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**PROGRAMME 2012 SDC**

of the Joint Statement  
on Postal Sector Evolution

**FINAL REPORT**

“DEVELOPING A QUALITY POSTAL SERVICE  
IN THE DIGITAL AGE PROJECT” PROJECT



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



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# NEW JOINT DECLARATION ON POSTAL SECTOR EVOLUTION

## OBJECTIVE

*THE PURPOSE OF THIS JOINT DECLARATION IS:*

- to build on the Joint Declaration of 2007 and on the experience and knowledge learned by the social partners
- to fulfill the role of the SDC to offer advice to the European Commission
- to support the continuing evolution of the postal sector in the final stages of the implementation of the 3<sup>rd</sup> Postal Directive leading to full market opening in all EU Member states in 2013.
- to support the development of sustainable postal services including the provision of universal services at affordable prices as defined in the Postal Directive
- to monitor that the social clause in the 3<sup>rd</sup> Directive is adhered to in both letter and spirit
- to promote and support social dialogue in the postal sector at both European and national levels

## INTRODUCTION

The 3<sup>rd</sup> Postal Directive concludes the process of liberalisation of the postal market in the EU. Full market opening took place on 1 January 2011 in 16 member states and the remaining 11 will open their markets on 1 January 2013. During the course of the liberalisation process competitors to the traditional National Postal Operators (NPOs) have entered the market. These companies often rely on business and labour market models that differ considerably to those of the NPOs

The market opening has occurred at the same time as a significant decrease in letter mail volumes which was further accelerated by the global economic crises

The post sector is in a process of continuous and profound change which has led to an intensive reorganisation process of the NPOs, coupled with modernisation and diversification of activities

The evolutions in the sector have social consequences, both quantitative in terms of reductions in head-count and qualitative in terms of the diverse employment models in place in the various member states

The shared aim of the social partners at European level is to accompany the ongoing change process at the national level specifically in respect of training, internal and external re-deployment based on a dynamic social dialogue within the NPOs

The 2007 Joint Declaration underlined the importance of "fair competition in the postal sector". The SDC has put in place an Observatory of the postal sector since 2008. There have been two projects in this period co-financed by the European Commission, PostEurop and UNI Europa. After these projects which have enabled social partners to collect substantial data on the ongoing transformation, this new Joint Declaration aims at formalising a common evaluation of the situation and at defining key principles to accompany the change.

## A SHARED ASSESSMENT

The social partners acknowledge that the postal sector will continue to change rapidly with an impact on all NPOs, irrespective of the diverse situations that exist across the EU

The social partners acknowledge that one of the main drivers to support change and the delivery of quality postal services is a quality workforce, motivated, trained and adaptable.

The social partners recognise that NPOs and competitors have taken varied approaches to the challenges and opportunities arising from liberalisation of the market and decrease of mail volumes.

The social partners are aware that the provision of universal postal services at affordable prices has always been at the heart of the Postal Directives

Social partners are convinced that change management will continue to be a necessary tool for the evolution of the sector and its long-term sustainable economic development.

The social partners realise that there needs to be a balance between an appropriately rewarded workforce and the requirement for adaptability to the new market circumstances. Enhancing competences and employability as result of a joint effort between managers, employees and Social Partners is important.

## PRINCIPLES TO ACCOMPANY THE TRANSFORMATION

In order to accompany the ongoing transformation of the sector, social partners support the principles below:

- To better anticipate the ongoing evolutions and their consequences on the provision of postal services and on the organisation of work, employment and skills. This necessitates adequate policies accompanied by a constructive social dialogue.
- To recognise that the management of change can benefit from country specific social dialogue. The implementation of this policy relies on constructive co-operation between the social partners.
- To develop the employees' employability to promote their internal and external mobility as a shared responsibility of the social partners and of each employee. Training, re-deployment programmes and internal communication, notably based on the full use of information and communication technologies, will contribute to the goal of quality postal services
- To encourage investment in the sector, in terms of modernisation of operations to address physical and electronic substitution and to improve the adaptability of the work organisation in order to better cope with new customer requirements and to increase productivity.

## THE WAY FORWARD

The social partners have monitored the social evolutions in the sector since the Joint Declaration of 2007 and plan to proceed with this work in the future, especially in the member states where the social dialogue concept is less developed.

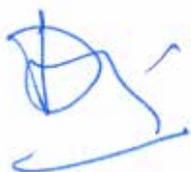
The social partners emphasise the need for competition to be fair and that they will continue to monitor the regulation of the postal sector, also in social terms

The social partners recognise that a single solution to the challenges and opportunities in the sector cannot be applied in every member state. They call on all postal operators and trade unions to implement the principles contained in this Joint Declaration and to share experiences to ensure mutually beneficial learning processes amongst EU social partners, taking national circumstances in to account

The social partners commit:

- to raise the awareness of key stakeholders of the social impacts of change
- to continue to monitor the provision of the Universal Service
- to disseminate widely the results of the social observatory
- to maintain the social observatory and to provide updated information via the SDC web site
- to ensure a continuous process of observation
- to collect selected good practices and to disseminate widely

Brussels, 18 April 2012



Dominique BAILLY  
*President SDC Postal Sector*



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## ACKNOWLEDGEMENTS

The project was successfully carried out thanks to the close cooperation between European social partners and all the involved stakeholders. PostEurop played an essential role in the management of the project while the Postal Sector Evolution working group coordinated its overall implementation. The concrete implementation was carried out by the project team composed on the employers' side by Heike Ausprung and Margaux Meidinger and on the unions' side by John Baldwin and Montserrat Mir.

Our special thanks also go to the speakers who contributed to the listening sessions. In particular the representatives, on both employers' and unions' side, from Austria, Belgium (employer), France, Germany, Italy, the Netherlands, Spain and Sweden (union), the external consultants and the representatives of La Poste who welcomed us in their post office. Their testimonies on their national situations represented a great added value in order to go more in-depth on each identified topic.

We are also grateful to Thierry Dieu from IPC who intervened during the Final Conference of the project as well as the high-level representatives, Botond Szebeny from PostEurop, Oliver Roethig from UNI Europa, Jean-Paul Tricart from DG Employment and Werner Stengg from DG Market who contributed to the round-table of this conference.

Finally we would also like to thank the experts from both postal operators and trade unions from more than 24 European countries who participated in the Final Conference of the project.

Special acknowledgements go to:

- The European Commission, and especially Guido Schwarz and Jean-Paul Tricart for their involvement and assistance;
- PostEurop, in particular Botond Szebeny, Antonino Scribellito, Waqas Ahsen, Laetitia Bruninx and Birgit Reifgerste with whom we had an excellent cooperation at each step of the project;
- UNI Europa for its commitment and support, in particular Oliver Roethig and Cornelia Broos;
- Cynthia Wee whose role as a moderator was key to the success of the Final Conference;
- The project team, Margaux Meidinger who led the project in a very effective way, and all the other members for their commitment and close cooperation.



**Dominique BAILLY**  
Chairman European Social Dialogue Committee Post



**John BALDWIN**  
Vice-Chairman European Social Dialogue Committee Post



## METHODOLOGY

The objectives of the project were several. At a time of profound transformation for the postal sector, all postal operators are faced with the need to adapt the work processes. It seemed therefore necessary to have a closer analysis on how this transformation impacts the operators' work organisation and the postal sector's environment. The logic of this project is therefore totally different from previous exercises and relies on a more selective and thorough approach on each topic. It aims at analysing in more depth a few significant initiatives initiated by National Postal Operators (NPOs) and Trade Unions. By having a closer look at and exchanging information on the opportunities and limits of exemplary practices implemented, solutions can be analysed together. Based on a different approach, this new project aims at continuing the process of close monitoring of the postal sector evolution which began with the Social Observatory initiative in 2008/2009 which enabled a large scale collection of data on the social evolutions within all the EU Member states in order to provide the Committee with a snapshot of the situation of the postal sector in this critical period.

The project has been conducted by a team composed of social partners from PostEurop, Heike Ausprung, Margaux Meidinger and Birgit Reifgerste and from UNI, John Baldwin and Montserrat Mir. All its members worked in close cooperation throughout the project in order to organise the different events and validate each step.

## LISTENING SESSIONS

Six listening sessions were conducted across 2013 in the framework of the project. They were organised on 25<sup>th</sup> April in Paris, 21<sup>st</sup> October, 15<sup>th</sup> November and 2<sup>nd</sup> December in Brussels each time with a selection of countries. In total during the six sessions, the SDC PSE working group heard national cases of Austria, Belgium, France, Germany, Italy, the Netherlands, Spain and Sweden. Moreover two sessions were organised in the format of exchanges with an external consultant in order to cover some more transversal and strategic issues.

The listening sessions touched upon the following topics:

- Main challenges in the postal sector today (external consultant)
- Work organisation in retail (Austria, France, Spain)
- Work organisation in sorting (Germany, Italy)
- Social regulation (Sweden, the Netherlands)
- Innovative use of networks and universal service (external consultant)
- Work organisation in parcels (Belgium)

The listening sessions were split into two parts: formal presentations by the national experts on the initiatives put in place followed by a larger debate involving all the members of the PSE working group. For each testimony, as far as possible, it was important to have both employer and union testimonies on the topic under study. It has moreover been a deliberate choice to have a limited number of participants to each session in order to have interactive meetings and raise the level of debate. In terms of a targeted audience, the objective was to invite as speakers operational experts who are not the usual participants to SDC activities in order to make them aware of our activities and of the interdependence between economic and social challenges.

## FINAL CONFERENCE

The Final Conference of the project was its last step. After having held listening sessions with a limited number of participants, it represented an opportunity to share the project's main results with a much wider audience. More than 60 participants, including employer and union representatives, the Commission and experts, from 24 countries attended the event. It was a successful conference which enabled a discussion of innovative practices in terms of work organisation and a raising of the debate on major issues for the future of the postal sector.

In more detail, the morning session was dedicated to the sharing of the main findings of the project listening sessions. These findings were presented by the members of the Postal Sector Evolution working group, 3 employers and 3 unions, who intervened as observers of the listening sessions. They were then discussed during round-tables and illustrated by national testimonies from a selection of experts from the Austrian, Belgian, Germany and Italian postal operators, who had already intervened during the listening sessions. The round-tables focused in particular on the impact of the activities' optimisation on work organisation in sorting, retail and parcels.

The afternoon sessions presented forward-looking reflections with presentations on the major challenges ahead by an external futurist, Carsten Beck from the Copenhagen Institute for Future Studies, and on the main evolution trends in the sector by Thierry Dieu from the International Post Corporation (IPC). They were followed by a round-table gathering high-level representatives: Botond Szebeny from PostEurop, Oliver Roethig from UNI Europa, Werner Stengg from DG Market, Jean-Paul Tricart from DG Employment, Dominique Bailly and John Baldwin from the Social Dialogue Committee. During this round-table the impact of the diversification on the sector's perimeter, the sector's specific identity as well as the new social challenges ahead were discussed.

## INTRODUCTION

### CONTEXT OF THE PROJECT

#### *THE SOCIAL OBSERVATORY INITIATIVE*

The European Social Dialogue Committee for the postal sector has done for several years a deep work of observation and monitoring of the social evolutions in the sector. The mandate was given by the Joint Declaration on the Postal Sector Evolution signed in 2007. In this framework the Social Observatory of the postal sector was launched. It was implemented through two EC financed projects: 'The Social Observatory of the postal sector' project conducted in 2009 and the 'Social partners preparing for change' project (second step of the Social Observatory) conducted in 2010-2011. These two projects enabled to observe the main social evolutions in the postal sector in particular in terms of social regulation, universal service and change management processes. The first one focused on 9 identified EU countries while the second project involved postal operators of the 27 EU Member states.

#### *THE NEW POSTAL SECTOR EVOLUTION JOINT DECLARATION*

On the basis of the main findings of these projects, an important milestone in the work of the PSE working group was the signature of the New Postal Sector Evolution Joint Declaration in 2012. This joint initiative of the European social partners aimed at evaluating the situation in the postal sector, defining key principles to accompany change and highlighting the main findings of the work done as outlined in the 2007 PSE Joint Statement. In the 2012 declaration the social partners acknowledged the continuous and rapid change while they recognised that various approaches of adaptation were possible. The document also underlined the role of change management as a necessary tool for the long-term sustainable economic development of the sector and the need for a balance between enhancing employability and adapting to the new market circumstances. The Joint Declaration outlined in particular 4 main principles to accompany the transformation which are supported by the social partners:

- A better anticipation of the ongoing evolutions and their consequences,
- A recognition that the management of change can benefit from country specific social dialogue,
- The development of the employees' employability to promote their internal and external mobility as a shared responsibility of the social partners and of each employee through training, re-deployment programs and communication,
- The modernisation of operations to improve the adaptability of the work organisation in order to better cope with new customer requirements and to increase productivity.

The Joint Declaration also set the way forward. It called on all postal operators and trade unions to share experiences to ensure mutually beneficial learning processes amongst EU social partners, taking national circumstances into account. Social partners committed themselves to a continuous monitoring process and the collection and dissemination of selected good practices. This set the framework for the submission of a new funding demand resulting in the current project.

#### *A PROJECT WITH A NEW APPROACH*

In this context the project 'Developing a quality postal sector' was launched as the third step of the Social Observatory. After a general overview of the main social evolutions in the postal sector, this project has had an analytical approach with the focus on a selection of national practices. The logic of the current project has been different from the former ones. It aimed to analyse in more depth a few significant initiatives of National Postal Operators (NPOs) and Trade Unions on fields of common interest and to exchange some lessons learnt for all; this required a more selective and thorough approach on each topic. Topics of common interest which focused both on internal evolutions related to work organisation and evolutions of the sector environment have been jointly agreed by the social partners; they represented the core of the PSE working group 2012-2013 work programme in accordance with the objectives set by the New Joint Declaration. This approach has allowed for continuing the process of close monitoring of the postal sector evolution.

## MAIN FINDINGS

### *THE POSTAL SECTOR AT A CRUCIAL POINT*

The national practices and the issues debated during the project have highlighted the fact that we are today at a crucial point of the transformation process with an acceleration of the mail volume decrease. Moreover it has appeared that since the beginning of the Social Observatory initiative, the postal sector environment has deeply evolved with a steady growth of the parcels' activity and a market which is more and more customer-driven. This changing environment brings new challenges but also new opportunities.

### *AN IMPORTANT TRANSFORMATION PROCESS TAKING ON BOARD ALL EMPLOYEES*

The national testimonies presented during the project have given us some hints on the transformation process. They have underlined that the postal sector has faced a profound transformation with an important optimisation effort at the same time that it has appeared that postal operators have to reflect on potential diversification options. This transformation has nevertheless not led to a structural breakdown. In all activities under study, mail sorting and delivery, parcels and the retail network, the work organisation has been deeply impacted by the modernisation. In this context, the importance of integrating all employees in the overall transformation process has been underlined. Indeed employees are faced with a situation of continuous change and the need to manage complexity. Both employers and trade unions have recognised an increased requirement for flexibility and efficiency of the workforce. However both sides have also recalled that efficiency should also be closely interlinked with quality of service and customer orientation based on the employees' know-how. Indeed employees are an essential part of the unique selling opportunities that postal operators have and contribute to build trust in the contact with customers. There are key levers for the development of new services of proximity to better answer the needs of the society.

### *REDEPLOYMENT AS A MAIN CHALLENGE*

After an important phase of optimisation and diversification, redeployment as a shared responsibility of social partners and of each employee seems today to be a major challenge. The accelerating decline in mail volumes in parallel with the development into new activities makes the need for redeployment even more crucial. Indeed the question today relies on how to redeploy employees from traditional to potential new diversified activities. The activities which are the most labor-intensive ones appear to be the ones in networks. Therefore potential redeployment paths could be from mail to parcels activity, in particular in the delivery network, and from the post offices network to financial services. It is nonetheless important to underline that the latter one is not an option for all operators as some of them do not have an owned-retail network anymore. The current trend of growing e-commerce could strengthen the need to increase the synergies between activities.

Diversification can create options for further employment via new business activities and the potential for redeployment depends on several parameters. In any case, these evolutions very much depend on the national context, the NPO's structure and the possible diversification strategy. There is no one-size-fits-all solution.

### *THE KEY ROLE OF SOCIAL PARTNERS TO ENSURE THE POSTAL OPERATORS' SUSTAINABLE TRANSFORMATION*

The national practices have underlined the role of social partners as an integral part of the change process and as key stakeholders in the anticipation, planning and concrete implementation of the required transformation. Social partners at national level are closely following the changes in working conditions brought in particular by modernisation and new market circumstances with the aim of quality jobs. They are associated to and supporting each step of the change process in the framework of the negotiations of collective agreements which enable to set some fundamental principles but also in day-to-day social dialogue. The ongoing evolutions have put in the forefront the key role of social dialogue which is considered as of strategic importance for the company's sustainable transformation in particular through agreements including measures in terms of wages and employment as well as initiatives to support the change process. These agreements are essential to ensure that the increased need for adaptability is accompanied by appropriate

social conditions for all employees. In view of the crucial role of national social partners in the transformation process, the European Social Dialogue Committee has therefore decided to launch a new project which aims at analysing in-depth the content and process of collective bargaining at national level.

## FUTURE CHALLENGES

### *NEW INTERNAL HR CHALLENGES*

Both the listening sessions and the final project conference have enabled to identify some future challenges in the social area for the sector. The modernisation of the work processes in particular thanks to automation has led to a split between internal and external tasks. Consequence is that the external tasks for employees in delivery are longer. In parallel, the ageing of the workforce is a growing issue for postal operators. In view of these two challenges, postal operators have to reflect on how to best support the ageing workforce to cope with growing physical challenges and on how to support mobility. This is one of the issues under study in the new project on demographic change conducted by the CSR, Health & Safety working groups of the Committee.

### *ONGOING CHALLENGES IN THE GROWING PARCEL MARKET*

Along with the increased diversification of their activities, incumbents are active in different markets, especially the parcels' one. The parcels' market is characterised by an important cost-based competition with the use of flexible employment models especially in delivery, given the high variability of the activities. At the same time, one important trend in the parcels' market is the fact that customers are always more demanding and require increasingly flexible, innovative and tailor-made delivery and return solutions. Postal operators need to adapt to these new requirements in order to be competitive while ensuring appropriate working conditions.

### *THE ISSUE OF THE SECTOR'S STRUCTURE*

The potential diversification of activities of postal operators also raises the question of the sector's future structure. Multiple options are conceivable ranging from having an integrated approach and structure to the split of the diverse activities. These choices will have an impact on the existing social framework of operators with either a common social framework and agreement for all activities or several agreements depending on the nature of the markets. The way forward will very much depend on the national context and the strategic choice of each national operator.

## NEXT STEPS

As indicated before, the Postal Sector Evolution working group plans to launch a new study on key issues dealt with in collective agreements and experiences of social dialogue to accompany the change process at national level. This analysis aims in particular to better understand the structure of national social dialogue in NPOs and identify potential key issues discussed at national level. Moreover on the basis of the project findings and a first research on the negotiation processes at national level, the working group plans to discuss a new Joint Declaration. This document would be a means to outline the main challenges of the current transformation and underline the major role of a constructive social dialogue. Eventually, after an intense period of observation in the last years, the Committee wishes to summarise the experiences made, including contributions of several actors, both from the European and the national levels, who have closely been involved in the sector's transformation process.



**ANALYTICAL SYNTHESIS  
OF THE PROJECT  
LISTENING SESSIONS**



## ANALYTICAL SYNTHESIS OF THE PROJECT LISTENING SESSIONS

The national case studies presented in the framework of the project listening sessions reflect some of the policies put in place by a selection of postal operators and trade unions. They highlight the diversity of the business and social models, the different levels of modernisation and diversification of postal companies which much depend on the specific national legal frameworks that they are evolving in.

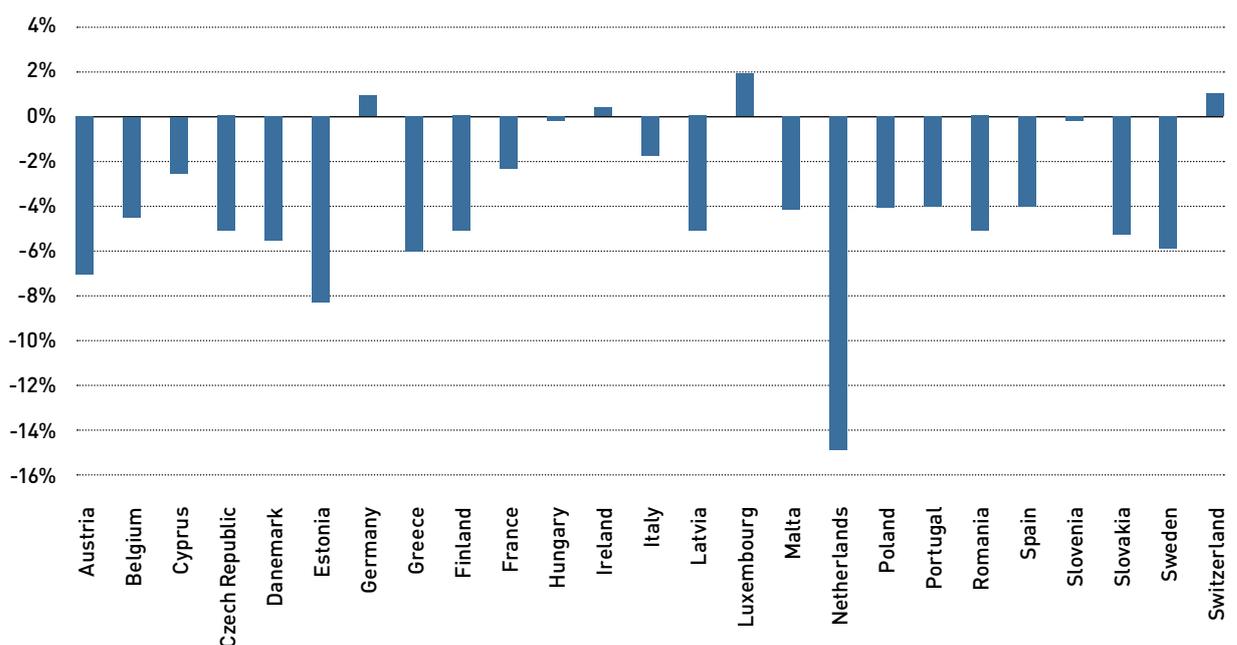
### 1. FIRST LISTENING SESSION “MAIN CHALLENGES IN THE POSTAL SECTOR TODAY”

In the first session an exchange with the consultancy “Input Consulting” took place. This consultancy which was subcontracted by WIK in order to report on the employment aspects of the study “Main development in the postal sector 2010-2013” commissioned by DG Market. This session had a twofold objective: first to recall and set the context as a basis for the project launching and second to share the results of the European social partners’ main findings on the social evolutions in the sector with Input Consulting.

The postal operators have undergone a profound transformation through three main steps: optimisation, diversification, and redeployment. The social optimisation has been put in place through different levers with a degree of optimisation which depends on the postal operators’ strategy but also on the national context. The results of the WIK study published at the end of 2013 which include a significant part on Employment aspects enabled us to have recent data on the main social evolutions in the sector. This data has been collected directly from the postal operators but also from different projects conducted by the Social Dialogue Committee. The study asserts in particular that “Social partners [...] succeeded in many Member States in designing sectoral change and restructuring USPS operations in a socially responsible way.” It underlines also the role played by the European social partners of the sector to monitor the change process with a presentation of the main messages of the 2012 new Postal Sector Evolution Joint Declaration.

First of all, it appears that social optimisation has consisted in the decrease of employment among most postal operators. The average rate of decrease has been of 2,5% and the figure below shows that this decrease is a general one with a few exceptions where a slight increase can be observed.

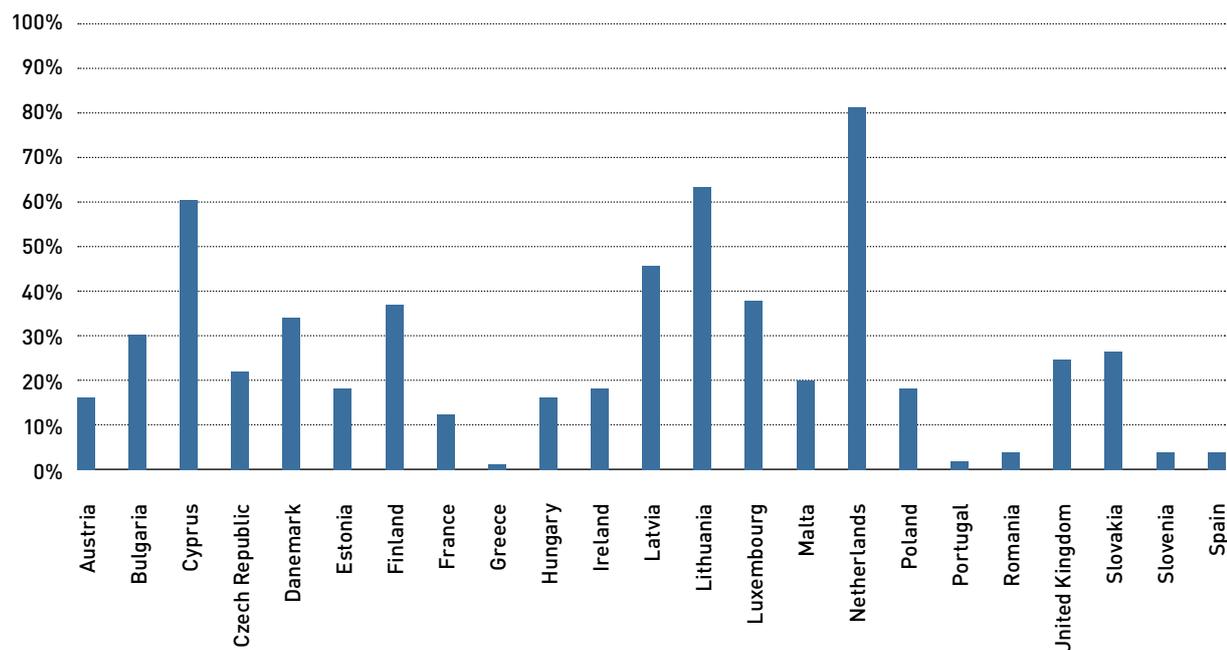
#### NPO'S EMPLOYMENT EVOLUTION FOR TWO YEARS (2010 AND 2011)



Source: WIK study for the European Commission “Main developments in the postal sector 2010-2013”

The evolution of the nature of employment has also been one of the main levers of optimisation. The development of part-time employment differs a lot between countries. Some operators largely rely on this type of employment, especially in delivery, while in others there are no part-time employees. This situation highly depends on the country specific characteristics. In general it can however be noted that the rate of part-time employment has been quite stable over the past years.

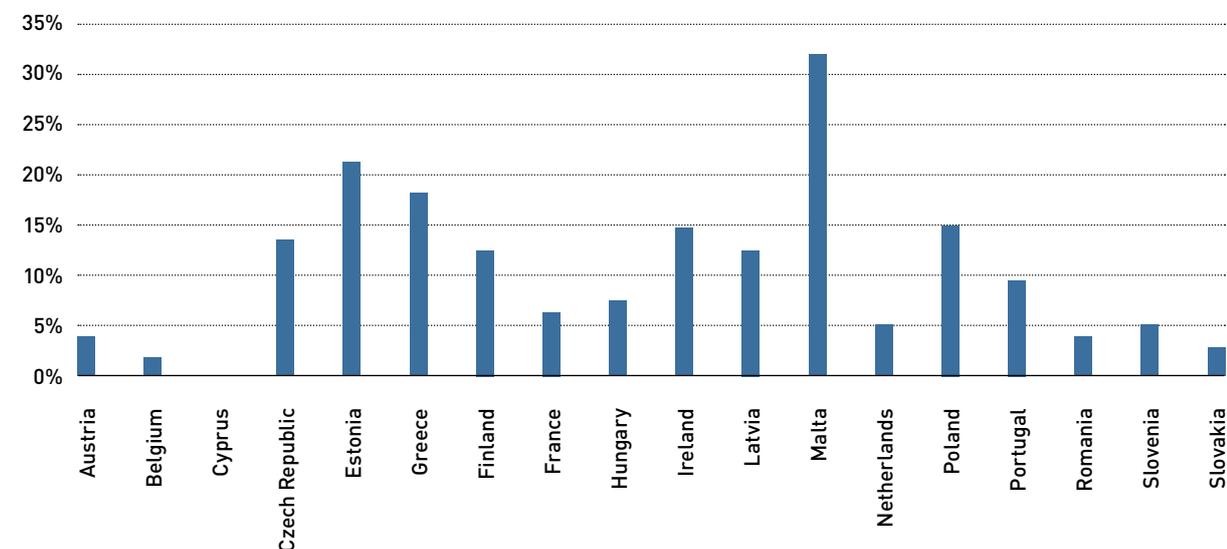
*NPO'S PART-TIME EMPLOYMENT RATE IN 2011*



Source: WIK study for the European Commission "Main developments in the postal sector 2010-2013"

The use of short-term contracts is also one of the levers to increase the flexibility of the work organisation. Its use has generally been low in most postal operators.

*NPO'S SHORT-TERM EMPLOYMENT RATE IN 2011*



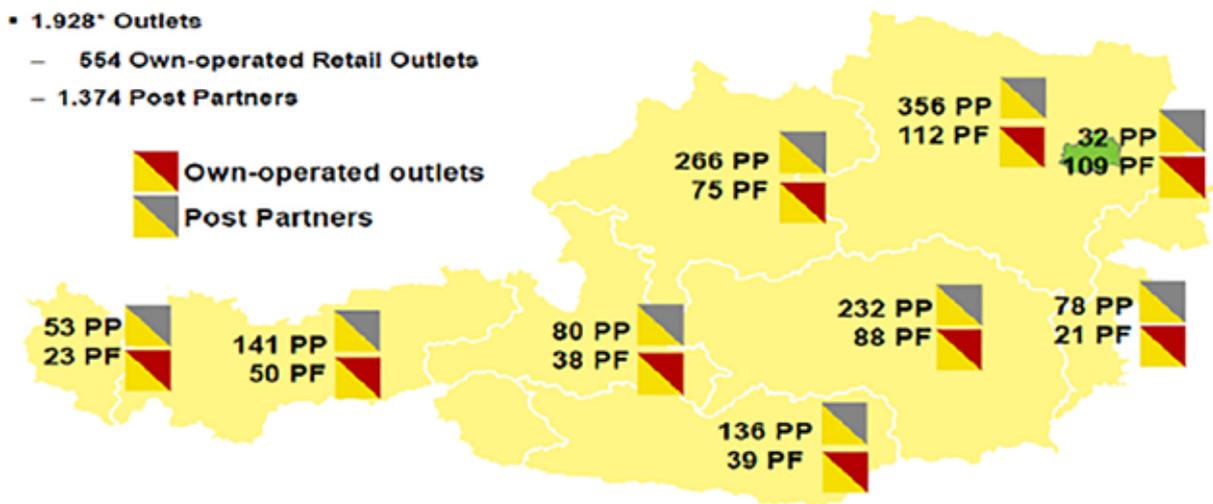
Source: WIK study for the European Commission "Main developments in the postal sector 2010-2013"

Diversification and optimisation processes of the postal operators have been under observation during the different projects in the framework of the Social Observatory. One of the main issues today is the redeployment of employees to support the diversification process. Postal operators are faced with two main challenges, to develop the competences of their employees in order to enable them to manage these new activities but also to enhance internal or external mobility. Options for internal mobility can comply redeployment from post offices network to financial services which is quite developed in postal operators which have financial services or from parcels to mail network, a process which raises some more complex questions.

## 2. SECOND LISTENING SESSION “WORK ORGANISATION IN RETAIL”

The social partners from Austria, France and Spain intervened during the session on work organisation in retail in order to present the way they have managed the optimisation of post offices at national level. Participants also had the opportunity to visit a French post office in order to see the wide range of products offered and the large use of new technologies in the offices.

National postal operators have followed different strategies to optimise and reengineer the post offices network. The first approach followed by several operators has been the enhancement of the efficiency and flexibility of the cost structure through a reduction of the owned post offices. This situation can be observed notably in Austria with an increased externalisation of the network, especially through partnerships. The choice to develop partnerships or maintain an owned network largely depends on the strategy of the postal operators.



### *Organisation of the network in Austria*

Source: Austrian post presentation, Paris, 25 April 2013

Another possible approach is to maintain most of the owned offices and defend the market leadership in the core business by network adaptation. This has in particular relied on the modernisation of the owned network to maintain its sustainability with increased automation, the restructuring of spaces and flows, the adjustment of opening hours and the decrease of waiting time. All postal operators which have decided to keep a network of post offices have undergone this modernisation at different levels. This includes an extensive use of new technologies and the need to innovate in terms of products and services offered in a multi-channel approach.



### *The French and the Austrian examples*

Source: French and Austrian posts presentations, Paris, 25 April 2013

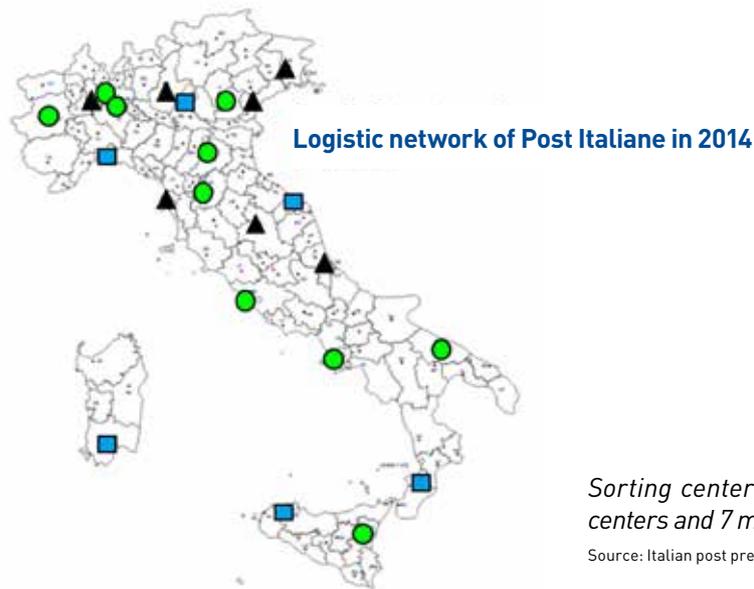
One of the priorities to support this modernisation has been an enhanced customer orientation and quality of service, in particular through a sales and counseling approach as well as personalised customers' treatment. In parallel there has been a large development of new products and services to better answer the customers' needs. The development of financial and in some case insurance services is one of the main areas of diversification for several postal operators which have maintained their own postal network. These financial services are either owned by the postal operators or managed in partnership with an existing banking provider. Other services include the development of mobile phone offers but also a larger variety of postal services and retail products. These major evolutions in post offices have largely relied on the employees and the evolution of their role and approach. They are expected to manage multiple tasks be flexible, but also be more customer-oriented and serve each customer personally. In order to prepare employees to this new approach, these changes should be supported by adequate training but also by an evolution of mindset. Employees have played a key role to support this modernisation process and a large majority adheres to these new setting and functions. There has been in particular a reduction of the "stress" linked to the waiting line but also a reinforced consideration from the customers which is given by the standing position next to the customer in the retail area and by the advisor role. As a consequence in most cases, these developments have been a win-win situation with an increased customer but also employee satisfaction as it is shown with the growing score progress on "People Results" in Correos.

The retail network has undergone a profound transformation in the last years which has had an important impact on the work organisation in the postal offices. For those postal operators which have made the choice to maintain an owned network, it consists in a unique physical presence which can represent a strong competitive advantage in particular to develop into financial services.

### **3. THIRD LISTENING SESSION "WORK ORGANISATION IN SORTING"**

The social partners from Germany and Italy intervened during this session in order to present the impact of the automation and modernisation of sorting on the work organisation in sorting centres but also in delivery.

The analysis shows that there has been an important optimisation process in sorting centers, which has however started at different moments and is at different levels between operators. This process has been implemented in particular through the centralisation of sorting centers which enabled to have a more uniform and concentrated facility structure. In Germany, in the framework of the Brief 2000 concept, 82 sorting centers have replaced more than 1,000 former sorting facilities with all the centers following the same layout with only differences in size. In Italy, there were 104 centers where 35% of the mail volumes were automatically which existed in 2000; they were largely reduced to 54 centers where more than 85% of mail is automatically sorted in 2010 to 34 in 2011 and 23 today. This process has led to the building of new modern centers with attention given to the quality of the workplace and an increased automation for standard and large letters as well as for small parcels.



*Sorting centers network in Italy with 16 automated centers and 7 manual ones*

Source: Italian post presentations, 25 October 2013

Over the past years the degree of automation and therefore the productivity have been significantly increased. It can be noted that in some operators, there is today sequencing for a large majority of the routes for standard letters, in Germany currently 95% of all car routes are sequenced. This automation has been supported by an increased standardisation of processes which has been an important tool to further increase efficiency. The main objectives of this process have been to reduce all operational costs, improve service quality and sustain the market developments.



*Machines for large letters' and small parcels' sorting at DP DHL sorting centers*

Source: Deutsche post presentation, 25 October 2013



*Machines for sequencing at DP DHL sorting centers*

Source: Deutsche post presentation, 25 October 2013

This optimisation has important social impacts with the need for an adaptation of the work organisation. First of all within sorting, the shift from totally manual to automated sorting has led to important adaptations with a new kind of jobs and the need for increased workforce flexibility with different working time models. Automation has also had an impact on delivery with a separation between internal and external tasks leading to longer delivery time; a fact which raises the issue of strenuousness. In Italy, a new model of organisation of delivery has been put in place through two main measures. First of all the reduction of 6 to 5 working days for postmen along with 5 days standard delivery for classic mail. Secondly the introduction of a new kind of postman who is working 6 days a week in order to deliver new kinds of services (new express parcel products, urban products (J+0), fastest top products, commercial proposals) in the afternoons during weekdays and on Saturday morning. Another important evolution in most postal operators is the large use of new technologies to support the function of the postmen: the development of e-bikes and e-vehicles which can help to manage the issue of longer routes and the equipment with electronic devices like personal digital assistants (PDAs).

The work organisation in sorting and delivery has already been largely adapted in view of the increased automation but it has to be noted that in the future further social impacts from volumes decrease, demographic evolutions and new customers' needs will have to be taken into consideration. In all cases, these work organisation evolutions have closely been monitored by trade unions and supported by collective agreements. In both Deutsche Post DHL and Poste Italiane, it has been underlined that changes in working conditions are closely followed with the aim of good jobs and that social dialogue has always been of strategic importance for the company's development.

#### 4. FOURTH LISTENING SESSION "SOCIAL REGULATION"

The state of play on social regulation in the postal sector at national level was illustrated by the case of Sweden and Netherlands, two countries where competition effectively takes place in the sector.

In Sweden, the only country where there is a Collective Labor Agreement (CLA) for the whole sector, the situation in the postal market is quite different. Indeed there have been for 15 years two different CLAs, one agreement for the incumbent and one for competitors, which had however been negotiated with the same trade union and whose conditions were close. Over this period, the conditions of the two agreements became gradually closer and at one point, employers agreed on the fact that they wanted a common agreement. The trade unions in particular have played a key role to achieve a CLA for the whole sector with a high level of unionisation both in Bring Citymail with around 50% to 60% of unionisation and the incumbent with 85-90%. Moreover the Swedish context where the government and clients would only accept to work with a company having a CLA has facilitated the situation. Today there is one sectoral agreement and also company agreements with the major difference being in terms of wages as in the competitor Bring Citymail, most people do not stay longer than 5 years while in Posten AB, employees stay much longer and have thus higher wages due to seniority; however there are decent salaries in both companies.

The importance of having a level-playing field was underlined, with in particular the need of labour contracts and sustainable working conditions can be of relevance to ensure fair competition. Indeed the Dutch example shows that a cost-based competition with a competitor, Sandd, having 20% of market share, along with an important decrease of mail volumes puts pressure on the incumbent for a stronger optimisation approach. PostNL has therefore put in place a low cost carrier Network VSP Addressed with one day per week delivery which was active till 2011, has developed economic products and reorganised to mainly part-time delivery. Today however as regards the internal reorganisation, PostNL has eventually opted for a less centralised organisation and for keeping some more experienced full time mailmen together with an alternative restructuring program in management, head office staff and support functions. In parallel, it has also put in place a successful program of external mobility, with more than 7,600 employees assisted in finding a new future outside PostNL and a social plan agreement with unions on "limitation of forced redundancies" and voluntary departures with financial incentives.

Indeed the operator faces competition with new entrants which usually rely on a different business model with few days per week delivery and more flexible forms of employment like independent workers. This underlines that social dialogue with new entrants could be of support. The situation in the postal market, after several years of conflict following the full-market opening, has been gradually enhanced and the new postal law includes labour conditions. Postal operators are required to either have a CLA based upon 80% labour contracts at national minimum wage level by 30 September 2013 or must apply labour contracts at minimum wage level. This obligation is monitored by the Dutch National Regulatory Authority (NRA) which can fine non-compliant postal companies. As a consequence, on July 2013, a rate of 60% of labour contracts at the concerned postal companies was reached even if it is to be noted that the 80% rate by 1<sup>st</sup> October is probably not achieved and many workers are still paid per piece. As regards part-time work, both employers and unions underlined that there can be part-time employment, which is often linked to the logistical model, with quality social conditions.

These two examples highlight that a CLA for the whole sector is even more relevant in countries where there is real competition in the postal market. Trade unions and in some cases public authorities can play a role

for achieving a social regulation of the market but in general a gradual approach is necessary to create the level playing field. What can be noted is that Sweden is the only country where there is a labour agreement for the whole sector while in some countries, minimum social norms and requirements have been included in the postal law.

## **5. FIFTH LISTENING SESSION “INNOVATIVE USE OF NETWORKS AND UNIVERSAL SERVICE”**

This session took the form of a presentation given by an external expert, Kristian Sund, an academic specialised in strategic issues who has contributed to several publications and conferences on the postal sector.

There are several innovation options for NPOs which should in particular rely on their unique resources and core competences as competitive advantages. The first one is the adaptation of the core business which can occur through optimisation, downsizing and innovation in order to slow down the decline of the letter activity. As an example, some postal operators have developed solutions to enhance the regular mail activities through digital platforms. The second is to diversify and differentiate into new businesses, notably logistics, or banking and mobile services. A third option followed by postal operators is to accompany the growth in e-commerce and logistics through innovation with the aim to capture value from the overall supply chain. This relies notably on the development of a full services offer from advertisement, through import/export, storage and delivery for e-commerce activities. Eventually the last option is to capture value from digital services through innovation to differentiate from other providers. Postal operators can thus rely on their specific asset of consumer trust to develop digital solutions offering secure mail and secure storage.

However from a strategic point of view, there are several challenges to diversification and innovation. First of all, the issue of synergies between the different activities developed by the operator is to be taken into consideration. The example of Poste Italiane which developed into Poste Mobile shows how an operator can take advantage of its large network and create synergies between old and new activities. Secondly, the inclusion of new companies can lead to an organisational capability gap with different cultures between the core company and the subsidiaries. Eventually what is to be taken into consideration are the possible tensions between old and new business models and the risk that new capabilities could destroy or substitute old ones. In terms of organisation, one key issue in this sense is to well perceive what needs to be developed internally and what can be outsourced. The different diversification strategies followed by the European postal operators raise the question of the definition of the postal sector itself.

The diversification and innovation process have led in some countries to a very advanced development of digital services with in particular the development of digital signature/ID, the existence of mandatory digital self-service in some areas and of public digital postboxes. This represents a new market for postal operators which can use this opportunity to develop secure mail solutions. The postal operators which develop into this area, tend to do it through acquisitions or joint ventures. The issue is however to see whether these new services can create sufficient revenues. In some digitally advanced countries like in Denmark the digital post has the same legal status as paper mail. This development raises the issue of the potential creation of a digital universal service which is linked to questions like the accessibility of this service to all the categories of population.

## **6. SIXTH LISTENING SESSION “WORK ORGANISATION IN PARCELS”**

The last session of the project was dedicated to work organisation in parcels with the testimony from the Belgium employer, bpost. It enabled to focus on the parcel strategy of postal operators and on the issue of delivery.

The development of parcels has introduced new challenges, the need to increase the productivity of the basic organisational model and the introduction of automation. These two requirements often led to a split in the basic network organisation. In social terms also, evolutions have been important. The rise of the e-commerce

culture has led to changing customer's behavior and requirements but also changing workers' traditions, behavior, focus and mindset as they need to adapt to the new environment. Today it appears that the parcel market is characterised by a high pace of change along with growing cost consciousness and rapidly changing environment; Postal operators are thus looking for maximum synergies with the reintegration of networks, an increased focus on quality and the enhancement of automated sorting.

Indeed postal operators need to answer to opportunities offered by the developing e-commerce activities and in particular to keep the pace with the fast growing market B2C/C2X thanks to a continuous improvements in products and services. This situation requires developing a clear strategy and plan for parcels' development. Bpost has integrated a clear plan for their development in its strategy "Developing Vision 2020". The delivery of parcels relies on different requirements and mindset than the delivery of regular mail; it highly depends on the terms and demands fixed by the customers. The latter are more demanding in particular in terms of quality of service, of diversity and convenience of delivery options and of increased accuracy in forecasting and planning. There has thus been a significant increase in the quality of delivery from 80% of D+4 in 2005 to 98% of D+1 in 2012 at Belgian post. The operator is also testing the delivery of parcels on Saturday in the framework of discussions with unions to see how this can be integrated in the 5 working days per week scheme. In terms of delivery, customers are offered several options: flexible at home delivery but also increased out-of-home delivery locations and return locations through extended opening time as well as all-time accessible pick-up locations "bpack 24/7".

The development into the parcels market creates new human resources challenges with in particular the need to move the organisation from a static to a dynamic model. The parcels' delivery is characterised by high volume variations and some companies face this variability by developing a modulation of working time or by the use of independent or temporary workers to manage the peaks of activities. Postal operators are faced with the necessity to manage the complexity of a big organisation including a high number of workers together with a particular culture. The transformation of postal operators' work organisation and mindset has already been a profound one but is still to be accelerated.

**FIRST AND SECOND LISTENING SESSIONS**  
PARIS 25 APRIL 2013

*“MAIN CHALLENGES IN THE POSTAL SECTOR TODAY”*  
*“WORK ORGANISATION IN RETAIL”*

**EUROPEAN SOCIAL DIALOGUE COMMITTEE FOR THE POSTAL SECTOR**  
**PROJECT “DEVELOPING A QUALITY POSTAL SERVICE IN THE DIGITAL AGE”**

**FIRST AND SECOND LISTENING SESSIONS**

**25<sup>th</sup> April 2013, Paris**

**AGENDA**

9.00-9.15	→ Beginning of the meeting → Welcome addresses	SDC Chair and Vice-Chair
<b>1<sup>st</sup> SESSION “MAIN CHALLENGES IN THE POSTAL SECTOR TODAY”</b>		
9.15- 10.45	Exchange with Input Consulting on main evolutions in the sector → <i>Dialogue with Claus ZANKER</i>	All participants / External consultant
10.45-11.00	<b>BREAK</b>	
<b>2<sup>nd</sup> SESSION “WORK ORGANISATION IN RETAIL”</b>		
11.00 -11.45	Austrian case study → <i>Intervention from Edgar MÜLLER, Österreichische Post AG</i> → <i>Intervention from Richard KÖHLER, GpF</i> Questions, exchange of views & debate	Austrian NPO and union / Audience
11.45 -12.30	French case study → <i>Intervention from Samuel BRISARD and Stéphane ROSSO, La Poste</i> → <i>Intervention from Raymond MOYA, FO-COM Enseigne</i> Questions, exchange of views & debate	French NPO and union / Audience
12.30-13.30	<b>LUNCH</b>	
13.30-14.30	Guided visit of a French post office	All
14.30-15.15	Spanish case study → <i>Intervention from Eloy FEITO MARTINEZ, Correos</i> Questions, exchange of views & debate	Spanish NPO and union / Audience
15.15-16.30	Debate and main conclusions on “Work organisation in retail”	All participants (PSE WG & speakers)

## LIST OF PARTICIPANTS

	FIRST NAME	LAST NAME	ORGANISATION	COUNTRY
1	Heike	AUSPRUNG	Deutsche Post DHL PSE Working Group	Germany
2	Dominique	BAILLY	La Poste Social Dialogue Committee Chair PSE Working Group	France
3	John	BALDWIN	CWU Social Dialogue Committee Vice-Chair PSE Working Group	United Kingdom
4	Samuel	BRISARD	La Poste Retail Unit	France
5	Nathalie	GANZEL	La Poste	France
6	Jan-Bart	HENRY	PostNL PSE Working Group	Netherlands
7	Richard	KÖHLER	GpF - Gewerkschaft der Post- und Fernmeldebediensteten	Austria
8	Armand	LABAT	La Poste	France
9	Eloy	FEITO MARTINEZ	Correos Retail Unit	Spain
10	Jorge	RODRIGUEZ CABRERO	Correos	Spain
11	Francisco	SANZ MORAL	Correos	Spain
12	Margaux	MEIDINGER	La Poste PSE Working Group	France
13	Raymond	MOYA	FO-COM Enseigne	France
14	Montserrat	MIR	CCOO PSE Working Group	Spain
15	Edgar	MÜLLER	Österreichische Post AG	Austria
16	Stéphane	ROSSO	La Poste Retail Unit	France
17	Jens	SAVERSTAM	SEKO - Union of service and communication employees PSE Working Group Sweden	Sweden
18	Claus	ZANKER	Input Consulting	Germany



Group visit to a French post office

**THIRD AND FOURTH LISTENING SESSIONS**  
BRUSSELS, 21 OCTOBER 2013

*“WORK ORGANISATION IN SORTING”*  
*“SOCIAL REGULATION”*

**EUROPEAN SOCIAL DIALOGUE COMMITTEE FOR THE POSTAL SECTOR**  
**PROJECT “DEVELOPING A QUALITY POSTAL SERVICE IN THE DIGITAL AGE”**

**THIRD AND FOURTH LISTENING SESSIONS**

**21<sup>st</sup> October 2013, Brussels**

**AGENDA**

<b>9.30-9.45</b>	→ Beginning of the meeting → Welcome addresses → Presentation of the project	SDC Chair and Vice-Chair
<b>3<sup>rd</sup> SESSION “WORK ORGANISATION IN SORTING”</b>		
<b>9.45- 11.00</b>	<b>German case study</b> → <i>Intervention from Frank BETTGENHAEUSER, Deutsche Post DHL</i> → <i>Intervention from Markus NOETHEN, ver.di</i> Questions, exchange of views & debate	German NPO and union / Audience
<b>11.00-11.15</b>	<b>BREAK</b>	
<b>11.15-12.30</b>	<b>Italian case study</b> → <i>Intervention from Ciro FERRARI, Poste Italiane</i> → <i>Intervention from Sebastiano CAPPUCIO, SLP-CISL</i> Questions, exchange of views & debate	Italian NPO and union / Audience
<b>12.30-13.30</b>	<b>LUNCH</b>	
<b>4<sup>th</sup> SESSION “SOCIAL REGULATION”</b>		
<b>13.30-14.10</b>	<b>Swedish case study</b> → <i>Intervention from Jens SAVERSTAM, SEKO</i> Questions, exchange of views & debate	Swedish union / Audience
<b>14.10-15.25</b>	<b>Dutch case study</b> → <i>Intervention from Hans BLIKMAN, PostNL</i> → <i>Intervention from Cees DEGELING, Abvakabo</i> Questions, exchange of views & debate	Dutch NPO and union / Audience
<b>15.25-17.00</b>	<b>Debate and main conclusions on Work organisation in sorting and Social regulation</b>	All participants (PSE WG & invited speakers)

## LIST OF PARTICIPANTS

	FIRST NAME	LAST NAME	ORGANISATION	COUNTRY
1	Dominique	BAILLY	La Poste Social Dialogue Committee Chair	France
2	John	BALDWIN	CWU UK Social Dialogue Committee Vice-Chair	United Kingdom
3	Frank	BETTGENHAEUSER	Deutsche Post AG	Germany
4	Johannes	BLIKMAN	PostNL PSE Working Group	The Netherlands
5	Sebastiano	CAPPUCIO	SLP-CISL	Italy
6	Cees	DEGELING	Abvakabo NL	The Netherlands
7	Ciro	FERRARI	Poste Italiane	Italy
8	Athina	GEORGIU	PostEurop	Belgium
9	Linda	KROMJONG	Deutsche Post DHL PSE Working Group	Germany
10	Galbiati	LORENZO	SLP-CISL	Italy
11	Margaux	MEIDINGER	La Poste PSE Working Group	France
12	Montserrat	MIR	CCOO PSE Working Group	Spain
13	Markus	NOTHEN	ver.di	Germany
14	Jens	SAVERSTAM	SEKO – the Union of Service and Communication PSE Working Group	Sweden



**FIFTH LISTENING SESSION**  
BRUSSELS, 15 NOVEMBER 2013

*“UNIVERSAL SERVICE AND  
INNOVATIVE USE OF NETWORKS”*

**EUROPEAN SOCIAL DIALOGUE COMMITTEE FOR THE POSTAL SECTOR**  
**PROJECT “DEVELOPING A QUALITY POSTAL SERVICE IN THE DIGITAL AGE”**

**FIFTH LISTENING SESSION**

**15<sup>th</sup> November 2013, Brussels, Belgium**

## AGENDA

5 <sup>th</sup> SESSION “UNIVERSAL SERVICE AND INNOVATIVE USE OF NETWORKS”		
14.00-14.15	→ Beginning of the meeting → Welcome addresses → Presentation of the project	SDC Chair and Vice-Chair
14.15-15.30	External expert presentation → <i>Intervention from Kristian SUND, Roskilde University</i> Questions, exchange of views & debate among the audience	External expert, audience
15.30-16.30	Main conclusions on Universal service and innovative use of networks	All participants (PSE WG & invited speakers)

## LIST OF PARTICIPANTS

	FIRST NAME	LAST NAME	ORGANISATION	COUNTRY
1	Heike	AUSPRUNG	Deutsche Post DHL PSE Working Group	Germany
2	Dominique	BAILLY	La Poste Social Dialogue Committee Chair	France
3	John	BALDWIN	CWU Social Dialogue Committee Vice-Chair	United Kingdom
4	Cornelia	BROOS	UNI Europa	Belgium
5	Maire	LODI	PostEurop	Belgium
6	Margaux	MEIDINGER	La Poste PSE Working Group	France
7	Jens	SAVERSTAM	SEKO – the Union of Service and Communication PSE Working Group	Sweden
8	Kristian	SUND	Roskilde University	Denmark

**SIXTH LISTENING SESSION**  
BRUSSELS, 2 DECEMBER 2013

*“WORK ORGANISATION IN PARCELS”*

**EUROPEAN SOCIAL DIALOGUE COMMITTEE FOR THE POSTAL SECTOR**  
**PROJECT “DEVELOPING A QUALITY POSTAL SERVICE IN THE DIGITAL AGE”**

**SIXTH LISTENING SESSION**

**2<sup>nd</sup> December 2013, Brussels, Belgium**

**AGENDA**

6 <sup>th</sup> SESSION “WORK ORGANISATION IN PARCELS”		
10.00-10.15	→ Welcome addresses → Presentation of the project	SDC Chair and Vice-Chair
10.15-11.20	Belgian case study → Presentation from Odar EECKHOUT Questions, exchange of views & debate	Belgian NPO
11.20-12.00	Debate and main conclusions on Work organisation in parcels	All participants (PSE WG & invited speakers)

**LIST OF PARTICIPANTS**

	FIRST NAME	LAST NAME	ORGANISATION	COUNTRY
1	Heike	AUSPRUNG	Deutsche Post DHL PSE Working Group	Germany
2	Dominique	BAILLY	La Poste Social Dialogue Committee Chair	France
3	John	BALDWIN	CWU Social Dialogue Committee Vice-Chair	United Kingdom
4	Odar	EECKHOUT	bpost	Belgium
5	Linda	KROMJONG	Deutsche Post DHL PSE Working Group	Germany
6	Margaux	MEIDINGER	La Poste PSE Working Group	France
7	Jens	SAVERSTAM	SEKO – the Union of Service and Communication PSE Working Group	Sweden

**FINAL CONFERENCE**  
BRUSSELS, 7 FEBRUARY 2014

*“DEVELOPING A QUALITY POSTAL  
SECTOR IN THE DIGITAL AGE”*

**EUROPEAN SOCIAL DIALOGUE COMMITTEE FOR THE POSTAL SECTOR**  
**PROJECT “DEVELOPING A QUALITY POSTAL SERVICE IN THE DIGITAL AGE”**

**FINAL CONFERENCE**

**7<sup>th</sup> February 2014, Brussels**

**AGENDA**

8.45 - 9.00	Welcome and registration	
9.00 - 9.15	Opening of the conference → <i>By D. Bailly and J. Baldwin</i>	SDC Chair & Vice-Chair
<b>1<sup>st</sup> SESSION “LESSONS LEARNT FROM THE CONTINUOUS CHANGE IN THE SECTOR”</b>		
9.15-11.00	Postal operators' adaptation in a context of important change → <i>Presentation of the project main findings, sessions 1-4</i>	PSE working group members and experts
11.00-11.15	<b>COFFEE BREAK</b>	
11.15-12.15	Postal operators' adaptation in a context of important change → <i>Presentation of the project main findings, sessions 5-6</i>	PSE working group members and experts
12.15-13.30	<b>LUNCH</b>	
<b>2<sup>nd</sup> SESSION “DEVELOPING KEY ELEMENTS OF SUCCESS FOR THE FUTURE”</b>		
13.30-14.45	What will be the postal sector of tomorrow? → <i>Experts presentations</i> • C. Beck from CIFFS • T. Dieu from IPC	External expert and IPC
14.45-16.00	How to manage the social impacts of the market evolutions? → <i>Round-table</i> • With B. Szebeny (PostEurop), O. Roethig (UNI Europa), JP. Tricart (DG Employment), W. Stengg (DG Market), D. Bailly and J. Baldwin (SDC)	PostEurop, UNI Europa, DG Empl, DG Markt, SDC
16.00-16.30	Main conclusions of the final conference	SDC Chair & Vice-Chair
16.30	End of the meeting	

## LIST OF PARTICIPANTS

	FIRST NAME	LAST NAME	ORGANISATION	COUNTRY
1	Waqas	AHSEN	PostEurop	Belgium
2	David	ANCIAUX	CEEP	Belgium
3	Heike	AUSPRUNG	Deutsche Post DHL PSE Working Group	Germany
4	Dominique	BAILLY	La Poste Social Dialogue Committee Chair	France
5	John	BALDWIN	CWU Social Dialogue Committee Vice-Chair	United Kingdom
6	Carsten	BECK	Copenhagen Institute for Future Studies	Denmark
7	Amparo	BERASAIN	FSP-UGT SECTOR POSTAL	Spain
8	Gyula	BERTA	Hungarian Postal Trade Union	Hungary
9	Frank	BETTGENHÄUSER	Deutsche Post AG	Germany
10	Hans	BLIKMAN	PostNL PSE Working Group	The Netherlands
11	Laetitia	BRUNINX	PostEurop	Belgium
12	Sebastiano	CAPPUCCIO	SLP-CISL	Italy
13	Marie Helene	CASTELLARNAU DUPONT	F3C CFDT	France
14	Francesco	COSTA	Poste Italiane PSE Working Group	Italy
15	Cees	DEGELING	Abvakabo FNV	The Netherlands
16	Thierry	DIEU	International Post Corporation	Belgium
17	Odar	EECKHOUT	bpost	Belgium
18	Eneida	FATKOJA	Posta Shqiptare	Albania
19	Maurizio	FERIAUD	SLC CGIL	Italy
20	Ciro	FERRARI	Poste Italiane	Italy
21	Isabelle	FLEURENCE	FO COM	France
22	Nathalie	GANZEL	La Poste	Belgium
23	Athina	GEORGIUO	PostEurop	Belgium
24	Thalia	GIANNAKI	Hellenic Post - ELTA	Greece

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25	Viktorija	GRUŽAUSKIENE	AB Lietuvos paštas	Lithuania
26	Etiënne	HANEVELD	Abvakabo FNV	The Netherlands
27	Jan Bart	HENRY	PostNL PSE Working Group	The Netherlands
28	Kristin	HENTSCHEL	European Commission - DG MARKT	Belgium
29	Jesus	HIDALGO	FSP-UGTSECTOR POSTAL	Spain
30	Juliana	HOXHA	Posta Shqiptare	Albania
31	Petre Christian	IANCU	Posta Romana	Romania
32	Arsénio	JOSÉ	Sindetelco	Portugal
33	Milan	JUKIC	Croatian Trade Union of Postal Workers	Croatia
34	Ruth	KAUGURS	Estonian Communication and Service Workers' Trade Union	Estonia
35	Alexander	KIRSCAHL	Deutsche Post DHL	Belgium
36	Ján	KOLLAR	Slovenská pošta	Slovak Republic
37	Marinos	KORTAS	Cyprus Postal Employees Union (PASDYD)	Cyprus
38	Karel	KOUKAL	OSZPTNS	Czech Republic
39	Linda	KROMJONG	Deutsche Post DHL PSE Working Group	Germany
40	Cinzia	MAIOLINI	Poste Italiane (SLC)	Italy
41	Ioana	MARINESCU	Posta Romana	Romania
42	Regino	MARTÍN BARCO	FSC - CC00 Sector Postal	Spain
43	Wieslawa	MAZARSKA	SL NSZZ Solidarnosc	Poland
44	Margaux	MEIDINGER	La Poste PSE Working Group	France

	FIRST NAME	LAST NAME	ORGANISATION	COUNTRY
45	Montserrat	MIR	CCOO PSE Working Group	Spain
46	Maja	MOSTARCIC	Hrvatska pošta	Croatia
47	Edgar	MULLER	Österreichische Post AG	Austria
48	Jean-Pierre	NYNS	ACOD – Sector Post	Belgium
49	Arja	OJAPALO	Itella	Finland
50	Oliver	ROETHIG	UNI Europa	Belgium
51	Francisco Sanz Moral	SANZ MORAL	Correos	Spain
52	Jens	SAVERSTAM	SEKO The Union of Service and Communication, PSE Working Group	Sweden
53	Guido	SCHWARZ	European Commission - DG Employment, Social Affairs and Inclusion	Belgium
54	Antonino	SCRIBELLITO	PostEurop	Belgium
55	Håvard	SIVERTSEN	Postkom	Norway
56	Alena	SOURKOVA	OSZPTNS	Czech Republic
57	Werner	STENGG	European Commission - DG MARKT	Belgium
58	Stephan	TEUSCHER	Ver.di	Germany
59	Botond	SZEBENY	PostEurop	Belgium
60	Jean-Paul	TRICART	European Commission - DG Employment, Social Affairs and Inclusion	Belgium
61	Lieve	VANOVERBEKE	ACV-Transcom	Belgium
62	Mariya	VLADIMIROVA	Bulgarian Posts	Bulgaria
63	Cynthia	WEE	PostEurop	Belgium



Dominique Bailly, Chair of the SDC; Jean-Paul Tricart, DG Employment; Werner Stengg, DG Market; Botond Szebeny, PostEurop Secretary General; Oliver Roethig, UNI Europa Regional Secretary and John Baldwin, Vice-Chair of the SDC



Oliver Roethig and John Baldwin



Odar Eeckhout, bpost, Dominique Bailly and John Baldwin



Heike Ausprung, Deutsche Post DHL



Thierry Dieu, IPC



Jens Saverstam, SEKO Sweden



Werner Stengg and Botond Szebeny



Audience

