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**PROGRAMME
2015-2016 SDC**

of the Joint Statement
on Postal Sector Evolution

FINAL REPORT

MOBILISING SOCIAL PARTNERS
IN A NEW CONTEXT



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

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USB Stick:

- Training seminar and final conference presentations and pictures
- Country sheets

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INTRODUCTION

Following the adoption on 22 June 2007 of a “Joint Statement on Postal Sector Evolution”, the European Social Dialogue Committee for the Postal Sector (SDC) launched the “Social Observatory of the postal sector” initiative. Within the framework of this initiative, several projects co-financed by the European Commission, PostEurop and UNI Europa were conducted in 2008-2009, 2010-2011 and 2013-2014. They enabled a better understanding of the main social evolutions in the postal sector in all EU Member States. These projects focused especially on the social transformation of national postal operators (NPOs) with an analysis of the evolution of the work organisation in several key activities and of the role of social dialogue to support this evolution. They also analysed the evolution of the postal sector environment. The current project is also enshrined in this initiative and aims at driving the reflection forward both as regards the evolution of the postal sector context and the internal transformation of postal companies.

As an important milestone in the SDC work, the “New Joint Declaration on Postal Sector Evolution” (see <http://www.postsocialdialog.eu/?nodeId=94415>) was signed on 18 April 2012. It enabled to present the European social partners’ shared assessment of the situation in the sector and to define key principles to accompany the transformation. It also set the way forward and called on all postal operators and trade unions to share experiences to ensure mutually beneficial learning processes amongst EU social partners. Social partners further committed themselves to a continuous monitoring process and the collection of selected good practices. The project “Mobilising social partners in a new context” has been conducted within this framework.

The previous project of the Postal Sector Evolution working group conducted in 2013-2014 highlighted that the sector is at a crucial point in the long-lasting transformation process with an acceleration of the mail volume decrease. It showed that the success of the transformation process is directly related to the capacity of social partners to support the postal operators’ sustainable transformation. Moreover it has appeared that since the beginning of the Social Observatory initiative, the postal environment has deeply evolved with a steady growth of the parcels’ and e-commerce activity and an increasingly customer-driven market. This changing environment brings both new challenges for employers and for workers, and new opportunities. The project “Mobilising social partners in a new context” is a follow-up to the project “Developing a quality postal service in the digital age” conducted by the SDC in 2013-2014.

The developing e-commerce activities and the changing customers’ requirements as well as societal evolutions with in particular the growing silver economy set a new context. Both in terms of e-commerce and proximity services, postal operators use to their advantage their key assets in terms of extended physical network and of relationships of trust with consumers. These services are complex and it is important for the European social partners to better understand these new highly competitive markets which involve numerous and diversified actors. These developments could be a source of new revenues as well as of employment and it is therefore important that social partners strive for fair and competitive working conditions. Especially training programs and re-skilling of workers are in the focus of discussions.

This evolving context is accompanied by an acceleration of internal transformation processes. This internal transformation has varying degrees in content and tends to affect a big part of the employees in the postal operators. Transformation processes have impacted working conditions, employment terms as well as competences to varying extents. It appears that operators, depending on their economic, socio-political national and internal context, have engaged differing paths of adaptation in social terms. They have either focused on security of employment, increased internal flexibility, evolution of wages and statuses or modulation of working time. The above identified elements are non-exhaustive and have been used at different levels by postal companies and usually in combination.

For the above reasons, the ongoing project aimed at bringing strong insights in the key activities developed by postal operators in terms of e-commerce and new proximity services. On this topic, it has been essential to better grasp the challenges and opportunities of the surrounding environment but also to identify innovative practices. At the same time, the project has sought to identify which national collective agreements have supported the social transformation of companies. It enabled the European social partners to obtain an overview of how national collective bargaining, in the researched countries, could possibly support change management or restructuring at the postal operators' level. The project also aimed at identifying common trends of social transformation. The outputs theoretically enabled to conceptualize and categorise the various options used in undergoing postal social transformation by the national social partners in collective bargaining. The project therefore provides considerable input to the social partners' reflections on the postal sector evolution.

ACKNOWLEDGEMENTS

The project was successfully carried thanks to the fruitful cooperation between European social partners, the close work with the consultants from Ecorys and all the involved stakeholders. PostEurop played an essential role in the Project Management and as a support to the organization of the two main events. All over the project, the Postal Sector Evolution working group was informed of each step. The day-to-day implementation was carried out by the project team with on the employers' side by Heike Ausprung, DP DHL, Hans Blikman, PostNL, Margaux Meidinger, La Poste, and Mircea Titei, Romanian Post, and on the unions' side by Jens Saverstam, Seko, Brian Scott, Unite, and Dimitris Theodorakis, UNI Europa.

The collaboration with the consultants from Ecorys, Thijs Viertelhuizen, Nick van der Lijn and Agnieszka Makulec, was continuous. Their contribution and presentations at the two events was valuable and they brought some important new insights on the main evolutions in the postal sector.

Our special thanks also go to the speakers who contributed to the two events of the project. In particular the representatives on employers' side, from Austria, Belgium, Denmark, France, Germany, Poland and Romania, who brought us their expertise on key issues for the sector. Important contribution was also given by trade unions with representatives from the Netherlands, Italy, Poland, Portugal, Spain, Sweden and Romania. Their testimonies on their national situations represented a great added value in order to go more in-depth on each identified topic.

We would also like to warmly thank Romanian Post for hosting the final conference of the project in Bucharest through an efficient support and a warm welcome.

We are also grateful to Botond Szebeny from PostEurop, Stephen DeMatteo from UNI Global Union and Camilla Olivius from DG Market for their valuable contribution on the main challenges in the postal sector at the Training seminar on e-commerce and new services.

Finally we would like to thank the experts from both postal operators and trade unions from more than 20 European countries who answered the questionnaires, participated in the interviews with consultant, reviewed the final report and actively took part to the events of the project.

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- The project team, Margaux Meidinger who led the project in a very effective way, and all other members for their commitment and close cooperation.



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METHODOLOGY

The objectives of the project were several. First of all, it had a very concrete objective of training European social partners on the new activities developed by postal operators and especially e-commerce and new services. In this sense it brought a direct added value to the SDC members. Secondly after several projects which analysed the social transformation of European postal operators, the objective was to better understand the tools which supported this transformation through an in-depth analysis of the content of the CLAs signed within main postal operators.

The project has been conducted by a team composed of social partners from PostEurop, Heike Ausprung, Hans Blikman, Margaux Meidinger and Mircea Titei and from UNI, Jens Saverstam, Brian Scott and Dimitris Theodorakis. All its members worked in close cooperation throughout the project in order to organise the different events and validate each step. Three external consultants, Thijs Viertelhuizen, Agnieszka Makulec and Nick Van der Lijn, from Ecorys, the agency selected for the project, have supported the project team and conducted the analysis. Regular phone meetings were organized between the project team and the consultant to ensure its smooth implementation. The PSE working group was informed during its meetings of the advancement of the project and validated each steps.

E-COMMERCE AND NEW SERVICES

On this key topic for the postal sector which is expected to constantly grow in the upcoming years, it was important to bring consistent training material to the social partners. For this purpose, the consultant Nick Van der Lijn from Ecorys together with the project team undertook a relevant desk research by compiling all existing studies and data on the subject.

This material was presented at a training seminar organized on 17-18 November 2015 in Brussels. It gathered 60 participants from 20 countries. The seminar took the form of three sessions. All these sessions consisted of a theoretical and transversal input brought by the consultant which was illustrated by national testimonies from experts from both employers and trade unions:

1. Main challenges in the postal sector with interventions from Ecorys, DG Growth, PostEurop and UNI
2. The e-commerce market and value chain with interventions from Ecorys, Deutsche Post DHL and Polczta Polska
3. Opportunities in proximity services with interventions from Ecorys, PostNord Denmark, bpost, La Poste and Postkom as well as Communithings.

In order to disseminate more widely and in an innovative manner the content of this training seminar the project team decided to elaborate a Massive Open Online Course (MOOC). This online training consists in 17 videos taken from the seminar and enriched by several animated visuals as well as quizzes in order to offer a complete and dynamic training experience to the user. The MOOC, available on the SDC website, aims at being disseminated to the postal operators and trade unions of all EU-Members states but also more widely to other stakeholders from the sector.

STUDY ON COLLECTIVE LABOUR AGREEMENTS (CLAs)

The study on CLAs aimed at getting into the detailed content of agreements in order to understand the main trends of social transformation. For this purpose, the project team together with the consultant decided to select 16 national postal operators from Austria, Belgium, Denmark, Estonia, Germany, Finland, France, Ireland, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, UK. The rationale behind this selection was to get a qualitative analysis of a limited number of companies rather than an exhaustive study. The choice of countries aimed at having a good balance between small and big, Western and Eastern operators as well as at getting companies at different levels of transformation; it also depended also on the quality of the existing contacts in these countries.

The analysis was conducted by the consultancy Ecorys as an external third-party. The consultant used two main sources of information. First of all, first-hand data was collected by means of questionnaires disseminated to all the 28 Member states in order to have an overall view of the transformation in the EU. This was completed by phone interviews done with the respondents from the 16 selected countries in order to get complementary information, in particular on the context of the CLAs' negotiations. Secondly in parallel, the consultant conducted a desk research which consisted in an analysis of CLAs' content through a detailed grid of analysis for each of the 16 countries.

In order to share the results of the analysis and enable debate between social partners, the final conference of the project was organized on 24-25 May 2016 in Bucharest. It was important for the SDC to set up such an event in an Eastern country which had been involved in the project. The conference gathered 52 participants from 18 countries. It was organized around six thematic sessions which consisted in the presentations from the study's outputs on each topic made by the consultant and in selected national testimonies on the relevant subject. These topics were considered as being the main trends of social transformation. The last session was a transversal and prospective one to open the debate.

- Session 1: Employment
- Session 2: Wage policies
- Session 3: Work organisation
- Session 4: External and internal mobility
- Session 5: Career planning and training
- Session 6: Searching for a new social and economic equilibrium
- Session 7: What role for social dialogue in the transformation and future trends?

On the basis of the questionnaires' results, the analysis of the desk research and the content of the final conference, the consultant has elaborated a detailed final report which is included in the current booklet. This report presents the main outputs from the CLAs' study with both transversal considerations and country-specific examples.

MAIN OUTPUTS OF THE PROJECT

1. BACKGROUND

The postal sector has been faced for several years with a decrease of mail volumes due to the development of new technologies resulting in e-competition, in a context of market opening. In this framework, postal operators have had to diversify their activities to find new growth levers but also to develop employment opportunities. In this sense, it is essential for European social partners to better grasp the opportunities offered by the booming e-commerce market as well as by the development of proximity services. This diversification has been combined with a continuous and important modernisation of incumbents' activities to optimize their cost structure, a process which has been closely supported by social dialogue. It is thus essential to bear in mind that all these transformations have occurred in order to face a context of important regulatory, economic and social evolutions.

In this framework, the project aims at offering an analysis on these two key topics for the postal sector. First, it has focused on the development of new services, e-commerce and proximity ones, and their social impacts to enable the European social partners to better understand these new markets and the opportunities for the postal sector. Secondly it has enabled the reflexion on the change management process to go further through the detailed analysis of the collective labour agreements which have been signed within national postal operators to support the transformation.

2. THE DEVELOPMENT OF E-COMMERCE AND NEW PROXIMITY SERVICES

A. OPPORTUNITIES AND CHALLENGES FOR POSTAL OPERATORS IN E-COMMERCE

The e-commerce market has been these last years a fast-growing but also highly-competitive one. In this complex value chain, with numerous actors, postal operators can find new opportunities of development but at the same time, they involve in a more competitive market. Besides delivery which is their core business, incumbents can develop a wider range of services by favouring a backward integration on the e-commerce value chain in order to stand as comprehensive partners along this chain. The services offered relate in particular to the sales' part with the provision of online market places as well as the facilitation of payment through online solutions but also the provision of fulfilment solutions with storage and pick & pack services. The development of these services relies on the postal operators' know-how, their position as trusted companies and their customers' knowledge. At the same time however, the analysis of the actors on the e-commerce value chain shows that some companies whose core competences are more upfront on the value chain tend to develop a new offer of services with forward integration. For instance market places are increasingly looking at offering delivery services so that they can also become comprehensive partners relying on their own services all along the value chain.

On this value chain, the last kilometre delivery is in particular of key importance for the customer. Postal operators need to better answer customers' needs in terms of flexibility, rapidity and choice of delivery. For this purpose, it appears that there is in some countries a development of flexible working arrangements and an increased operational externalisation which impacts work organisation (e.g. outsourcing, licensing, flexible labour arrangements and temporary agency work incidence). This comes together with an increased combination and complexity of mail and parcels delivery within several postal operators. Moreover the evolutions of the work organisation show a tendency to extend delivery time across the day and at the week-end so that delivery can occur when customers are at home. In view of the new customers' needs and the new quality requirements, the project has highlighted that competition on this activity occurs not only through cost-cutting but also via quality of service provision.

B. THE POTENTIAL OFFERED BY NEW PROXIMITY SERVICES

There is a high diversity of new proximity services tested or implemented by postal operators. These services which are usually characterized by a personalisation of the relationship are fully in accordance with emerging societal needs like in particular the silver economy, the demand for rapid delivery of fresh products but also the optimisation of public services.

The project highlights that there is potential for incumbents to develop new services to individuals based on their extended network and the relationship of trust with consumers. Indeed national postal operators have a unique added-value in terms of proximity and physical link, especially in the digital economy. This development creates opportunities in terms of employment as the traditional delivery rounds can be enriched by added-value services. In this framework, there is a need to develop new competences through the training and re-training of existing employees in a lifelong learning perspective but also to attract new skilled labour.

3. COLLECTIVE LABOUR AGREEMENTS AS KEY TOOLS TO SUPPORT THE CHANGE PROCESS

A. GENERAL CONSIDERATIONS

National postal operators face common challenges but at different stages of transformation. Overall postal operators, together with trade unions' participation and involvement, have managed to support well the transformation and to mitigate its impacts, in particular through the signature of CLAs. In this framework, it appears that there is a general recognition among social partners of the need to transform the organizations, the requirements for new competences and for an increased flexibility of staff while maintaining good working conditions.

The content of the CLAs differs significantly between the EU Member States due to different national contexts, in particular in terms of social regulatory framework and industrial relations structures. It is also closely linked to the companies' internal situation as there are at different stages of the transformation process. Thus the national context is important to understand the change management process within each postal operator which has put in place several measures to reduce staff costs and optimise the workforce structure. In this context, postal operators have strived to find the right balance in terms of flexibility in working arrangements and employment security. The project has enabled to identify some particularly innovative and effective practices. The exchange of good practices is crucial in that sense.

B. THE KEY ROLE OF SOCIAL DIALOGUE

The project highlights that social dialogue has had an important role in mitigating the negative consequences of the transformation on employment and working conditions in the sector. For this purpose, labour agreements constitute central elements of the social change process in most national postal operators. Measures identified in the CLAs do not only aim at limiting the impact of the transformation. Positive measures to enable employees to benefit from the transformation have also been put in place. Training has in particular become an increased priority in most operators. However it is also important to bear in mind that CLAs do not contain all the measures implemented to support the change process.

C. SOME REFLECTIONS ON POSTAL OPERATORS' SOCIAL TRANSFORMATION STRATEGIES

One of the aims of the project was to establish a typology of social transformation strategies. The study on CLAs has shown that there are many differences between national postal operators' strategies in managing the social transformation but also common trends.

The main identified factors shaping the operators' strategies are the evolution of employment, wages, employment statuses and work organisation, the modulation of working time as well as the development of mobility and training. The above identified levers are non-exhaustive and have been used at different levels by postal companies and usually in combination.

On the basis of these different available levers, a first description of social transformation strategies can be drawn. The identified strategies can vary over time or be combined according to the operators' or the national context. They are closely linked to the diversification strategies of postal operators.

The strategies are shaped around three main variables which are employment, wages and flexibility.

- A strategy geared towards employment security with no forced redundancies, with an emphasis on work re-organisation to counteract negotiated wage freezes or moderation.
- A strategy geared towards the maintenance of labour conditions in terms of wages and stability of the work organisation but which entails a reduction in employment and in some cases externalisation of some operations (last-mile delivery and new services).
- A strategy aimed at preserving wages' and employment levels whilst entailing increased internal and external flexibility in work organisation patterns.

The identified strategies can also be combined with different arrangements regarding working conditions of current workforce versus future employees. Thus operators can opt for the maintenance of statuses and wages for existing staff while offering different conditions for newly recruited employees in terms of lower wages and/or more flexible statuses. The same can be applied with regard to internalised and externalised operations.

In this evolving context, social partners also put in place several positive measures to support the transformation in the sector. The development of new jobs together with the need for new skills has required the development of further training programmes to enable up-skilling and re-skilling of employees. This has in particular been essential to develop their employability and support the redeployment of staff through internal and/or external mobility. In this increasingly fast developing environment at the digital age, postal operators also need to hire new competences and attract the younger generations.

CONSULTANT REPORT EXECUTIVE SUMMARY

INTRODUCTION

The substantial transformation process that National Postal Operators (NPOs) experienced since the launch of the EU Third Postal Directive (Directive 2008/6/EC) coupled with the development of new technologies, profoundly affected employment in the sector, impacting the number and types of available jobs, employment conditions and skills requirements. The key underlying trend of these changes includes a sharp decline in mail volumes, increased competition between postal services providers and e-substitution as well as enhanced diversification of postal sector products offered. These processes of change brought along a decrease in employment levels and working conditions that increasingly deviated from the high level public standards present in the NPOs before. The decline in mail volume caused a surplus of postmen and postwomen, whereas the increase in parcel (and other) services require new competences and increased flexibility of staff.

ABOUT THE STUDY

In this context, the European Social Dialogue Committee for the postal sector (SDC) has sought to identify the way Collective Labour Agreements (CLAs) support the transformation of NPOs in social terms.

With the project “Mobilising social partners in a new context” financed by the European Commission under Grant Agreement VS/2015/0054, Ecorys has undertaken the following tasks:

- Contribute to the definition of the study methodology in terms of the CLAs parameters;
- Collect through different possible means (questionnaire, interviews, desk research) the relevant data on the process and content of the main CLAs negotiated between national postal operators and trade unions on the change process as well as on the national legal framework in social terms and the structure of dialogue at the national level;
- Suggest a possible selection of countries to be studied;
- Provide the social partners with a consistent report on the process and content of the main CLAs on change management as well as on the national social regulatory framework and the structure of social dialogue at national level;
- At the conference, share the main findings of the survey (desk research, questionnaire, interviews) with social partners.

The scope of this project is limited to a comparative analysis of CLAs and social dialogue in 16 EU Member States. These countries are AT, BE, DE, DK, EE, FI, FR, IE, IT, NL, PL, PT, RO, ES, SE and UK. Because the timing of agreement of the CLAs differs between countries the study focuses on the CLAs in the 16 countries that have been most recently negotiated. Because CLAs are often based on previous ones, a cut-off date has been set at 2009, the year in which countries could start with the transposition of Directive 2008/6/EC.

The approach that has been applied for this project consists of various methods including desk research, interviews with EU-level representatives of the social partners and, a survey among social partners in the postal sector in the EU28.

RESULTS OF THE COMPARATIVE ANALYSIS

GENERAL RESULTS

CLAs negotiated among the social partners provided the necessary framework to facilitate the change. The CLAs offer the key levers for NPOs to adapt their workforce to the new market conditions that have emerged. The precise content of these CLAs and their outcomes in terms of levers for the management of social change strongly differ within Europe.

Whereas the CLAs are different outcomes of negotiations between social partners, the divergence also originates in a variety of contextual factors. On the one hand, EU Member States have different historical traditions in collective bargaining processes and also different legal frameworks that govern the collective bargaining process as well as the labour market itself. These traditions and legal frameworks structure the interactions between social partners as well as the options available to them to manage social change. On the other hand, postal sector operators in the EU follow different business strategies and are to different extents confronted with competition from new operators. As the postal companies find themselves at different stages of adaptation, the need to restructure and the way of restructuring varies among them.

Agreements laid down in the postal sector CLAs also reflect different trade-offs between the various negotiated options. Such trade-offs are most visible in those cases where the CLA comprise explicit concessions from either or both the side of employers and employees.

Not only do CLAs reflect different trade-offs, these agreements represent social models advocated by both the NPOs and trade unions. The CLAs include agreements on how to employ, to reward and to part from staff members, which together constitute a social model. There is however not a single social model that can be found in all CLAs from across the EU. The divergence follows from the different outcomes of negotiations between the social partners, but also from several common trends.

These common trends predominantly relate to the fact that NPOs transformed from public sector organisations with civil servants as employees to commercial companies with employees contracted on the basis of conditions that have been agreed upon by social partners under competitive circumstances in the evolving postal sector market. In addition, a diversification of the service portfolio has taken place at all NPOs, which contributed to the changes in employment levels and labour conditions. Finally, this transformation process is flanked by exogenous trends on the labour market that are present in all EU Member States and not limited to the postal sector only. These trends include an increase of flexibilisation of employment relations as well as increased share of variable wage components.

Our analysis confirmed the lower employment levels and lower working conditions currently existing in the postal sector, especially for new employees. At the same time however, our analysis also revealed that social changes at NPOs are not only subject to downward pressures. To a large extent, the huge transformation of postal operators has been managed in a socially responsible way by the social partners.

KEY MEASURES INCLUDED IN THE CLAS

CLAs can be subdivided in various types; ranging from 'regular' CLAs, specific CLAs aimed at managing social change to 'integrative' CLAs to merge arrangements on employment conditions for different types of staff members. In addition, CLAs do not automatically cover all staff working for the NPOs. Self-employed staff members that are hired by the postal companies are never covered by the CLAs. Even though the majority of CLAs are applicable to all staff members, certain staff categories working under a labour contract for the company can be exempted from an agreement.

Wages

Since postal sector liberalisation, the level of wages have been lowered to render NPOs more competitive in the light of new market conditions, our analysis of the CLAs revealed that the salary packages also have been simplified during the period 2009-2015. In practice this implies a reduction of the number of function groups existent in the company as well as a reduction in the number of allowances.

Salary packages in the postal sector include a fixed basic salary of which the level depends on factors such as age and experience as well as a variable component. The variable component can comprise many different types of remuneration that depend mainly on performance or atypical working time arrangements. Not all NPOs offer the same types of such allowances. In addition, certain types of variable wages are not available for all staff members. Overall the number of allowances has been reduced to administer salaries more efficiently. Allowances are still provided by some NPOs for the usage of private vehicles for professional

purposes, for lunches, for staff members with families. It appears however that special allowances for staff working on Saturdays and on evenings tend to disappear with the objective of enlarging the scope of the regular working time.

Social management levers

For the purpose of this study, social management levers, or national collective bargaining outcomes targeting the adaptation/transformation of the postal operators, have been conceptualised in terms of working-time arrangements, measures to mitigate planned job losses, support and compensation for redundant workers, concessions made by the employers and/ or trade unions, and training:

- Decrease of employment mainly managed by natural attrition;
- Modulation of working-time is increasingly applied by NPOs to manage peak activities within a short-term horizon;
- Most NPOs have increased the number of part-time workers to hire staff in line with fluctuating market demands;
- Several CLAs set limits to the share of total staff members that can be hired on part-time basis;
- In several NPOs early retirement was and still is a key measure to mitigate planned job losses;
- Short-time work to avoid lay-offs is included in a few CLAs where national legislation allows this;
- CLAs also foresee retraining and redeployment of surplus staff as key measures to avoid lay-offs;
- In those cases where lay-offs cannot be avoided social plans foresee measures like severance payments, retraining and redeployment for surplus staff;
- Most CLAs include references to training measure that range from basic training, via training related to restructuring to lifelong learning.

EXPECTATIONS FOR THE FUTURE

Restructuring in the postal sector did not take place fully at the expense of employment and working conditions. This is the main merit of social dialogue in the postal sector. CLAs constitute central elements of the social change process in all EU Member States included in this study.

Hence social changes at NPOs are not only subject to downward pressures. Indeed we can observe concessions from multiple NPOs to hire new staff on a full-time basis. In addition, multiple NPOs now pay increasing attention to career development and mobility of staff within their (large) companies supported by training programmes. In this way the NPOs can acquire new skilled staff to provide new services.

In the future we therefore can expect a continued commitment of the social partners towards social dialogue and negotiating CLAs. NPOs are likely to increasingly diverge by offering new different types of services, proximity but also e-commerce and digital services, that bring along different needs in terms of (skills) requirements of staff and employment conditions offered. This will also create a need for social partners to negotiate the terms of retraining existing staff and hiring new staff from particular target groups such as young jobseekers in order to find new skills. In the digital age, these evolutions may occur faster than in the previous years.

MOBILISING SOCIAL PARTNERS IN A NEW CONTEXT

REPORT: POSTAL SECTOR EVOLUTION PROJECT

Client: PostEurop on behalf of the SDC
Rotterdam, 28.07.2016



Mobilising social partners in a new context
Report: Postal Sector Evolution Project

Client: PostEurop on behalf of the SDC
Rotterdam, 28.07.2016

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1. INTRODUCTION

The substantial transformation process that National Postal Operators (NPOs) experienced since the launch of the EU Third Postal Directive (Directive 2008/6/EC) coupled with the development of new technologies, profoundly affected employment in the sector, impacting the number and types of available jobs, employment conditions and the skills requirements. The key underlying trend of these changes includes a sharp decline in mail volumes, increased competition between postal services providers and e-substitution as well as enhanced diversification of postal sector products offered.

The European Social Dialogue Committee for the postal sector (SDC) has commissioned ECORYS to support the Postal Sector Evolution and Training Working groups of the SDC in undertaking the project “Mobilising social partners in a new context” financed by the European Commission under Grant Agreement VS/2015/0054. This project seeks to identify the way Collective Labour Agreements (CLAs) support the transformation of NPOs in social terms. At the same time, the project has a complementary prospective approach which aims at improving the understanding of new key activities developed by the NPOs and trade unions and the structure of these new markets.

Key tasks of the study are:

- Contribute to the definition of the study methodology in terms of the CLAs parameters;
- Collect through different possible means (questionnaire, interviews, desk research) the relevant data on the process and content of the main CLAs negotiated between national postal operators and trade unions on the change process as well as on the national legal framework in social terms and the structure of dialogue at the national level;
- Suggest a possible selection of countries to be studied;
- Provide the social partners with a consistent report on the process and content of the main CLAs on change management as well as on the national social regulatory framework and the structure of social dialogue at national level;
- At the conference, share the main findings of the survey (desk research, questionnaire, interviews) with social partners.

The scope of this project is limited to CLAs and social dialogue in 16 EU Member States. These countries are AT, BE, DE, DK, EE, FI, FR, IE, IT, NL, PL, PT, RO, ES, SE and UK. Because the timing of agreement of the CLAs differs between countries the study focuses on the CLAs in the 16 countries that have been most recently negotiated. Because CLAs are often based on previous ones, a cut-off date has been set at 2009, the year in which countries could start with the transposition of Directive 2008/6/EC.

The approach that has been applied for this project consists of various methods that include desk research, interviews with EU-level representatives of the social partners and, a survey among social partners in the postal sector in the EU28.

This report presents the findings of the comparative analysis of the postal sector CLAs in the 16 EU Member States. The second chapter presents the key trends in the European postal sector to elaborate on the key developments in the postal sector. In the third chapter the impacts of these developments on the work floor and beyond are set out, whereas the fourth chapter presents the divergence of the European postal sector social partner’s response to these impacts as laid down in the collective labour agreements. In the fifth chapter the common elements are discussed. The sixth chapter finally includes an overview of the trends.

2. KEY DEVELOPMENTS IN THE POSTAL SECTOR IN EUROPE

This chapter includes an overview of the key developments in the postal sector resulting from postal market liberalisation. The liberalisation process has taken place unequally across the EU. In Germany for instance the postal market was already fully opened on 1.1.2008 whereas this occurred much later in other EU Member States.

This chapter therewith specifies the context in which the changes affecting employees take place and that postal sector social partners manage with the agreements laid down in the CLAs. The chapter is mainly based on desk research and includes several outcomes of the Ecorys survey.

2.1 MAIL

In all Member States of the European Union (EU28), mail volumes have decreased by 4.1% on average between 2007 and 2011. The two major developments underlying this decrease are economic decline and changing communication habits between businesses, between consumers and between businesses and consumers¹. Table 1 shows the average change rate per year between 2007-2011 in mail volume. Southern European countries have, as a result of the economic recession and the debt crisis, experienced the largest decline with an average yearly change rate of -6%. Both the volume of letter post and direct mail has been declining in these countries. Eastern- and Western-European countries moreover, experienced a significantly lower drop, respectively -2.4% and -3.9%. While the volume of letter post has declined continuously in these countries, the volume of direct mail stabilized in 2010/2011.

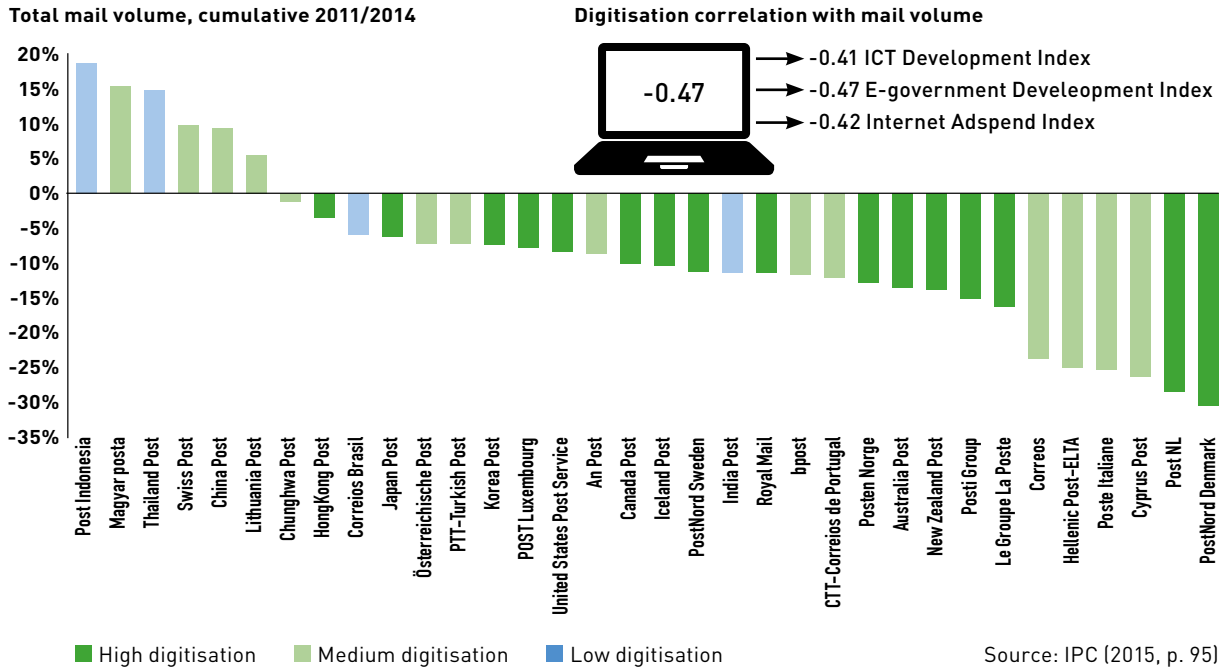
Table 1. Mail volume (domestic and cross-border inbound) per country group (2011)

	Population distribution (2011)	Distribution of letter post volume (2011)	Letter post items per capita (2011)	Average change rate per year (2007-2011)
Western countries	55%	82%	252	-3,9%
Southern countries	25%	12%	82	-6,0%
Eastern countries	21%	6%	50	-2,4%
Total (32 countries)	520m	87.5bn	168	-4,0%
EU-28	507m	82.5bn	163	-4,1%

Even though mail volumes have been declining in the EU 28 Member States, the decline does not affect all National Postal Organisations (NPOs) equally. Figure 1.1 shows the mail volume growth by country between 2011 and 2012. The main negative outliers are Dutch PostNL and PostNord Denmark. At the same time however, Swiss Post experienced an increase in mail volume. Also Poste Italiane experienced an increase in mail volume in 2012, which was a result of direct mailing that is more sensible to economic volatility as well as of unaddressed letters. Both types of mail represent more than one third of Poste Italiane's total mail volumes in 2012.

1. WIK-Consult, 2013, pp. 167-168.

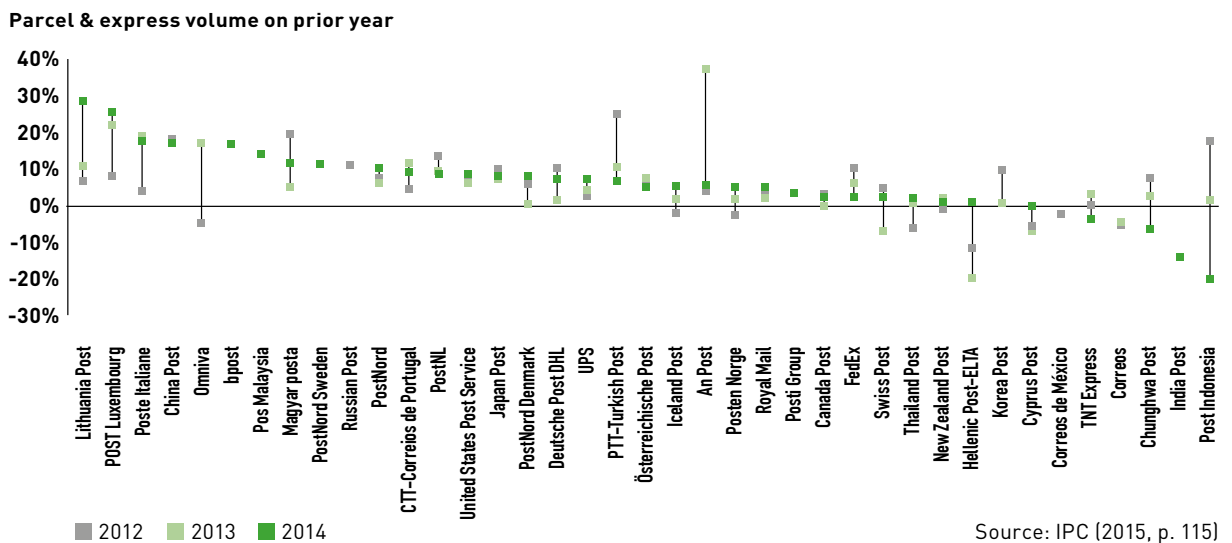
Figure 1. Mail volume growth by postal organization (2011-2014)



2.2 PARCELS AND E-COMMERCE

In contrast to declining mail volumes, the parcel business has been increasing and has proven to be a “golden opportunity” for postal organizations². According to ATKearney (2012; 2015) European parcel volumes grew by 6% annually between 2009-2011 and by 5% annually between 2011-2013. E-Commerce is the main driver behind this growth as the general trend to order goods (and services) online triggers increasing demand for the services of parcel carriers. The European postal organizations with the highest growth rates in the parcel business, as shown in figure 1.2, are Poste Italiane, Bpost and PostNord Sweden.

Figure 2. Parcel & express volume growth by postal organization (2012-2014)



2. Accenture, 2014, p. 7.

Within the European courier, express and parcel (CEP) market, the business-to-business (B2B) segment accounted for an estimated 70% of the total CEP revenues in Europe in 2011. B2B is in particular important for cross-border CEP, accounting for 90% of total cross-border volumes in 2010 against only 10% B2C. In the domestic segment, B2C accounts for more than 40% of the total volume. The relatively low share of cross-border B2C volume reflects the comparatively lower importance of cross-border distance selling compared to its role in national markets (WIK-Consult, 2013, p. 227). The share of B2C volume in the total parcel market is however showing an upward trend, for instance from 45% to an estimated 50% in the German parcel market, which is considered by WIK-Consult (2013, p. 227) as representative for many European countries.

Parcels and e-commerce is however a much more competitive market than the mail market. Competition is particularly based on costs as well as on flexibility in delivery that can be offered to customers. Hence the pressure for service providers to offer delivery services against lower costs and as flexible as possible is high, which affects costs and conditions of labour.

2.3 BANKING (FINANCIAL SERVICES)

For some NPOs banking belonged to the core activities of the organization. As a result of the diversification process some NPOs remained active in banking, whereas others (Deutsche Post for instance) sold off these activities.

Those postal organizations that continued with banking activities also intensified the range of services offered, varying from basic payment services to the provision of mortgages. Within the area of diversification, financial services have – according to research conducted by Accenture (2014) based on a sample of postal organizations – the highest overall Earnings Before Interest and Tax (EBIT) at 8.2%.

The UK Post Office and the Italian Poste Italiane are both examples of postal organizations that integrated banking services into their organisations. The Post Office is a state-owned company supplying insurances, savings and loans & mortgages. The Poste Italiane also expanded its services towards banking and finance, nowadays with 13 million payment cards being the leading issuer in Italy in credit, debit and pre-paid cards.

The survey conducted by Ecorys shows that 73% of the respondents expect that their company will introduce or further develop the possibility to make payments, as a further indication of the emerging integration of banking services into postal organizations.

2.4 OTHER SERVICES (PROXIMITY SERVICES)

In recent years, postal organizations have been transforming their businesses into hybrid organizations, providing a range of business such as parcels and logistics but also non-mail services – besides banking – called ‘proximity services’³. These proximity services can be divided into five categories:

- Extending the product range in delivery (e.g. groceries, pharmaceutical products)
- Targeted solutions for a specific sector (e.g. welfare)
- New services in postal offices (e.g. banking services)
- Proximity to the public space (e.g. road quality)
- In-house visits and services (e.g. towards elderly people, collection of contracts, reading meters, collection of electric appliances or PET bottles for recycling etc.)

As stated in the 2015 report from Accenture (p. 1): *“these services can powerfully reposition post and parcel players as innovative service providers that offer and deliver services on behalf of other private and public organizations”*. An example provided by Williams⁴ (2015, p. 3) shows us how postal organizations can deliver services on behalf of other private and public organizations:

3. Accenture, 2014, p. 7.

4. Williams D., “Transformation and the Postal Business”, the Postal Industry | Vol 3 | Issue 1 | 2015

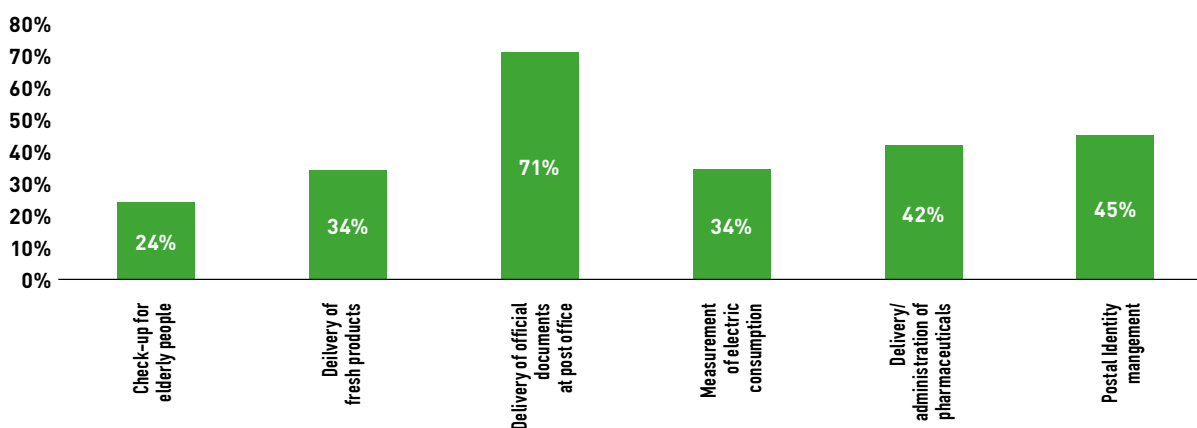
Postal systems certainly have rich physical networks that can be used in any adaptation [...]. One potential area is the Internet of Things [...]. In theory, each component of physical infrastructure — whether a mailbox, a vehicle, a machine, or a letter carrier equipped with sensors — could connect to the Internet of Things. [...]. This platform could also be useful to local governments, utilities, and smart city initiatives. As postal vehicles pass through each neighborhood, they could read meters automatically, test Wi-Fi and other signal strength, report congestion and road conditions, and measure air quality.

According to Accenture (2015), revenues from non-mail services are now exceeding revenue generated from mail activities. They further estimate that the potential market for proximity services worldwide could reach US\$ 10 billion between 2016-2019 based on current workforce levels alone.

The French La Poste Group is one of the European postal organizations actively engaged in providing proximity services through their 'Services Plus' program. This program comprises services such as offering assistance to elderly or isolated people, providing people with medicine from the pharmacist and accompanying the delivery of equipment with installation assistance.

A recent survey among postal organizations and trade unions conducted by Ecorys, provides insights in the proximity services that are expected to be introduced or further developed in the coming five years (2017-2022). As shown in figure 1.3, the respondents expect that the delivery of official documents (73%), postal identity management (45%) and the delivery/administering of pharmaceuticals (42%) will take off. Check up for elderly people is the least common service expected to be introduced or further developed (24%).

Figure 3. Percentage postal organizations and trade unions expecting to introduce or further develop proximity services 2017-2022



Ecorys survey among social partners in the postal sectors of EU Member States (employers: n=20, trade unions: n=18).

All postal companies are affected by the profound changes in the sector as described above, albeit to different extents. Postal sector liberalization and the diversification of service provision occurred at different speeds and with different focuses among the NPOs. For example, it has been shown that some NPOs still manage to achieve growth rates in the mail sector. Neither do all NPOs develop new services in the same direction. This divergence creates different pressures on the companies to adapt to competitive pressures from other (new) service providers. In addition, this divergence creates social impacts as well as staff-related needs that require a different ways of management. Hence, the divergence in responses brings along differences in adjustments of labour conditions and other implications for the workforce.

3. EMPLOYMENT AND SOCIAL IMPACT OF THE CHANGES IN THE POSTAL SECTOR

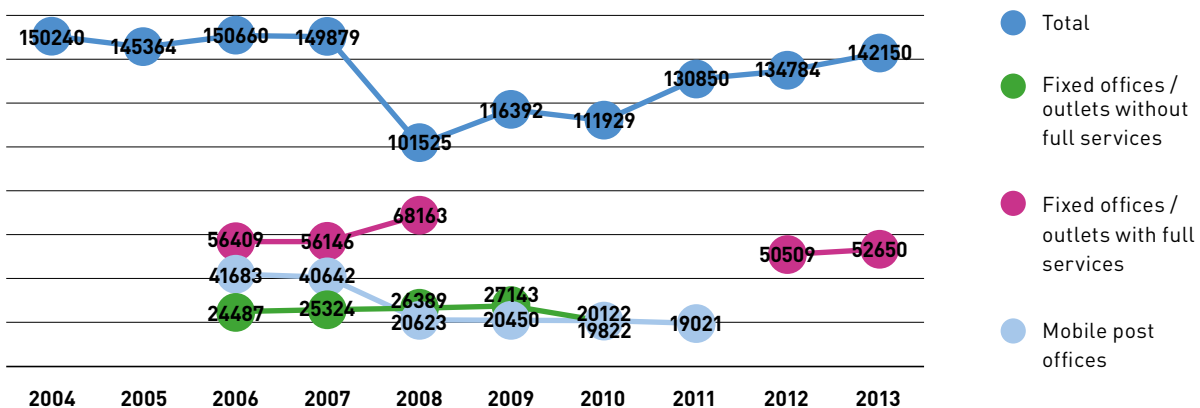
The new market conditions in the European postal sector, a combined trend of a fast-shrinking traditional market and intensified competition, force NPOs to revise their business models on both the strategic and operational levels⁵. On one hand, they were forced to diversify their business portfolio by identifying and developing new growth models (as described in the previous sections). On the other hand, they need to make substantial operational adjustments, which have significant impacts on the employment and working conditions in the sector. To make this modernization process possible and create a competitive wage structure in the majority of countries the collective labour agreements negotiated among the social partners provided the necessary framework to facilitate the change.

This chapter presents the impacts of the changes in the postal sector on innovation and optimization on the work floor (3.1.) and the impacts on employment and working conditions (3.2) as perceived by the trade unions and postal operators. The presented findings rely to a large extent on the outcomes of the survey that was conducted by Ecorys and the analysis of the content and context of collective labour agreements in the European countries.

3.1 IMPACTS OF THE CHANGES IN THE POSTAL SECTOR ON INNOVATION AND OPTIMIZATION ON THE WORKFLOOR

The quest for operational efficiencies has relied essentially on developing new technologies and rationalizing processes⁶. Postal operators have modernized their activities at an operational level, in particular in terms of sorting, delivery, and the post office network⁷. In terms of increasing operational efficiency in the network of post offices, the trend towards a reduction of the number of post offices owned by the NPOs is to be observed in the recent years. Whereas the Eurostat/DG Grow data presenting the total number of post offices and postal agencies in the EU show only moderate decline in the total numbers – from 150 thousand. in 2004 to about 142 thousand. in 2013 (with the sharpest decline in 2008), the general trend towards closure of post offices sold to external franchises is to be observed in many countries – e.g. Dutch PostNL, German Deutsche Post AG (DPAG) and Swedish Post have (almost) no more owned network while other companies like French La Poste, which have developed financial services have still a partially owned and extended network.

Figure 4. Change of the number of post offices in EU*



*Data for EU27 for the years 2004-2011 and for EU28 for 2012-2013.

Source: Eurostat/DG Grow⁸.

5. Bailly, D., Meidinger, M. (2010). The dual trend towards operational efficiencies and social regulation in European postal services, pp. 336-350.

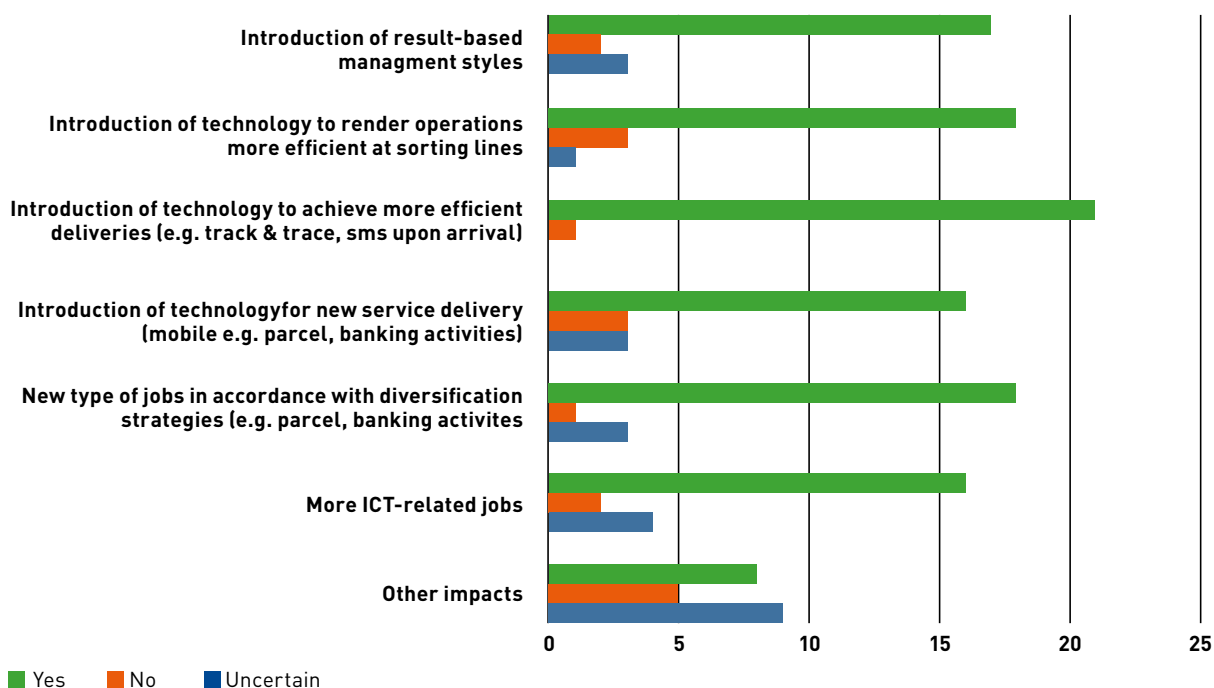
6. Ibid.

7. Bailly, D., Meidinger, M. (2013). Finding the conditions for a successful social redeployment combined with diversification of activities, pp. 305-316.

8. Glossary for postal statistics is available here: <http://bookshop.europa.eu/en/glossary-postal-statistics-pbET0415666/?CatalogCategoryID=e9gKABStGNMAAAEjQ5EY4e5L> [accessed on 13.06.2016].

The process of optimization of postal network was accompanied with an increase in operational efficiencies of the existing offices through increased automation, restructuring spaces and flows, changed opening hours, and/or reduced waiting times. Moreover, the process optimization in the area of sorting, was implemented through the automatization and centralization of sorting centres, resulting in more streamlined facilities⁹. In terms of delivery, the efficiencies were to be achieved by increasing the flexibility of delivery times, the introduction of technology to achieve more efficient deliveries (e.g. track & trace, sms upon arrival) or new types of service delivery (e.g. digital postcards). Moreover, NPOs needed to introduce efficiency-enhancing measures to optimise their diversified service provision, such as introduction of result-based management styles, the creation new types of jobs in accordance with diversification strategies (e.g. parcel, banking activities) and more ICT-related jobs become inevitable. Figure 5 below shows the use of the above mentioned optimization measures at the NPOs. The introduction of solutions for more efficient deliveries was most often recalled by the social partners who participated in the Ecorys survey (these were introduced in 87% of NPOs that took part in the survey). Such innovative delivery solutions included track& trace systems (e.g. Bulgaria, France), SMS upon arrival for domestic courier services (in Bulgaria), multiple delivery options (e.g. in France), tracking on delivery for not registered mail (e.g. in Italy), personal digital assistant with printer and POS for payments (in Italy) or GPS and geolocation tools (in Luxembourg). Three quarters of the NPOs introduced technologies to render operations more efficient at sorting lines and new types of jobs in accordance with diversification strategies. The Italian NPO referred to the introduction of automated plants and the purchase of new equipment (sorting frames, rolls, etc.) to make the sorting processes easier and quicker (similarly in Luxembourg). In Spain, sorting machines for all kind of shipping objects were introduced, while in Portugal the CTT strategy foresaw measures to increase efficiency of all the operations. These operational changes brought forward a need for changing the organisation of work, as well as for new skills of the employees. There are multiple examples that the collective bargaining process focused around adjusting to this new business requirements, which will be further described in the next sub-chapter.

Figure 5. Impact of the changes in the postal sector on innovation and optimization of the work floor (by number of countries)



Source: Ecorys survey among social partners in the postal sectors of EU Member States (employers: n=20; trade unions: n=17).

9. Bailly, D., Meidinger, M. (2015). When Rapidly Decreasing Mail Volumes Call for More Innovative Social and Economic Approaches, [in:] M.A. Crew, T. J. Brennan (eds.), Postal and Delivery Innovation in the Digital Economy, Topics in Regulatory Economics and Policy 50.

Nearly 70% of the NPOs used the introduction of result-based management styles, more ICT-related jobs and technology for new service delivery to achieve operational efficiencies. These include:

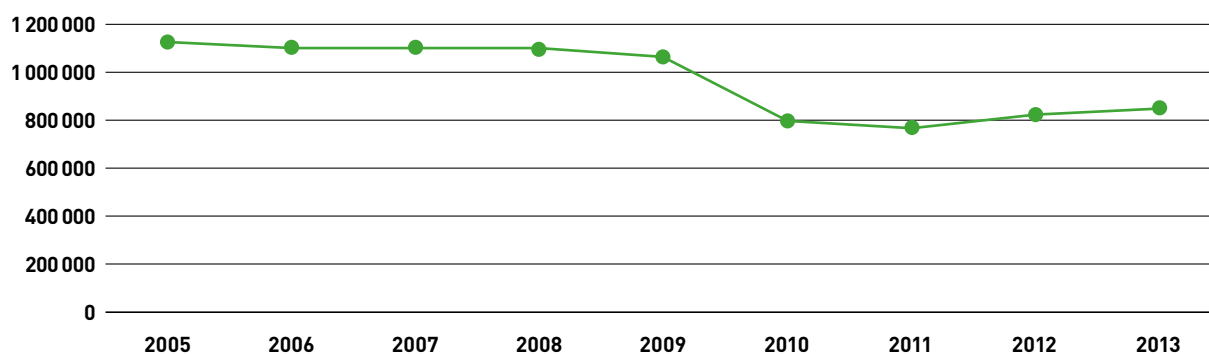
- E-subscriptions for newspapers and magazines in Bulgaria;
- Mobile postcards in Bulgaria or Spain;
- An electronic system for paying pensions at post offices introduced in Bulgaria;
- Equipping all postmen with a smartphone 'Facteo' in France;
- Digital mails and services in Italy;
- Customized stamps in Spain.

Examples of innovations in terms of more effective management systems include: enhanced training of managers to give them tools to manage the change process as introduced in La Poste, the introduction in 2015 of a new performance appraisal system based on behaviours and results achievement in Portugal, and the introduction of management by objectives in Sweden. Among the other innovation and optimization processes the most interesting example include cloud services (Italy).

3.2 SOCIAL IMPACTS

These changes in the postal sector brought along implications for employment levels and conditions. As shown in figure 6, the number of staff members working in the postal sector declined over the period 2005-2013. Since 2011 postal operators, in particular new operators but also a limited number of incumbent operators, have hired new staff. Generally speaking however, the number of staff members working in the postal sector is currently on a much lower level than before.

Figure 6. Decline in employment in national postal sectors (EU27)



Source: Eurostat/DG Growth data¹⁰.

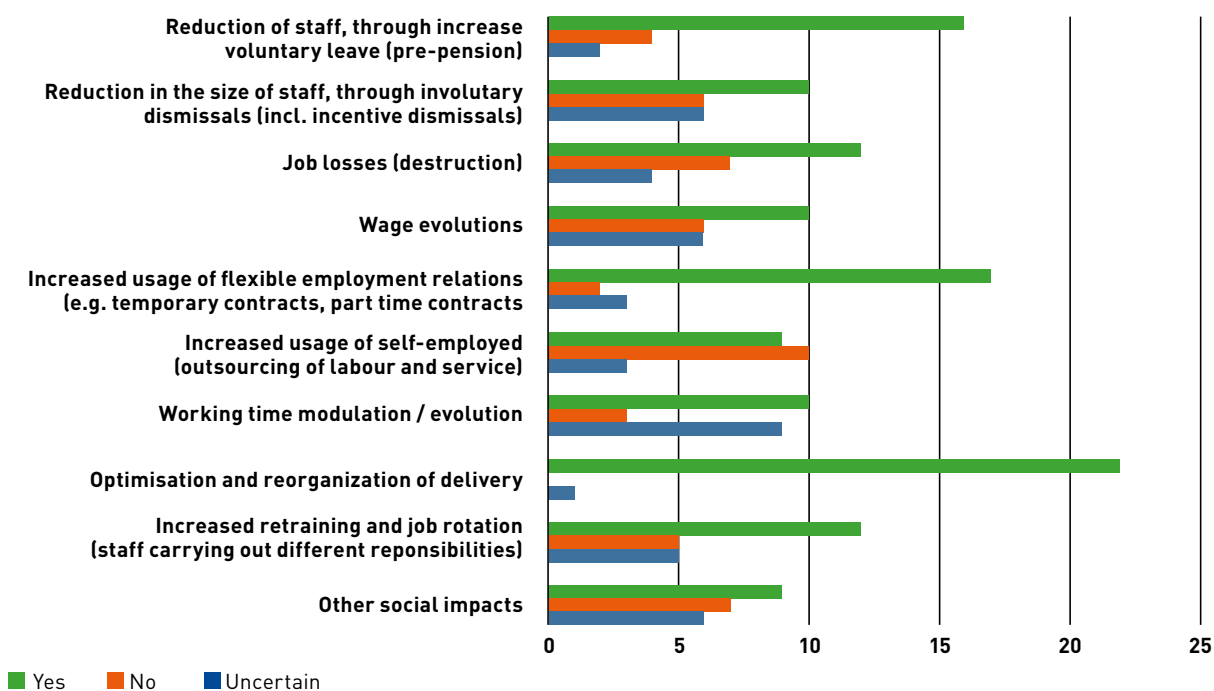
The Ecorys survey (figure 7) revealed that job losses were experienced in 12 countries, reduction of the size of staff through involuntary dismissals (including incentive dismissals) - in 10 countries, whereas the reduction through voluntary leave was even more frequently applied (16 countries). The reduction of employment cannot easily be explained by massive layoffs.

First of all, the reduction in employment occurred via natural attrition, which was possible due to the high average age of staff working at the postal operators. Natural attrition was furthermore supported by voluntary leave programmes, early retirement and in some cases involuntary dismissals. Several organisations stressed their efforts to protect full-time jobs of a permanent character, therefore limiting new recruitments and encouraging voluntary leave programmes (e.g. the Irish CLA makes clear indication to the preference of internal recruitment over external one and to the internal labour substitution).

10. Glossary for postal statistics is available here: <http://bookshop.europa.eu/en/glossary-postal-statistics-pbET0415666/?CatalogCategoryID=e9gKABstGNMAAAEjQ5EY4e5L> (accessed on 13.06.2016).

The voluntary leave programmes applied in the countries range from the programmes aimed at increasing early retirement (e.g. in Polish Poczta Polska) to the more complex programmes supporting the employees mobility (e.g. through supporting acquisition of new skills) to other jobs and sectors (e.g. Swedish Post program Futurum), including intra-ministerial mobility programmes (e.g. in Austria, Spain), work-to-work mobility programmes (in the Netherlands) and to self-employment (e.g. in France).

Figure 7. Countries observing the social impacts in their NPOs



Source: Ecorys survey among social partners in the postal sectors of EU Member States. (employers: n=20; trade unions: n=18)

Apart from the reduction of the size of employment, another frequently observed social impact is the increased usage of flexible employment relations. The increased usage of flexible employment relations mainly refers to the increase in the number of part-time contracts and the reduction of employment contracts of unlimited duration.

Moreover, changes in the sectors also included (re-) training and job rotation of employees. In a number of countries, existing staff was (re-) trained to provide the new services and products (including banking, financial or insurance services), while internal mobility was promoted simultaneously. Moreover, in France for example, redeployment of employees from mail to parcels' activities and from mail to post offices took place to facilitate an optimal response to the fluctuating demand. The changes in the Bulgarian post required the re-training on the job of both postmen and clerks to provide more services, while in the past there was separation between employees providing postal and financial services. Additionally, the work of postmen is organized in such a way that they should be familiar with several delivery areas. In rural areas it is a practice for the employees of the post office of one village to serves the post offices of other nearby villages as well.

Less frequently observed impacts of postal sector transformation observed by the social partners are wage evolutions (including wage decreases), working time modulation and outsourcing of labour and services. Wage decreases were reported by 10 countries. Some NPOs introduced a new salary system (e.g. in Germany) or differentiated the wages between staff working in cities and those working in the countryside (Estonia). In Spain moreover, wages were frozen since 2010 and even decreased by 5% for civil servants working at Correos.

With regard to the working time modulation, the change of the working time to better adjust staff availability to market needs were e.g. introduced in Bulgaria (longer working hours for serving clients applied in periods with higher volumes), in Germany, Portugal and Italy. In Austria, the yearly modulation of working time to better manage peak of activities was set by 2012 CLA. Local experiments of working time adaptation for postmen with deliveries of parcels in the evening have been put in place in France as well as experimentation of delivery on Saturdays and even Sundays in some countries. Finally, a small number of countries reported the outsourcing of certain collateral services – e.g. security, cleaning, transports, mailboxes maintenance and pouch service in Spain or in the logistics area in Sweden.

The table 2 below provides an overview of the countries in which the various social impacts of the changes have been observed.

Table 2. Observed social changes in the sector

No.	Social impacts in the postal sectors	Countries that observed these impacts	Ratio
1.	Reduction in the size of staff, through increase voluntary leave (pre-pension)	Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, France, Germany, Greece, Ireland, Luxembourg, Netherlands, Poland, Portugal, Slovakia, Sweden, United Kingdom	16 out of 22 countries participating in the survey
2.	Reduction in the size of staff, through involuntary dismissals (incl. incentive dismissals)	Bulgaria, Croatia, Czech Republic, France, Italy, Lithuania, Luxembourg, Netherlands, Slovakia, Sweden	10 out of 22 countries participating in the survey
3.	Job losses (destruction)	Bulgaria, Czech Republic, Estonia, Germany, Ireland, Netherlands, Poland, Slovakia, Spain, Sweden, United Kingdom	11 out of 22 countries participating in the survey
4.	Wage evolutions	Cyprus, Estonia, Germany, Greece, Ireland, Lithuania, Malta, Poland, Slovakia, United Kingdom	10 out of 22 countries participating in the survey
5.	Increased usage of flexible employment relations (e.g. temporary contracts, part-time contracts)	Belgium, Bulgaria, Cyprus, Czech Republic, Estonia, France, Greece, Ireland, Italy, Lithuania, Luxembourg, Malta, Poland, Slovakia, Spain, Sweden, United Kingdom	18 out of 22 countries participating in the survey
6.	Increased usage of self-employed (outsourcing of labour and services)	Belgium, Cyprus, Czech Republic, Estonia, Greece, Ireland, Luxembourg, Slovakia, Sweden	9 out of 22 countries participating in the survey
7.	Working time modulation/ evolution	Belgium, Cyprus, Czech Republic, Estonia, France, Germany, Italy, Lithuania, Luxembourg, Netherlands	10 out of 22 countries participating in the survey
8.	Optimisation and reorganization of delivery	Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, France, Germany, Greece, Ireland, Italy, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Slovakia, Spain, Sweden, United Kingdom	21 out of 22 countries participating in the survey
9.	Increased retraining and job rotation (staff carrying out different responsibilities)	Belgium, Bulgaria, Cyprus, Czech Republic, France, Germany, Greece, Italy, Lithuania, Malta, Poland, Slovakia	12 out of 22 countries participating in the survey
10.	Other social impacts	Belgium, Cyprus, France, Germany, Ireland, Luxembourg, Netherlands, Spain, United Kingdom	10 out of 22 countries participating in the survey

Source: Ecorys survey among social partners in the postal sectors of EU Member States (employers: n=20; trade unions: n=18)

4. DIVERGENT APPROACHES OF MANAGING SOCIAL CHANGE AT NATIONAL POSTAL OPERATORS

In Europe, NPOs have managed these social changes through arrangements laid down in Collective Labour Agreements (CLAs). Given the traditional high levels of unionization among postal sector employees, collective bargaining is traditionally a prominent feature of the sector. Hence trade unions have always been extensively involved in wage-setting and the negotiations on other employment conditions. The management of social change is no exception. The CLAs offer the key levers for NPOs to adapt their workforce to the new market conditions that have emerged. The precise content of these CLAs and their outcomes in terms of levers for the management of social change strongly differ within Europe.

Whereas the CLAs reflect different outcomes of negotiations between social partners, the divergence also originates in a variety of contextual factors. On the one hand, EU Member States have different historical traditions in collective bargaining processes and also different legal frameworks that govern the collective bargaining process as well as the labour market itself. These traditions and legal frameworks structure the interactions between social partners as well as the options available to them to manage social change. On the other hand, postal sector operators in the EU follow different business strategies and are to different extents confronted with competition from new operators. As the postal companies find themselves at different stages of adaptation, the need to restructure varies among them.

These contextual differences limit the comparability between the CLAs that have been concluded in the 16 EU Member States since the launch of the EU's Third Postal Directive. In our comparison we therefore focus on several key issues that are pivotal for the management of social change. The first issue concerns the wages. Wages are a key deterrent for the competitiveness of NPOs on the liberalised postal market since these determine to a large extent their cost structure. However, the downwards flexibility of wages is limited¹¹, albeit not impossible as postal sector agreements in the EU have shown. Other key levers for the management of social change will also be taken into account.

In their study on the response of collective bargaining to the 2008 economic crisis, Vera Glassner et al. (2011)¹² identified six categories of provisions laid down in company-level agreements in various manufacturing and service sectors, including the postal sector, in Europe. We adopted these categories in order to facilitate the comparison between the CLAs in the postal sector. The six categories are:

1. Introduction of short-time work and/ or temporary lay-offs: **Part-time unemployment or short-time work;**
2. Variations in working-time arrangements: **Measures that allow for a more flexible use of human resources to respond to fluctuating demand and to avoid lay-offs for full-time staff, such as working time accounts, flexible contracts, leave schemes;**
3. Mitigating planned job losses: **Early retirement, internal/ external mobility (redeployment), non-renewal of contracts, non-filling of vacancies;**
4. Support and compensation for redundant workers: **Measures laid down in Social Plans and include severance payments, (re-)training, mobility, support with finding new employment and/ or becoming self-employed;**
5. Employee concessions on pay, working time and other working conditions: **Employee commitment to lower wages;**
6. Employment guarantees: **Employer commitment to full-time contracts, to avoid involuntary dismissals, and to avoid hiring people on 0-hour contracts.**

Training constitutes a cross-cutting provision as it can be used to mitigate job-losses and support redundant workers by facilitating mobility. According to Glassner et al. (2011), a closer look at service-sector agreements in Europe reveals that employee concessions, employment guarantees and measures to mitigate job-losses were the most commonly used measures. As our analysis shows, the measures included in the postal sector CLAs slightly deviate from this. Before turning to their content in terms of social change management, we first present some background information on the CLAs.

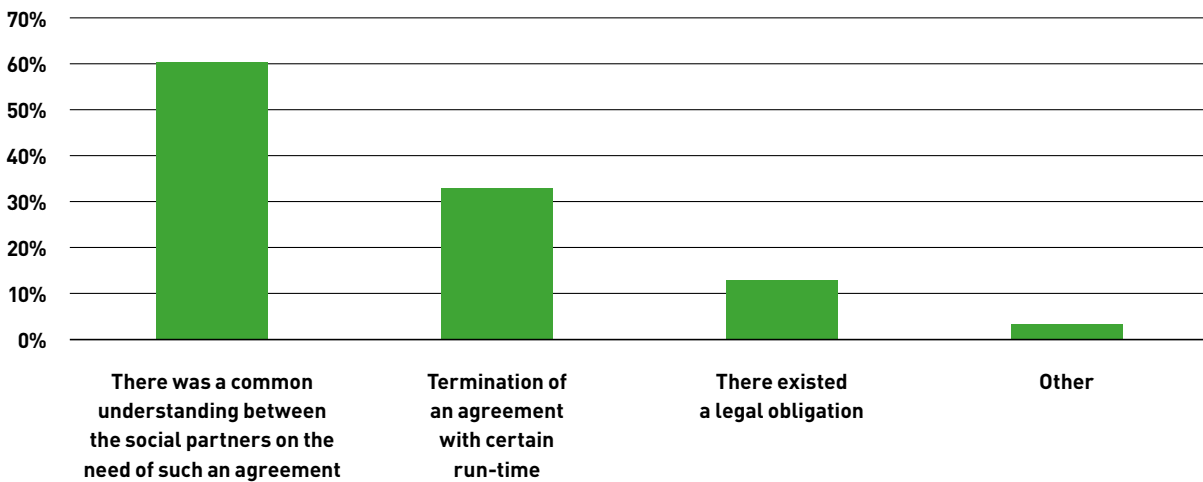
11. cf. Scharpf, F.W. (1999) Europa regieren.

12. Glass, V., M. Keune & P. Marginson (2011), Collective bargaining in a time of crisis: developments in the private sector in Europe. *Transfer* 17(3), pp. 303-321

Background of the CLAs

The Ecorys survey shows that most of the CLAs were concluded because the social partners concluded it necessary to reach an agreement in the light of the changes in the sector. 60% of the respondents indicated that there was a common understanding among the social partners of the need of such an agreement. About 30% stated that the validity of a previous agreement with a certain runtime expired and hence a new agreement needed to be negotiated. Only 13% indicated that there existed a legal agreement that forced the social partners to conclude an agreement.

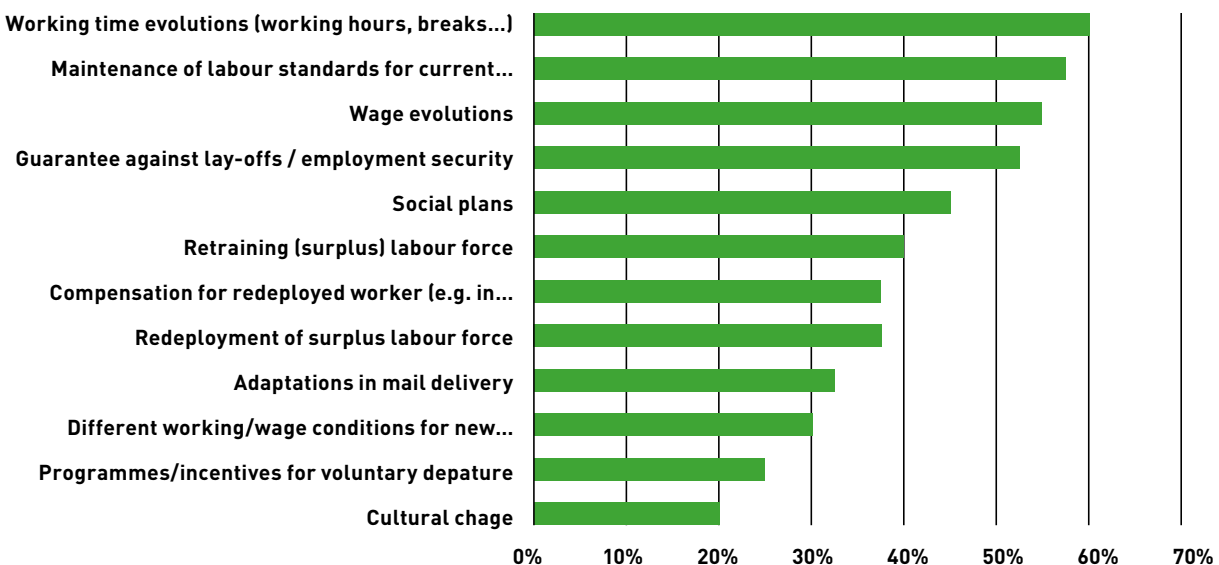
Figure 8. Reasons for concluding a CLA



Source: Ecorys survey among social partners in the postal sectors of EU Member States (employers: n=20; trade unions: n=18).

The Ecorys survey also asked about the main topics covered by the agreement. These are in particular Working time evolutions (60%), maintenance of labour standards for existing employees(58%), wage evolutions (55%), and employment security (53%). The topics are further depicted in Figure 9.

Figure 9. Topics covered in the CLAs



Source: Ecorys survey among social partners in the postal sectors of EU Member States (employers: n=20; trade unions: n=18)

Coverage of CLAs

CLAs do not automatically cover all staff working for the NPOs. Self-employed staff members that are hired by the postal companies are never covered by the CLAs. Even though the majority of CLAs are applicable to all staff members, certain staff categories working under a labour contract for the company can be exempted from an agreement: In Germany for instance, there are different CLAs for staff working at DHL in the parcel sector and staff working elsewhere at DPAG. In Denmark and Spain the higher management is explicitly excluded from the CLA since these are hired on the basis of individual contracts. In Italy moreover, a separate CLA for management exists (as opposed to the CLA for non-managerial staff). Table 3 summarises the coverage of the CLAs included in this study.

Table 3. Coverage of CLAs

	All employees	Exceptions
AT	✓	
BE	✓	
DE	✓	Employees in operations are covered by different CLAs
DK	✓	Management is excluded
EE	✓	
FI	✓	
FR	✓	
IE	✓	
IT		Different CLAs for managerial and non-managerial staff
NL	✓	
PL	✓	
PT	✓	
RO	✓	
ES	✓	Management is excluded
SE	✓	Staff hired under "special arrangements" is excluded
UK	✓	

4.1 SALARY PACKAGES

Staff structure and employment conditions are to a large extent determined by the legacy of postal companies as public sector organisations. Many – if not all – employees of the former public sector postal organisations had the status of civil servants and enjoyed associated high-level employment conditions. They therefore have a tradition of quality and employment conditions that are comparatively well-protected. In several countries, NPOs still have a significant share of civil servants among their employees. Even though this share decreased during the last years, the 2013 WIK report points to NPOs in Austria, Belgium, Spain, France and Luxembourg where the share of civil servants equalled or exceeded 40% of total staff size. Civil servants generally have higher wages and higher benefits for which employers need to pay high social contributions.

Since the liberalisation of the postal sector commenced, employment conditions deteriorated with regard to wages paid in the sector¹³. New competitors pay considerably lower wages than those offered by the former monopolist NPO. In order to remain competitive the NPOs reduced wages for (newly hired) employees. Wage differentiation between existing and new staff was introduced for instance in Germany, in Estonia and in Belgium with auxiliary employees¹⁴.

While the level of the wages have been lowered to render NPOs more competitive in the light of new market conditions, our analysis of the CLAs revealed that the salary packages also have been simplified during the period 2009-2015. In practice this implies a reduction of the number of function groups

13. Cf. Forba Report (2013).

14. Ibid.

existent in the company as well as a reduction in the number of allowances. Some CLAs include an explicit statement that salaries are annually negotiated (DK, EE, FR) whereas the salaries mentioned in the CLA for other NPOs are usually valid for the duration of the CLAs.

The analysis of CLAs revealed that salary packages in the postal sector comprise a fixed basic salary and a variable component in all countries investigated. The variable component allows NPOs to adjust wages more in accordance with market conditions. Adapting wage costs to market conditions works best with performance-based allowances that for instance depend on individual performance or on company performance or a combination of both. Based on our analysis, such performance-based payments are not offered by all NPOs, and also not to all types of staff.

Basic salaries

Basic salary packages differ usually per function group, whereas the level of the basic salary within each function group depends on factors like age, experience (both qualifications and/or years of service). In Belgium, bpost distinguishes between a basic salary package for civil servants and a basic salary package for new contractual employees called auxiliary postmen, whereas the latter level is lower than the former to be in accordance with the market. In the Netherlands a special basic salary package exists for delivery staff on Saturdays, with hourly rates well above the minimum wage level. In several countries (DE, IT, NL) the basic salary is topped up with additional remunerative benefits like holiday pay and /or a 13th month.

Variable salaries

The variable component of the salary packages can comprise many different types of remuneration that depend mainly on performance or on a-typical working time arrangements. These allowances include for example allowances for working at night, working in the weekend or on holidays, but also performance-related bonuses. Based on the available information from the CLA analysis not all NPOs offer the same allowances. In AT, DE, DK, FI, PL, PT, RO, ES, UK special allowances for working night-shifts are foreseen in the CLAs. In DE, DK, FI, PT, RO and ES, special allowances exist for staff working on Saturdays, Sundays or on public holidays. In some cases like PostNL a premium has already been incorporated in the higher basic wage for delivery staff on Saturdays. Hence an allowance for working on Saturdays has not been introduced.

Performance-based allowances are only foreseen in the CLAs in BE, DE, F, IT, NL, PL and ES. The applicability however varies strongly: At DPAG all staff have a performance related pay ranging from around 5% - 17,5% of the annual base salary whereas a performance-related share at PostNL is only foreseen for commercial staff.

Allowances become more divergent with regard to particular issues. In NL, BE and PT allowances exist to cover the costs of the use of private vehicles, bicycles in particular, for work purposes. In addition, NPOs in BE, FR and PT offer allowances (vouchers) for lunch. In France and Italy postal companies provide family allowances to cover costs of children of employees.

In addition, it appears that special allowances for staff working on Saturdays and on evenings tend to disappear, which will be the case at the end of 2017 within PostNL. Also, the agreement signed within bpost in October 2015 foresees that Saturday work becomes a regular working day. The decrease of costs is also managed by the suppression of breaks and meal breaks. This is the case in the CLA concluded within PostNord Denmark in December 2015.

Overall, the number of allowances has been reduced at NPOs. Postal services as civil service organisations originally provided up to 100 types of allowances. This reduction resulted out of the need to administer salaries more efficiently as the administration of allowances requires much resource. La Poste for example simplified the structure of variable payments 20 years ago with the introduction of "additional compensation" that combined all public sector bonuses in a single allowance. Some NPOs however, like in Italy and Poland seem to continue to offer a wide variety of allowances.

The table below presents an overview of the various salary components for sector workers based on the analysis of the CLAs.

Table 4 Salary packages at NPOs

	Fixed	Variable
AT	Basic salary per function group (level depends on age, experience and geographical location)	<ul style="list-style-type: none"> Night shift allowance
BE	Basic salary per function group for baremic/contractual staff (annually adjusted); For auxiliary staff (static, neither indexed nor increased with experience).	<ul style="list-style-type: none"> Lunch/ dinner vouchers; End of year allowance (until end 2016); Meal allowance and compensation for transportation costs; Bonus payment.
DE	<ul style="list-style-type: none"> Basic salary per function group (9 salary ranges) Holiday pay 13th month (Christmas) 	<ul style="list-style-type: none"> Performance related pay ranging from around 5% - 17,5% of the annual base salary Night shift allowance Allowance for working on Saturday or Sunday or on public holidays. Allowance for religious celebrations, e.g. 24.12./31.12., Easter Saturday
DK	<ul style="list-style-type: none"> Basic salary per function group (4 salary ranges) excluding pension insurance contributions 	<ul style="list-style-type: none"> Night shift allowance Allowance for working on Saturday or Sunday or on public holidays; Allowance for working on-call.
EE	Basic salary per function group	
FI	Basic monthly or hourly salary per function group	<ul style="list-style-type: none"> Performance-related payment only white collar workers (not for blue-collar workers); Night/ evening shift allowance Allowance for working on Saturday or Sunday; Overtime allowance.
FR	Basic salary per function group	<ul style="list-style-type: none"> Various allowances; Allowances for employees with families; Mutual aid and social solidarity programmes; Holiday vouchers.
IE	<ul style="list-style-type: none"> Basic salary per function group 	<ul style="list-style-type: none"> Overtime allowance
IT	<ul style="list-style-type: none"> Basic salary per function group 13th month (Christmas) 14th month Individual seniority pay Additional pay for other function groups 	<ul style="list-style-type: none"> Bonus payments Allowances for employees with families
NL	<ul style="list-style-type: none"> Basic salary per function group (level depends on age, experience (qualification/ service years for delivery staff), functioning of the employee and type of employment contract (Full-time versus Part-time); Holiday allowances Special hourly rates for delivery staff on Saturdays, exceeding minimum wage. 	<ul style="list-style-type: none"> Bonuses only for commercial staff; Overtime and results-based compensation for delivery staff; compensation for transportation costs.;
PL	Basic salary per function group (3 groups: postmen, customer advisors, all other employees) (level depends on type of employment contract, type of work, qualifications, quality and quantity of performed work)	<ul style="list-style-type: none"> Nigh-shift allowance (Labour Code); Various allowances; Bonus payments
PT	Basic salary per function group (7 function groups) (level depends on experience (years of service) and worker's merit and on seniority);	<ul style="list-style-type: none"> Night shift allowance Allowance for working on Sunday or on public holidays;
RO	Basic salary per function group	<ul style="list-style-type: none"> Night shift allowance Allowance for working on Sunday or on public holidays; Allowance for working overtime Bonuses (e.g. for holidays)
ES	<ul style="list-style-type: none"> Basic salary per function group (5 function groups) The remuneration of part-time workers will be in proportion with the amount of hours worked 	<ul style="list-style-type: none"> Performance-related payment; Night shift allowance Allowance for working on Saturday and/ or Sunday or on public holidays; Productivity-related allowances Variable allowances.
SE	Basic salary per function group	Unknown
UK	Basic salary per function group	<ul style="list-style-type: none"> Night shift allowance; Allowance for working on unsocial hours; Allowance for working overtime.

Source: CLA analysis Ecorys.

4.2 SOCIAL MANAGEMENT LEVERS INCLUDED IN THE CLAS

Working-time arrangements

For the purpose of this comparison working-time arrangements refer to the flexible interpretation of hours worked during a working week as well as to short-time working arrangements, working-time modulation and to flexible employment contracts.

Short time work

The possibility for social partners to use short-time work for social change management depends on national employment legislation in place. It requires employers to claim public unemployment insurance benefits for their surplus staff. Instead of the need to lay off workers, short-time work offers the possibility for surplus staff to work part-time and to receive a part-time unemployment benefit. Not all unemployment insurance schemes allow for such an application. Short-time work is therefore only applied by a limited number of NPOs in Belgium, the Netherlands, Sweden and the UK. The CLA in Sweden for example offers the possibility for surplus employees over 60 years old to accept a partial pension combined with the part-time employment. In Spain, the CLA includes the possibility for surplus staff to take unpaid leave, which is a de facto shortening of working time, albeit not covered via the public social protection system. Instead workers receive a sum of money from the NPO to retire before the age of 65. This sum is lower than the earnings they would receive had they continued to work under their normal salaries.

Working time modulation

Modulation of working time is increasingly applied by NPOs to manage peak activities. This refers to the possibility to increase the number of working hours on the short term but remain with the agreements on regular working hours on the longer term. A new working time model in delivery was introduced at the Austrian Post in September 2012. Therewith a new calculation method of working time was put in place for the 9000 postmen from 1st January 2013 that takes into consideration the real working time and not anymore the distributed quantities and routes. The new calculation method includes two main measures:

1. To better calculate the volume of work, postmen are equipped with a GPS transmitter which shall enable to better evaluate the work volume for a specific delivery centre and therefore to evaluate the needs in terms of employees and increase flexibility.
2. A new system to manage in a more flexible manner overtime in order to enable postmen to work more during peak periods and recover these hours during periods of lower demand. For this purpose, each postman will have a corridor of working time of 300 extra hours which is the annual maximum limit. If less than 150 hours are used, overtime can be recovered, and if more than 150 are used, they will be paid.

Working time modulation is also introduced through other means. For instance, in France parcels and mail are more often delivered in a combined manner. In Belgium, Saturday became a regular workday for which bpost does not pay allowances anymore. By including Saturday in the working week, bpost has more flexibility in allocation delivery staff.

Flexible employment

Flexible employment contracts such as part-time contracts, fixed-term contracts, and temporary agency work allow NPOs to hire staff more in line with their changing needs for labour following fluctuating market demands: "Fixed-term and casual employees can help posts to keep staff costs to a minimum while maintaining a flexible workforce to meet rising demand during busy periods" (IPC, 2015, p. 83). This flexibility is especially required for the delivery of parcels.

Indeed, the Forba Report (2013) states that job losses at NPO were partially offset by an equal number of jobs created by the new competitors, but that most of the new jobs were part-time¹⁵. Most NPOs have increased the number of part-time workers since the start of the liberalisation process. The precise extent of part-time work differs considerably between countries. Some NPOs such as PostNL have radically changed employment patterns and now largely operate with part-time staff.

15. FORBA, 2013: 2-3.

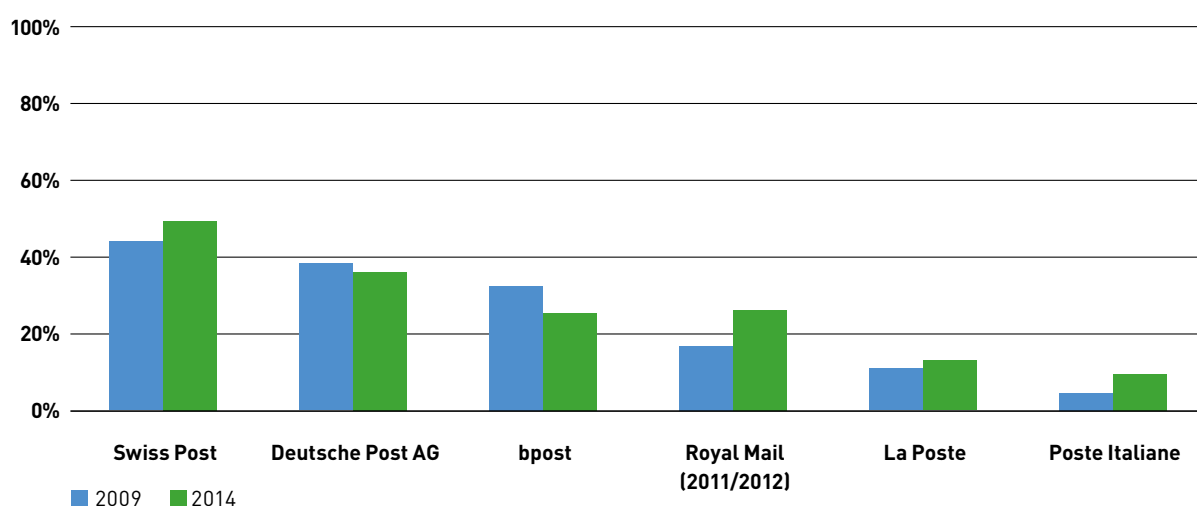
The increased share of part-time employment is not only reserved for the postal sector. During the last two decades employment legislation in all EU Member States gradually allowed employers to hire (and fire) staff under flexible employment conditions, i.e. as opposed to a full-time position. Hence the possibility to apply flexible labour contracts in postal sector CLAs is also largely determined by national employment legislation. Not all labour markets in the EU are equally flexible as contractual forms do not necessarily exist in all member states. Even if there are legal possibilities to hire staff under a certain flexible labour contract, e.g. a 0-hour contract, it is not necessarily included in the CLA. In the latest CLA for Royal Mail for instance, Royal Mail has committed itself not to employ staff on the basis of such a 0-hour contract.

The available information on the postal sector CLAs has shown that all NPOs can hire staff on part-time basis. In addition, the possibility to hire staff on the basis of temporary fixed-term contracts is in the majority of CLAs explicitly mentioned¹⁶. In France, the CLA also refers to the possibility to hire staff on the basis of intermittent contracts.

At the same time, many CLAs impose limitations to the employers to apply flexible contracts (DK, FI, FR, IT, NL, PT, ES, UK). Such limitations are particularly intended to avoid further ‘crowding out’ of existing full-time staff by new staff that is hired on part-time basis or under fixed-term contracts. Such provisions for instance limit the number of times a fixed-term contract can be renewed or specify the conditions under which an intermittent contract can be used, i.e. the latter only when it cannot disavour of the number of hours worked by part-time staff or hamper access to full-time work. In the CLA for Royal Mail for example, a quantitative limitation has been included: part-time work should not exceed ¼ of total employment.

The table below provides an overview of the incidence of part-time work at selected NPOs.

Figure 10. Incidence of part-time work at selected NPOs



Source: SDC (2016) compiled data.

In addition, staff members at NPOs are to a larger extent working on the basis of employment contracts of limited duration (fixed-term contracts) than before. Reverse trends however, can also be witnessed in the sector. La Poste for instance, is committed to convert temporary and fixed-term employees into permanent positions¹⁷. The NPO has agreed to integrate 3,000 people within La Poste that had previously worked under temporary contracts between 2013 and 2015. More than 90% of La Poste’s employees worked under permanent contracts in 2014.

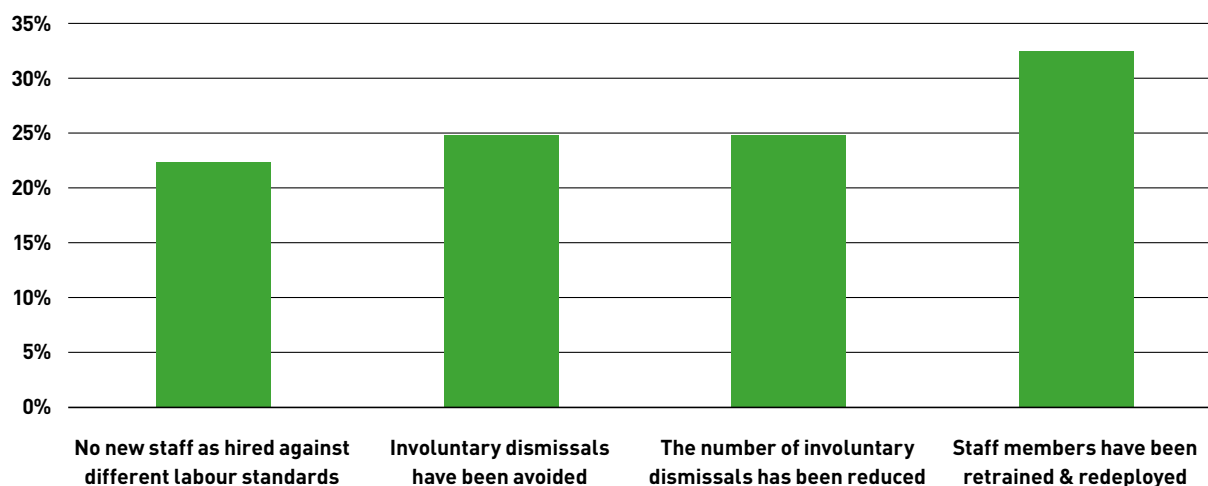
16. Except in AT, DE, EE and PL. The fact that it is not explicitly mentioned doesn’t mean that staff is not hired on the basis of such contracts. Needs to be further checked!

17. Cf. IPC, 2015, p. 83.

Measures to mitigate planned job losses

The Ecorys survey revealed that many CLAs contributed to avoid involuntary dismissals or at least to the fact that the number of involuntary dismissals has been reduced.

Figure 11. Results of the CLAs



Source: Ecorys survey among social partners in the postal sectors of EU Member States (employers: n=20; trade unions: n=18).

The analysis of the CLAs has shown that in many countries (AT, EE, ES, PT) early retirement was and still is used to mitigate planned job losses. In Portugal for instance, the bulk of the reductions followed voluntary early retirement measures and a decrease in the use of fixed-term contracts. Before the privatisation of CTT there were two types of pension schemes in place in the company: Employees that started working at CTT before 1992 had the same pension scheme as public servants. Those commencing employment after 1992 fell under the national social system. Hence employees with a long working history could choose to retire early to retain a comparatively high pension. Due to the national restructuring these two systems are converging. Some employees approaching retirement age could also opt to go for an 'early retirement.' Employees close to retirement could, for example, 'retire early' on paid leave (usually 80-90% of salaries) awaiting the day that they were eligible to receive their pensions. Once they left the company, their positions would usually not be filled with new staff (see also further in this chapter).

In Estonia, the CLA foresees subsidies for employees having more than 10 years working record at Omniva (former AS Eesti Post) and only one year until retirement. Eligible surplus staff members can herewith retire earlier. Also in Poland, the Voluntary Leave Programme foresees funding that allow certain workers to leave the company by retiring early. In Sweden moreover, the Personal Adaptation Agreement foresees an early retirement arrangement that can be offered to surplus employees after turning 60. They can choose to retire earlier and receive the amount that corresponds with the regular pension rate.

The Ecorys survey (cf. figure 13) showed that the CLAs mainly facilitated the retraining and redeployment of surplus staff. Hence an important measure that seeks to mitigate planned job losses is redeployment. Several NPOs have committed themselves in the CLAs to redeploy surplus staff elsewhere in the company (internal mobility) or to assist them in finding employment elsewhere (external mobility). NPOs like bpost have established job mobility centres to assist staff with finding other employment in or outside the company. The introduction of these job mobility centres also led to increased attention to career planning and coaching of staff members within the company.

Other NPOs, for instance in Austria, the Netherlands and Sweden introduced dedicated programmes to find alternative employment opportunities in or outside the company for surplus staff.

At Austrian Post for example, the Career Development Department supports employees to plan a new career within the company by providing advice on job interviews, helping out with skills development as well as by supporting the motivation for a job change. The Swedish programme Futurum furthermore is a voluntary programme to promote external mobility open for all surplus workers. Futurum foresees the possibility to leave employment at the NPO, while continue to receive salary and intensified support in the search for new job opportunities or a study to engage in a new career. Training and retraining are thus also offered to (surplus) staff to prepare them for new jobs. This is for instance laid down in the CLA in the UK.

At La Poste a preference for internal mobility exists. La Poste has especially established “Group Mobility Spaces” over the country to support the mobility of employees at local level between the company’s branches and from the Group to the subsidiaries.

The Ecorys survey provided some insights in the origin and destination of internally redeployed staff members. These included transfers from mail delivery to counters and parcel units, from letter sorting to parcel sorting, and from delivery to sorting.

Provisions on redeployment are at least in the case of DPAG combined with extensive provisions on “suitable and reasonable employment alternatives” and compensations packages in case for example when alternative employment offered to the surplus workers is at a lower level, when the salary is lower, or when the geographical distance from home to work increased. If the alternative employment position offered is considered ‘suitable’ and thus in line with the provisions laid down in the CLA and if eventually compensation is offered, the surplus staff member is obliged to accept the position.

Finally, several CLAs (ES and PT) include explicit statements on the non-replacement of staff with positions that have become obsolete.

Support and compensation for redundant workers

In the case that workers have to be made redundant the CLAs include a variety of measures, including references to social plans. A concrete measure that most significantly differs from those to mitigate redundancies are severance payments for laid off workers (DK, EE, FI, IE, NL, PL, RO). Other types of support and compensation for redundant workers are to be specified in social plans. In addition, other measures mentioned in the CLA range from redeployment to training. In Romania, severance payments are only paid if the NPO cannot offer another job to the redundant worker. In Finland and the Netherlands, these payments are closely associated with achieving the transition into new employment. In some countries the CLAs basically refer to applicable employment protection legislation and present the procedure.

Concessions

On the basis of the analysis of the CLAs only a limited number of concessions made by either trade unions or employers have been identified. In Spain the trade unions agreed with a wage freeze or even a decrease: according to a CCOO representative, there has been a wage freeze since 2010 as well as a 5% wage decrease for the civil servants in 2012. As discussed previously, wage levels have been decreasing everywhere in the postal sector in Europe since the liberalisation process. Hence perhaps more interestingly for this analysis are the concessions done by the employers. NPOs in BE and FR committed themselves to hire new staff on full-time basis, whereas Royal Mail is committed to avoid hiring staff on the basis of 0-hour contracts, which can be regarded as new commitment from these employers to higher level employment standards. In the UK furthermore, the CLA includes an explicit commitment to avoiding compulsory redundancies. In Spain the CLA simply contains a statement that Correos will hire new staff. The CLA does not clarify under what kind of conditions these new employees will be hired. At Poste Italiane the recruitment of new staff is not foreseen in the CLA but in individual agreements for subsidiary companies.

Training

Training is in a variety of ways addressed in the CLAs. In the CLAs in DE, FI and PL no provisions on training are included. This can be a result of the fact that training is not a subject of discussion between the social partners. At DPAG for instance, the issue of trainings is formally discussed between the Works Council and the management of DPAG.

In those instances where provisions on training are included in the CLAs, they do so in various ways and for different purposes. In some CLAs only include references to 'basic' trainings such as obligatory professional training (AT), a training delivered by the trade union (EE) or initial training (RO). In addition, references to trainings that are solely offered in the framework of restructuring are included in the CLAs in Belgium and the UK. For example, bpost offers (surplus) employees the opportunity of earning a high school degree if they have not had the chance of earning a degree in the past.

Finally, provisions on training are included to promote life-long learning and individual career development (DK, ES, FR, IE, NL, PT, UK). Some CLAs, especially in France and the UK provisions on training mirror the increased attention to career planning and coaching. Here training is considered key to the development of staff members and the process of adapting them to new business activities. In the latest CLA adopted in France in 2015, access to training as well as professional evolution are considered by the signatory partners two key pillars for each employee to become the "actor and the beneficiary of the transformation" at La Poste. In the Netherlands moreover, training is arranged via R&D funds (O&O fondsen) that are sector organisations in which employers and trade unions are represented. These R&D funds seek – among others- to facilitate and stimulate training and (re-) education of employees working in the sector, thus also PostNL employees, whereas the employer is the co-financing partner for that part of the training investment that is not covered by subsidies. In the CLA of Poste Italiane training is recognised as an important tool to achieve the company's goals. A Joint Body for Training and Retraining, that defines important Training' projects, has been established.

Table 5. Overview social change management levers at NPOs

		AT	BE	DE	DK	EE	FI	FR	IE	IT	NL	PL	PT	RO	ES	SE	UK	
Working time arrangements	Fixed-term contracts	√	√ 1.90% ¹⁸	√	√		√	√ 6.3%	√	√ 1.6%	√	√ 6.5%	√	√	√	√ 2.9%		
	Part-time work	√	√ 25.6% ¹⁹	√ 34%	√	√	√	√ 6.6%	√	√ 9.8%	√ 79%	√	√ 5.5%	√	√	√ 49.1%	√ 26.4%	
	Short-time work	√	√					√			√					√	√	
	Working-time modulation	√		√	√			√										
	Agency work	√			√		√ 11% ²⁰	√		√ 0.1%	√ 11%						√	√
	Flexible working hours	√		√							√							
Measures to mitigate planned job losses	Early retirement	√				√		√			√	√	√		√	√		
	Redeployment: internal mobility	√		√				√	√	√	√		√		√		√	
	Redeployment: external mobility	√		√				√			√							
	Non-replacement	√											√		√			
	Training	√						√		√							√	
	Career counselling	√					√	√			√							
	Support in finding new job / setting up own company	√					√	√		√	√							
	Financial arrangements for volunteer leavers	√					√			√	√							
	Voluntary leave programme	√								√	√							
	Job search assistance	√							√			√						
Support & compensation for redundant workers	Severance payments	√			√	√					√	√		√				
	Training		√		√			√								√	√	
	Job search assistance	√	√		√			√			√					√		
	Career counselling	√					√	√			√							
	Support in finding new job / setting up own company	√					√	√			√							
	Redeployment: internal mobility	√						√										
Concessions	Limitations to flexibility (employers)	√			√		√	√		√	√		√		√		√	
	Commitment to full-time contracts (employers)	√	√					√		√								
	Commitment to hire new staff (employers)	√						√		√					√			
	Commitment to avoid compulsory redundancies (employers)	√		√							√						√	
	Lower standards for auxiliary staff (trade unions)	√	√															
	Wage freezes & decreases (trade unions)															√		
	Decrease in wage levels for new hires	√		√												√		
Training	Basic training	√				√				√				√				
	Restructuring		√							√						√	√	
	Lifelong learning, career development	√			√			√	√	√	√		√		√			
	No reference			√			√					√						

Source: CLA analysis Ecorys.

18. Companies' annual reports 2014

19. Company annual report 2015

20. WIK Survey: WIK (2013). Main developments in the postal sector (2010-2013).

5. GLOBAL STRATEGIES OF SOCIAL PARTNERS

5.1 A TYPOLOGY OF COLLECTIVE LABOUR AGREEMENTS: SHARED FEATURES

On the basis of the analysis of the CLAs included in this study, it is possible to identify several (how many?) types of CLAs. These types have the following characteristics:

1. Measures to manage social change adopted as part of 'regular' Collective Labour Agreements: These Agreements are concluded at company or at sector level by the social partners and govern key employment relations in terms of wages, working time, employment contracts, etc. These are usually renegotiated previous agreements.
2. Specific Collective Labour Agreements aimed at managing social change: These agreements are concluded at company level by the social partners and can include precise measures (cf. section 4.2. on social change levers) or have the character of framework agreements that set out broader principles for change.
3. Integrative Collective Labour Agreements to merge arrangements on employment conditions for different types of staff members (e.g. mail versus parcels and blue collar versus white collar workers).

These types of CLAs are not mutually exclusive as hybrid types may exist. An integrative CLA for instance can include provisions on managing social change: In the case of PostNL for example, the CLAs for mail and parcel delivery staff are merged to eradicate significant differences in employment conditions for mail and parcel delivery staff.

Also the DPAG's Mantel- and Entgelttarifverträge are merged, previous regular agreements for blue and white collar staff and anticipate on the social consequences of the liberalised postal sector market through various amendments, e.g. these include efficiency-enhancing measures such as the shortening breaks. In those countries where multiple CLAs apply to postal sector employees, the typologies can occur at multiple occasions.

The Table below presents an overview of the classification of the various CLAs in the types.

Table 6. Types of CLAs

	Measures adopted from 'regular' CLAs	CLA specifically aimed at managing social change	Integrative CLAs
AT	√		
BE	√		
DE	√	√	√
DK	√		
EE	√		
FI	√		
FR	√	√	
IE		√	
IT	√		
NL			√
PL	√		
PT	√		
RO	√		
ES		√	
SE	√		
UK		√	

5.2 TRADE-OFFS ENCOUNTERED

Agreements laid down in the postal sector CLAs reflect different trade-offs between the various negotiated options. In their article on innovative social and economic approaches in the postal sector Bailly & Meidinger (2015) refer in this context to the case of PostNL where the maintenance of labour conditions in terms of wages and working time was prioritised above forced redundancies.

Glassner et al (2011) found that the negotiations at company level in times of crisis were much more of a distributive nature, and hence more competitive, than the CLA negotiations in times of crisis that took place at sector or national level, which were more of an integrative (cooperative) nature. The key trade-off that is being negotiated between social partners concerns the maintenance of competitiveness on the one hand and of high levels of employment and/ or wages on the other hand.

Our analysis revealed that trade-offs are not always that clearly visible in the CLAs. Such trade-offs are most visible in those cases where the CLA comprise explicit concessions from either or both the side of employer's and employees. Perhaps the Spanish CLA is the most obvious case because it comprises both an employee commitment to freeze wages and to lower wage levels of public servants, with a commitment from employers to hire new staff (against lower employment conditions).

At the same time however, the legal framework constituted by employment protection in which negotiations on CLAs take place limits the extent to which trade-offs can be discussed. For instance, employment protection legislation provides the options to the social partners for how to deal with compulsory redundancies. The precise trade-offs have been already negotiated between social partners at a higher level, at national level for instance, when new laws to make the labour market more flexible were introduced.

Furthermore, CLA negotiations create an own dynamic where reputation of the social partners plays a large role. NPOs have to uphold a reputation to provide quality services delivered by a secure and trustworthy institution.

In addition, there is the element of timing in the negotiations: CLAs are often amendments of previous CLAs and previous restructuring measures. In case market circumstances allow, employers can commit themselves to hire new staff, on the basis of full-time labour contracts, or to avoid the hiring of staff on the basis of 0-hour contracts after having staff sizes reduced or new staff hired earlier during previous periods. NPOs like La Poste, committed themselves to hire new employees on the basis of permanent contracts and to contribute to a better balance between work and private life in return of increased internal flexibility of staff members.

5.3 EVOLUTION OF SOCIAL MODELS

Not only do CLAs reflect different trade-offs, these agreements also represent social models advocated by both the NPOs and trade unions. The CLAs include agreements on how to employ, to reward and to part from staff members, which together constitute a social model. There is however not a single social model that can be found in all CLAs from across the EU. The divergence follows from the different outcomes of negotiations between the social partners, but also from several common trends.

These common trends predominantly relate to the fact that NPOs transformed from public sector organisations with civil servants as employees to commercial companies with employees contracted on the basis of conditions that have been agreed upon by social partners under competitive circumstances in the evolving postal sector market. In addition, a diversification of the service portfolio has taken place at all NPOs, which contributed to the changes in employment levels and labour conditions. Finally, this transformation process is flanked by exogenous trends on the labour market that are present in all EU Member States and not limited to the postal sector only. These trends include an increase of flexibilisation of employment relations as well increased shares of variable wage components.

These trends have taken place and are still taking place to different extents in the EU. The shift from public sector organisations to commercial companies occurred unevenly as privatisation happened only recently in some countries (e.g. Portugal) and civil servants still comprise large shares of the total employees in others (e.g. Cyprus). Also the diversification of service portfolios occurs differently at the NPOs with for example some postal companies increasingly focussing on parcels and others on banking. Finally, the change process of labour markets for instance brought forward different degrees of flexibilisation across Europe, with the Netherlands and the UK being forerunners, where it is for example possible to employ workers without a guaranteed number of hours (0-hour contracts).

With CLAs anticipating on different types of situations at NPOs in different contexts, the associated social models differ as well. The continued commitment of social partners to social dialogue constitutes the core of the postal sector social models.

The liberalised postal sector in the EU created economic necessities for NPOs to restructure. In practice, this caused employers to advocate a decrease in employment levels and a lowering of labour conditions. With legislation that makes the labour market more flexible in force, employers became potentially able to do so unilaterally. For trade unions however, such measures would be undesirable. While recognising the need to restructure, lowering employment levels and labour conditions represent for trade unions a loss of worker's rights and privileges.

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. Indeed, employment levels and labour conditions have been significantly lowered at most NPOs, but the agreements between NPOs and trade unions in the CLAs paved the way that this happened in an often socially acceptable manner.

At the same time NPOs increasingly have a genuine interest in maintaining decent employment levels and labour conditions to maintain the good staff within the companies and to attract new staff with skills necessary to provide new services. Several NPOs' model relies on the rationale that good working conditions favour stable and qualified staff and thus the quality of services. The precise needs of NPOs to restructure and to prefer certain options results from the different business models applied as well the stage of restructuring in which NPOs find themselves. Furthermore, the capacity of NPOs to prefer some options over others e.g. is the NPO able to finance severance payments, to redeploy surplus staff internally or to offer support with finding a new job. Hence, when comparing the agreements laid down in the current CLAs with those agreed upon in earlier CLAs, it is possible to identify a reverse trend that allow for a prudent optimistic outlook to the future of social models in the European postal sector. Some CLAs include announcements from NPOs to hire new staff, whereas other CLAs include an approximation of working conditions of flexible staff to those of permanent staff members or include wage increases for all staff members after years of restraint. Furthermore, some CLAs reflect increased attention to human resources and a refocus from redundancies to redeployment of surplus staff elsewhere in the company.

An optimistic outlook is furthermore supported by the fact that NPOs are increasingly offering new types of services that provide new opportunities for companies. These new services also provide opportunities for (new) staff members as new skills are required for the delivery of these services. These new services usually rely on the relationship of trust that employees have built with customers and require thus a stable and skilled workforce. This may bring a deterioration of labour standards to a halt at most NPOs and attract new skilled staff members.

6. LESSONS LEARNED AND EXPECTATIONS FOR THE FUTURE

Liberalisation of the postal service sector has meanwhile taken place in all 16 EU Member States included in this study. Postal operators have been privatised and markets have been opened to competition from new postal companies. In addition, new technologies and changed (consumer) behaviour caused a significant decline in traditional mail volumes and an increase in e-commerce and parcel volumes. Under these circumstances the incumbent National Postal Operators (NPOs) transformed their business models and evolved from public sector organisations into a diverse range commercial companies that are still seeking to achieve sustainable business growth by offering various services.

Not only did NPOs change their business models, the underlying social models in the organisations also altered. This process of change brought along a decrease in employment levels and working conditions that increasingly deviated from the high level public standards present in the NPOs before. The decline in mail volume caused a surplus of postmen and postwomen, whereas the increase in parcel (and other) services require new competences and increased flexibility of staff.

Hence, the quest for competitiveness seems at odds with high levels of employment and generous (public sector) working conditions. Indeed, a central trade-off that characterises restructuring is the one between competitiveness and employment. **Restructuring in the postal sector however, did not take place fully at the expense of employment and working conditions. This is the main merit of social dialogue in the postal sector. Collective Labour Agreements (CLAs) constitute central elements of the social change process in the in all EU Member States included in this study.** Postal sector employers and trade unions committed themselves to negotiate agreements on socially acceptable restructuring. The social partners agreed on the terms of restructuring in different types of CLAs: In regular CLAs, in specific CLAs aimed at managing social change and in integrative CLAs. Aside from the different types of CLAs identified, also the content of the CLAs differs significantly between the EU Member States.

These CLAs include a wide variety of social change levers that have been deployed by the social partners in the 16 EU Member States. Salary packages have been simplified and wages frozen or even lowered. In addition, the CLAs introduced various types of more flexible working time arrangements such as part-time work and working time modulations. Furthermore, measures to mitigate planned job losses ranges from early retirement to internal mobility, whereas redundant workers receive different types of support such as severance payments in the case of dismissal. CLAs also offered guarantees to postal sector workers as well as positive measures to support to the transformation in the sector.

The literature review provides much evidence for the fact that employment levels and working conditions have relatively worsened in the postal sector in the EU during the past decade. Our analysis confirmed the lower employment levels and working conditions currently existing in the postal sector, especially for new employees. At the same time however, our analysis also revealed that social changes at NPOs are not only subject to downward pressures. There has however not been any major restructuring and large social plans as it could have been the case in other sectors. To a large extent, the huge transformation of postal operators has been managed in a socially responsible way. The bottom line seems to have been reached in at least at several larger NPOs and there are first signs of a potential reverse trend. A key indicator for this trend are the concessions from multiple NPOs to hire new staff on a full-time basis. In addition, multiple NPOs now pay increasing attention to career development and mobility of staff within their (large) companies.

In the future we can expect a continued commitment of the social partners towards social dialogue and negotiating CLAs. NPOs are likely to increasingly diverge by offering new different types of services, proximity but also e-commerce and digital services that bring along different needs in terms of (skills) requirements to staff and employment conditions offered. This will also create a need for social partners to negotiate the terms of retraining existing staff and hiring new staff from particular target groups such as young jobseekers in order to find new skills. In the digital age, these evolutions may occur faster than in the previous years.

**TRAINING SEMINAR ON
E-COMMERCE AND NEW SERVICES**

BRUSSELS, 17-18 NOVEMBER 2015

EUROPEAN SOCIAL DIALOGUE COMMITTEE FOR THE POSTAL SECTOR
PROJECT “MOBILISING SOCIAL PARTNERS IN A NEW CONTEXT”

TRAINING SEMINAR ON E-COMMERCE AND NEW SERVICES

Brussels, 17-18 November 2015

AGENDA - DAY 1

	Content	Speakers
10:00-10:15	Opening remarks and Introduction	Dominique BAILLY, <i>SDC Chair</i> & Brian SCOTT, <i>SDC Vice-Chair</i>
10:15-11:00	Setting the scene: “Developments in the post sector” Overview of developments: →Market developments, impact on NPO’s and NPO strategies, regulatory and social issues	Nick VAN DER LIJN, <i>Ecorys</i>
SESSION 1: THE E-COMMERCE MARKET AND OPPORTUNITIES FOR POSTAL OPERATORS		
11:00-12:30	The e-commerce value-chain and market The e-commerce value chain Postal operators’ role in e-commerce Main social issues in the parcels’ market	<i>Ecorys</i> Botond SZEBENY, <i>PostEurop</i> Stephen DEMATTEO, <i>UNI Global Union</i>
12:30-14:00	Lunch break	
14:00-15:00	EC policy on the digital single market strategy in relation to the postal sector	Camilla OLIVIOUS, <i>DG GROW</i>
15:00-15:15	Coffee break	
15:15-17:00	Closer look at NPO’s role in the e-commerce value chain • NPO’s strategies in e-commerce and parcels’ delivery → Case 1 → Case 2 → Case 3	<i>Ecorys</i> Ralph WIECHERS, <i>Deutsche Post DHL</i> Wiesława MAZARSKA, <i>Poczta Polska</i> Harvard SIVERTSEN, <i>Postkom</i>
17:00-17:30	Preliminary conclusions	<i>Ecorys & SDC Chair/Vice-chair</i>

AGENDA - DAY 2

Content		Speakers
SESSION 2: DEVELOPING INTO NEW PROXIMITY SERVICES		
09:00-10:30	The potential of proximity services <ul style="list-style-type: none"> • Overview of main proximity services • The role of postal operators in proximity services → Case 1	<i>Ecorys</i> Hans MARIS, <i>bpost</i>
10:45-11:00	Coffee break	
11:00-12:30	→ Case 2 <ul style="list-style-type: none"> • Technologies to support proximity services 	Jeppe TRIER, <i>PostNord Denmark</i> David GILLOT, <i>CommuniThings</i>
15:00:15.15	Lunch break	
SESSION 3: NEW SERVICES IMPACT ON SKILLS AND JOBS		
14:00-16:00	Impacts on skills and competences and on work organization <ul style="list-style-type: none"> → Case 1 • Discussion 	<i>Ecorys</i> Daniel CHARON, <i>La Poste</i> SDC Members
16:00-17:00	Preliminary conclusions <ul style="list-style-type: none"> • Summary and reflections on the training, outlook to challenges ahead 	<i>Ecorys</i> SDC Chair and Vice-Chair

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FINAL CONFERENCE

BUCHAREST, 24-25 MAY 2016

EUROPEAN SOCIAL DIALOGUE COMMITTEE FOR THE POSTAL SECTOR
PROJECT "MOBILISING SOCIAL PARTNERS IN A NEW CONTEXT"

FINAL CONFERENCE

Bucharest, 24-25 May 2016

AGENDA - DAY 1

	Content	Speakers
09:30-9:45	Opening remarks	<i>Romanian post and trade union</i>
09:45-10:00	Introduction	Dominique BAILLY, <i>SDC Chair</i> & Brian SCOTT, <i>SDC Vice-Chair</i>
SETTING THE SCENE: "OVERVIEW OF THE SOCIAL TRANSFORMATION OF THE POSTAL SECTOR"		
10:00-10:45	Main outputs of the study	
	→ Typology of CLAs	Thijs VIERTTELHAUSEN, <i>Ecorys</i>
	→ Optimisation measures and evolution of social models	
	• Exchanges of views	All participants
10:45-11:00	Coffee break	
SESSION 1: EMPLOYMENT		
11:00-11:30	Main outputs of the study	<i>Ecorys</i>
11:30-12:15	National testimonies • Spanish and Portuguese case studies	Violeta ARGANDA, <i>CCOO</i> Jose OLIVEIRA, <i>SNTCT</i>
12:15 -13:45	Lunch break	
SESSION 2: WAGE POLICIES		
13:45-14:45	Main outputs of the study	<i>Ecorys</i>
	Exchanges of views	All participants
SESSION 3: WORK ORGANISATION		
14:45-15:15	Main outputs of the study	<i>Ecorys</i>
	National testimonies • Dutch and Italian case studies	Ger DELEIJ, <i>FNV</i> <i>SLC-CGIL</i>
15:15 -16:00	Coffee break	
16:00-16:30	Main outputs of the study	<i>Ecorys</i>
16:30-17:30	National testimonies • Polish, Swedish and Finnish case studies	Wiesława MAZARSKA, <i>Solidarnosk</i> Jens SAVERSTAM, <i>SEKO & PAU</i>
17:30-18:00	Main conclusions of Day 1	<i>Ecorys / SDC Chair & Vice-Chair</i>

AGENDA - DAY 2

Content		Speakers
SESSION 5: CAREER PLANNING AND TRAINING		
09:00-09:30	Main outputs of the study	<i>Ecorys</i>
09.30-10.30	National testimonies • French and Austrian case studies	Dominique BAILLY, <i>La Poste</i> Ursula BACHMAIR, <i>Austrian Post</i>
10.30-10:45	Coffee break	
SESSION 6: SEARCHING FOR A NEW SOCIAL AND ECONOMIC EQUILIBRIUM		
10.45-12.30	Social transformation strategies and trade-offs	<i>Ecorys</i>
	National testimonies • Romanian case study	Irina PURCARU, <i>Posta Romana</i> Cristi IANCU, <i>Postal Workers Union Romania</i>
	Round-table discussion on social transformation strategies	All participants
12:30-14.00	Lunch break	
SESSION 7: WHAT ROLE FOR SOCIAL DIALOGUE IN THE TRANSFORMATION AND FUTURE TRENDS?		
14.00-16.00	Synthesis of the debates and proposal of key messages	<i>SDC Chair and Vice-Chair</i>
	Round-table with all participants	All participants
16.00-17.00	Main conclusions and follow-up	<i>Ecorys / SDC Chair & Vice-Chair</i>

EUROPEAN SOCIAL DIALOGUE COMMITTEE FOR THE POSTAL SECTOR PROJECT "MOBILISING SOCIAL PARTNERS IN A NEW CONTEXT"

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