



Trend Research for the European Postal Sector in 2030
SCENARIO OVERVIEW



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

MORPHOLOGICAL BOX OVERVIEW

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

SCENARIO RANGE

Future Opportunity Space



How could the postal sector look like in 2030?

2019

2030

GREY SCENARIO: "STANDARDISED SOCIETY"

PINK SCENARIO: "ECHO CHAMBER SOCIETY"

BLUE SCENARIO: "ADAPTABLE SOCIETY"

PURPLE SCENARIO: "VICIOUS CYCLE SOCIETY"

ORANGE SCENARIO: "INNOVATIVE SOCIETY"

SCENARIO OVERVIEW IN A NUTSHELL

GREY SCENARIO: “STANDARDISED SOCIETY”

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

PINK SCENARIO: “ECHO CHAMBER SOCIETY”

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

BLUE SCENARIO: “ADAPTABLE SOCIETY”

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

PURPLE SCENARIO: “VICIOUS CYCLE SOCIETY”

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

ORANGE SCENARIO: “INNOVATIVE SOCIETY”

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

GREY SCENARIO: “STANDARDISED SOCIETY”

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SOCIETY AND POLITICS

- Transparency and sustainability are the new guiding principles of society
- Shift from individualist to more communal values
- Stark and rapid technological change
- Technology and algorithms permeate everyday life
- Highly interventionist policies
- Politics rely on management by algorithm to achieve efficiency gains



ECONOMY

- Focus on sustainable business models and employment
- Carbon taxes and individual carbon budgets strongly influence consumption patterns
- Data is seen as a common good, public data trusts organised data usage
- Open access to data drives a new wave of entrepreneurship
- Focus on the human side of automation
- Less concentration of economic power



POSTAL SECTOR

- Radical transformation of the sector's activities
- Fleets have become utterly electric
- Expanded definition of USO requires the offering of socially-relevant (proximity) services
- New services such as smart data offers and e-government services
- Enabling services for environmentally-friendly supply chains
- Incumbent companies benefit from new regulatory conditions



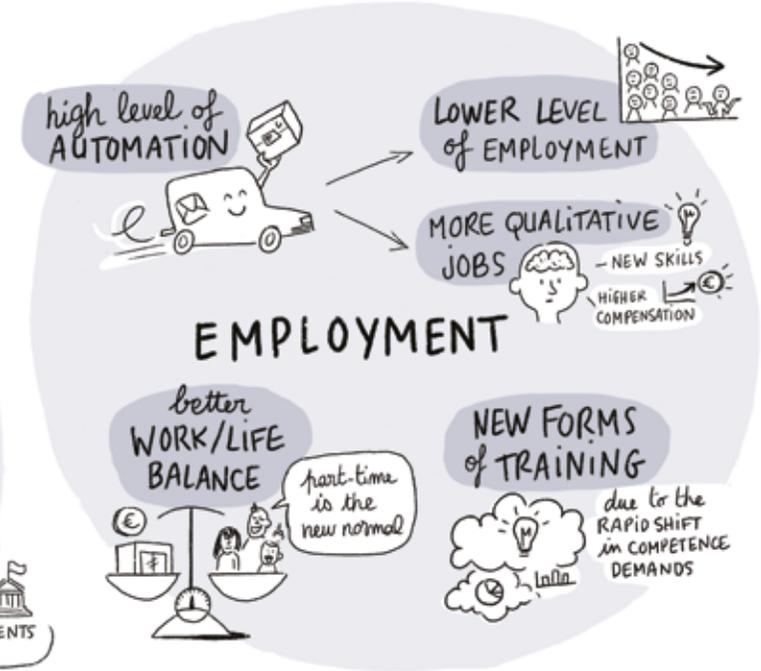
EMPLOYMENT

- Part-time is the new normal
- Many jobs have become more complex, compensation has increased
- Continuing task automation requires constant retraining
- Virtually everyone has access to further training because of public financial support
- Decrease in process flexibility due to more complex technical environment



SOCIAL DIALOGUE

- Key role in negotiating new standards for the radically changed world of work
- New forms of labour organisation and collective bargaining through AI-platforms
- Questions of ethical AI and management by algorithms as ongoing topics of debate
- Little discussion about facts and figures due to data transparency
- Focus on the human aspect of labour conditions



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



SOCIETY AND POLITICS

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



ECONOMY

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



POSTAL SECTOR

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



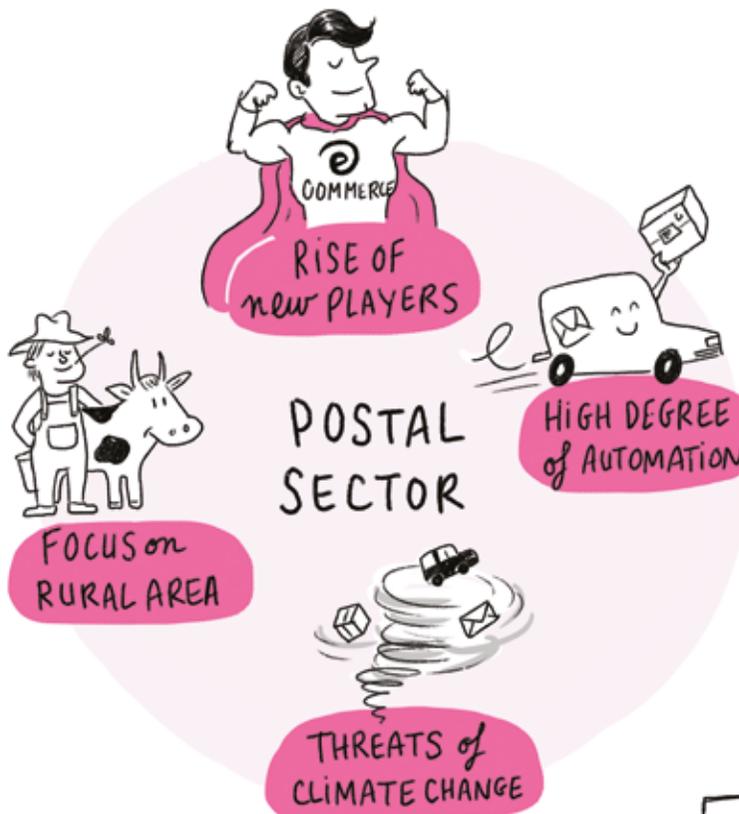
EMPLOYMENT

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



SOCIAL DIALOGUE

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



PINK SCENARIO
ECHO CHAMBER SOCIETY



BLUE SCENARIO: “ADAPTABLE SOCIETY”

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



SOCIETY AND POLITICS

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



ECONOMY

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



POSTAL SECTOR

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



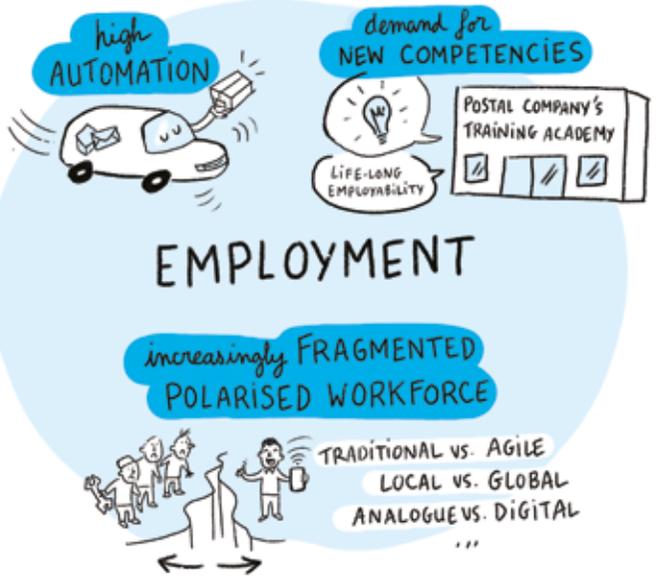
EMPLOYMENT

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

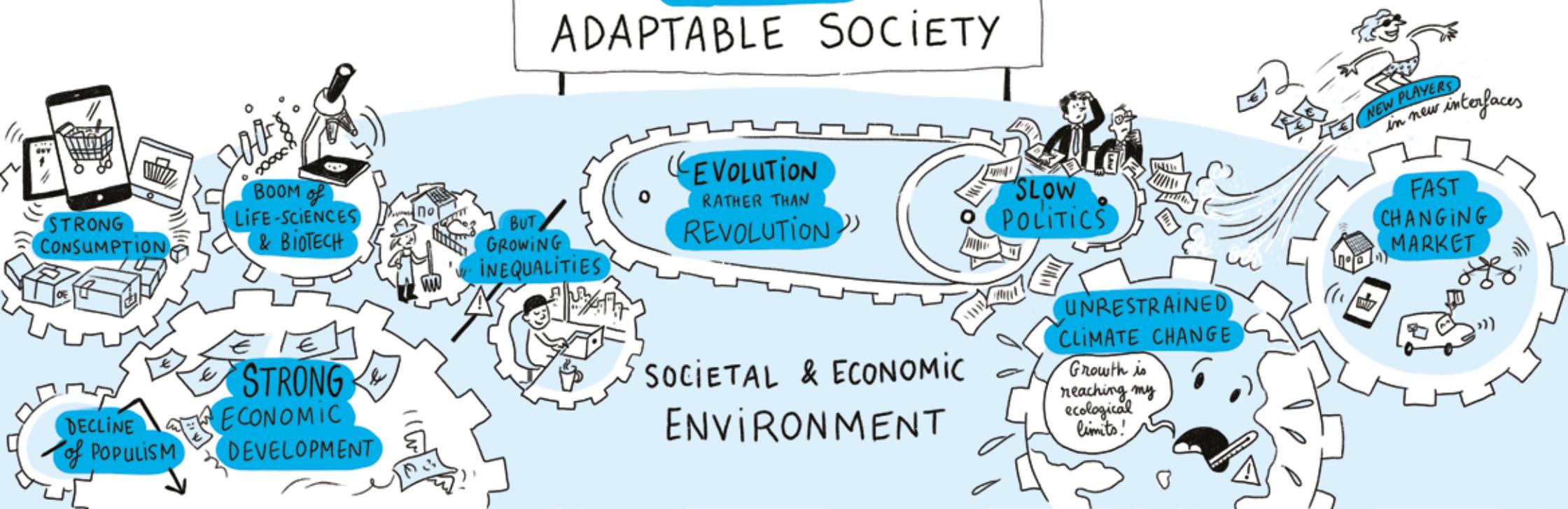


SOCIAL DIALOGUE

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



BLUE SCENARIO
ADAPTABLE SOCIETY



PURPLE SCENARIO: “VICIOUS CYCLE SOCIETY”

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



SOCIETY AND POLITICS

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



ECONOMY

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



POSTAL SECTOR

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



EMPLOYMENT

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



SOCIAL DIALOGUE

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



ONE MAJOR PLAYER

historical or not...

technological BACKLASH



REVIVAL of LETTERS

POSTAL SECTOR



BUDGETARY LIMITATION



PRESERVATION of LOCAL POST OFFICE



LOW EMPLOYMENT

NO MISTAKE
NO RISK



NO INNOVATION...

FEAR of JOB LOSSES

EMPLOYMENT

MANY EMPLOYEES IN THE LOW PAID SECTOR

— manual repetitive simple ACTIVITIES



Well PAID employees



FEAR of DISMISSALS



GROWING POLARISATION no solidarity

SOCIAL DIALOGUE



DETERIORATION of SOCIAL DIALOGUE

PURPLE SCENARIO
VICIOUS CYCLE SOCIETY



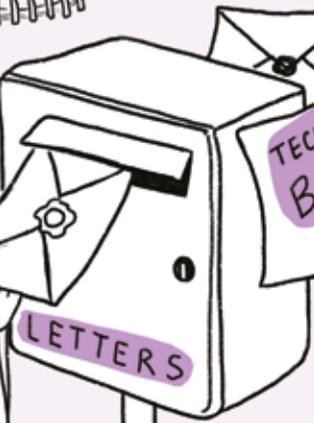
AILING INFRASTRUCTURE



TECHNOLOGICAL BACKLASH

PROTECTIONISM

SOCIETAL & ECONOMIC ENVIRONMENT



ORANGE SCENARIO: “INNOVATIVE SOCIETY”

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



SOCIETY AND POLITICS

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



ECONOMY

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



POSTAL SECTOR

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



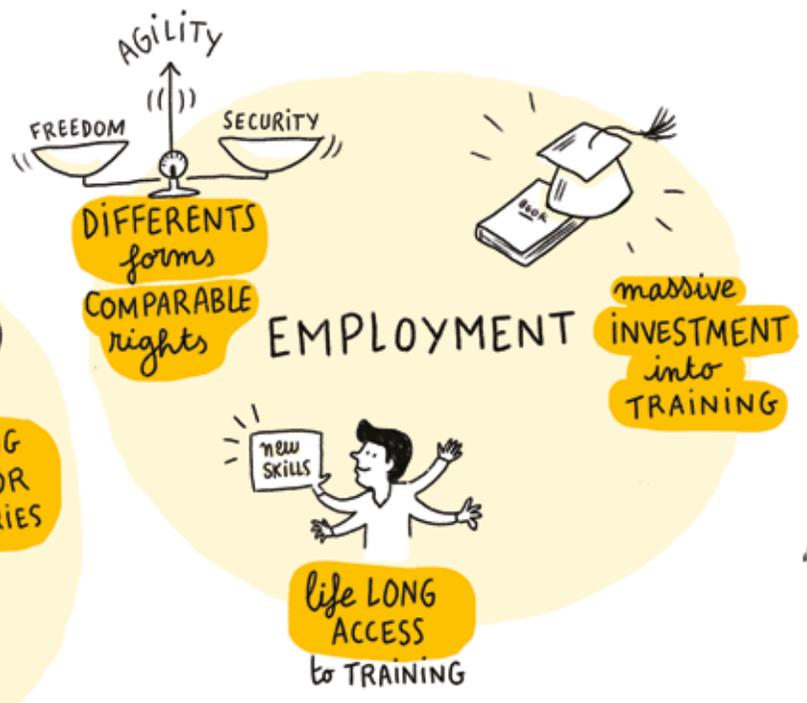
EMPLOYMENT

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



SOCIAL DIALOGUE

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



ORANGE SCENARIO

INNOVATIVE SOCIETY





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