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2024

Sector analysis on postal and courier activities

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Executive summary

- This sector analysis on the postal and courier activities sector (NACE Class H53) accompanies the EURES Report on labour shortages and surpluses 2024. This analysis focuses on the main determinants and causes of labour market imbalances in the postal and courier activities sector.
- In 2024, the postal and courier activities sector was made up of approximately 60 000 enterprises directly employing around 1.52 million individuals. A similar number of EU countries report shortages and surpluses of key occupations in postal and courier services such as messengers, package deliverers, luggage porters, supply and distribution managers.
- Previously dominated by public postal monopolies, the postal and courier services sector now faces intense competition from private courier companies and e-commerce giants who have heavily invested in logistics and technology. As a result, while areas like parcel delivery have experienced growth, traditional mail services have seen a decline.
- Demographic shifts, such as an ageing workforce, create challenges in adapting to new technologies and coping with increased physical demands. Technological advancements highlight a divide between public and private postal operators, with state-owned companies struggling to modernise their workforce, while private companies lead in tech integration and skill development.
- To reduce operational costs, many postal operators use complex pay schemes, and new lower-paid, less secure job categories. These changes have led to diminished job security and reduced earnings for employees. The pressures of tight delivery schedules and performance targets are forcing workers into more flexible but insecure roles, contributing to financial instability for many.
- The rise in parcel deliveries has increased the physical demands on workers, leading to higher workloads and a greater risk of strain. Handling heavier parcels, combined with streamlined sorting and delivery processes, has intensified these challenges. The implementation of technology-driven tools, such as geo-routing software and wearable devices that can be used for monitoring performance, adds to the stress. Overall, these changes have reduced the appeal of taking up jobs in the postal and courier services.
- The diversification of services has transformed the skill set required to work in postal and courier professions, potentially creating a mismatch in the supply-demand of skills for these jobs. Traditional competencies are no longer sufficient, with employees now needing to develop a broader range of skills. Delivery workers need licenses for motorised vehicles, use digital communication tools, and social skills for customer interaction. Similarly, post office employees now focus more on customer service and sales, requiring perceptiveness and service-oriented abilities. Back-office roles are also evolving, with demands for critical thinking and ICT skills.
- The postal sector exhibits a wide range of contractual arrangements, from stable full-time positions in universal service obligation (USO)-governed activities, to more flexible forms such as temporary workers, subcontracting, and self-employment in non-USO services. The latter category is becoming more common among traditional postal operators to meet fluctuating demand. However, while workers in USO-covered services typically enjoy full-time, indefinite contracts and union representation, those in non-USO activities face more unstable conditions. Subcontracting practices, while offering flexibility, tend to be associated with higher turnover, longer hours, and poorer working conditions.
- To address evolving industry needs, postal operators have implemented training programmes focused on digital, technology, and customer service skills. These initiatives aim to equip workers with the necessary competencies to meet the dynamic demands of the postal network. Additionally, legislative measures have been introduced to improve working conditions, protect workers' rights, and ensure fair practices, particularly in subcontracting arrangements, by holding companies accountable for social security contributions and preventing exploitation.

1.0 Introduction

This sector analysis accompanies the EURES Report on labour shortages and surpluses 2024, with this year's edition focusing on the transport sector. The purpose of this analysis is to investigate labour market imbalances in the postal and courier activities sector, with a particular focus on understanding its determinants and causes.

Based on the NACE classification (Class H53), postal and courier activities encompass the pick-up, transport, and delivery of letters and parcels under various agreements, including those covered by a universal service obligation (USO)-as well as commercial agreements (non-USO). Therefore, the occupation included in these activities typically are: delivery staff, parcel handlers, postal clerks.

An overview of the sector is provided in Chapter 2. The labour market imbalances in the postal and courier sector were analysed in relation to the following macro topics:

- Influence of sectoral trends on labour market imbalances (Chapter 3)
- Recent global crises: implications for the labour market (Chapter 4)
- Workforce demographic and related issues (Chapter 5)
- Labour migration and mobility (Chapter 6)
- Working conditions and the role of social dialogue (Chapter 7)
- Skills and qualifications gaps (Chapter 8)
- Recruitment practices to fill labour and skill gaps (Chapter 9)
- Measures to tackle labour market imbalances (Chapter 10)

The study draws on a comprehensive literature review conducted at both EU and national levels, supplemented by insights from a focus group, held on 27 November 2024, comprising key stakeholders, including representatives from trade unions[1]. Further data were provided by EURES National Coordination Offices (NCOs), who identified occupations within the sector experiencing shortages and surpluses. Additionally, Eurostat data were used to highlight key indicators related to workforce profiles.

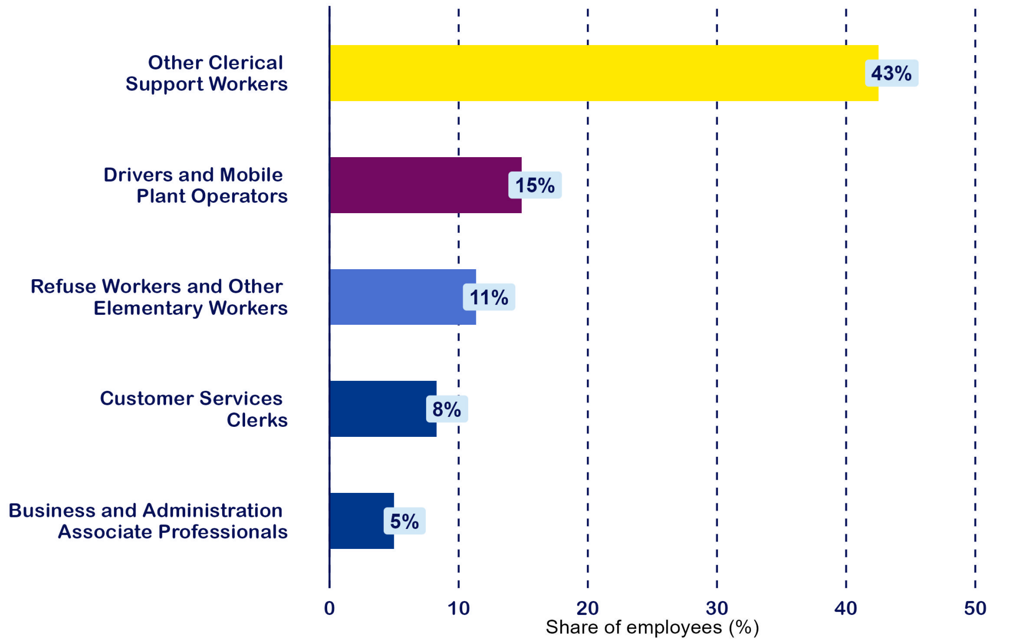
[1] Although contact was made with them, employers and employer organisations did not participate in the focus group.

2.0 Overview of the postal and courier activities sector

At the end of 2024, approximately 1.52 million were employed in the postal and courier activities sector across the EU (Eurostat, 2024a). The vast majority (74%) were employed in large companies (250 employees or more) that represent less than 1% of the enterprises in the sector. The sector is dominated by micro enterprises with 0-9 employees (97%) (Eurostat, 2024b).

As shown in Figure 1, The largest share of employment in the courier and postal services is represented by the broad category of other clerical support workers (43%) followed by drivers and mobile plant operators (15%).

Figure 1 - Share of employment represented by the five most common broad occupations in the courier and postal services sector, 2023



Source: Eurostat (2024). Labour Force Survey special extractions.

Table 1 reports the most frequently reported shortages are in the category of messengers, package deliverers, and luggage porters, with shortages observed in seven countries (Table 1). This is followed by supply, distribution, and related managers, where six countries report shortages. Meanwhile, surpluses for messengers, package deliverers, and luggage porters, as well as supply, distribution, and related managers, are each reported in seven countries.

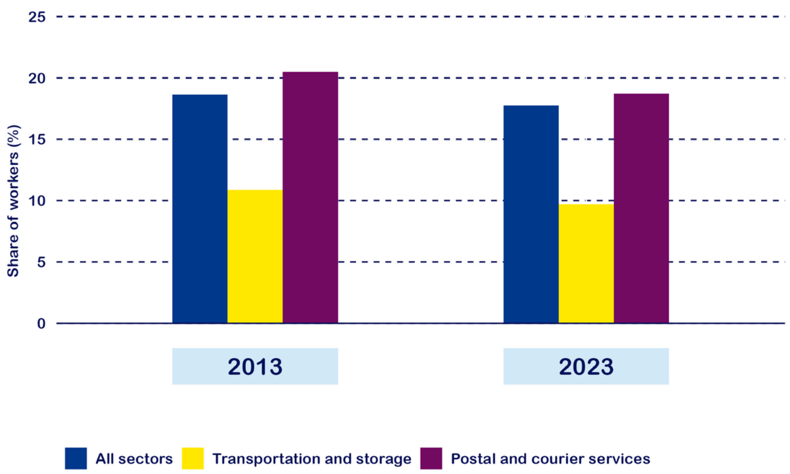
Table 1 Countries reporting shortages and surplus for selected courier and postal services occupations, 2024

Occupation	Countries reporting shortages	Countries reporting surpluses
Messengers, package deliverers and luggage porters	7 countries (CY, DK, HU, IT, MT, RO, SK)	7 countries (BG, CZ, ES, LT, LV, AT, PT)
Supply, distribution and related managers	6 countries (BE, FR, NL, MT, RO, SK)	7 countries (BE, BG, ES, LT, LV, AT, PT)

Source: NCO data. NCOs may report both a shortage and a surplus for a given occupation due to differences at regional level.

The share of part-time employment in the courier and postal services sector has declined slightly from 21% in 2013 to 18% in 2023 (Figure 2). However, it remains twice as high as the overall rate in the transportation and storage sector and slightly above the share of part-time employment in all sectors.

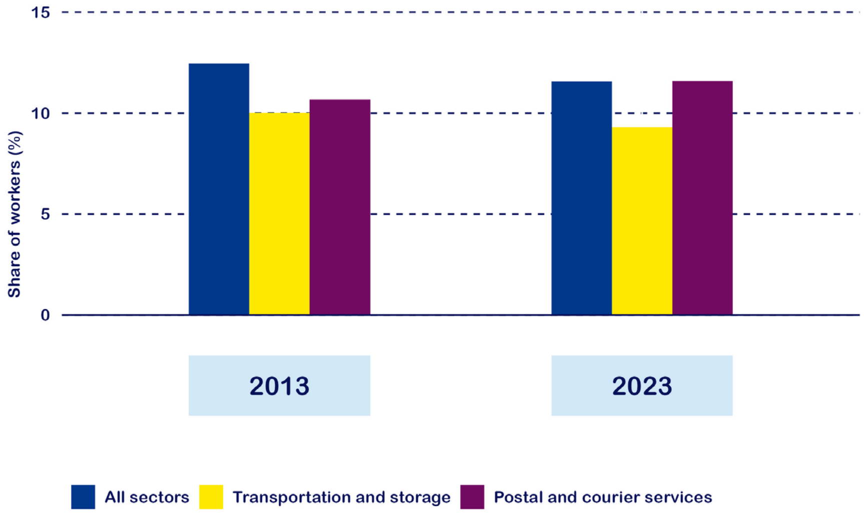
Figure 2 - Part-time employment in the courier and postal services sector, the transportation and storage sector and the overall economy in the EU-27, 2013 and 2023



Source: Eurostat (2024). Labour Force Survey special extractions.

Temporary employment in the courier and postal services sub-sector has risen slightly between 2013 and 2023, reaching 12% in 2023 (Figure 3). This aligns with the overall temporary employment rate across all sectors and exceeds the rate in the broader transportation and storage sector by three percentage points.

Figure 3 - Temporary employment in the courier and postal services sector, the transportation and storage sector and the overall economy in the EU-27, 2013 and 2023



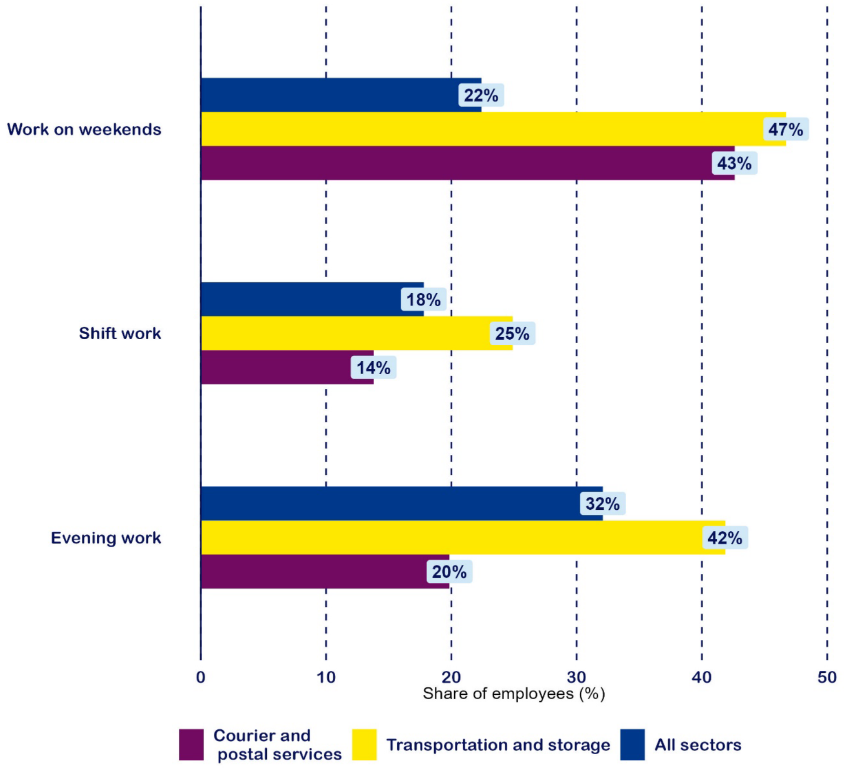
Source: Eurostat (2024). Labour Force Survey special extractions.

As displayed in Figure 4, non-standard work schedules in the courier and postal services sector is particularly high for weekend work, with 42% of employees engaged in it. This is slightly lower than in the transportation and storage sector but significantly higher than in the overall economy. Evening work is also common, affecting 20% of employees, though it remains substantially lower than in transportation and storage. Shift work, at 13%, is the least prevalent among the three atypical work types, falling below the rates observed in both the transportation and storage sector and all sectors combined.

Comparing across sectors, the transportation and storage sector consistently reports the highest levels of non-standard work schedules, especially for weekend and evening work, where it surpasses 40%. In contrast, shift work is more evenly distributed across sectors, though it remains lower in courier and postal services.

These data highlight the sector's reliance on non-standard working hours, particularly weekend shifts, which could be linked to the high demand for delivery services outside of regular business hours.

Figure 4 - Non-standard work schedules in the courier and postal services sector, the transportation and storage sector, and the overall economy in the EU-27, 2023



Source: Eurostat (2024). Labour Force Survey special extractions.

3.0 Influence of sectoral trends on labour market imbalances

Key determinants of labour market imbalances in relation to sectoral trends:

- Increased competition from courier services and large e-commerce companies, including those operating through digital labour platforms, has fragmented the market, pressuring Universal Service Providers (USPs) to adapt, often at the cost of workforce stability.
- Liberalisation in the sector has blurred the lines between public service obligations and commercial activities, leading to lower wages, reduced benefits, and low job security, particularly among smaller operators. These factors are responsible for lowering the attractiveness of postal jobs and their ability to attract talent.
- While improving efficiency, digitalisation has intensified workplace surveillance and work intensity.

The postal service sector has undergone significant transformations in recent decades, driven by the liberalisation of markets, the decline in mail volume, and the growth of e-commerce. These trends have not only reshaped the nature of postal operations but have also had important implications for the employment structure and working conditions.

Between 2017 and 2021, employment in the postal and courier sector grew by 1.5%, accounting for 0.8% of Europe's total employment by 2021. Employment trends within the sector varied significantly by country. Greece had the lowest share of postal and courier workers, at 0.3%, while Slovakia and Croatia had the highest at 1%. Together, five countries - France, Germany, Italy, Poland, and Spain- represented approximately 64% of postal and courier workers in Europe (European Commission: Directorate-General for Internal Market et al., 2022). From 2017 to 2020, Bulgaria and Iceland saw significant declines in Universal Service Providers (USP) employment, with annual drops of 13% and 12%, respectively. In contrast, Germany and the Netherlands experienced workforce growth, with annual increases of 7.5% and 4.8%, driven largely by mergers that expanded operations and increased parcel volumes, leading to a higher demand for workers (European Commission: Directorate-General for Internal Market et al., 2022). The share of USP employment in total domestic employment decreased in Northern and Eastern Europe by 6.9% and 2.9%, respectively, while it increased by 5.2% in Western Europe, largely due to organisational changes and rising demand for parcels (European Commission: Directorate-General for Internal Market et al., 2022).

Despite the challenges faced by traditional postal services, the sector remains a key source of employment in many countries. Postal operators under the universal service obligation (USO)[2] are often among the largest employers in their countries (Copenhagen Economics, 2019). However, the overall trend in recent years has been a decline in employment in USO postal services, as fewer companies are offering universal or interchangeable services. This is reflected in the decline in the number of companies providing USO services, which dropped from 2 313 in 2012 to 892 in 2022 (Eurofound, 2024).

Market liberalisation and shift of business models

The liberalisation of the postal sector began in the late 1990s with European Commission Directive 97/67, which was amended in 2002 and 2010, ultimately culminating in the mandatory opening of the market by 2012 (Eurofound, 2017). Prior to this liberalisation, the postal market was dominated by national postal monopolies which were responsible for providing universal public services under the USO. These monopolies operated with standard contractual arrangements, often as civil servants, and had a well-established workforce structure. Since the liberalisation, the sector has faced a significant reduction in domestic letter mail services, largely due to the rise of digital communication, including government e-communications, which has led to a sharp decline in traditional letter volumes. For instance, Denmark's implementation of mandatory digital communication for government services, which started in 2014, led to a 93% reduction in basic letter volume between 2010 and 2017 (European Commission, 2021; Eurofound, 2024).

[2] The USO is the core of the Postal Services Directive (97/67/EC) ensuring that essential services, such as postal services, are accessible to all residents of a country or region at an affordable price, with consistent quality, and across all geographic areas.

The liberalisation and market opening have facilitated the rise of the Courier-Express-Parcel (CEP) business model which caters to the growing demand for parcel deliveries driven by e-commerce. With this shift, former postal monopolies had to adjust their operations to remain competitive in an increasingly fragmented market. According to Syndex and UNI Global (2019), this market transformation has put additional pressure on former monopolies to adapt their service offerings and workforce practices. As market liberalisation progressed, numerous courier and express service providers entered the market and started offering more competitive services, leading to a decline in the market share of USPs in the parcel segment. These new entrants, including large e-commerce companies, have the financial capacity to invest heavily in logistics infrastructure and technology, often prioritising long-term market share over short-term profits (Copenhagen Economics, 2019). National USPs, while still playing a key role in the sector, have had to compete with international logistics companies such as UPS, FedEx, and Amazon, who are expanding their operations, particularly in the parcel delivery segment (Eurofound, 2024).

Private companies' ability to swiftly adopt new technologies and implement efficient delivery solutions gives them a further competitive advantage compared to state-owned postal operators. In Bulgaria, for example, automated delivery boxes represent a growing trend, providing efficient and customer-friendly solutions. Private companies specialising in same-day delivery have embraced these innovations, meeting market demand and reinforcing their competitive edge. Efforts to address these disparities include extending collective bargaining agreements to encompass the entire postal service market. However, this initiative faces significant resistance and challenges, particularly in harmonising the interest of diverse market players.

Digital labour platforms have expanded significantly across the EU, with over 500 active platforms identified by the European Commission, contributing to a platform economy valued at EUR 14 billion in 2020, up from EUR 3 billion in 2016 (European Commission, 2021). This expansion has reshaped the labour dynamics of postal and courier activities, both in terms of shift from public to private services as well as of employment practices. Platform-based courier services offer more tailored solutions, such as on-site pick-up and delivery, with prices dependent on speed, contrasting with the standardised services of traditional postal operators. This shift has led to a diversification of delivery options, with postal operators increasingly collaborating with or adopting platform-based models to enhance service flexibility and meet evolving consumer demands (EU-OSHA, 2022).

Stakeholders consulted in the focus group highlighted that these market shifts have had significant consequences for workers. Traditional public services, such as universal mail delivery, have lost their distinctiveness as postal operators increasingly compete in the expanding parcel delivery sector. Liberalisation has blurred the lines of responsibility between public service roles and commercial operations. According to stakeholders, working conditions have been notably affected. While large multinational operators may still provide stable employment, smaller competitors often offer lower wages, fewer benefits, and limited job security. Due to cost constraints, training and skills development are frequently overlooked.

As a consequence, the sector struggles to provide competitive wages, career growth opportunities, and attractive working conditions, making it more difficult to attract and retain workers. Additionally, the perception of postal work has shifted. Once considered a stable and attractive profession, it is now increasingly viewed as low-paying and unappealing. Workers are expected to manage growing workloads, particularly in last-mile parcel delivery, with little support or recognition.

Digitalisation of the postal sector

Digitalisation in the postal sector has transformed the working environment and the skills required for postal workers. On the one hand, digital technologies have facilitated postal workers' daily tasks, improved workplace transparency, and streamlined operations, helping workers stay organised and efficient. On the other hand, the push for digitalisation has also led to heightened workplace surveillance and increased work pressure. For these reasons, the impact of digitalisation on working conditions is ambiguous, with trade unions highlighting both the potential benefits and the negative consequences (European Commission: Directorate-General for Internal Market et al., 2022).

Digitalisation has led to a decline of traditional postal correspondence, which decreased by an average of 6.5% annually between 2013 and 2019. At the same time, the parcel delivery sector has experienced a surge, driven in large part by the growth of e-commerce globally (France Travail, 2024). This shift has not only affected the volume of mail but also the profile of postal workers and the skills required for the job. With increased competition in the parcel sector and a diversification of postal operators, the demand on postal workers' skills has evolved. Postal works now need to be able to drive larger vehicles for deliveries, be familiar with communication technologies for peer-to-peer services, and own basic sales-related skills for customer interactions (European Commission: Directorate-General for Internal Market et al., 2022).

4.0 Recent global crises: implications for the labour market

Key determinants of labour market imbalances in relation to recent global crises:

- The COVID-19 pandemic accelerated the shift to online shopping, creating a gap in the workforce, particularly among older employees, who lacked the digital skills required to meet increased demand.
- Innovations like parcel lockers, PUDO (Pick-Up and Drop-Off) points, and carbon-reduction measures, driven by the pandemic's surge in e-commerce, reshaped job roles, creating demand for new skills but straining an already stretched workforce.
- Russia's aggression in Ukraine led to logistical challenges, sanctions, and security concerns that disrupted courier operations and strained workforce stability in affected regions.

Lingering impacts of the COVID-19 pandemic on the labour market

The COVID-19 pandemic brought operational challenges for USPs, accelerating ongoing trends and exposing new dynamic within the postal sector. As e-commerce surged during lockdowns, parcel volumes reached unprecedented levels, compelling operators to innovate and rethink their delivery operations. While initially reactive, these changes are now driving long-terms trends in the sector. The shift to online shopping pushed operators to develop innovative solutions to optimise last-mile delivery. Parcel lockers and PUDO (Pick-Up and Drop-Off) points are examples of these key developments along with the strategies that operators are increasingly adopting to reduce carbon footprint (e.g., fleet electrification) (Grove et at, 2023).

While workforce shortages emerged during the pandemic, primarily due to illness and quarantine measures, the overall number of workers employed at USPs across Europe continued to decline between 2017 and 2021 (European Commission: Directorate-General for Internal Market et al., 2022).

Stakeholders consulted through the focus group agreed that the COVID-19 pandemic acted as a catalyst for transformation. During the pandemic, postal services were deemed essential, ensuring the delivery of vital goods like medical supplies, meals and e-commerce parcels. This placed the workers on the frontline and pushed to implement safeguarding measures, including scanning all packages. Such a rapid growth prompted postal operators to develop new capabilities like parcel delivery tracking, flexible delivery options and expanded parcel lockers. Stakeholders commented that, in Bulgaria for instance, where the average postal worker's age is 48 years, the lack of digital skills necessitated training programmes. However, such initiatives are costly and not universally implemented.

Russia's war of aggression against Ukraine

The ongoing war has caused disruptions to postal and courier services, forcing global operators to adjust their operations. In the immediate aftermath of the invasion in February 2022, major international courier companies, including UPS, FedEx, and DHL, suspended services to and from Ukraine, Russia, and Belarus due to safety concerns and airspace restrictions (Meldner, 2024). On the DHL website[3] it is read that in Ukraine, services have resumed in selected locations, but these are limited and come with elevated risks. DHL has suspended all inbound shipments to these countries and, as of 1 September 2022, fully ceased domestic operations within Russia. This decision was driven by logistical challenges posed by the war, including sanctions, restricted access, and heightened security concerns.

[3] Ukraine Situation Update | DHL | Global

Consulted stakeholders also reported that Russia's war of aggression against Ukraine led to a surge of migration flows from Ukraine to EU Member States with an impact on the postal sector. For example, trade unions from the Netherlands reported that more than 100 000 Ukrainians migrated, and some joined the postal workforce to fill critical staff shortages. In contrast, language barriers in Bulgaria prevented such integration, leaving staff gaps unaddressed.

5.0 Workforce demographic and related issues

Key determinants of labour market imbalances in relation to workforce demographic

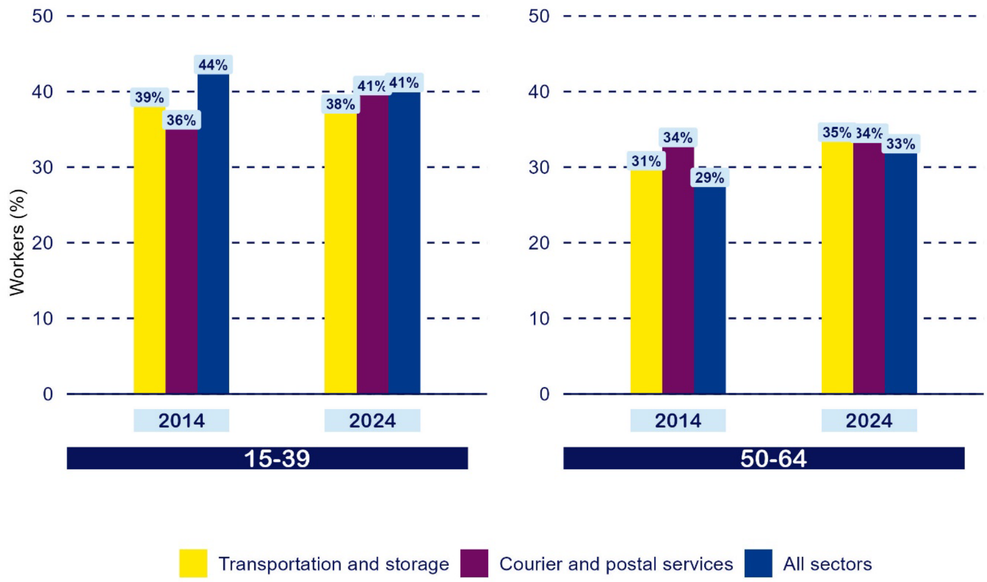
- The postal sector has an ageing workforce, creating challenges in adapting to new technologies; many long-serving employees are nearing retirement, creating skill gaps in the sector.
- Female participation in the workforce has decreased, widening the gender gap in the sector.
- The difficulty to recruit highly educated workers limits innovation in the sector.
- The sector struggles to attract younger, tech-savvy workers, deepening labour market imbalances.

Demographic trends in the postal and courier sector are reshaping workforce dynamics and posing challenges for the industry.

The ageing of workforce creates operational challenges, particularly in adapting to new technologies and increasing physical demand on employees. In addition, increased competition, the rise of e-commerce, and privatisation are further complicating the labour dynamics, as many employees who started their careers in the fully state-owned systems are approaching retirement without the necessary digital skills (Euractiv, 2019). Similarly, consulted stakeholders from Bulgaria highlighted this issue, emphasising the need for targeted training and updated workplace practices to address skills gap among ageing employees.

In 2024, the share of older workers (aged 50-64 years) in the postal and courier services industry (34%) is higher than in the rest of the economy, albeit similar to the average in the transportation sector (Figure 5). The share of workers aged 50 to 64 years in the sector is only very slightly higher (1 percentage point) than the average in the wider economy (Figure 5). In 2024, the proportion of workers in the postal and courier sector aged 15-39 years stood at 41%, the same as the average of all sectors, and 3 percentage points higher than the transportation and storage sector in general. .

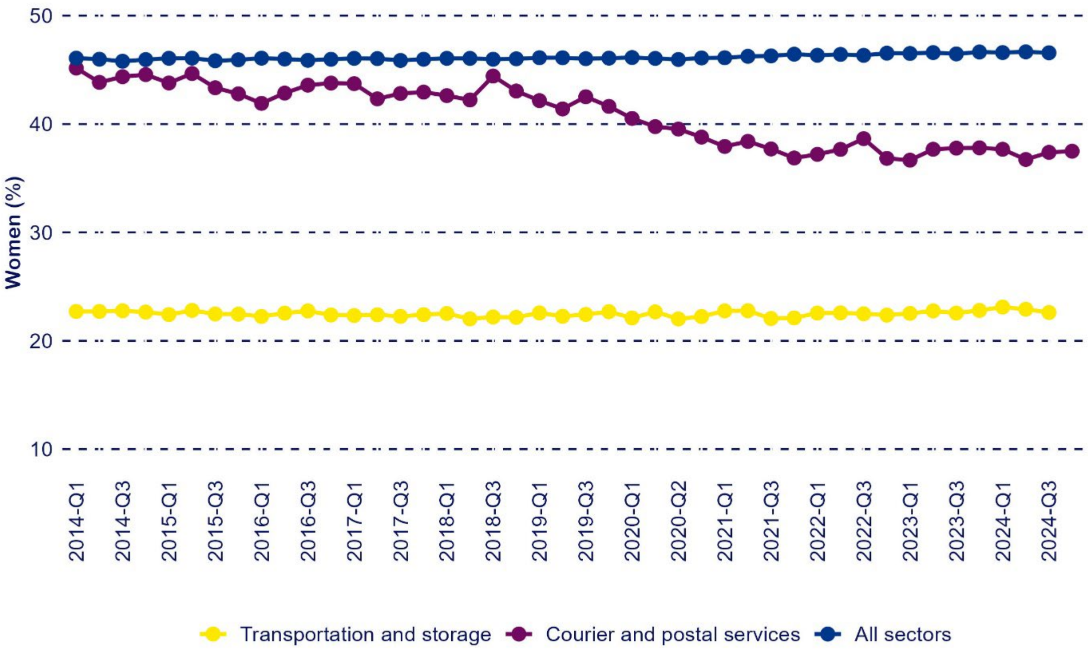
Figure 5 - Employment age structure in the courier and postal services sector, the transportation and storage sector and the overall economy in the EU-27, 2014 and 2024



Source: Eurostat [lfsq_egan2, lfsq_egan22d]

While female participation in the workforce has increased overall by 1.8% in the EU between 2019 and 2023 (Directorate-General for Economic and Financial Affairs, 2024), the share of women in the postal and courier services sector has substantially decreased, from 45% in 2014 to 37.5% in Q3 2024 (Figure 6). This means that female employment went from a similar level relative to the overall economy, to a negative 10 percentage point gap in around ten years (Figure 6).

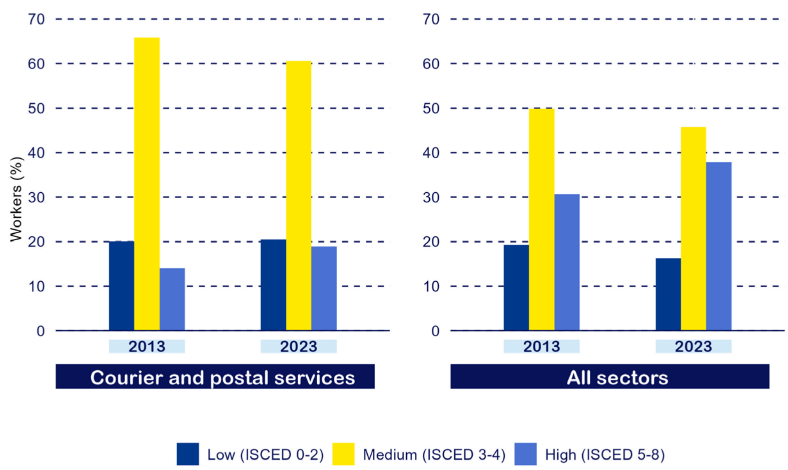
Figure 6 - Share of female employment in the courier and postal services sector, the transportation and storage sector and the overall economy in the EU-27, 2014 Q1 – 2024 Q4



Source: Eurostat [lfsq_egan2, lfsq_egan22d]

In the courier and postal services sector, medium-educated workers (ISCED 3–4) remain the dominant group, representing around 60% of the workforce in 2023, though their share has declined slightly since 2013 (Figure 7). While the proportion of low-educated workers (ISCED 0–2) has remained relatively stable, the share of highly-educated workers (ISCED 5–8) has seen a modest increase, indicating slow progress in the sector's educational upskilling.

Figure 7 - Education structure in the courier and postal services sector, and the overall economy in the EU-27, 2013 and 2023



Source: Eurostat (2024). Labour Force Survey special extractions.

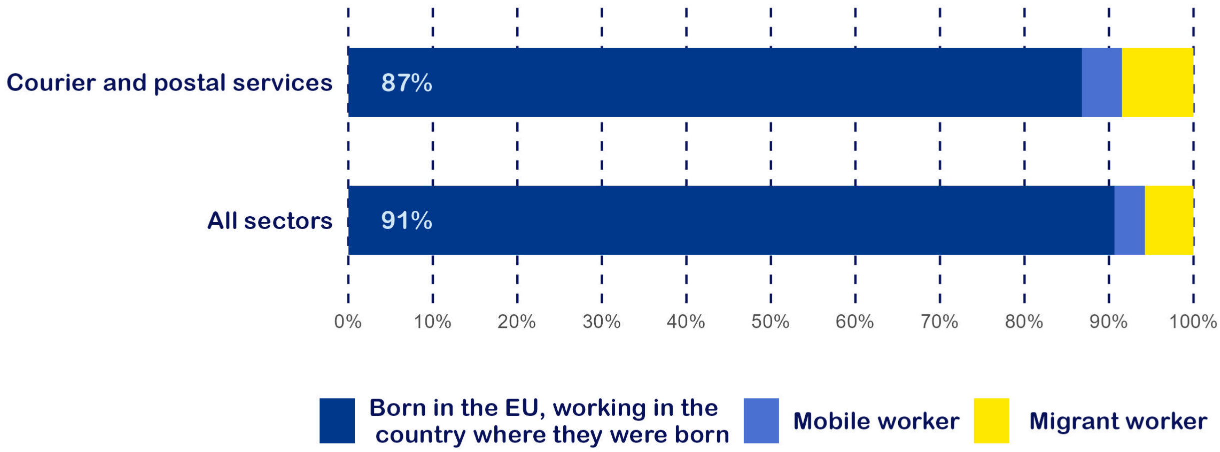
6.0 Labour migration and mobility

Key determinants of labour market imbalances in relation to labour migration and mobility:

- The postal and courier services rely on a lower share of EU nationals working in their home countries, and higher shares of mobile and migrant workers, compared to other sectors of the economy. These differences are however small.
- Migrants are a significant share of the workers employed in digital labour platforms, who are more likely to be non-compliant with sub-standard working conditions.

Figure 8 compares the composition of workers in the courier and postal services sector, by country of birth, in 2023. 87% of workers are EU nationals working in the country where they were born, a slightly lower proportion than in the EU-27 overall economy. Mobile workers represent around 5% of the individuals employed in the courier and postal services sector, while migrant workers are around 9%.

Figure 8 - Overall employed by country of origin in the courier and postal services sector and in all sectors, EU-27, 2023



Note: Mobile workers refer to people originating from the EU but working in another Member State. Migrant workers refer to people originating from outside the EU working in a Member State.
Source: Eurostat (2024). Labour Force Survey special extractions.

Migrants are identified as representing a significant share of the workers employed in digital labour platforms for parcel deliveries, a sub-sector of the postal and courier services which has grown substantially in the last decade (EU-OSHA, 2022). Specifically, countries with strong labour markets that attract many immigrants (e.g. Ireland) tend to have a larger proportion of foreigners in the platform workforce than countries experiencing emigration of national workers (e.g. Romania) (Urzi Brancati et al., 2020). One potential issue associated with the high prevalence of non-EU nationals in the digital labour platform industry in non-compliance with migration and labour legislation. The likelihood of these workers experiencing sub-standard working conditions and, in the worst cases, exploitation, has reportedly risen since the COVID-19 pandemic (De Wispelaere and Gillis, 2021).

7.0 Working conditions and the role of social dialogue

Key determinants of labour market imbalances in relation to working conditions:

- Rising parcel volumes from online shopping have led to heavier workloads, creating physical and mental strain for workers; the shift towards handling larger parcels increases the risk of injuries and physical exhaustion.
- Wage freezes and salaries below national averages deter new recruits and lead to dissatisfaction among existing staff.
- The introduction of lower-paying roles like auxiliary delivery staff reduces job security and discourages long-term employment.
- Non-standard employment contracts and the absence of collective bargaining for some workers exacerbate wage disparities.
- Rigid delivery routes, digital surveillance and performance monitoring tools impose additional stress on workers, especially older employees.

Workload challenges

One of the most significant challenges in relation to working conditions is the growing workload faced by postal employees. This is driven by a rise in the number of parcels being processed and delivered, largely due to the surge in online shopping. At the same time, staff reductions and a focus on efficiency and productivity have added further strain (Syndex and Uni Global, 2019).

The emergence of new business models, including budget competitors and the increasing demand for quick parcel deliveries, has placed pressure on traditional postal operators to reduce their operational costs. The pressure to cut costs has driven operators to implement measures that directly impact employees' earnings and job structures. One such measure is the introduction of complex pay schemes. These schemes may include variable pay components tied to performance or workload, creating some uncertainty for employees about their take-home pay. In addition, wage freezes mean that salaries remain stagnant over time, even as living costs and inflation rise, effectively reducing employees' purchasing power. Furthermore, postal operators have introduced new job categories, such as assistant or auxiliary delivery staff. These roles typically come with lower pay and fewer benefits compared to traditional full-time positions.

Similarly, stakeholders consulted through the focus group cited the increased use of platform-based models as an employment mode that helps companies respond to tight delivery schedules and the demands of e-commerce. These models often involve more flexible employment arrangements, although workers may not receive the same benefits as traditionally employed staff. Collectively, these changes diminish real wages and contribute to a less stable and equitable work environment (Syndex and Uni Global, 2019).

Additionally, the physical demands on workers have intensified as result of the shift towards parcel delivery, driven by the rise of e-commerce. Postal workers are increasingly responsible for handling heavier parcels. Combined with the rationalisation of sorting and delivery processes, workload and risk of physical strain is higher. For example, workers are often required to meet performance targets set through software tools, such as geo-routing (Syndex and Uni Global, 2019). For older workers, this system is particularly challenging as it assumes a universal approach to workload calculation, disregarding the natural decline in performance that comes with age or years of physical strain (Syndex and Uni Global, 2019).

Employment conditions

As postal services are often the primary employer in many regions with scarce job opportunities, workers in these areas have limited bargaining power, which exacerbates their vulnerability. These issues are compounded by the fragmented nature of the sector, where wages are often lower than the national average. In fact, the average wage for a USP employee in Europe was just around EUR 15 per hour in 2021, with only a slight increase over a four-year period (European Commission: Directorate-General for Internal Market et al., 2022). Non-USP employees typically earn even less, as they are often not covered by collective bargaining agreements, contributing to a two-tier labour market that widens the wage gap (Syndex and Uni Global, 2019).

According to consulted stakeholders, the increasing reliance on subcontracting and outsourcing in the postal sector is deteriorating working conditions. They describe this trend as part of a broader 'race to the bottom' where global companies prioritise cost-cutting over worker well-being. These practices create significant disparities in working conditions across the industry, with private operators often offering inferior terms compared to public postal services.

Due to differing labour standards requirements, the liberalisation of the postal sector has contributed to unequal working conditions across countries. For example, a stakeholder noted that in countries like Germany and Scandinavian nations, companies cannot operate as postal providers unless they meet specific licensing and labour standards. However, in other countries like Bulgaria, private competitors are not held to the same terms and conditions as the national postal operator, which leads to significantly lower wages and precarious working conditions.

Impact of technology and digitalisation

The increased reliance on technology in the postal sector also plays a role for working conditions. The introduction of automation, for example, has led to job cuts and rationalisation of tasks, further reducing the number of workers needed. This, in turn, increases the pressure on the remaining workforce to meet delivery targets. In Sweden, for instance, employment cuts are happening at a faster rate than the drop in volumes. Workers, particularly those with less job security or precarious employment, are now being asked to work longer hours or take on additional responsibilities to compensate for the shortfall in staff (Syndex and Uni Global, 2019). Companies are increasingly adopting a low-cost model, putting additional strain on wages and working conditions (Syndex and Uni Global, 2019). This has led to growing concern from trade unions, who are advocating for fair wages, better working conditions, and more equitable treatment for postal workers across the sector. For example, in Belgium, trade unions have called for equal minimum standards across all market players to ensure fair competition and protect workers' rights (European Commission: Directorate-General for Internal Market et al., 2022).

Wearable devices used for employee monitoring are another product of the digital transition which sparked significant controversy. Wearables can be used as tools for performance oversight, measuring metrics such as distance covered, items processed, and even tracking breaks, including restroom visits, to ensure compliance with production targets. While wearable devices like posture-monitoring systems also aim to improve workplace ergonomics and prevent health risks, their implementation raises concerns about data privacy work-related stress and competition among employees (Eurofound, 2020). In fact, continuous monitoring can create an uncomfortable environment for workers and lead to decreased trust in the employer (EU-OSHA, 2024b). Workers may experience fear of job loss due to feeling under constant scrutiny to meet targets. Such fear may contribute to increasing long-term absences, occupational illnesses, and high turnover rates, as seen in companies like CityMail, which experienced a 60% annual turnover rate due to stress and poor working conditions (Syndex and Uni Global, 2019).

The role of social dialogue

Between 2015 and 2023, the postal and courier activities sector in the EU-27 experienced significant growth in the number of trade unions, reflecting changes in labour representation across Member States. According to Eurofound (2024), the total number of trade unions in the EU-27 in the sector increased from 98 to 115. Trade unions increased in countries like Belgium, Croatia, Czechia, Finland, Greece, Portugal, Romania, Slovenia, Spain, and Sweden. In contrast, some countries saw a decline, such as the Netherlands and Hungary. Additionally, restructuring in the form of union mergers occurred in some nations, such as Ireland (Eurofound, 2024).

The USO segment, including activities like mail and parcel delivery by national USPs, is well-covered by trade unions. Of the 115 trade unions identified in 2023, 82 unions represent workers employed by national USPs, with coverage extending to all Member States. However, representation of workers in other postal services (e.g., subcontractors, parcel delivery by non-USPs) is missing in certain countries (Croatia, Poland, and Slovakia).

Despite strong trade union coverage of white-collar workers (77% of unions), blue-collar workers (65%), and management staff (69%), certain categories remain underrepresented. For example, only 26% of trade unions represent contractor workers, a group increasingly prevalent due to outsourcing practices. Self-employed workers, who form a growing share of the workforce in the liberalised postal sector, are represented by just 8% of trade unions (Eurofound, 2024).

Union activity remains concentrated in large companies (250+ employees), where 90% of trade unions represent workers. In contrast, smaller companies with 1 – 9 employees see much lower trade union engagement, with only 30% of unions covering such workplaces. This uneven distribution mirrors broader trends in industrial relations, where union density is typically stronger in larger enterprises.

The representativeness of employer organisations in the postal and courier sector has significantly expanded over the years, reflecting growing complexity in the industry. According to Eurofound (2024), there has been a notable increase in national sectoral employer organisations, from 23 in 2015 to 44 in 2023, spanning 18 Member States. National USPs are members of 16 out of the 44 employer organisations identified. Several employer organisations represent European multinational companies operating in the other postal services segment or businesses beyond the postal and courier sector. Sectors covered are typically transport and logistics and newspapers, media, publishing, marketing, and entertainment.

Social dialogue in the postal sector has been instrumental in managing the impact of declining letter volumes, digitalisation, and of organisational restructuring on employment. The European Social Dialogue Committee (SDC) for the Postal Sector, established in 1999, exemplifies successful cooperation between social partners, such as PostEurop for postal operators and UNI Europa Post & Logistics for trade unions. Through this collaboration, social partners have addressed critical issues such as wages, working hours and employment contract types (European Commission, 2022).

A successful example is given by the implementation of several strategies to safeguard employment conditions and mitigate job losses, including voluntary early retirement, compensation payments, internal job transitions, and upskilling or reskilling programmes. While upskilling initiatives are widespread, they often benefit more the higher-level positions, aligning with operational goals of postal companies rather than addressing the needs of the broader workforce. Further, these strategies are pursued in only a few countries, reflecting a fragmented approach across the sector (Kalbermatter et al., 2021).

Stakeholders acknowledged the importance of social dialogue traditions within EU Member States, which allow for national characteristics to influence labour regulation through subsidiarity. However, the social dialogue's ability to address shortages by protecting employment and working conditions is limited by the current EU legislative frameworks, certain national laws and limited scope of collective bargaining.

For example, the global nature of e-commerce means that national postal operators (e.g. French Post and DHL) increasingly operate across international markets. These operators are now responsible not only for postal workers in their home countries but also for logistics workers worldwide. Stakeholders emphasised the need to revise both the Postal Services Directive and the recently adopted Corporate Sustainability Directive to establish clear definitions of universal postal service provisions and address the impact of diversified international activities. Without such revisions, companies may engage in a 'race to the bottom', driving down labour standards and disrupting supply chains across Europe.

One stakeholder from Ireland pointed out the country's weak labour legislation, which does not guarantee the right to trade union recognition. This legal gap severely limits the ability of unions to improve conditions through collective bargaining. The stakeholder highlighted the importance of the EU's Adequate Minimum Wages Directive, specifically its provision requiring Member States to ensure collective bargaining coverage of up to 80%.

The growing diversity of players in the postal and courier sector calls for minimum labour standards and collective agreements, according to stakeholders. Competition in the sector has become more intense, and the lack of collective agreements puts public operators at a disadvantage. Public operators must serve all areas, which is costly, while private couriers can avoid this obligation. An example was given of DHL, where management resisted unionisation efforts, even though the company had a collective agreement. Similarly, stakeholders pointed out that Amazon operates as a postal provider in Spain without meeting the same labour standards as traditional postal companies. These practices highlight the need for sector-wide collective bargaining and human rights protections for all players in the postal supply chain.

Stakeholders advocated for extending collective bargaining to the wider postal and courier sector. They noted that the approach to collective agreements varies across countries. Some rely on agreements with individual companies, while others pursue branch-level or sectoral agreements at the national level. However, these efforts face significant challenges, with some countries achieving success and others failing to secure comprehensive agreements.

Finally, organising workers beyond the core workforce remains a significant challenge for unions, especially in the face of competition from large private logistics companies. This difficulty is compounded by insufficient knowledge about how digitalisation affects labour processes, highlighting the need for further research to address local issues and develop 'good practices' (Kalbermatter et al., 2021). Expanding union membership in digitalised workplaces is critical to influencing the implementation of digital technologies through collective bargaining. However, declining union participation, especially among younger employees who view their positions as temporary, threatens the effectiveness of social dialogue (European Commission, 2022).

8.0 Skills and qualifications gaps

Key determinants of labour market imbalances in relation to skills and qualifications:

- The postal sector faces a growing skills gap as traditional competencies become outdated. With the diversification of postal services, workers must develop a broader skill set, including digital literacy, customer service, and critical thinking, increasing demand for skilled workers
- Ageing workforces, especially in state-owned postal companies, struggle to adapt to new technologies, creating skill shortages in roles that demand digital proficiency.
- The gap between state-owned and private sector postal companies in adopting new technologies exacerbates skill shortages, with private companies better equipped to meet market demand.

The diversification of postal services has reshaped the profile of the postal worker. Traditional skills are no longer sufficient. Employees now require a broader range of competencies. For delivery workers, this includes obtaining licences for motorised vehicles, mastering digital devices for peer-to-peer communication, and acquiring social skills to interact with customers. Post office employees, meanwhile, must develop perceptiveness, service orientation, and sales abilities to handle their evolving roles, which increasingly focus on customer service rather than administrative tasks. Back-office roles are also evolving, with new demands for critical thinking, active listening, and basic ICT proficiency. As hybrid mail, mobile apps, and digital document management become standard services, all postal workers must continually enhance their digital skills to remain effective in their roles.

Stakeholders consulted through the focus group highlighted the evolving skill requirements driven by technological advancements and the noticeable disparities between the public and private sectors. In Bulgaria, these challenges are particularly pronounced in the state-owned Bulgarian Post compared to its private sector counterparts. The ageing workforce at the state-owned Bulgarian Post, with an average employee age between 48 and 58 years, faces significant difficulties in adapting to modern digital technologies. In contrast, private companies like DHL and other international players are setting benchmarks for technological integration and workforce engagement. DHL, for instance, was reported as widely recognised as a leader in technological innovation. Its workforce is younger, more dynamic, and better equipped to handle the demands of modern logistics. The company's comprehensive employee benefits, higher salaries, and skill-development programmes make it an attractive employer. This trend is mirrored by other international firms such as the French company La Poste, which also offers competitive working conditions and employs skilled professionals.

While no existing publication delves into the size of the mismatch between the skills supplied and demanded, the evolved nature of the skills and qualification required in the postal and courier services may be responsible for an excess of low-skilled workers and a shortage of suitably qualified workers.

9.0 Recruitment practices to fill labour and skill gaps

Key determinants of labour market imbalances in relation to recruitment practices:

- Widespread practices of heavy reliance on temporary work agencies, short-term contracts, or self-employment undermines job stability and long-term career prospects for workers.
- Platform-based and self-employment models create uncertainty around workers' rights, deterring potential candidates.
- Recruitment efforts are increasingly challenged by high turnover, competition from alternative employers, and physically demanding job roles, particularly in parcel delivery.
- As postal operators expand into new service areas like logistics and food delivery, recruitment strategies must adapt to attract workers with different skill sets and employment expectations.

Various contractual arrangements coexist, ranging from traditional full-time contracts to subcontracting and self-employment, particularly in non-USO postal activities. In the countries where postal services are governed by the USO, workers are typically employed under more stable conditions, often with full-time, indefinite contracts. These employees are generally organised by trade unions, a legacy of the former national postal monopolies (Eurofound, 2024). The situation is notably different in non-USO postal activities, where there has been a significant increase in the use of temporary agency workers, subcontractors, and self-employed individuals. To remain competitive in the growing parcel segment, national USPs often subcontract non-USO activities to smaller companies, particularly to manage fluctuating demand. While subcontracting provides greater flexibility, it frequently leads to less stable contractual arrangements, characterised by higher staff turnover, longer working hours, and poorer working conditions (Eurofound, 2024). Stakeholders consulted in the workshop reported that, despite a higher prevalence of atypical contracting practices in non-USO activities, employment in both sections are becoming increasingly flexible and less protective. Stakeholders also shared that there is currently no data separating USO and non-USO activities to measure this trend precisely.

The rising use of these contractual arrangements is particularly pronounced in the last-mile delivery of parcels. Such delivery chains often involve complex networks of subcontractors, including temporary work agencies, transport service providers, and self-employed couriers, which complicate the enforcement of labour laws (Syndex and Uni Global, 2019). This fragmentation makes it difficult for authorities to determine who is legally responsible for workers' rights, leading to increased risks of undeclared work and exploitation (EU-OSHA, 2024a). Such arrangements are becoming common as alternative operators, particularly those in the CEP sector, challenge the business models and social structures of traditional postal services (Syndex and Uni Global, 2019).

Participants in the focus group expressed concerns about the increased involvement of global platforms in last-mile delivery. These platforms often rely on self-employed workers, disregarding local labour regulations on health insurance, paid leave and job security. Stakeholders commented how self-employed drivers, whether on bikes or in vehicles, are directly competing with employees who have permanent contracts in the postal and courier sector. This shift creates significant challenges, particularly for trade unions, as they navigate the complexities of bargaining on behalf of workers. Stakeholders from the Netherlands noted that the challenges posed by using self-employed workers in the postal and logistics sector have become a key point of discussion among trade unions. While the flexibility offered by self-employment appeals many workers, it also raises concerns about social equity, fair wages, and long-term employment stability.

As competition intensifies, USPs are increasingly shifting from a civil servant model to more flexible, non-standard employment types. In countries like France and Belgium, the share of civil servants in the workforce at postal operators such as La Poste and Bpost has been significantly reduced. La Poste, for example, froze recruitment for civil servants in 1993, and by 2018, civil servants made up only 42% of the workforce, down from 50% in 2013 (Syndex and Uni Global, 2019). In Belgium, the share of civil servants at Bpost decreased from 70% to 45% between 2010 and 2018, as voluntary schemes such as early retirement programmes were widely used to reduce employment levels (Syndex and Uni Global, 2019).

Part-time employment has also increased within the sector. Across Europe, USPs have increasingly relied on part-time workers to cope with fluctuating demand, particularly during peak times. In Belgium, for example, trade unions have raised concerns about the rise of 'mini-jobs' which involve workers employed for just a few hours each day at wages barely above the minimum hourly rate (Uni Europa, 2020). Similarly, in Sweden, the proportion of full-time jobs has decreased, with more students taking part-time roles to meet the demand for mail sorting and delivery (Uni Europa, 2020).

The emergence of digital platforms, such as those used for parcel delivery, also explains the shift in the contractual arrangements. Workers in this sector are often classified as self-employed, which limits their access to social protection, including occupational health and safety regulations. Platform work such as this one allows providers to bypass employment legislation regarding zero-hour contracts. This trend is particularly prevalent for last-mile delivery, where couriers are often employed under atypical contracts, and their legal status can be ambiguous (EU-OSHA, 2024a). For example, in Spain, the national postal service Correos employs a significant number of temporary workers on precarious, month-to-month contracts, creating employment instability and making long-term career planning difficult for these employees (Reina Corbacho, 2021). Stakeholders highlighted that platform delivery can sometime be paid per delivery. Other models include distance-based pay or commission-based pay. Although not zero-hour contracts, these can be extremely precarious working conditions depending on the quantity of packages available.

At the same time, many USPs, such as La Poste (French national postal service) and CTT (Portuguese national postal service), have diversified into different areas like food delivery, using mixed employment models that combine self-employed couriers with permanent staff (European Commission: Directorate-General for Internal Market et al., 2022). These changes, while offering some flexibility, contribute to job insecurity and reduced social benefits for workers.

10.0 Measures to tackle labour market imbalances

Key measures to tackle labour market imbalances:

- The postal sector's future hinges on its ability to balance technological advancement with workforce readiness. Upskilling and continuous education of workers to meet the demands of a rapidly evolving job market are necessary to realise this objective.
- Trainings in digital and technology skills, data analytics, products, sales, and management are among the training prioritised by European countries to upskill their postal workforce.
- Permanent contracts and expanding recruitment campaigns can be effective solutions to labour shortages and high turnover rates, particularly in physically demanding roles.
- Legislative reforms enforcing subcontractor accountability for social security contributions can improve working conditions and reducing unfair labour practices in the courier sector.

New training programmes aim to attract and retain talented postal workers while ensuring they are equipped to handle the dynamic requirements of the postal network (European Commission: Directorate-General for Internal Market et al., 2022). These initiatives are key to addressing the current mismatch in the sector's supply and demand for skills, which is potentially responsible for an excess of low-skilled workers vis-à-vis a shortage of suitable qualified workers.

European postal operators and social partners have collaborated on initiatives like the EU-funded 'Postal Skills and Work Environment in the Digital Era' project (European Social Dialogue Committee for the Postal Sector, 2022)[4]. This programme highlighted the growing need for digital literacy, social perceptiveness, and adaptive skills across all roles in the postal sector (European Commission: Directorate-General for Internal Market et al., 2022).

PostEurop, a collective body representing postal operators, emphasises the importance of lifelong learning. By fostering continuous education and training, postal organisations aim to bridge the gap between current skill levels and evolving job requirements, ensuring employees remain competitive and adaptable in dynamic labour markets. (European Commission: Directorate-General for Internal Market et al., 2022).

The postal sector's future hinges on its ability to balance technological advancement with workforce readiness. Through substantial investments in training programmes, from big data analytics to customer service excellence, postal operators are not only meeting the demands of today but also preparing their employees for the challenges of tomorrow. This commitment to skill development ensures that the workforce remains a vital part of the sector's transformation, enabling postal services to thrive in a rapidly changing environment (European Commission: Directorate-General for Internal Market et al., 2022).

In Finland, Posti has identified digitalisation as a transformative factor affecting its operations, from product offerings and consumer behaviour to work processes involving mobile applications. As a response, digital and technology skill development has become a priority. In 2020, Posti, with 17 000 employees, introduced training focused on Pick Up and Delivery (PUD) mobile devices and customer service skills, benefitting 550 drivers and drive arrangers. By 2021, over 1 000 Posti and partner drivers participated in this initiative. Additional training efforts included Big Data and Essentials of Data and Analytics online courses, benefitting hundreds of employees (European Commission: Directorate-General for Internal Market et al., 2022).

[4] The European Social Dialogue Committee for the Postal Sector

Spain's Correos supported an extensive training programme in 2020, enabling 1.6 million hours of training for over 316 000 participants. The curriculum, delivered via the Correos virtual campus and on-site sessions, included courses on products, sales, and management. Key offerings were the 'Product School', an online programme covering Correos' commercial services and sales techniques, and the 'Sales School,' tailored for sales managers and commercial customer service teams. Correos Express, a subsidiary, developed specialised courses to address digital transformation, such as cybersecurity, Big Data, and dynamic delivery management (European Commission: Directorate-General for Internal Market et al., 2022).

In France, La Poste has committed to ambitious internal digital transformation and education goals. By 2021, 25 000 employees, out of 248 000, had completed digital and data-related training, with a target for all employees to finish the programme by 2025. The company also aims to train 40 000 managers and sales staff in artificial intelligence applications for their roles, while 5 000 employees are set to become data experts (European Commission: Directorate-General for Internal Market et al., 2022; La Poste, 2021).

PostNL in the Netherlands has implemented a series of initiatives to address labour shortages and high turnover rates among mail deliverers. These initiatives include offering permanent contracts from the start, increasing starter premiums, and expanding recruitment campaigns (Post NL, 2023). However, these measures have had limited success in reducing turnover, particularly among parcel deliverers, who face physically demanding work and competition from other employers.

Legislative initiatives have also contributed to improving working conditions. In November 2019, Germany introduced the Parcel Delivery Personnel Protection Act (Paketboten-Schutz-Gesetz), which extends subcontractor liability for proper payment of social security contributions to the courier, express, and parcel industry. This measure, already applied in the meat processing and construction industries, holds the main contractors accountable if their subcontractors fail to pay these contributions. By encouraging parcel service providers to select subcontractors more carefully, the law aims to protect employees and prevent unfair competition based on driving down labour costs. The law has proven effective, as evaluations show a rise in the number of employees subject to social security contributions in the industry since its implementation. Subcontractors are increasingly seeking prequalification and adhering to proper payment practices. This has helped improve working conditions for parcel delivery personnel, particularly in the 'last mile' of delivery, while addressing issues like undeclared work and fraud in the sector (Federal Ministry of Labour and Social Affairs, 2022).

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