

# Representativeness of the European social partner organisations: Postal and courier activities sector

## Introduction

This study aims to provide the necessary information to encourage sectoral social dialogue in the postal and courier activities sector. Eurofound's series of representativeness studies, carried out at the request of the European Commission, sets out to identify the relevant social partner organisations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU). The study thus identifies the relevant social partner organisations in the sector by means of both a top-down approach (listing the members of the relevant European associations) and a bottom-up approach through Eurofound's Network of European correspondents.

To be considered in a representativeness study, a **national association** should be a relevant sector-related interest association and meet the following criteria:

- a) the association's domain relates to the sector;
- b) the association is either regularly involved in sector-related collective bargaining and/or affiliated to any relevant European interest association. A **European association** should be a relevant sector-related interest association, whether it is on the Commission's list of interest organisations to be consulted on behalf of the sector under Article 154 of the TFEU and/or participates in sector-related European social dialogue and/or has requested consultation under Article 154.

The sector demarcation to be considered in a representativeness study is agreed upon by the European social partner organisations, and defined in terms of the Statistical Classification of Economic Activities in the European Community (NACE), to ensure the cross-national comparability of the findings.

## Sectoral demarcation and social dialogue

For the purpose of this study, the sectoral social partner organisations at European level agreed to consider the postal and courier activities sector as embracing NACE (Rev. 2) 53.10 and 53.20. This includes the following activities:

- 53.10 Postal activities under universal obligation;
- 53.20 Other postal and courier activities.

According to this definition, the organisations listed by the European Commission as social partners' organisations consulted under Article 154 of the TFEU are, on the employee side, UNI Europa Post & Logistics, and on the employer side, PostEurop.

The European sectoral social dialogue committee for the postal sector was set up in 1999. The committee has covered different issues such as the evolution of the sector, corporate social responsibility (CSR), accident prevention, promotion of social dialogue, and training and lifelong learning. In recent years, the European social partners in the sector have developed a number of joint projects.

## Economic and employment characteristics

Postal services in the European Union have been gradually liberalised since 1997 when the Postal Services Directive opened up about 3% of the regulated national mail services markets to competition. Subsequent directives in 2002 and 2008 led to the progressive liberalisation of the postal sector, with the full market opening in 2010–2012. Across the EU28, there were 52,599 postal and courier services enterprises in 2011 (the last year with available figures), generating €59 billion of value added according to Eurostat's Structural Business Statistics database. The sector is dominated by large enterprises (those employing 250 or more people). According to Eurostat, in 2010 the 342 large enterprises in the sector provided 89.9% of the value added and employed 88.2% of the workforce.

The sector employed 1,698,300 people in 2014, representing around 0.8% of total employment in the EU. Men make up the majority of workers, accounting for 59% of the total workforce. As a result of various factors – the liberalisation of the market, technological changes and the fall in the volume of mail due to the rise in electronic communication – employment in the postal and courier activities sector has decreased in recent years, falling by 14% between 2008 and 2014.

## National level of interest representation

### Trade unions

Some 103 sector-related trade unions were identified in 28 countries as fulfilling the criteria to be included in the representativeness study. Most countries have a pluralistic structure, although the trade union landscape is very fragmented, with 12 countries having four or more unions: they record very low sectoral density. Sectional overlap is the most widespread domain demarcation (39%), followed by overlap (36%). All the trade unions cover the sector in all the regions of their countries except for ELA-Gizalan in Spain, which is only active in the Basque Country region.

### Employer organisations

The study identified 23 employer organisations in just 9 countries (Austria, Denmark, Spain, Finland, Italy, Luxembourg, the Netherlands, Slovenia and Sweden). A total of 28 postal companies (one in each Member State) were also identified and are included in the study; most are in public ownership (20) or semi-state owned companies (3). For the employer organisations, sectional overlap was the most widespread domain demarcation (52%) followed by sectionalism (32%). For the companies, overlap was the most widespread domain demarcation (61%) followed by congruence (28%). The prominence of overlap is explained by domain demarcations that cover diverse sectors outside postal and courier activities, usually bank and insurance activities. On the employer side too low sectoral density prevails.

### Collective bargaining

Some 97 of the 103 trade unions are involved in sector-related collective bargaining. At least one trade union is involved in sector-related collective bargaining in each country. All 23 employer organisations and all 28 companies are involved in collective bargaining. In most of the countries, a low degree of collective bargaining centralisation coexists with high collective bargaining coverage. Thus, only in 10 Member States (Austria, the Czech Republic, Denmark, Finland, Italy, Luxembourg, the Netherlands, Slovenia, Spain and Sweden) do social partners bargain at both single- and multi-employer level, while in the other Member States social partners bargain exclusively at company level. In terms of collective bargaining coverage, 12 Member States record rates exceeding 80% (Austria, Belgium, Croatia, Denmark, Finland, France, Italy, Malta, the Netherlands, Poland, Slovenia and Sweden), while 13 Member States record rates that oscillate between 45% and 80% (Bulgaria, the Czech Republic, Germany, Estonia, Hungary, Ireland, Latvia, Lithuania, Portugal, Romania, Slovakia, Spain and the UK).

More trade unions (81%) than employer organisations (64%) are consulted by national governments on sector-related issues while genuine sector-specific bodies (bipartite or tripartite) have been established in just nine countries.

## European level of representation

In the postal and courier activities sector, the organisations listed by the European Commission as a social partner organisation to be consulted under Article 154 of the TFEU are UNI Europa Post & Logistics on the employee side and PostEurop on the employer side.

## Domain and composition

UNI Europa Post & Logistics has 56 direct affiliations in all EU28 countries apart from Slovenia, with 51 of these being involved in sector-related collective bargaining. Some 54% of the trade unions identified in this study are therefore directly affiliated to UNI Europa Post & Logistics. Only RSRH in Croatia, ZZ PP in Poland and SDPZ in Slovenia can be considered major trade unions not covered by UNI Europa Post & Logistics given their relatively high sectoral density (very high in the case of SDPZ), participation in collective bargaining and involvement in consultation on sector-related issues.

All PostEurop's 28 affiliations covering all EU28 countries are companies. All of them are involved in or covered by sector-related single-employer collective bargaining, apart from one in Finland, which is covered only by a multi-employer collective agreement. Czech Post and Slovenian Post are covered by both single and multi-employer collective bargaining.

### Capacity to negotiate

Analyses of the legal statutes of both organisations reveal that UNI Europa Post & Logistics has a statutory mandating procedure to negotiate agreements on behalf of its members, in accordance with Article 155 TFEU. At present, PostEurop has neither a statutory mandate/mandating procedure nor a (formal) non-statutory mandate to negotiate agreements on behalf of its members in accordance with Article 155 TFEU. However, following a specified internal procedure, PostEurop has signed nine joint documents in the context of the European Sectoral Social Dialogue Committee in the postal and courier activities sector.

### Other European organisations

According to the bottom-up approach, the European Confederation of Independent Trade Unions (CESI) is a sector-related European organisation covering at least three countries, affiliating 14 sector-related trade unions in 11 countries. The approach also suggests that the European Public Service Union (EPSU), which may be also sector-related as a result of the existence of public-owned postal companies in several countries, is present in seven countries. Thus, CESI and to some extent EPSU can be considered relevant organisations identified on the employee side.

Conversely, a similar review of membership of the national employer/business associations did not reveal any other organisation with affiliates in at least three countries.

## Conclusions

Top-down and bottom-up analyses of the postal and courier activities sector show that UNI Europa Post & Logistics on the employee side and PostEurop on the employer side are currently the most important European social partners in the sector.

### Further information

The report *Representativeness of the European social partner organisations: Postal and courier activities sector* is available at <http://bit.ly/RepStudies>

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