term unemployed have a hard time gaining a foothold in the primary labor market. As small and local companies benefit from the weakness of large companies, new jobs are only created on local level. But, in job placement, family and social networks often play a bigger role than actual qualifications of applicants. The global labor mobility of highly qualified workers has come to a standstill.

The economic situation is also reflected in the postal sector. With only one major player in every national market, employment levels have declined. Job profiles of employees have a very strong local focus. In many postal companies, the fear of job losses shapes the working atmosphere. In fact, there have been some major layoffs over the past few years, which also affected senior management, and especially those involved in international business. This has led to a widespread culture of voluntary wage sacrifice when one's own company is in a bad condition. Working culture in almost all postal companies is more focused on avoiding mistakes and risks than innovating and taking advantage of opportunities. Due to a general lack of investment in new automation technology, manual, often repetitive and simple activities have regained importance. The proportion of low-paid employees has risen massively, even though politics tried to take countermeasures by steadily increasing minimum wages. However, in society, this is often bypassed by the spread of informal activities. The gap between well-paid employees and those who work for minimum wage has clearly widened in recent years.

SOCIAL DIALOGUE

Social tensions are high in almost all European countries. In this context, social dialogue has continued to deteriorate, whereas differences between the individual European states are quite large. It is rare that social dialogue really takes place at eye level. Too often, the fear of dismissals dominates the talks.

Furthermore, due to growing polarisation in society, solidarity has become a rather tribal or niche-oriented approach. This also undermines workers' willingness for collective strikes, especially as a majority of the people consider strikes not as a legitimate means in labour disputes, but as an additional damage to an already stricken economy.

Conversations in social dialogue are dominated by the issues of socially acceptable job cuts and employment guarantees. Another important topic remains the preservation of local post offices.

USO IN THIS SCENARIO

A strong USO exists in (legal) theory, but it is difficult to fulfill legal specifications in reality. Ailing infrastructure leads to delivery problems. In addition, staff shortages and budgetary restrictions of postal companies often complicate the provision of legal requirements.

USO Level

Low	Medium	High

ORANGE SCENARIO: INNOVATIVE SOCIETY

SCENARIO IN A NUTSHELL

Reinvigorated social dialogue using new approaches as a key driver for managing difficult societal and economical transitions in an innovative and socially conducive way.

COMMUNICATION PATTERNS	CONSUMPTION PATTERNS AND CONSUMER PROTECTION	COMPETITION AND REGULATION IN THE POSTAL SECTOR	ECONOMIC DEVELOPMENT	INNOVATION DYNAMICS	TRAFFIC INFRASTRUCTURES	DATA MANAGEMENT AND INFRASTRUCTURES	CHANGING WORLD OF WORK	CHANGE OF (FURTHER) EDUCATION SYSTEMS	SOCIETAL DIVIDE	CLIMATE CHANGE AND ECOLOGICAL DISTORTIONS	DEVELOPMENT OF SOCIAL DIALOGUE
Digital high culture	Mainly conspicuous consumption, low consumer protection	Strong competition (new players as leaders), reluctant regulation	New growth dynamics (average EU growth above 3%)	Incremental change, incremental acceptance	Ailing infrastructure due to underinvestment	Hyperconnected world, Internet of Everything	Hybrid working world, growing variations/differentiations	Low access, predominantly traditional structures	Growing societal divide and tensions	High temperature rise, rapid deterioration of ecologic conditions	Business as usual (incremental adjustment)
Digital fragmentation, hybrid use	Mainly conscious consumption, high consumer protection	Strong competition (new players as challengers), high political will to regulate	Continuing growth path (average EU growth between 2% to 2.5%)	Disruptive change, forced technological openness	Lighthouse projects while other infrastructure is ailing	Mostly closed systems (Splinternet)	New work prevails, diminishing variations/differentiations	Broad access, evolution of traditional structures	Closing gap, new forms of coherence	Paris agreement world: containment of climate change, high regulation	Renewal and new forms of social dialogue
Digital fatigue	Mainly individualized consumption, low interest in consumer rights	Reduced competition (traditionals with niche share), reluctant regulation	Slowed growth and stagnation in Europe	Slowing innovation dynamics, technological scepticism	Good infrastructure in cities, mostly ailing in countryside	Expanding digital gaps between countries and regions	New work prevails, growing variations/differentiations	Broad access, new approaches	Fragmented societies (differentiated living worlds), mostly tolerant	(Surprising) Mitigation of climate change, lower regulation	Deterioration of social dialogue
	Mainly service-oriented, high interest in consumer rights	Reduced competition (withdrawal of new players), high regulation	Worsening economic framework conditions, new economic indicators		Infrastructure boom with high investments				Fragmented societies (differentiated living worlds), mostly indifferent		End of social dialogue

STORYLINE: SOCIETAL ENVIRONMENT

Faced with significant global challenges and a world drifting apart socially and economically, European governments responded to the challenges by embracing change and by preparing the groundwork for inclusive future developments. In a digitally hyperconnected world with rapid technological change, policy-makers have achieved social stability and security through proactive regulation. Well-informed problem-awareness coupled with the willingness to implement innovative policies have led to reduced inequality and improved future outlook for the vast majority of the society. Future-oriented decision-making has built on international agendas such as the UN's Agenda 2030 or the Paris Agreement.

Social dialogue has been instrumental in this change process from both a bottom-up and a top-down perspective. Thus, policy solutions that would address sectoral specifics without creating high-level distortions could be found because information on workers' and businesses' needs and the resulting policy implications were readily available to policy makers. But it also helped to facilitate the implementation of new solutions. Key focus areas have been the reduction of income inequalities by improved access to education and further training on the one hand. With a large majority of workers having access to regular training activities that help them to update their skill-sets, life-long learning has finally become the norm. This has supported an expanding economy with well-trained workers ready to take advantage of the development of new trades and completely new areas of activity. On the other hands, governments have largely invested in infrastructure, R&D, and climate mitigation.

Consumers are well-informed and purpose-oriented. The definition of status is continuing to shift from material possessions to the availability of leisure time and an experience-oriented lifestyle. Citizens have become much more active and engaged politically than in the 2010s. Grass-roots activism is helping the implementation of ambitious policies in some, but has also increasingly become a stumbling block for new infrastructure projects.

ECONOMIC ENVIRONMENT

The European economy is looking back on a decade of relatively strong growth. Favourable circumstances in the broader context of global trade have outweighed the occasional protectionist storm clouds. Innovation in technology has been one driver of continuing growth. National economies have also profited from a renewed public investment into infrastructure and education and on fostering private consumption. To finance their massive investment programs, governments have readily relied on higher levels of debt, in part also using inflation to further drive employment and growth.

Public investment in infrastructure has reached a significantly higher level than in the late 2010s. Overhauling the ailing traffic infrastructure has been one focus point, while digital infrastructure has been another. Infrastructure projects are being undertaken with a special interest on maintaining regional cohesion and closing gaps. Another investment focus has been climate change mitigation, both nationally and internationally, in the context of renewed commitment to the Paris Agreement.

Looking at economy and society, one can see a by and large very positive situation, but also some new challenges on the horizon. While have risen and income inequality has decreased, the cost of living has also been climbing quickly. Inflation and strong climate change mitigation regulations have been driving up housing costs. Some experts see this as a new threat for social cohesion. Inflation has also led to higher consumer prices overall. To avoid the rising costs of ownership, consumers have turned to product-service-systems. This is increasing personal convenience and utility, has also created new forms of dependence on service providers that often operate in a realm of natural monopolies.

THE POSTAL SECTOR

The postal sector has seen significant change, not at least due to the stark reduction of mail volumes. New services have taken the place of mail delivery, which means that postal operators have diversified their service portfolio. Besides an increase in the small parcel business and logistics, they have also ventured into proximity and e-government services and – in some instances – increased their financial and insurance products on offer or digital communication services. In some countries, the implementation of e-government services is also part of the diversification. Looking at postal operators across Europe, the portfolio of services differs significantly on the national level; the fragmentation of the sector on the European level has increased. As with many other sectors, the diversification has led to blurred boundaries between the postal sector and other economic sectors.

The competitive landscape in the postal sector has changed. Many of the new services offered by postal operators have also become part of universal service obligation, which has led many new players to reduce their activities or drop out of the market entirely. Thus, competition in the postal sector has decreased. While traditional postal operators have generally profited economically from reduced competition, the setting has also brought the challenge of remaining innovative nevertheless.

The change in service portfolios has also required significant investments. Investments into automation have focused on collaborative robotics and other methods to use human-machine-interaction to avoid automation-related worker displacement. New solutions support workers rather than replace them – except for areas of extreme labour shortage – and have reduced workplace risk. Such technological improvements and investments have been easier to realise for larger postal operators. Last but not least, climate change mitigation measures are requiring green solutions along the supply chain, but especially for delivery. The necessary investment has been taxing smaller postal operators.

EMPLOYMENT IN THE POSTAL SECTOR

Employment conditions in the postal sector have developed along the general lines of change in the broader economy. Employee-friendly forms of flexibility have become widespread, allowing workers more freedom in how to organise their workdays. While the standard employment relationship has been developed further to take into account new forms of work organisation, the level of security that it offers has remained stable. A range of different forms of employment flexibility for operational purposes exist, but offer rights and access to social security comparable to the standard employment relationship. Zero-hour- and on-call-contracts are rare. Effective regulation on the relationship between workers and new forms of automation, such as collaborative robotics and artificial intelligence, have played an important role in the development of this new world of work that exhibits the social benefits of inclusive growth.

Technological change has been progressing steadily and life-long access to further training has been a key issue both to help workers maintain – or regain – their employability and to closing skill gaps. Government programs offer financial support for further training and greater transparency about evolving competence needs and suitable training programs. Companies have also increased the investment in their workforces, focusing on providing adequate training to all workers, especially in contexts where new technologies and processes are being implemented. Thus the adaptation of their workforces to the diversification has been achieved mostly through training. Overall, more people than ever before are consistently acquiring new skills throughout their careers. This has also promoted increased mobility between activities.

SOCIAL DIALOGUE

Driven by wider societal discourse about the distribution of robust economic growth and the effects of new forms of employments, social dialogue has seen both an expansion and a renewal. Its role has been strengthened and its influence has increased significantly as solutions agreed upon by the social partners have spilled over into the wider societal and political arena.

Effective social dialogue has become a key driver for addressing challenges in the world of work that have consequences on a wider societal level and for finding workable solutions that foster inclusive growth. Digital tools that foster dialogue and innovative means for engagement have also supported the renewal of social dialogue.

More actors, such as platform companies, have become involved in social dialogue which covers a wider range of topics. Major issues have been the digital transformation of the economy and society and improving social cohesion. Social dialogue has also covered the expansion of services in the postal sector and social partners have been actively involved in the decision making process leading to the implementation of new service and business models.

USO IN THIS SCENARIO

The definition of the USO has been expanded beyond mail and small parcels to include proximity services and – in some nations – also to financial services for vulnerable client groups and to basic digital services in order to reduce the digital gap.

USO Level

| Low | Medium | High |

CONCLUSIONS

MAIN CONCLUSIONS

The project "Trend research for the postal sector in 2030" has been a particularly innovative exercise for the social partners of the European social dialogue committee for the postal sector. It is therefore important to build on this successful initiative for the future activities of the SDC. Social partners are in the process of reflecting on the next steps that will ensure the follow-up to this project and build on its outputs.

A NEW WAY OF WORKING TOGETHER

In terms of lasting impact, this new way of working in co-construction and ideation has set a precedent in the work of the Committee; all participants enjoyed this exercise and felt much involved in the process. It will have a long-time impact in the sense that future meetings will incorporate as much as possible this new way of working together.

A COMMUNICATION PACKAGE TO FURTHER DISSEMINATE THE SCENARIOS

In terms of multiplier effect, a communication package including the short version and the visuals of each scenario is to be published so that the SDC members can present the different scenarios within their respective organisations. This booklet will enable to disseminate the scenarios among social partners at the national level and thus reach a much wider audience. As many postal companies and unions are conducting strategic research on future developments, the scenarios will directly contribute to their reflections. More largely, the scenarios will enable to enrich the discussions ahead on the evolutions in the sector which will have regulatory impacts. The project will therefore contribute to the larger reflection on the future of the postal sector in Europe.

NEW FUNDING DEMAND AS A FOLLOW-UP

As a next step, it is foreseen that the next project, for which there should be a funding demand to the European Commission in 2020, will further dig into the subject in order to make this prospective work more concrete. The objective is to work on "Future personas" in the postal sector meaning that some specific job functions in the postal sector will be identified with the objective to see how these functions will look like in the future. Personas translate abstract target group models into specific, comprehensible life contexts. The European social partners will have to align more specifically on the content of this next funding demand. They are willing to follow-up on this prospective study and also to make it even more concrete and applicable to the realities of the postal sector.
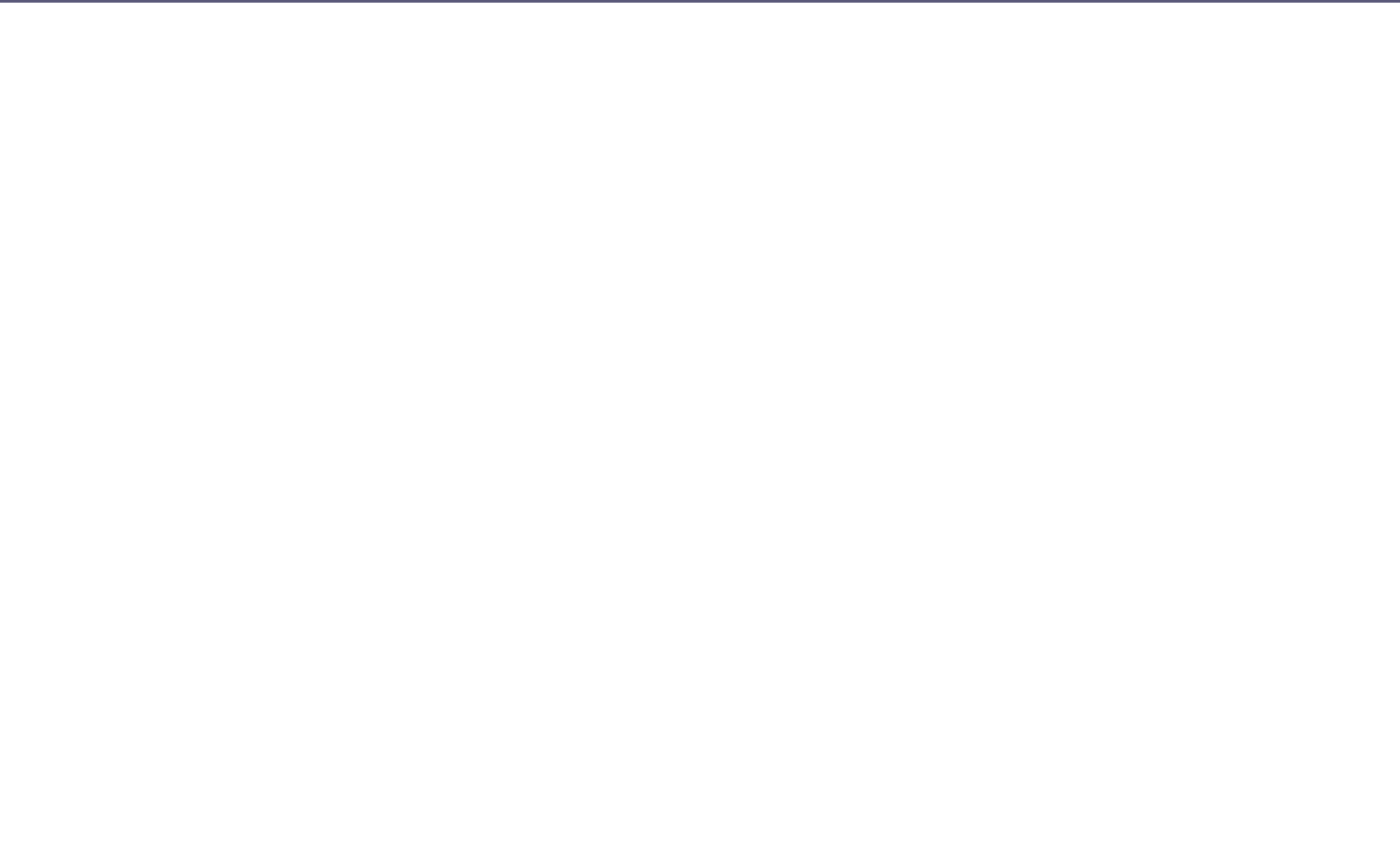
Round-table 1: Julio Gonzalez, Correos; Margaux Meidinger, Le Groupe La Poste/PSE Group Chair; Raphaël Goulet, DG Growth.

Round-table 2: José Oliveira, SNTCT/ SDC Vice-chair; Jutta Rawe-Bäumer, Deutsche Post DHL Group/ SDC Chair; Jorg Tagger, DG Employment; Dimitris Theodorakis, UNI.

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