

Industrial relations and social dialogue

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



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Country codes

AT	Austria	FR	France	PT	Portugal
BE	Belgium	HR	Croatia	RO	Romania
BG	Bulgaria	HU	Hungary	SE	Sweden
CY	Cyprus	IE	Ireland	SI	Slovenia
CZ	Czechia	IT	Italy	SK	Slovakia
DE	Germany	LT	Lithuania		
DK	Denmark	LU	Luxembourg	MA	Morocco
EE	Estonia	LV	Latvia	NO	Norway
EL	Greece	MT	Malta	UK	United Kingdom
ES	Spain	NL	Netherlands		
FI	Finland	PL	Poland		

Introduction

The aim of this representativeness study is to identify the relevant national and supranational social actors (that is, the trade unions and employer organisations) in the postal and courier activities sector, and to show how the national actors relate to the sector's European interest organisations for both workers and employers.

The impetus for this study, and for similar studies in other sectors, arises from the aim of the European Commission to identify the representative social partner organisations to be consulted under the provisions of the Treaty on the Functioning of the European Union (TFEU) and to be eligible for participation in European sectoral social dialogue committees (ESSDCs).

The report is divided into five parts: an introduction; a first chapter giving an overview of the economic specificities and the employment trends in the postal and courier activities sector; a second chapter with an analysis of the social partner organisations in all EU27 Member States; a third chapter analysing the representativeness of the relevant European organisations, in particular their membership composition and capacity to negotiate; and a conclusion.

This section presents the objectives of the study, along with a brief introduction to European social dialogue in the postal and courier activities sector, and a brief introduction to the chosen methodology.

0.1. Objectives of the study

Representativeness studies are conducted for four reasons.

- The European Commission aims to confirm the representativeness of the social partner organisations consulted under Article 154 of the TFEU.
- Representativeness is a criterion to be eligible for setting up or participating in an ESSDC.
- Representativeness also means having the capacity to negotiate agreements that can be implemented by Council decision, as provided for by Article 155 of the TFEU.
- This study can also offer guidance for future capacity-building initiatives.

Representativeness is defined by the European Commission decision of 20 May 1998 on the establishment of sectoral social dialogue committees promoting the dialogue between the social partners at European level (Decision 98/500/EC). For an organisation to be recognised as a representative EU social partner organisation, it must:

- relate to specific sectors or categories and be organised at European level
- represent organisations that are themselves an integral and recognised part of Member States' social partner structures, that have the capacity to negotiate labour agreements and that are representative of several Member States
- have adequate structures to ensure its effective participation in the work of an ESSDC

To accomplish its aims, this study first identifies the relevant national social partner organisations in the postal and courier sector, before analysing the structure of the sector's relevant European organisations, in particular their membership composition.

0.2. Historic background of the postal services ESSDC

The postal services ESSDC was formally set up in 1999 with PostEurop representing the employers and UNI Europa representing the workers. According to the PostEurop Statutes (Article 7), only the 'Postal Operators of countries that fall within the definition of the European Territory ... and who provide universal service and have designation as postal operators to the UPU' are eligible to be members of the organisation (PostEurop, 2021).¹ The European Service Workers Union, UNI Europa, has a dedicated structure for the postal and courier and logistics industries: UNI Europa Post & Logistics.

As per its rules of procedure, the committee advises the European Commission on social policy-related matters and promotes social dialogue by steering negotiations between the partners in the sector.² It is noteworthy that a joint initiative between employers and workers in the postal and courier activities sector was active before the formal establishment of the postal sector social dialogue committee in 1999. As early as 1995, both PostEurop and UNI Europa were working in a Joint Postal Committee and proposing sector-related opinions and suggestions to the national and European institutions (listed in Table 59, Section 3.7).

Importantly, the postal sector social dialogue committee's composition changed in December 2017, when the European Confederation of Independent Trade Unions (CESI) first took part in the committee. CESI participation was based on a memorandum of understanding (MoU) with UNI Europa, as described in the minutes of the postal services ESSDC on 7 December 2017.³ Drawing on the representativeness study of the postal and courier activities sector published in 2017, the MoU concluded that CESI represented 14 member organisations from 11 EU Member States in the postal and courier activities sector. The MoU states that CESI representation on the ESSDC is composed of two seats: one for the CESI sector-related Trade and Council representative and one for the deputy representative.

¹ The Universal Postal Union (UPU) is a United Nations agency established in 1874, providing the primary forum for cooperation between postal players and ensuring a universal network of up-to-date products and services.

² More information on the rules of procedure of the postal sector ESSDC is available at <https://ec.europa.eu/social/main.jsp?catId=521&langId=en&agreementId=161>

³ Minutes for the postal services ESSDC on 7 December 2017 are available at <https://circabc.europa.eu/sd/a/b55802a0-df4e-4782-97f1-f3aa45f25dc6/Post-20171207-PL-min.pdf>

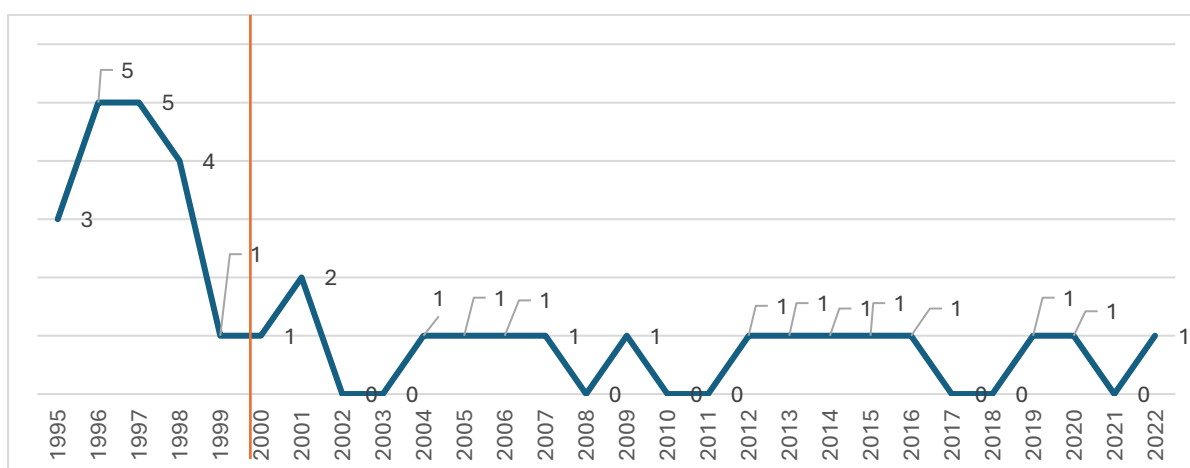
Table 1: Organisations currently represented on the postal services ESSDC

Representing workers	Representing employers
UNI Europa Post & Logistics – UNI Europa	Trade association of the European public postal operators – PostEurop
European Confederation of Independent Trade Unions – CESI (following the publication of the 2017 postal and courier activities sector representativeness study)	

Sources: PostSocialDialog, undated; Eurofound, 2017

From its creation, the postal sector social dialogue committee has covered different issues such as the evolution of the sector, accident prevention, promotion of social dialogue, training and lifelong learning, corporate social responsibility, opinions on the impact of the demographic change on the sector, and Postal Directive implementation, in several joint texts and opinions (see Figure 1). Different topics are dealt with in various working groups, such as the postal sector evolution working group, the corporate social responsibility working group, and the training, health and safety working group.⁴

Figure 1: Number of joint texts in the postal services ESSDC, 1995–2022



Source: Authors' compilation based on data from European Commission, postal services ESSDC database

Over the years, the European social partners in the postal and courier activities sector – UNI Europa Post & Logistics and, since December 2017, CESI on the employees' side and PostEurop on the employers' side – have developed a number of joint projects. In 2006, the training, health and safety working group worked on the Joint Declaration on training and skills, by means of which social partners recognised skills as a central element for the development of postal activities, in compliance with the 2000 Lisbon Strategy. The declaration identified six orientations that social partners should follow: connecting training and the development of skills with the professional activities; promoting the validation of training and the recognition of skills; continuously informing staff broadly on training, skills development and professional career paths; sharing the responsibility for skills development

⁴ More information on the working groups of the postal sector social dialogue committee is available at <http://www.postsocialdialog.eu/>

between the company and staff; developing the anticipation of needs; and diversifying learning and skills development approaches.

In 2007, the postal sector social dialogue committee signed the Joint Statement on postal sector evolution. The document reflected on the future of the sector in the context of the ongoing full opening up of the market. While it recognised the value of liberalisation, it stressed that it should not impinge on working conditions in the sector. The Joint Statement gave the postal and courier activities sector evolution working group a mandate to work on changes in the sector. The working group realised a major initiative, the social observatory of the postal sector, which included several projects. In 2009, it launched the Social Observatory Project in nine EU Member States with a view to monitoring the social consequences of liberalisations and the role of social partners in the process. In 2010–2011, the project ‘Social partners preparing for change’ was devoted to change management policies, new entrants and activities under universal service obligation (USO) in all EU Member States (PostSocialDialog, undated). Building on the 2007 Joint Statement, the new Joint Declaration was adopted in 2012, when full liberalisation of the postal sector was achieved.⁵ The text of the declaration stated that ‘The post sector is in a process of continuous and rapid change There needs to be a balance between an appropriately rewarded workforce and the requirement for adaptability to the new market circumstances.’ Consequently, the project ‘Developing a quality postal service in the digital age’ was initiated in 2012. It identified major future challenges for the sector, and shared lessons among operators and unions, and promoted a better understanding of national good practice. At the final conference in February 2014, social partners and experts discussed the evolution of the sector in the context of the implementation of the Postal Services Directive, which, together with the decline in mail volumes and technological change, has fundamentally altered the sector.

In 2013, the European social partners began a joint project on training, examining the impact of the introduction of new technologies on the sector and sharing experiences on matching skills and jobs. Under the aegis of the training, health and safety working group, the project gave an overview of the different strategies implemented by postal operators and trade unions in the EU to address skills mismatches in a rapidly changing sector. Building on the outcomes of the joint project, the social partners adopted a Joint Declaration in November 2014 on matching skills and jobs in the European postal sector. Led by the corporate social responsibility working group, European social partners adopted Joint Conclusions on environment in 2013.⁶ In the document, social partners acknowledge the need for the postal sector to mitigate the environmental effects of its activities and to include environmental issues in their work on social dialogue, thus raising public awareness on the matter. In 2013, another project, ‘Managing demographic challenges and finding sustainable solutions by the social partners in the postal sector’, was initiated. It aimed to raise awareness on the impact of demographic challenges on the postal industry, discuss management practices to sustain employability, and promote health and ability to work in an ageing workforce. Building on the results

⁵ More information on the 2012 New Joint Declaration on postal sector evolution is available at <https://ec.europa.eu/social/main.jsp?catId=521&langId=en&agreementId=5239>

⁶ More information on the 2013 Joint Conclusions on environment is available at <https://ec.europa.eu/social/main.jsp?catId=521&langId=en&agreementId=5289>

of the joint project, the social partners adopted a Joint Declaration in July 2015 on demographic change in the postal and courier activities sector.

Faced with a significant decline in mail volume and an increase in product differentiation, a Joint Declaration ‘on the role of social dialogue in the transformation’ was adopted in 2016 and covered changes in the postal sector in a broader sense, ‘both in terms of intensity and of duration, in particular due to the decrease of mail volumes driven by e-substitution and in a context of postal liberalisation.’⁷

Following the 2016 Joint Declaration, the training, health and safety working group ran the project ‘Promoting social dialogue in the postal sector in an enlarged Europe’ from 2016 to 2018. It investigated the practices through which employers and trade unions are managing the impact that new technologies, in particular digitisation, have on training and retraining programmes for employees, and the impact on work organisation, skills and training needs. Based on the findings of this project, social partners have adopted another initiative, ‘Postal skills and work environment in the digital era’, which has analysed the impact of digitalisation on skills and work environment in three key areas: back-office operations, delivery operations and post office operations. The Joint Declaration on training and work environment in the digital transition adopted in 2022 took stock of these findings (UNI Europa, 2022).⁸

Between 2018 and 2023, the European social partners conducted two highly innovative, in terms of content and working methodology, foresight projects. The project ‘Trend research for the postal sector in 2030’, implemented between 2018 and 2019, enabled the social partners to devise five joint scenarios on possible futures of the sector in 2030, in line with the foresight methodology. The project illustrated the forward-looking stance of the postal sector. As a direct follow-up to this project, a second project, conducted from 2020 to 2023, aimed to formulate the postal characters (personas) who could exist in the five scenarios on the postal sector in 2030. This project made it possible to operationalise the foresight study by considering the postal characters in 2030 in terms of main missions, competences and work environment. The events (such as workshops, working groups and conferences) organised within the framework of this project indicated a high level of participation (over 50 participants) on the part of both employers (over 20 participants from 9 Member States) and workers’ representatives (over 20 participants from 12 Member States). Both projects endeavoured to better anticipate the main economic, technological, environmental and societal trends affecting the sector and to prepare accordingly (PostSocialDialog, undated).

0.3. Definitions and methodology

The methodology applied is linked to the criteria identified in Commission Decision 98/500/EC: sector-relatedness, membership and organisational capacity. These criteria will be defined successively in this section.

⁷ More information on the 2016 Joint Declaration on the role of social dialogue in the transformation is available at <https://ec.europa.eu/social/main.jsp?catId=521&langId=en&agreementId=5484>

⁸ More information on the 2022 Joint Declaration on training and work environment in the digital transition is available at <https://ec.europa.eu/social/main.jsp?catId=521&langId=en&agreementId=5784>

Sector-relatedness

Sector-relatedness refers to the demarcation of the postal and courier sector in agreement with the social partners and the European Commission.

When analysing the ways trade unions and employer organisations relate to the sector, this must include the extent to which their membership domains cover all types of workers in all types of companies in all types of activities in the sector. How the sector is defined is crucial for the assessment of sector-relatedness.

Every sector is demarcated in terms of Statistical Classification of Economic Activities in the European Community (NACE) (Rev. 2) codes. All existing sectoral social dialogue committees have been demarcated with a NACE code, which defines the scope of economic activities covered by the committee. The NACE code to be applied in each sectoral representativeness study is confirmed by the European Commission after consultation with the social partners.

In this study, the postal and courier activities sector is defined as embracing NACE (Rev. 2) 53.10 and 53.20. This includes the following activities:

- 53.10 – Postal activities under USO
- 53.20 – Other postal and courier activities

Due to the limitations of data reliability for the postal and courier activities sector, which are explained in detail in Section 0.4, the sectoral activities discussed in this report have been defined as illustrated in Table 3.

This study focuses on European and national organisations.

European organisations are analysed via the top-down approach if they:

- are on the European Commission's list of interest organisations to be consulted on behalf of the sector under Article 154 of the TFEU and/or
- participate in sector-related European social dialogue

The Commission may decide to include other EU sector-related organisations in the study, if relevant (for example, if a sector-related organisation requests to be consulted, under Article 154 of the TFEU).

A **national organisation** is considered to be a relevant sector-related interest association if it meets both criteria A and B:

- The association's domain relates to the sector
- The association is either:
 - affiliated to a European-level organisation, which is analysed in the study within the top-down approach (independent of its involvement in collective bargaining), or, if not,
 - regularly involved in sector-related collective bargaining

Table 2 and Figure 2 show the membership domain patterns that can exist. The membership domains of trade unions and employer organisations can be exactly in line with the demarcation of the sector (that is, covering all activities in NACE 53.10 and NACE 53.20); this type of sector-relatedness is called 'congruence'. If the membership domain of an organisation goes beyond the postal and courier activities sector as defined here, it is categorised as 'overlapping'. 'Sectionalism' is a type of sector-

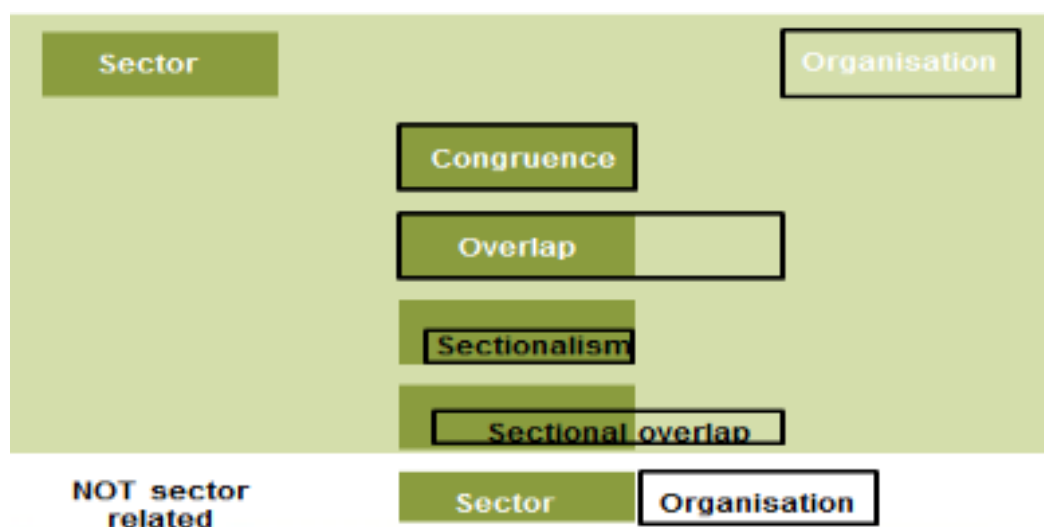
relatedness whereby an organisation covers part of the sector and nothing else, whereas organisations that fall into the category of ‘sectional overlap’ cover part of the sector and also have members in other sectors.

Table 2: Membership domain patterns of an organisation

Domain pattern	Domain of organisation within the sector	Domain of organisation outside the sector
	Does the domain of the trade union/employer organisation cover potentially all employees/companies in the sector?	Does the trade union/ employer organisation also potentially represent employees/companies outside the sector?
Congruence	Yes	No
Overlap		Yes
Sectionalism	No	No
Sectional overlap		Yes

Source: Eurofound

Figure 2: Four different types of sector-relatedness



Source: Eurofound

Membership

Membership is another important aspect of representativeness. This study looks at two levels of membership: first, the geographical coverage of the EU-level organisations (for instance, how many Member States an EU-level trade union or employer organisation has affiliates in) and, second, the organisational density (that is, the number of members who are employees as a percentage of the total number of employees in a given industry or Member State) of the national affiliates. Important aspects to be assessed are whether the EU-level players organise most, or at least the most significant, national-level players (significant in relation to their membership strength in the sector and their

involvement in collective bargaining) and whether there are any major gaps in their membership domains.

Membership of a social partner organisation requires payment of membership fees. However, some organisations are reluctant to inform third parties about such payments. Considering the limits of transparency, this study does not always distinguish between different membership statuses. Where possible, indirect membership (such as membership through another organisation to which the employer organisation or trade union is affiliated) is considered in this report.

Organisational capacity

The organisational capacity of the European social partners is analysed in terms of their ability to commit themselves on behalf of their members and to conclude binding agreements or actions that can be implemented or monitored EU-wide through the support of their affiliates. To assess their capacity to negotiate, the **actors** and their objectives and decision-making structures provided for in their statutes are considered, as are the **outcomes** in terms of texts agreed. The **processes** through which the organisations obtain mandates, support and approval from their member organisations in the negotiation process are also considered.

The **involvement of social partners' members in national-level collective bargaining** is also important, as it shows that they are able to obtain a mandate to negotiate on behalf of their members (at least at national level, which could then also translate into a mandate to negotiate at EU level). Such a mandate, whether implicit or explicit, allows for negotiations to take place at European level that could potentially result in binding agreements or the drafting of European autonomous agreements (requiring implementation by social partners at national level in line with their respective practices and traditions). The capacity to act autonomously in this way among those represented on the postal services ESSDC contributes significantly to the committee's effectiveness.

The involvement in collective bargaining of national sector-related trade unions and employer organisations is also a factor that distinguishes them from professional associations and business associations, which only defend their members' interests through unilateral lobbying activities and do not involve themselves in negotiations on working conditions through collective bargaining or social dialogue. Trade unions and employer organisations that do engage in collective bargaining on behalf of their members have a proven capacity to obtain a mandate from their members to negotiate and to reach compromises and agreements with organisations representing different interests. In its analysis, this report aims to distinguish between these different types of organisations.

Finally, representativeness also depends upon the organisations' structures and resources, their capacity to encourage the active participation of their members and combine the different interests of member organisations, and their potential to act autonomously at European level. Effective participation in the postal services ESSDC is assessed in terms of presence at the meetings during 2020, 2021, 2022 and 2023.

0.4. Data collection and quality control measures

Data collection

Representativeness studies combine top-down and bottom-up approaches. The top-down approach includes all sector-related affiliates of UNI Europa, CESI and PostEurop, while the bottom-up approach looks at the organisations organising employees or employers and/or involved in sector-related collective bargaining and social dialogue in the EU Member States and their membership of European-level organisations.

Except where otherwise stated, this study draws on the country-level studies provided by the Network of Eurofound Correspondents (listed in Annex 3, Table 72). Where precise data were not available, estimates were used. Thus, quantitative data (such as those used to calculate density rates) may stem from any of the following sources:

- official statistics and representative survey studies
- administrative data, such as membership figures provided by the organisations
- estimates, expert opinions and assessments from the Network of Eurofound Correspondents or representatives of the organisations

Other sources used in this report include the European Commission's social dialogue texts database and the articles of association of the EU-level organisations.

The information used in this study was collected by the Network of Eurofound Correspondents in a series of 27 national contributions. The national correspondents, who are all industrial relations experts, are required to gather data on all relevant national-level organisations and to approach them by telephone or email, using standardised questionnaires. While the questionnaires are in English, correspondents can interview or contact the organisation in the relevant national language. The questionnaires are completed by the national correspondents.

In the case of the postal and courier activities sector, Eurostat's Structural Business Statistics (SBS) dataset, used traditionally in representativeness studies for sectoral employment and the number of companies, does not provide data that cohere with the information collected at national level by the Network of Eurofound Correspondents, particularly in the case of the number of companies in each country. Specifically, as the SBS metadata notice shows,⁹ the SBS dataset describes the structure, conduct and performance of economic activities, down to the most detailed activity level (several hundred economic sectors) based on statistics transmitted annually by the EU Member States (based on a legal obligation dating from 1995). The majority of the data are collected by national statistical institutes by means of statistical surveys, from business registers or from various administrative sources. It is noteworthy that Member States apply various statistical methods, depending on the data source, such as grossing up, model-based estimation or various forms of imputation. To address the significant divergence between the data from the SBS and the data from the Network of Eurofound Correspondents, additional sources of data for the sector have been identified. This includes the annual Survey on Postal Statistics of the Directorate-General (DG) for Internal Market, Industry,

⁹ More details and descriptions of the dataset are available in the metadata notice of the Eurostat structural business statistics, at https://ec.europa.eu/eurostat/cache/metadata/en/sbs_h_esms.htm

Entrepreneurship and SMEs, which is based on voluntary data collection by the national regulatory authorities in each Member State. The postal statistics from DG Internal Market, Industry, Entrepreneurship and SMEs cover the companies operating under USO, or universal services under direct or indirect designation (USD), which will be referred to under the term 'universal service provider' (USP) across the report, as well as all the other companies in the postal and courier sector. The DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics also include data on turnover, access points, postal traffic (letter and parcel), prices and quality of service.¹⁰ The DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics provide no information on sectoral employment, so the data on employment used in this report are based on the SBS dataset, complemented by data provided by the Network of Eurofound Correspondents for countries for which the SBS data lack information, either due to low reliability or due to confidentiality. In order to harmonise the definitions of the activities in the postal and courier activities sector between the DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics and the Eurostat's SBS data, the classifications in Table 3 were applied in the current study.

¹⁰ More details and descriptions of the dataset are available in the metadata notice of the Survey on Postal Statistics, at https://ec.europa.eu/assets/grow/growth/toolbox/postal/metadata/en/t_dggr_esms.htm

Table 3: Classification of activities in the postal and courier activities sector used in the current study

NACE (Rev. 2) code used in the SBS	Activity description	DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics used for the number of companies
53 – Postal and courier activities	This division includes all postal and courier activities, such as pickup, transport and delivery of letters and parcels under various arrangements.	Postal services
53.10 – Postal activities under USO	<p>This class includes the activities of postal operators under USO by one or more designated USP.</p> <p>This class includes pickup, sorting, transport and delivery (domestic or international) of letter-post and (mail-type) parcels and packages by postal services operating under USO. One or more modes of transport may be involved, and the activity may be carried out using either self-owned (private) transport or public transport. This class also includes collection of letter-mail and parcels from public letterboxes or from post offices.</p>	Enterprises providing USD and enterprises providing universal services or services interchangeable with USO
53.20 – Other postal and courier activities	This class includes pickup, sorting, transport, and delivery (domestic or international) of letter-post and (mail-type) parcels and packages by firms operating outside the scope of a USO. One or more modes of transport may be involved, and the activity may be carried out using either self-owned (private) transport or public transport. This class also includes home delivery services.	Enterprises providing other postal services

Sources: Eurostat, 2008; DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics [POST_CUBE1_X_custom_207]

Quality assurance

To ensure the quality of the information gathered, several verification procedures and feedback loops were included in the process of preparing this study.

First, combining the top-down and bottom-up approaches, information on the affiliates of the relevant EU-level social partners and information on other sector-related associations was collected from the reports prepared by the Network of Eurofound Correspondents, between November 2022 and February 2023. Subsequently, the authors of this report checked the consistency of the national contributions and, where necessary, asked the national correspondents to revise them between February 2023 and July 2023. Based on these collected data, an overview report was drafted by the authors between September 2023 and April 2024.

A first, informal (pre-evaluation) consultation between DG Employment, Social Affairs and Inclusion and the European-level sectoral social partners identified in the report was carried out between May and July 2024. Based on the comments received, the draft report was finalised and submitted for formal written evaluation by the Eurofound Advisory Committee on Industrial Relations, the European-

level sectoral social partners identified in the report and DG Employment, Social Affairs and Inclusion between August and September 2024. Following this evaluation, final corrections were made, and the report was edited and published on the Eurofound website.

During this process, all relevant actors and organisations mentioned in the report were invited to check the consistency of the information included in it, thereby ensuring that the bottom-up approach included all the relevant sector-related organisations from each country. As different social partner organisations were able to view the information reported by other organisations in the same country and, if necessary, comment on the credibility or accuracy of the information on other organisations representing a similar membership, this process involved an element of mutual control and recognition.

These quality assurance measures and the evaluation and approval of the report by the Eurofound Advisory Committee on Industrial Relations – which consists of representatives of both sides of industry, governments and the European Commission – as well as the evaluation and approval of it by the European-level sectoral social partners identified in the report, ensure the legitimacy of the findings of this study.

0.5. Structure of the report

As stated earlier in the introduction, this report consists of three main parts. It begins with a brief summary of the economic background and employment specificities of the postal and courier activities sector. It then analyses the relevant social partner organisations in the EU27 Member States. The third part considers the representative organisations at European level.

Finally, it is important to note the difference between the research and political aspects of this study. While providing data on the representativeness of the organisations under consideration, the report does not conclude on whether the representativeness of the European social partner organisations and their national affiliates is sufficient for participation in the European social dialogue. Rather, the information and analyses in this report provide the evidence base for further efforts and decisions of the social partners themselves and of the European Commission.

1. Economic background and employment in the postal and courier activities sector

Different sources indicate different total number of employees in the EU27, varying from 1.2 million to 1.8 million. According to the Eurostat SBS, there were 1.6 million people employed in the entire postal and courier activities sector in 2022 in the EU27 (Table 4). Just under one-third of the EU workforce is employed in Germany, which is most probably due to the high number of employees of the German company DHL. Together, Germany, France and Italy employ over 50% of the EU postal and courier activities sector workforce. In Germany, France, Romania, Hungary, Denmark, Finland and Slovenia, the share of persons employed in the postal and courier activities sector is higher than 1%, which is the European average.

Table 4: Employees in the postal and courier sector, EU27, 2022

Member State	Number of persons employed in NACE 53	Share of EU27 postal workforce (%)	Share of total national employment (%)
EU27	1,613,636	100	1.01
DE	515,709	31.97	1.32
FR	253,083	15.69	1.26
IT	140,026	8.68	0.77
ES	108,782 ¹¹	6.74	0.70
PL	94,917	5.88	0.83
NL	68,230	4.23	0.81
RO	53,001	3.29	1.13
HU	45,870	2.84	1.36
BE	38,707	2.40	0.99
SE	33,801	2.10	0.94
CZ	30,659	1.90	0.74
DK	29,953	1.86	1.40
AT	28,375	1.76	0.76
PT	23,235	1.44	0.53
IE	22,274	1.38	0.98
BG	21,143	1.31	0.95
EL	21,116	1.31	0.62

¹¹ According to the Spanish National Institute of Statistics, the number of employed persons in NACE 53 in Spain in 2022 was 112,815 employees.

Member State	Number of persons employed in NACE 53	Share of EU27 postal workforce (%)	Share of total national employment (%)
FI	19,105	1.18	1.10
SK	17,514	1.09	0.98
HR	11,852	0.73	0.95
LT	11,532	0.71	0.93
SI	8,046	0.50	1.03
LV	6,330	0.39	0.92
EE	4,021	0.25	0.75
CY	3,226	0.20	0.86
LU*	2,014	0.12	0.51
MT*	1,115	0.07	0.48

Notes: * = data for 2020. **Bold font** indicates countries in which the share of employment in the postal and courier activities sector is higher than the EU average.

Source: Eurostat, Annual detailed enterprise statistics for services (NACE re.2H-N and S95) [sbs_na_1a_se_r2]

1.1. Distinction between postal services under USO and USD and other postal services

Around 40% of the EU postal workforce was employed in universal services in 2022 (Table 5). Due to the very limited reliability of employment data in the two parts of the postal and courier activities sector, the numbers for employment at national level, presented in Table 4, have been compiled using the Eurostat SBS dataset combined with data and estimations provided by the Network of Eurofound Correspondents. Based on the available data, Latvia, Portugal, Romania and Spain are around the EU average, while in Austria, Belgium, Croatia, Czechia, Estonia, France, Italy, Malta, Poland, Slovakia and Slovenia the proportion of the sectoral workforce in universal service activities varies between 70% and 91% (which is significantly higher than the EU average of 40%). This proportion is between 50% and 69% (still higher than the EU average) in Finland, Hungary, Ireland, the Netherlands and Sweden. The lowest proportion is recorded in Cyprus (17%), followed by Greece (19%), Denmark (28%) and Lithuania (30%).

Table 5: Employment in NACE 53.10 and 53.20, by Member State and EU27, 2022

Member State	NACE 53 – All postal and courier activities	53.10 – Postal services under USO and USD by one or more USP	53.20 – Other postal and courier activities	Share of workers in 53.10 (USO and USD) (%)
EU27	1,613,636	660,170	952,706	41
AT	28,375	20,000	8,500	70
BE	38,707	28,000	10,000	72

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

Member State	NACE 53 – All postal and courier activities	53.10 – Postal services under USO and USD by one or more USP	53.20 – Other postal and courier activities	Share of workers in 53.10 (USO and USD) (%)
BG	21,143	:	:	n/a
CY	3,226	560	2,666	17
CZ	30,659	28,000	2,500	91
DE	515,709 ¹²	0 ¹²	515,708 ¹²	n/a
DK	29,953	8,500	20,500	28
EE*	4,021	3,299*	722	82
EL	21,116	4,000	17,116	19
ES	108,782 ¹³	50,000	60,000	46
FI	19,105	12,666	6,439	66
FR*	253,083	220,000*	18,000*	87
HR	11,852	9,544	2,308	81
HU	45,870	25,225	12,000	55
IE	22,274	12,000	7,164	54
IT	140,026	120,000	20,000	86
LT	11,532	3,500	:	30
LU**	2,014**	:	:	n/a
LV	6,330	2,899	3,431	46
MT**	1,115**	800	300	72
NL	68,230	35,203	33,027	52
PL*	94,917	71,000	6,000	75
PT	23,235	10,294	12,941	44
RO	53,001	22,366	30,635	42
SE	33,801	21,300	12,501	63
SI*	8,046	5,927*	1,035*	74
SK*	17,514	13,000*	4,300*	74

Notes: : = no data; * = data provided by the Network of Eurofound Correspondents; ** = data for 2020 were used. Grey shaded cells indicate rough estimates provided by the Network of Eurofound Correspondents and should be treated with caution; n/a = not applicable.

Source: Eurostat, Annual detailed enterprise statistics for services (NACE re.2H-N and S95) [sbs_na_1a_se_r2]

¹² In Germany, the company register run by the Federal Statistical Office (Destatis) does not display any data for NACE 53.10 activities due to data protection regulations, as there is only one company providing universal services: Deutsche Post DHL.

¹³ According to the Spanish Institute of Statistics, the number of employed persons in NACE 53 in Spain in 2022 was 112,815.

As explained in Section 0.4, given the significant inconsistencies between the SBS data and the data provided by the Network of Eurofound Correspondents on the number of companies in the sector, for the analysis of the companies in the postal and courier activities sector an alternative data source was identified and used: DG Internal Market, Industry, Entrepreneurship and SMEs' annual postal statistics. Details on the methodology of these surveys are provided in Section 0.4 of the Introduction mentioned above. DG Internal Market, Industry, Entrepreneurship and SMEs' postal statistics data are collected for the following categories of companies: enterprises providing universal services under direct or indirect designation ('USD' across the report), enterprises providing universal services or services interchangeable with universal service obligation ('USO' across the report) and enterprises providing other postal services ('other postal services' across the report). Table 6 shows that the total number of companies active in postal and courier activities sector in 2022 was over 20,000 in the entire EU27. Almost 96% of all postal companies operate in the 'other postal services' category. In each Member State, there is one company providing USD activities, constituting 0.13% of the total number of companies in the sector. A little over 4% of the companies are providing universal services or services interchangeable with USO services. Looking at the national distribution of the postal companies, Germany records a little over half of the total postal companies in the entire EU27, followed by Italy and Spain.

Table 6: Number of companies in the postal and courier activities sector, by Member State and EU, 2022

Member State	Absolute number of companies providing					Shares of companies providing			
	Postal services – Total	NACE 53.10 – USD	NACE 53.10 – USO	NACE 53.20 – Other postal service		Postal services (% of the total EU number)	NACE 53.10 – USD (%)	NACE 53.10 – USO (%)	NACE 53.20 – Other postal service (%)
EU27	20,883	27	865	19,992	EU27	100	0.13	4.14	95.73
AT	16	1	15	:	AT	0.08	3.70	2.13	:
BE	704	1	3	700	BE	3.37	3.70	0.43	99.43
BG	178	1	12	165	BG	0.85	3.70	1.70	92.70
CY	20	1	:	19	CY	0.10	3.70	:	95.00
CZ	28	1	26	1	CZ	0.13	3.70	3.69	3.57
DE	11,401	1*	400	11,000	DE	54.59	3.70	56.82	96.49
DK	10	1	:	9	DK	0.05	3.70	:	90.00
EE	24	1	1	22	EE	0.11	3.70	0.14	91.67
EL	724	1	10	713	EL	3.47	3.70	1.42	98.48
ES	2,894^a	1	108 ^b	2,785 ^c	ES	13.86	3.70	15.34	96.23
FI**	29	1	17	11	FI	0.14	3.70	2.41	37.93
FR	53	1	:	52	FR	0.25	3.70	:	98.11
HR	24	1	8	15	HR	0.11	3.70	1.14	62.50
HU	165	1	1	163	HU	0.79	3.70	0.14	98.79
IE	5	1	:	4	IE	0.02	3.70	:	80.00
IT	3,671	1	:	3,670	IT	17.58	3.70	:	99.97

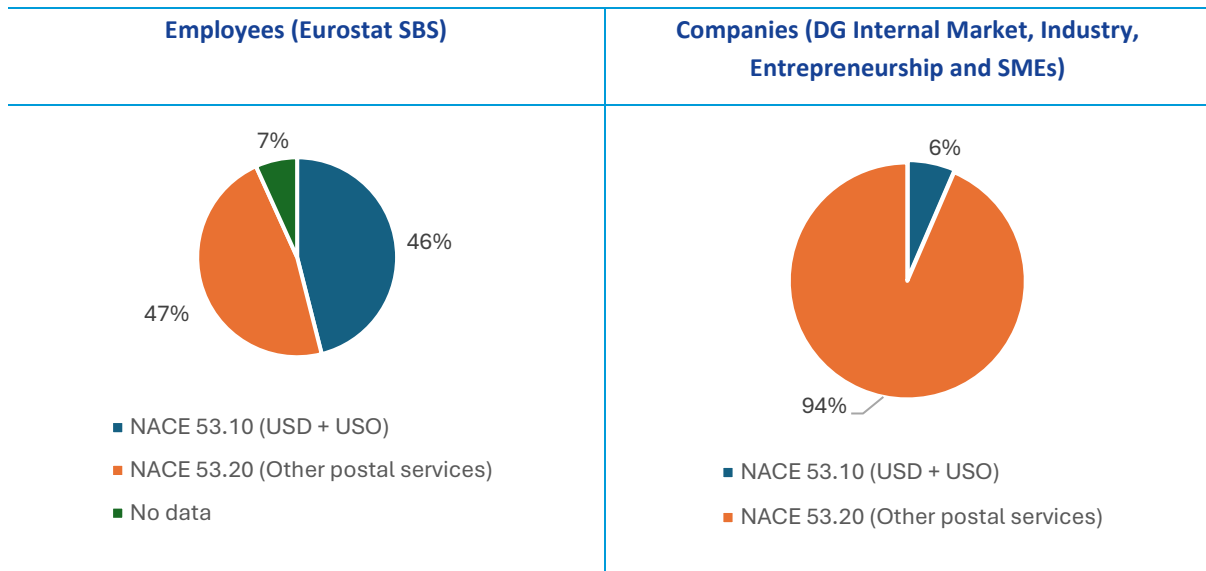
LT	44	1	15	28	LT	0.21	3.70	2.13	63.64
LU	39	1	26	12	LU	0.19	3.70	3.69	30.77
LV	62	1	:	61	LV	0.30	3.70	:	98.39
MT	25	1	1	23	MT	0.12	3.70	0.14	92.00
NL	120	1	:	119	NL	0.57	3.70	:	99.17
PL	123	1	46	76	PL	0.59	3.70	6.53	61.79
PT	82	1	14	67	PT	0.39	3.70	1.99	81.71
RO	352	1	133	218	RO	1.69	3.70	18.89	61.93
SE	34	1	19	14	SE	0.16	3.70	2.70	41.18
SI	31	1	6	24	SI	0.15	3.70	0.85	77.42
SK	26	1	4	21	SK	0.12	3.70	0.57	80.77

Notes: : = no data; * = data provided by the Network of Eurofound Correspondents; ** = in Finland, the Eurofound correspondent indicated there are two companies with activities under USD: a national one covering the entire country, and a regional one for the Åland region; ^a = in Spain, according to the National Institute of Statistics, the total number of companies in the postal and courier activities sector in 2022 was 27,120; ^b = postal operators with a licence to provide only services under the scope of USO; ^c = this number represents the sum of operators with a licence to provide services only outside the scope of USO and those with a mixed licence (both services out and in the scope of USO).

Sources: DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics [POST_CUBE1_X_custom_207]; Network of Eurofound Correspondents, 2023

In terms of the distribution of employment across different segments of the sector, as noted in Section 0.4, DG Internal Market, Industry, Entrepreneurship and SMEs' data were used for the number of companies in this report, while Eurostat SBS data were used for the employment statistics, complemented, where needed, with information from the Network of Eurofound Correspondents. As explained in the notes to Table 5, the Eurostat SBS data for the postal and courier activities sector are notably compromised due to substantial gaps, particularly since 2018. As the most recent Eurostat SBS data for employment available are for 2020, the comparative analysis uses 2020 as the reference year. A significant proportion, 46%, of total employment within the postal and courier activities sector was in the 6% of companies providing USD and USO activities (Figure 3).

Figure 3: Share of companies and employees in NACE 53.10 and NACE 53.20, EU27, 2020

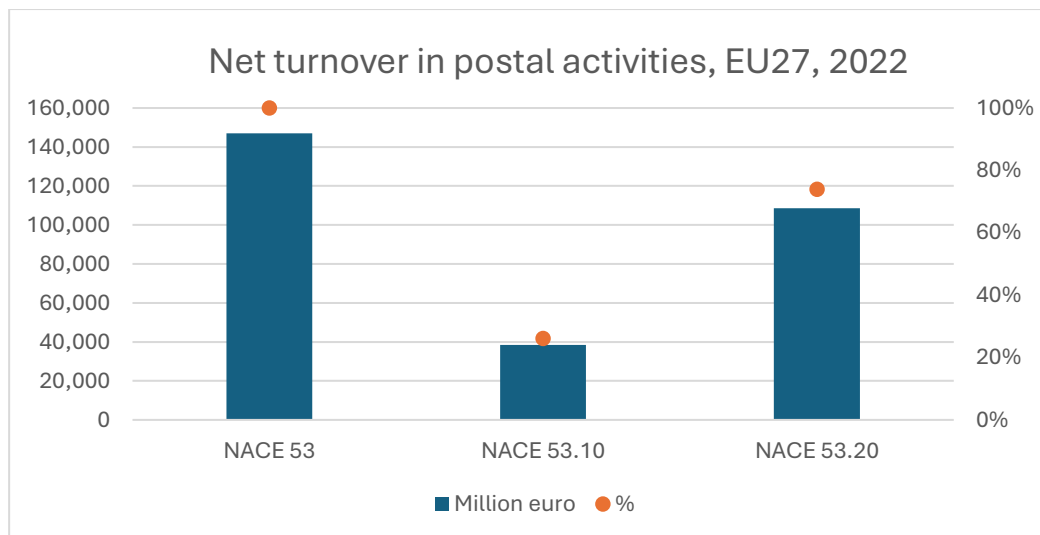


Note: As Table 6 above shows, by 2022 the share of companies in the two parts of the sector had further changed to almost 96% 'other postal services'.

Sources: Eurostat, Annual detailed enterprise statistics for services (NACE re.2H-N and S95) [sbs_na_1a_se_r2]; DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics [POST_CUBE1_X_custom_207]

While almost half of the workers in the entire sector are active in USD and USO postal services, the highest share of economic output is recorded in the other postal and courier services; almost three-quarters of the total net turnover of the postal and courier activities sector, nearly €109 billion of the €150 billion total, was produced by companies working the NACE 53.20 subsector in the EU27 in 2022 (Figure 4).

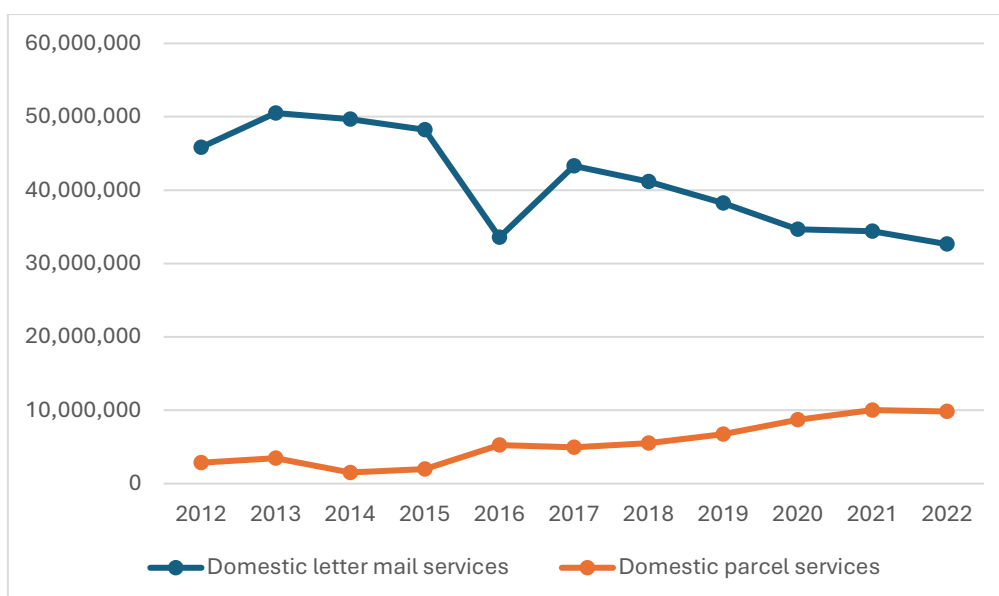
Figure 4: Net turnover in postal activities, EU27, 2022 (million euro)



Source: Eurostat, Annual detailed enterprise statistics for services (NACE re.2H-N and S95) [sbs_na_1a_se_r2]

In addition to the distinction between universal services and other postal activities, distinguishing between letter deliveries and parcel deliveries is also relevant. While the letter segment of the postal sector is declining, the parcel segment is growing steadily, and the lockdowns imposed during the COVID-19 pandemic across most of the EU27 countries in 2020 and 2021 have exacerbated this trend (Figure 5). As indicated in a report from the Universal Postal Union, the specialised United Nations agency for postal matters, 2020 was the year with the steepest decline in international postal volumes since the UPU started recording in 2010 (UPU, 2020). Another factor behind the decline of the letter post segment is the changing demand behaviour as well as the substitution of traditional mail with e-communication, particularly with the governmental institutions, as is the case in Denmark, Finland, the Netherlands and Sweden. For example, in Denmark, the mandatory digitalisation of communication within the government since 2014 translated into a decline of 93% in basic letter volume between 2010 and 2017 (European Commission, 2021).

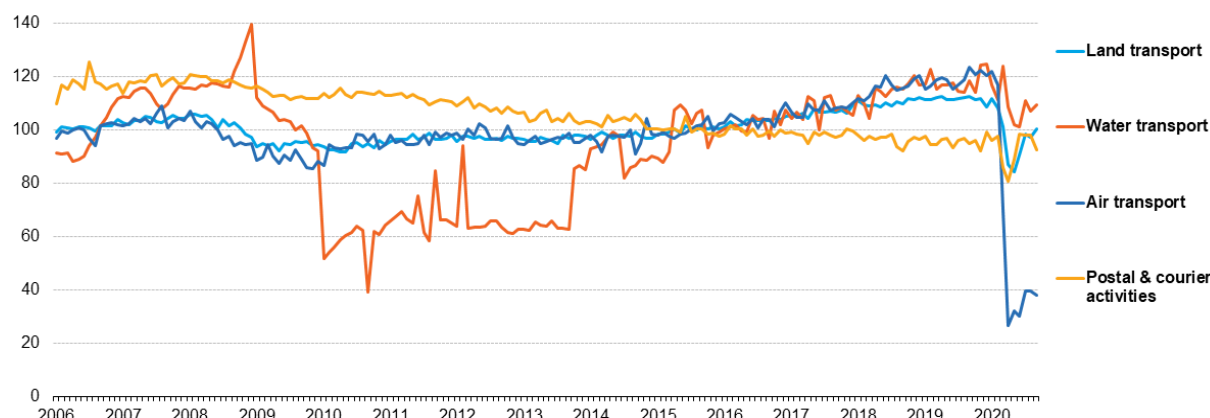
Figure 5: Total volumes of domestic letter mail services and parcel services, EU27



Source: DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics [POST_CUBE1_X_custom_184]

According to Eurostat’s index of services production for transportation, storage and postal services, postal and courier activities have had a relatively stable trend, compared with land, water or air transport services in the EU27 between 2015 and 2020 (Figure 6).

Figure 6: Index of services production for transportation, storage and postal services, EU27



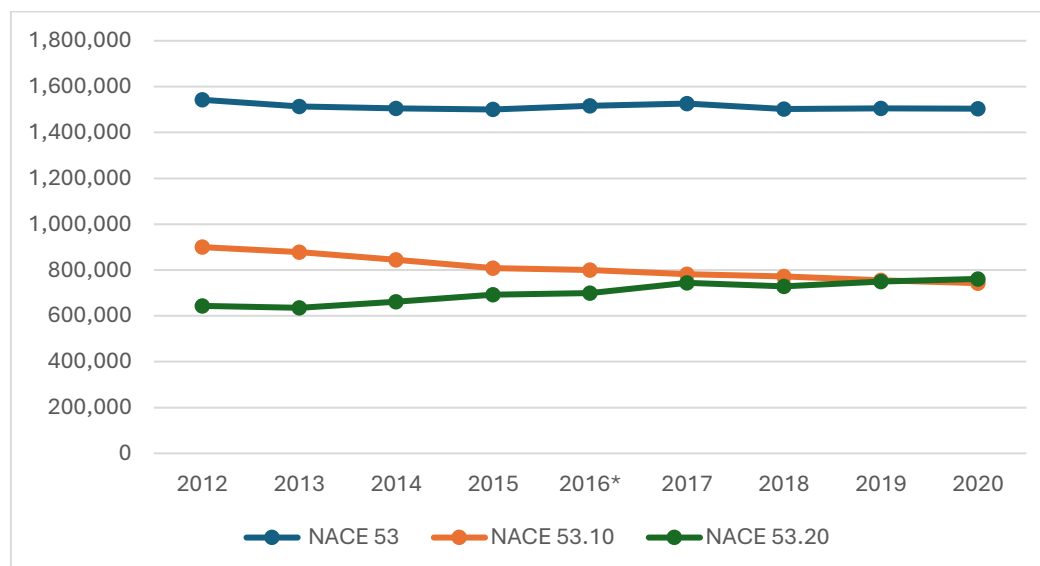
Source: Eurostat, Index of services production for transportation, storage and postal services [sts_sepr_m]

1.2. Employment in postal and courier activities

The 1.6 million persons employed in the postal and courier activities sector across the EU correspond to about 1% of the total employed population. Postal operators under USO are usually one of the biggest employers in their countries (Copenhagen Economics, 2019).

Eurostat data show that the total employment in USO has been declining since 2012, despite the slight increases in 2016 and 2017, as Figure 7 shows. When looking at the change in the two different parts of the sector, the activities in NACE 53.20 have recorded a constant rise since 2013, which is consistent with the analysis of the European Commission (2021).

Figure 7: Employment in NACE 53.10 and NACE 53.20, EU27, 2012–2020



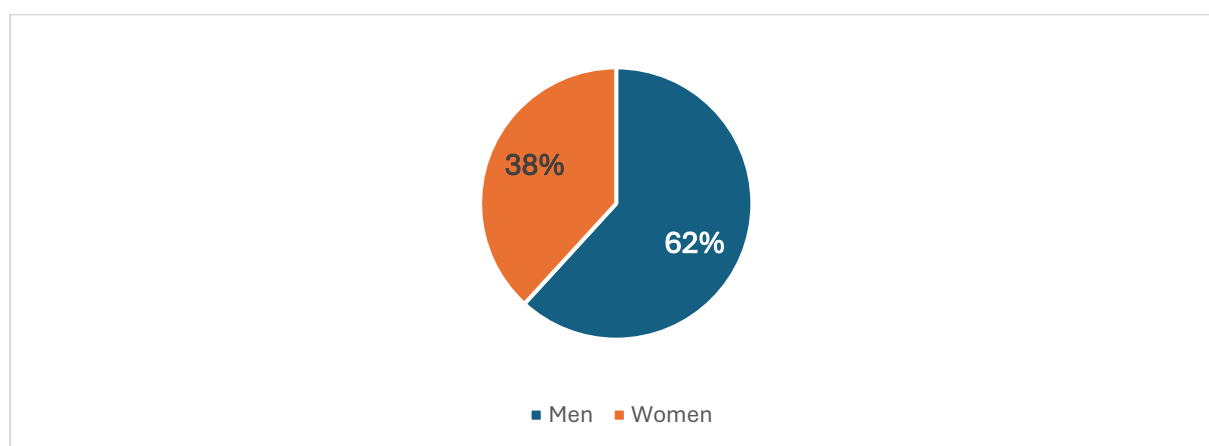
Note: * indicates that, as there are no data available separately for the activities under USO and other postal and courier activities for 2016, estimates have been used.

Source: Eurostat, Annual detailed enterprise statistics for services (NACE re.2H-N and S95) [sbs_na_1a_se_r2]

Employment in the sector has diminished, compared with the previous representativeness study, published in 2017, which recorded a 14% decrease between 2008 and 2014, as indicated by the European Union Labour Force Survey (EU-LFS) data. Subsequently, the same dataset shows that the negative change in employment between 2015 and 2020 amounted to 3% (Table 7). Given that the EU-LFS data rely on a probabilistic survey, a methodological decision was made to use the detailed enterprise statistics provided by the Eurostat SBS data, which show a positive change in employment between 2015 and 2020, amounting to 3,439 persons (Figure 3 and Figure 7).

In order to illustrate the demographic structure of the employment in the sector, data from the EU-LFS were used, as only this dataset provides information on the gender distribution of the sectoral workforce. The postal and courier activities sector is dominated by men, with women covering under 40% of the sectoral workforce at European level (Figure 8).

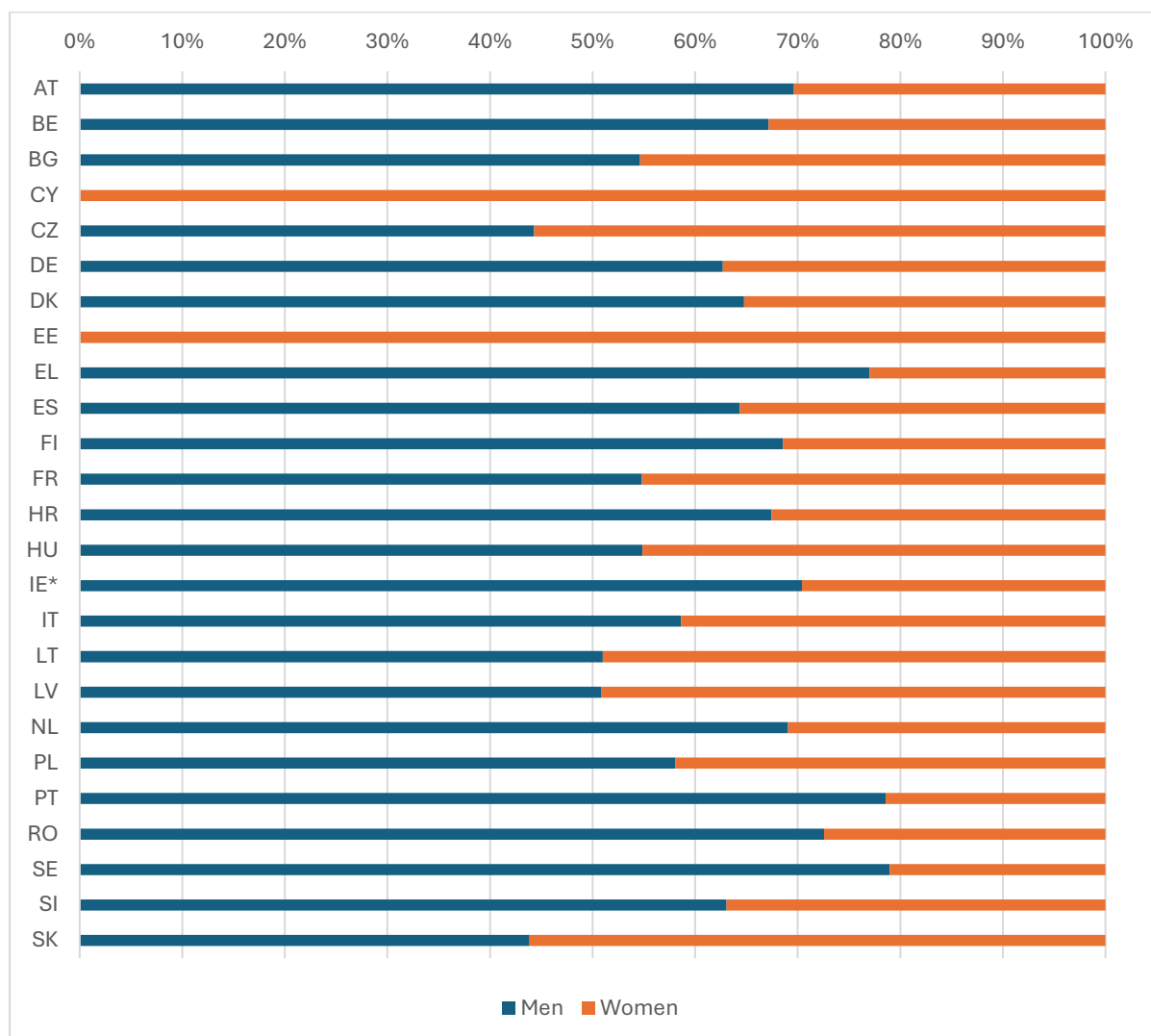
Figure 8: Gender distribution of the workforce in the entire postal and courier activities sector (NACE 53) in EU27, 2023 (%)



Source: Eurostat, *Employment by sex, age, and detailed economic activity* [lfsq_egan22d]

At national level, the situation is similar, with men dominating the employment in most Member States. Only in Czechia and Slovakia is the number of women working in the sector higher than the number of men. In Bulgaria, France, Hungary, Italy, Latvia, Lithuania, Poland and Slovenia, the share of women working in the sector is higher than 38%, which is the EU average (Figure 9).

Figure 9: Gender distribution of the postal workforce (NACE 53) at national level, 2023 (%)

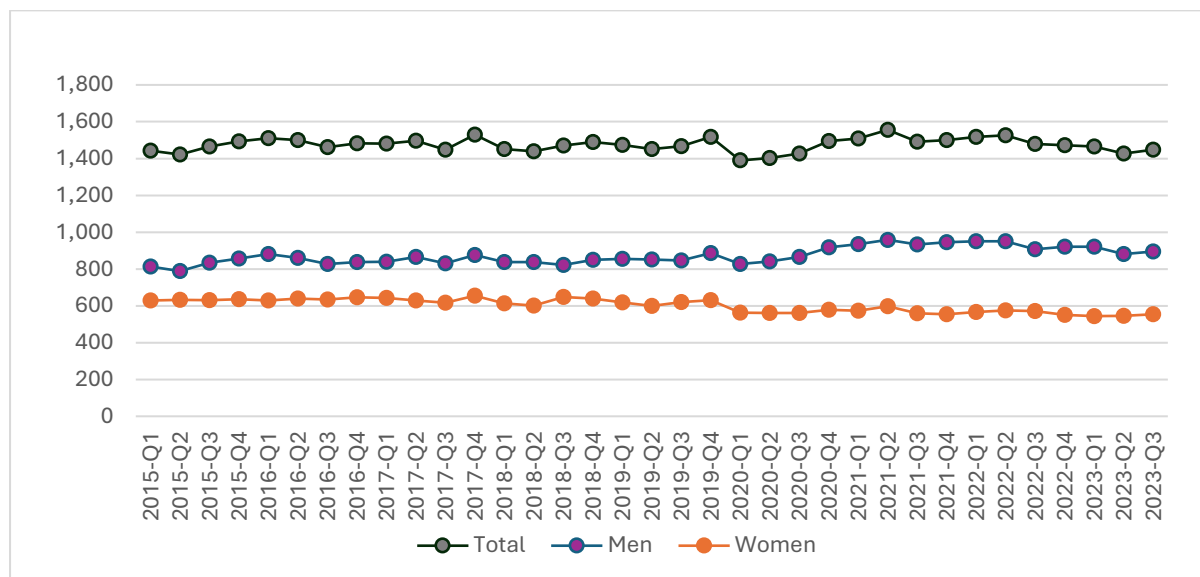


Notes: No data are available for Luxembourg and Malta; no data are available on the share of men employed in the sector for Cyprus and Estonia; * indicates that, for Ireland, no data on the number of women employed in 2023 were available, so data from 2022 were used.

Source: Eurostat, *Employment by sex, age, and detailed economic activity* [lfsq_egan22d]

Whereas in 2017 and 2019 there was a slight increase in the total employment compared with the previous years, the employment level has steadily decreased during recent years (Figure 10). The first two quarters of 2020 depict a more pronounced decrease across the entire sector, mirroring the reduced activities experienced in all sectors in the first months of the COVID-19 pandemic lockdowns. Although both genders have been impacted by these lockdowns, Figure 10 illustrates that in the last quarter of 2020 the number of men employed in the postal and courier activities sector had not only reached but surpassed the pre-lockdown level. This rebound for the entire postal workforce occurred in the first quarter of 2021. The number of women working in the postal and courier activities sector has been on a continuous decline since the COVID-19 lockdowns.

Figure 10: Trend in employment in the postal and courier sector (NACE 53) in EU27, 2015–2023



Source: Eurostat, *Employment by sex, age, and detailed economic activity [lfsq_egan22d]*

As the EU-LFS data show, in half of the Member States the employment in the sector has decreased, while in a number of countries a significant increase, of more than 10%, has been recorded, as seen in Belgium, Estonia, Greece, Lithuania, the Netherlands, Portugal and Romania. As the data are unreliable for some of these countries (Estonia and Lithuania), the analysis below has to be treated with caution (Table 7 and

Figure 11).

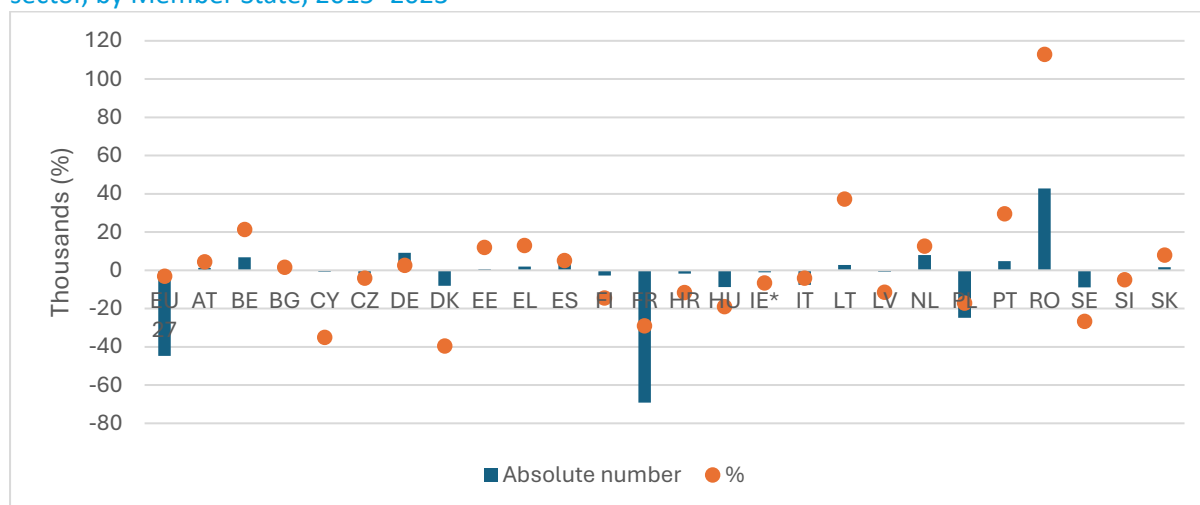
Table 7: Employment trend in the postal and courier activities sector, EU27, 2015–2023

	Thousands						Change between 2015 and 2023 (%)			
	2015			2023			Member State	Total	Men	Women
Member State	Total	Men	Women	Total	Men	Women				
EU27	1,492.9	856.2	636.6	1,448.2	895.0	553.3	EU27	-3.0	4.5	-13.1
AT	28.9	20.6	8.4	30.2	21.1	9.2	AT	4.5	2.4	9.5
BE	32.2	23.6	8.6	39.1	26.2	12.8	BE	21.4	11.0	48.8
BG	23.5	9.5	14.0	23.9	13.0	10.8	BG	1.7	36.8	-22.9
CY	2.0	1.2	0.8	1.3	:	0.8	CY	-35.0		0.0
CZ	44.9	16.4	28.5	43.1	19.1	24.0	CZ	-4.0	16.5	-15.8
DE	344.7	207.3	137.4	353.9	221.9	132.0	DE	2.7	7.0	-3.9
DK	20.2	14.3	5.9	12.2	7.9	4.3	DK	-39.6	-44.8	-27.1
EE†	5.8	:	:	6.5	:	4.0	EE†	12.1	:	:
EL	15.4	9.9	5.5	17.4	13.4	4.0	EL	13.0	35.4	-27.3
ES	118.5	75.7	42.9	124.5	80.1	44.4	ES	5.1	5.8	3.5
FI	18.6	11.6	7.1	15.9	10.9	5.0	FI	-14.5	-6.0	-29.6
FR	237.6	122.2	115.4	168.5	92.3	76.1	FR	-29.1	-24.5	-34.1
HU	45.7	18.0	27.7	37.0	20.3	16.7	HU	-19.0	12.8	-39.7
HR†	14.6	7.9	6.7	12.9	8.7	4.2	HR†	-11.6	10.1	-37.3
IE*	16.7	12.1	4.6	15.6	11.9	5.0*	IE*	-6.6	-1.7	8.7
IT	188.3	109.1	79.2	180.7	106.0	74.8	IT	-4.0	-2.8	-5.6
LT†	7.5	1.8*	5.3	10.3	5.2	5.0	LT†	37.3	188.9	-5.7
LU	:	:	:	:	:	:	LU	:	:	:
LV†	6.1	2	4.0	5.4	2.9	3	LV†	-11.5	61.1	-30.0
MT	:	:	:	:	:	:	MT	:	:	:
NL	63.3	37.2	26.1	71.3	49.3	22.1	NL	12.6	32.5	-15.3
PL	145.0	82.8	62.2	120.1	69.7	50.4	PL	-17.2	-15.8	-19.0
PT	16.2	10.1	4.6*	21.0	16.5	4.5	PT	29.6	63.4	-2.2
RO	37.9	25.0	12.9	80.7	58.5	22.1	RO	112.9	134.0	71.3
SE	33.7	23.2	10.5	24.7	19.9	5.3	SE	-26.7	-14.2	-49.5
SI†	8.2	5.5	2.6	7.8	5.8	3.4	SI†	-4.9	5.5	30.8
SK	21.1	8.2	12.9	22.8	10.0	12.8	SK	8.1	22.0	-0.8

Note: : = no data; * = for Ireland, no data on the number of women employed in 2023 were available, so data from 2018 were used; † = data for Croatia, Estonia, Latvia, Lithuania and Slovenia have low reliability.

Source: Eurostat, *Employment by sex, age, and detailed economic activity [lfsq_egan22d]*

Figure 11: Change in the number of people employed in the entire postal and courier activities sector, by Member State, 2015–2023



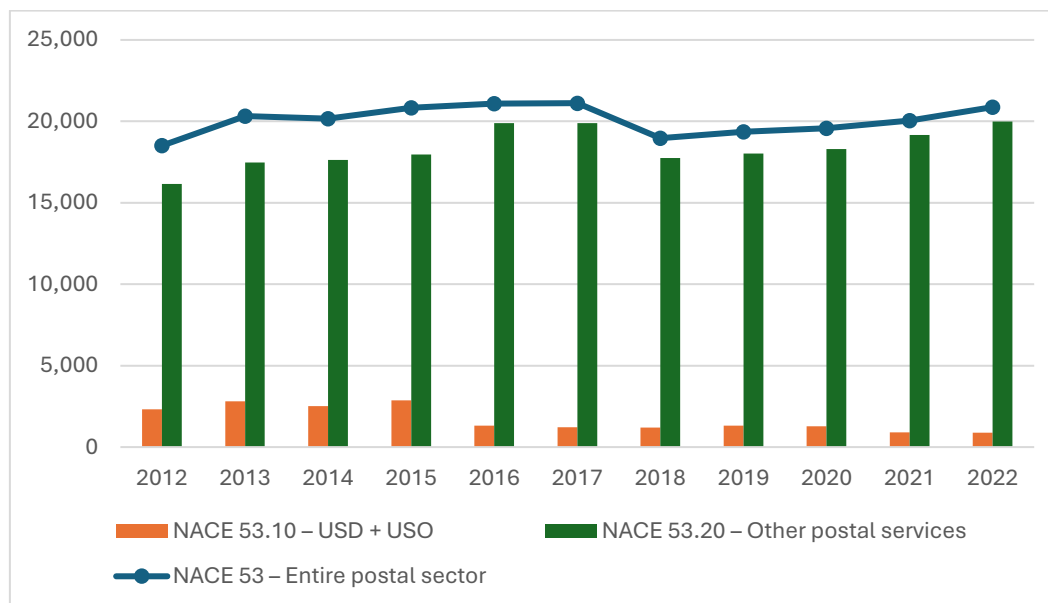
Note: No data are available for Luxembourg and Malta; data for Croatia, Estonia, Latvia, Lithuania and Slovenia have low reliability; * = for Ireland, no data on the number of women employed in 2023 were available, so data from 2018 were used.

Source: Eurostat, *Employment by sex, age, and detailed economic activity [lfsq_egan22d]*

1.3. Companies in the postal and courier services sector

In 2022, there were over 20,000 companies in the entire postal and courier services sector in the EU27 according to the postal statistics of DG Internal Market, Industry, Entrepreneurship and SMEs. The vast majority – almost 96% – were active in other postal services, those not under USO or USD, as shown in Section 1.1. The number of companies in the sector has increased since 2012, from 18,500 to almost 21,000 in 2022 (Figure 12). In terms of the different parts of the sector, the number of companies providing USD and USO activities decreased between 2012 and 2022, from 2,313 to 892. The number of USD-providing companies has been stable since 2012 and amounts to one in each Member State (as shown in Table 6). Thus the decrease in USD and USO activities is due to the diminishing number of companies providing universal services or services interchangeable with a USO.

Figure 12: Change in number of companies in the postal and courier activities sector, EU27, 2012–2022



Source: DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics [POST_CUBE1_X_custom_207]

The DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics do not allow an overview of the distribution of employment and companies in the sector by size groups, as there are no data on the size of the companies. This analysis would only be possible based on Eurostat SBS data for the postal and courier activities sector, which, as noted above, are notably compromised due to substantial gaps, particularly since 2018. Bearing this reliability limitation in mind, Table 8 and Figure 13 show that the postal and courier sector is extremely polarised, with over 73% of the total EU employees working in larger companies (of 250 employees or more) and 89% of the companies having fewer than 10 employees.

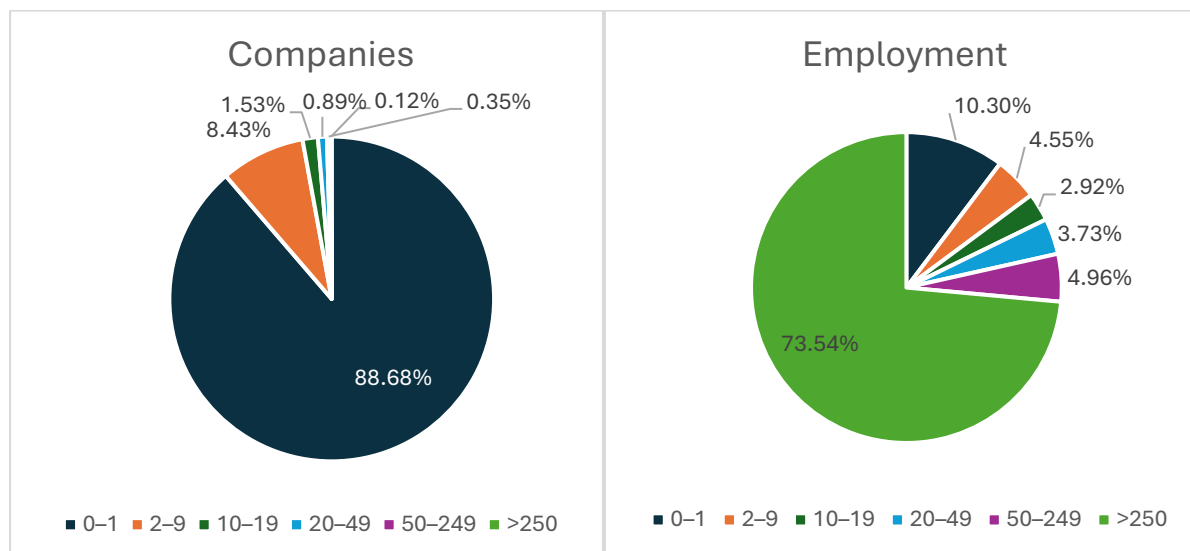
Table 8: Number of enterprises and persons employed in the entire postal and courier activities sector, 2022

EU27	0 to 1	2 to 9	10 to 19	20 to 49	50 to 249	Over 250	Total
Number of companies	200,000	19,000	3,450*	2,000	791	278	229,577
Number of persons employed	166,113	73,400	47,100	60,159	80,028	1,186,080	1,612,875

Notes: * indicates that data for 2021 were used, as data for 2022 were not available. Data on companies have poor reliability and should be treated with caution.

Source: Eurostat, Annual detailed enterprise statistics for services (NACE re.2H-N and S95) [sbs_na_1a_se_r2]

Figure 13: Share of companies and employment in the postal and courier activities sector by size category, EU27, 2022



Note: Data on companies have poor reliability and should be treated with caution.

Source: Eurostat, Annual detailed enterprise statistics for services (NACE re.2H-N and S95) [sbs_na_1a_se_r2]

Looking at the two parts of the sector, the very large companies, with over 250 employees, in universal postal services, employ 99% of the workforce in this part of the sector. The share of microenterprises, which could be interpreted as self-employed workers in this part of the sector, constitutes 94%, as the number of companies with no or one person employed shows in Table 9. The situation is less polarised for the other postal and courier activities even if the majority of the workforce is employed in large companies, with 56% of employees working for companies with over 250 people.

Table 9: Number of enterprises and persons employed in NACE 53.10 and NACE 53.20, 2022

EU27		0 to 1	2 to 9	10 to 19	20 to 49	50 to 249	>250	Total
NACE 53.10 – Universal services	Number of companies	640*	:	15	:	3	26	1,158*
	Share of companies	93.5%	:	2.2%	:	0.5%	3.8%	100%
	Number of persons	844	:	220	100*	514*	657,276	660,170
	Share of persons	0.13%	:	0.03%	0.02%	0.08%	99.7%	100%
NACE 53.20 – Other	Number of companies	202,972	18,877	3,570	2,000	788	252	228,000
	Share of companies	88.8%	8.2%	1.56%	0.8%	0.3%	0.1%	100%

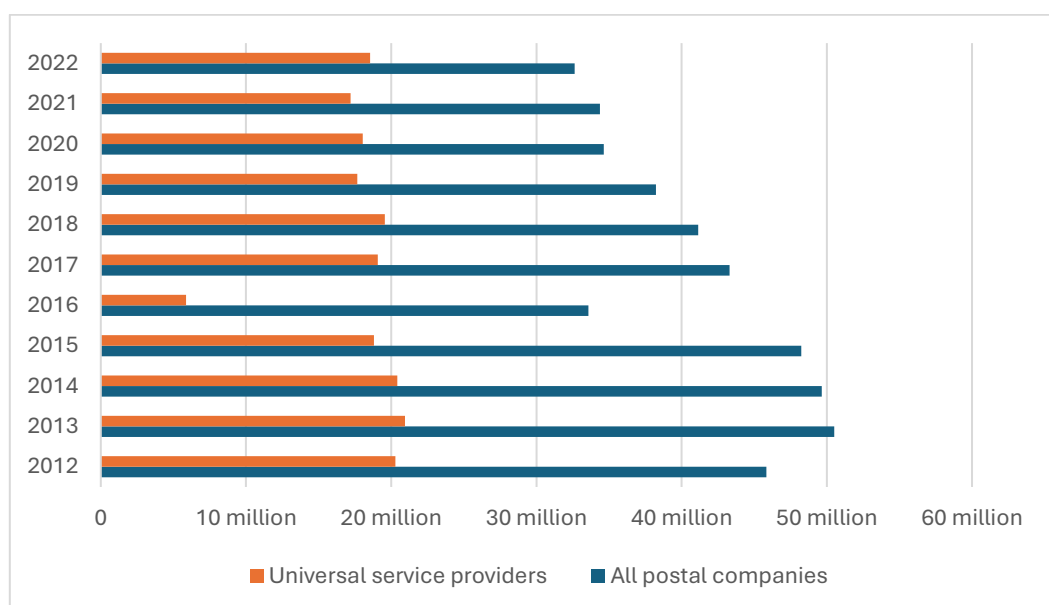
postal services	Number of persons	165,269	72,113	46,912	60,100	79,500	528,804	952,706
	Share of persons	17.3%	7.5%	4.9%	6.3%	8.3%	55.5%	100%

Notes: : indicates no data; * indicates data for 2021 were used, as data for 2022 were not available.

Source: Eurostat, Annual detailed enterprise statistics for services (NACE re.2H-N and S95) [sbs_na_1a_se_r2]

When looking at the companies active in both letter deliveries and parcel deliveries, the concentration of USPs in the letter delivery subsector is evident (Figure 14).

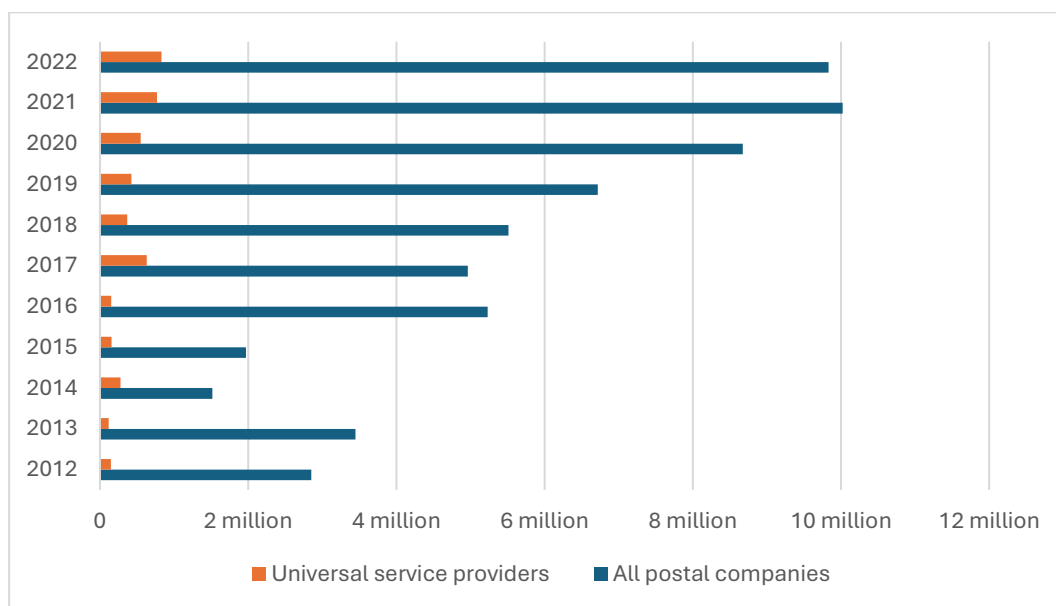
Figure 14: Domestic letter mail services, total volume, by types of companies in the sector, EU27



Source: DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics [POST_CUBE1_X_custom_184]

As explained in a report by Copenhagen Economics (2019), although certain parcels fall under USO activities, this obligation only applies to parcels below a certain weight limit. The absence of a monopoly has facilitated the emergence of numerous courier and express service providers, creating a fragmented parcel market where the USPs hold relatively low delivery shares (Figure 15).

Figure 15: Domestic parcel services, total volume, by types of companies in the sector, EU27



Source: DG Internal Market, Industry, Entrepreneurship and SMEs postal statistics [POST_CUBE1_X_custom_184]

The success of USPs against new entrants varies, with about half of the top 20 global postal markets successfully transitioning from mail to parcels, while the rest lag behind (Briest et al, 2019). As the same report shows, this major shift involves large e-commerce companies entering the delivery sector, acting as disruptors reshaping the industry. These new entrants have the capacity to invest heavily, sacrificing short-term profits. National USPs face strong competition; nevertheless, they continue to play an important role in the parcel segment. However, international logistics companies (such as UPS, FedEx and Amazon) are expanding their coverage in this part of the sector, especially following the increase in e-commerce activities. Data provided by the Network of Eurofound Correspondents reveal that these non-EU operators are among the largest service providers in the other postal services part of the sector in 16 Member States: Austria, Belgium, Croatia, Cyprus, Czechia, Germany, Estonia, France, Ireland, Italy, Lithuania, the Netherlands, Portugal, Romania, Spain and Sweden (see Table 71 in Annex 1). These companies are covered by the term ‘non-EU operators’ across the report. Also related to the **internationalisation** of these companies is the fact that the national USPs from several Members States have subsidiaries in their neighbouring countries. Deutsche Post DHL Group from Germany and Le Groupe La Poste from France dominate the European postal market, with activities across the entire EU (according to the data provided by the Eurofound correspondents from Germany and France). Eurofound correspondents from Belgium, Denmark, Estonia, Hungary, Ireland, Italy, Luxembourg, Malta, the Netherlands, Poland, Slovenia and Sweden also indicated that DHL is active in the other postal services part of the sector in their country, while for DPD, a subsidiary of La Poste, it was confirmed by the national correspondents from Austria, Bulgaria, Croatia, Estonia, Ireland, Latvia, Lithuania, the Netherlands, Portugal and Spain (as shown in Table 71 in Annex 1). DHL and DPD are covered by the term ‘European multinational postal companies’ across the report.

In some countries, the incumbent postal operators under USO have been traditionally part of state-owned organisations providing telecommunication and banking services complementary to the postal ones. In view of the fall in mail volumes, many operators have **diversified** their activities. Data collected by the Network of Eurofound Correspondents show that 14 out of the 30 companies providing postal and courier services under USO included in this study have activities in banking, finance and insurance; 12 have activities in logistics, warehousing and packaging; 8 have activities in commerce and retail; 5 have activities in telecommunications; and 4 have activities in road transport (Table 10). Additionally, in some Member States, proximity services (consisting in the provision of meals and medication, as well as regular checks for vulnerable, single residents) have been mentioned among the services provided by the employees of companies providing USO postal and courier services.

As noted in the European Commission report (2021), despite the decrease in government **ownership** registered since 2008, after several governments sold some or all of their shares in the national operators, data collected by the Network of Eurofound Correspondents show that, in the majority of countries, national operators are still either entirely publicly owned companies, or the state is the major stakeholder. Greece, Malta, the Netherlands, Portugal and Slovakia are the only exceptions (see Table 70 in Annex 1).

Table 10: Activities of the national USPs included in this study, 2023

<i>Member State</i>	<i>Company name (national language)</i>	<i>Active in other sectors</i>	<i>Multinational company</i>	<i>Having subsidiaries</i>	<i>Active in other Member States</i>
<i>AT</i>	Österreichische Post AG (ÖPAG)	Banking	Yes	Yes (5)	BG, DE, HR, HU, SI, SK
<i>BE</i>	Bpost	Banking as an intermediary	Yes	Yes	Bpost has several entities in other countries (DE, ES, FR, IT, NL, PL), mainly in e-commerce logistics, but not for universal service.
<i>BG</i>	Български пощи ЕАД (Bulgarian Post PLC)	Logistics and commerce	No	No	No
<i>CY</i>	Cyprus Post	No	No	No	No
<i>CZ</i>	Česká pošta, s. p. (Czech Post)	Freight transport by road, telecommunications, other financial activities, and packaging activities	No	No	No

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

Member State	Company name (national language)	Active in other sectors	Multinational company	Having subsidiaries	Active in other Member States
<i>DE</i>	Deutsche Post DHL	Logistics	Yes	Yes	All over the world (220 countries)
<i>DK</i>	PostNord Danmark (also called Post Danmark A/S Ltd. PostNord is the parent organisation)	Logistics	Yes – the part of PostNord AB that owns the Danish and Swedish former state-owned postal companies under the USO.	No	PostNord covers the Scandinavian countries and FI. PostNord Denmark is the Danish branch.
<i>EE</i>	AS Eesti Post (Estonian Post)	Finance and commerce	Yes	Yes (Omniva LT UAB in Lithuania and Omniva SIA Post11 OÜ in Latvia)	LT, LV
<i>EL</i>	Ellinika Tahidromia A.E. (ELTA) (Ελληνικά Ταχυδρομεία Α.Ε., ΕΛΤΑ) (ELTA S.A. or Hellenic Post SA)	Financial, retail network products and courier services	No	Yes, it is a group of companies in activities under USO and courier services.	
<i>ES</i>	Sociedad Estatal Correos y Telégrafos (part of Grupo Correos)	Logistics, retail, financial services and administrative services	No	Yes: Correos Express for courier services and Correos Telecom for telecommunications	PT (Correos Express Portugal)
<i>FI</i>	Posti Group	Logistics	Yes (Aditro Logistics)		EE, LT, LV, NO, PL, SE
<i>FI</i>	Åland Post	Logistics, e-commerce, road transport, stamp design and sales	No	No	No
<i>FR</i>	Le Groupe La Poste	Banking, insurance, telecommunications, digital services and real estate	Yes	Geopost/DPD	Geopost/DPD is active in almost all EU Member States.
<i>HR</i>	HP – Hrvatska Pošta d.d. (Croatian Post)	Logistics	No	No	No
<i>HU</i>	Magyar Posta Zártkörűen Működő Részvénytársaság (Hungarian Post)	Financial and intermediary activities, and retail trade	No	Several subsidiaries; however, they are active in other sectors (such as NACE 70.10, NACE 68.20, NACE 82.99 and NACE 62.01) and not in NACE 53.	No
<i>IE</i>	An Post	Banking, insurance, mobile services, and government	No (though An Post does have a UK subsidiary)	Postpoint, Air Business	No

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

Member State	Company name (national language)	Active in other sectors	Multinational company	Having subsidiaries	Active in other Member States
		services (including collecting TV licences, dog licences and Garda fines)			
<i>IT</i>	Poste Italiane S.p.A.	Logistics, financial and insurance services, payment systems and telephony	No	Bancoposta Fondi S.p.A. (capital investment fund), SDA Express Courier S.p.A., Poste Vita S.p.A. (insurance policies, pension funds), PostePay S.p.A. (electronic payment system)	No
<i>LT</i>	AB Lietuvos paštas (Lithuanian Post)	No	No	No	No
<i>LU</i>	POST Luxembourg	Philately, telecommunications and financial activities	Yes (subsidiaries in France, Monaco and Morocco)	Michel Greco S.A.	FR
<i>LV</i>	Latvijas Pasts (Latvian Post)	Trade, philatelic services and financial services	No	None	No
<i>MT</i>	MaltaPost plc	Logistics, banking, document management and insurance	No	No	No
<i>NL</i>	PostNL	Logistics	Yes	Yes (Spring)	PostNL is active in BE; Spring is active in DE, ES, FR, IT.
<i>PL</i>	Poczta Polska SA	No	No	Poczta Polska Dystrybucja S.A.	No data
<i>PT</i>	CTT Correios de Portugal, S.A.	Banking, financial services and retail trade	No	CTT Expresso (NACE 53.20), CTT Contacto (NACE 53.20)	ES
<i>PT</i>	CTT Contacto S.A. (part of CTT Correios de Portugal, S.A.)	No	No	CTT Contacto is a subsidiary of CTT	No
<i>RO</i>	Compania Națională Poșta Română S.A. (Poșta Română)	No	No	No	No
<i>SE</i>	PostNord Group AB	Logistics (warehousing), and transporting parcels and letters as part of	Yes	Yes, several subsidiaries	Yes, mainly in DK, FI, NO

Member State	Company name (national language)	Active in other sectors	Multinational company	Having subsidiaries	Active in other Member States
		logistics/road transport			
SI	Pošta Slovenije (Post of Slovenia)	Logistics, commerce and IT solutions	No	PS Logistika d.o.o.	No
SK	Slovenská pošta, a.s.	Road freight transport, financial services, logistics	No	Yes, Slovak Parcel Service	No
SK	Slovak Parcel Service (SPS; part of Slovenská pošta, a.s.)	No	No	No, it is a subsidiary of Slovenská pošta.	No

Source: Network of Eurofound Correspondents, 2023

1.4. Changes in employment in the postal and courier activities sector

The postal services sector has undergone significant changes associated with the full opening of the postal services market, which was coupled with a notable fall in the volume of mail over the years. As the previous representativeness study showed, the liberalisation of the postal services across the EU started in the second half of the 1990s with European Commission Directive 97/67, amended in 2002 and 2010, reaching the obligatory market opening by 2012 (Eurofound, 2017). As providers of a universal service of public interest, the national postal monopolies dominated the market before the liberalisation of the sector, and standard forms of employment, often as civil servants, were predominant in the sector. At the same time, postal operators were faced with a significant and constant decline in the volume of mail, brought on by digitalisation, in parallel with an increase in the volume of parcels with the boom of e-commerce. As a Syndex and UNI Global (2019) study shows, one of the main consequences of liberalisation of the market is the growth of e-commerce and the increased use of the Courier–Express–Parcel (CEP) business model,¹⁴ alongside the pressure for former monopolies in the sector to adapt their business models to a growing parcel market. For the workforce, this has led to a growth in alternative modes of employment and a deterioration in working conditions.

Currently, several forms of employment coexist, from standard, full-time, indefinite contracts (which are the large majority of contracts) to subcontracting (in a few cases of self-employed workers), as the data collected by the Network of Eurofound Correspondents indicate (see Table 63 in Annex 1). Only in 10 Member States are there civil servants employed – in Austria, Belgium, Cyprus, Denmark, France, Germany, Ireland, Luxembourg, Spain and Sweden – and this is the case only for the postal services under USO. In countries in which there are no civil servants in the sector, the workers employed in the postal activities under USO have predominantly full-time, indefinite employment contracts and are well organised and represented by trade unions in most EU Member States, which is most often

¹⁴ A model characterising the large international express carriers such as DHL (part of Deutsche Post DHL group), FedEx, TNT and UPS, which together accounted for 87% of the international express market in 2019, when the cited study was published.

explained by the heritage of the former monopolistic role of the national postal companies. USPs have put in place several measures to ensure that the ongoing changes are supported by adequate human resources policies. The measures derive from the projects implemented in collaboration between the European social partner organisations (mentioned in Section 0.2), and cover in particular training, reskilling, upskilling, internal mobility and collective bargaining. However, according to the data collected by the Network of Eurofound Correspondents, the working conditions in postal services under USO are deteriorating. In four countries (Austria, Bulgaria, Czechia and Hungary), stagnating wages are also reported.

The situation is different in the other postal activities, where an increase in temporary agency workers, workers of contractors and self-employed workers is reported in most Member States. It is noteworthy that, even in the countries in which the national USP dominates the other postal and courier services, the national USP subcontracts the activities in this subsector to smaller companies in order to maintain competitiveness and answer to the important fluctuation of activities. This translates into more flexible employment arrangements, often on minimum national wages and minimal working standards, and results in a high staff turnover rate, longer working time and worse working conditions in general for the workers in this subsector than those in the activities under USO. Subcontracting practices are increasing in this subsector in response to the need for more flexibility, especially during periods of increased demand. This is evidenced in an evaluation report on the implementation of the Postal Directive, published by the European Commission (2021), and is confirmed by the data collected by the Network of Eurofound Correspondents in all 27 Member States. As evidenced in the same report, the postal services sector has a two-tier labour market with, on the one hand, well-represented workers and collectively negotiated agreements in services under USO, and, on the other hand, poorly organised workers and almost no collective agreements in the other postal services, which are not under USO. This is in part because the other postal services subsector is its dominated by smaller companies, which are more difficult to organise, and so too are people working part time, self-employed workers and temporary agency workers. In the postal services that are not under USO, a considerable overlap with the transport sector is reported in some countries – France, Luxembourg and Sweden among others – and, in some cases, the transport trade union represents delivery workers and these workers are covered by the collective bargaining agreements signed with companies and/or employer organisations from the transport sectors.

Despite some reports (such as WIK Consult, 2019) indicating the increased use of platforms in the sector, the Network of Eurofound Correspondents reports little evidence of the use of platform-mediated activities in the postal and courier activities sector, as in most Member States platform-mediated work is confined to food delivery activities (see Table 63 in Annex 1).

2. National level of interest representation

This chapter presents an overview of the national-level trade unions and employer organisations active in the postal and courier activities sector. This study identifies 115 trade unions and 44 employer organisations and business associations in the sector (Table 11). A detailed presentation of the sectoral industrial relations landscape in each of the EU27 Member States can be found in Annex 2. This chapter provides a panoramic overview with totals that will form the basis for the calculation of representativeness in the next chapter.

Table 11: Number of national-level trade unions, employer organisations and companies providing USD

Number of trade unions										Member State	Number of employer organisations (EOs)/business associations (BAs) and USPs												
											EO/BA				USP								
										3	AT	5								1			
										8	BE	4								1			
										3	BG	0								1			
										5	CY	0								1			
										2	CZ	0								1			
										3	DE	1								1			
										3	DK	2								1			
										2	EE	0								1			
										4	EL	0								1			
										9	ES	4								1			
										11 ¹⁵	FI	3								2*			
										7	FR	4								1			
										3	HR	1								1			
										2	HU	1								1			
										4	IE	0								1			
										8	IT	4								1			
										2	LT	0								1			
										3	LU	1								1			
										1	LV	2								1			
										1	MT	0								1			

¹⁵ There are 10 trade unions organising postal workers in Finland. The eleventh union, which was initially included in the data collection, TVML, a trade union affiliated to CESI, does not organise members in the postal and courier sector, as it is a customs union, so the members' relation to postal and courier services is a monitoring one in international postal services. TVML does not participate in any of the postal working groups in CESI. Given this, TVML is not included in this study.

Number of trade unions													Member State	Number of employer organisations (EOs)/business associations (BAs) and USPs											
														EO/BA					USP						
													3 ¹⁶	NL	1								1		
													2	PL	1								1		
													10 ¹⁷	PT	0								1		
													2	RO	1								1		
													9	SE	4								1		
													3	SI	2								1		
													2 ¹⁸	SK	3								1		
													115	EU27	44								28		

Note: * In Finland, the Eurofound correspondent indicated there are two companies providing services under USD: a national one covering the entire country and a regional one for the Åland region. Detailed descriptions of the national social partner organisations and companies in the sector are available in Table 71 in Annex 2.

Source: Network of Eurofound Correspondents, 2023

2.1. Coverage, sector-relatedness and organisational density of trade unions

In 2023, 115 postal and courier activities sector trade unions were identified, whereas in 2015 103 trade unions were identified in the EU27 and the UK. The total number of trade unions in the postal and courier activities sector in EU27 Member States in 2015 was 98 (Table 12). In 10 countries the number of trade unions has increased from 2015 to 2023: Belgium, Croatia, Czechia, Finland, Greece, Portugal, Romania, Slovenia, Spain and Sweden. By contrast, the number of trade unions has decreased in the Netherlands, where LBV and Subcopartners, which were included in the previous representativeness study for the postal and courier activities sector, are no longer active. VHP2 has no members in this sector, and De Unie, which has a few members in the postal and courier activities sector (although it is unknown how many), refused to participate in this representativeness study, despite being a co-signatory of one collective bargaining agreements related to the other postal services in the Netherlands. In Hungary, Mapész, a trade union included in the previous representativeness study for the postal and courier activities sector, is no longer recognised as a representative trade union due to its very small membership volume and having no role in the social dialogue; Pomész, another trade union included in the previous representativeness study for the postal

¹⁶ In the Netherlands, the trade union De Unie has a few members in the postal sector but refused to participate in this study, despite being a co-signatory of one collective bargaining agreement related to the other postal services (NACE 53.20) in the Netherlands. De Unie is not included in this study.

¹⁷ In Portugal, there are two trade unions, SERS and SNEET, which are co-signatories of a collective bargaining agreement in the postal sector with the national USP, but neither of these has members in the sector, as they represents engineers only. SERS and SNET are not included in this study.

¹⁸ In Slovakia, two trade unions with very small memberships in the sector, SOZP and POS, refused to participate in this study and thus are not included.

and courier activities sector is a member of Pofész, which is included in the current report; the trade union Postal Interest Representation '92, also included in the previous representativeness study for the postal and courier activities sector, is no longer active. In Denmark, two trade unions, IDA and DM, were included separately in the previous representativeness study for the postal and courier activities sector. In the current report, both IDA and DM are included as members of the trade union Akademikerne. Akademikerne is a confederation of trade unions, with no individual members. Akademikerne signs a collective agreement that covers members from seven of its member unions in the postal and courier activities sector (Djøf, DM, Ingeniørforeningen (IDA), Forbundet for Arkitekter og Designere (FAOD), Forbundet Kommunikation og Sprog (KS), Dansk Psykolog Forening (DP) and Jordbrugsakademikerne (JA)). In Ireland, the trade unions CPSU and PSEU, which were included in the previous representativeness study for postal and courier activities sector, were amalgamated, along with another union, Impact, to form Fórsa in 2018.

Table 12: Comparative overview of the number of national trade unions organising workers in the postal and courier activities sector in each Member State, 2015 and 2023

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
2023	3	8	3	5	2	3	3	2	4	9	11	7	3	2
2015	3	3	3	5	1	3	4	2	2	6	5	9	2	5
	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SI	SK	EU
2023	4 ¹⁹	8	2	3	1	1	3	2	10	2	9	3	2	115
2015	5	8	2	3	1	1	7	2	6	1	6	1	2	98

Note: The list of trade unions active in 2015 is available in Table A1 of the previous representativeness study (Eurofound, 2017, p. 40). Red font indicates discrepancies between the number of trade unions identified in 2015 and 2023.

Sources: Network of Eurofound Correspondents 2015, 2023; Eurofound, 2017

In this section, the sector-relatedness and bargaining strength of trade unions in each Member State and in the EU27 in total are assessed. There are 48 trade unions from 17 Member States covering all the activities in the postal and courier activities sector. Table 13 and

Table 15 show that the overwhelming majority of trade unions cover workers in activities under USO, with 82 trade unions covering workers employed by the national USP. This part of the sector is not only better covered by trade unions, but also evenly distributed across all Member States. By contrast, workers active in other postal services are represented by trade unions in two-thirds of Member States.

¹⁹ In Ireland, the trade unions CPSU and PSEU, which were included in the previous representativeness study for the postal sector, were amalgamated, along with another union, Impact, to form Fórsa in 2018.

Table 13: Sector-relatedness of national postal and courier activities sector trade unions

Member State	Number of trade unions	NACE 53.10 – Universal services			NACE 53.20 – Other postal services					Other sectors
		Mail	Parcels	USP	Mail	Parcels	USP	European multinational companies (MNCs)	Non-EU operator	
Number of trade unions	115	90	92	82	75	83	60	31	20	90 (25 in transport)
Share of all trade unions (%)	100	78	80	71	65	72	52	26	17	78
Number of Member States	27	27	26	27	22	22	22	13	10	26
Member States with no trade unions (or no data)	0	0	1 (LU)	0	5	5	5	5 in which EU MNCs are active	6 in which non-EU operators are active	2

Note: The complete list of trade unions is available in Table 64 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

No trade unions represent any of the workers in other postal services in Croatia, Poland and Slovakia, despite the fact that 60 trade unions from 22 Member States cover the activities of the USPs in the other postal services part of the sector. In Lithuania and Slovenia, workers in other postal services delivering mail are not covered by trade unions, while, in Czechia and Luxembourg, workers in parcel activities are not represented by postal unions. The lack of coverage of workers in these activities is explained by the fact that, in several countries, the national USPs are not active in both NACE 53.10 and NACE 53.20. Some 31 trade unions from 13 Member States organise workers employed by European multinational companies, such as DHL or DPD, which are active in their countries of origin and 17 additional Member States, as detailed in Section 1.3. There are 20 trade unions in 10 Member States (Austria, Belgium, Germany, France, Ireland, Italy, the Netherlands, Portugal, Spain and Sweden) that represent workers in the delivery activities of non-European operators (such as UPS, Amazon and FedEx), out of the 16 countries in which these operators are active (see the Member States listed in Section 1.3).

Finally, looking at the multi-sectionalism of trade unions, 90 of the 115 trade unions are also active in other sectors such as telecommunications, information and communications technology (ICT), road and railway transport, banking, insurance and financial services, logistics, media, commerce, tourism, administration and public services. Only in Croatia and Romania do all the trade unions included in this study cover the postal and courier activities sector exclusively. In some countries, the workers in the other postal services (NACE 53.20) are covered by the transport branch of trade unions that also have a postal branch, as is the case in France and Italy, or by transport unions, as is the case in Luxembourg and Sweden, among others.

Table 14: Categories of workers represented by postal and courier activities sector trade unions, EU27

Member States	Number of trade unions	Blue-collar workers	White-collar workers	Management	Civil servants	Workers of contractors ²⁰	Temporary agency workers ²¹	Employees on				Self-employed
								Full-time indefinite contracts	Part-time indefinite contracts	Full-time fixed contracts	Part-time fixed contracts	
Number of trade unions	115	77	91	82	31	31	34	95	89	82	81	9
Share of all trade unions (%)	100	65	77	69	26	26	28	80	75	69	68	8
Number of Member States	27	27	27	25	14	12	14	27	26	24	23	5

Note: The complete list of trade unions is available in Table 64 in Annex 1; data on membership domains were available only for 76 of the trade unions.

Source: Network of Eurofound Correspondents, 2023

Table 14 and Table 15 show that trade unions predominantly organise white-collar workers, management and blue-collar workers under full-time open-ended contracts. Nonetheless, unions cover other types of contracts quite well (including part-time open-ended, full-time fixed-term and part-time fixed-term contracts), partly contradicting evidence suggesting that unions struggle to represent ‘non-standard’ workers.

Table 14 shows that two categories of postal workers that are poorly covered by collective bargaining and union organisation are the workers of contractors and the remaining civil servants of the sector, the latter of whom are only organised in half of the countries observed. This may be due to the decrease in their numbers after the process of liberalisation in the sector that has occurred over the last few decades. Lastly, self-employed workers are by far the least represented category of workers. This is consistent with the general tendency of unions to organise and represent dependent workers.

²⁰ This category includes workers employed by contracted companies (contractors) performing outsourced services for companies providing postal and courier services. More information on contracting and outsourcing practices and their impact on industrial relations is available at the entry for ‘outsourcing’ in the *European industrial relations dictionary*, available at <https://www.eurofound.europa.eu/en/european-industrial-relations-dictionary/outsourcing>

²¹ This category includes workers who, in compliance with national law, conclude contracts of employment or employment relationships with temporary employment agencies in order to be assigned to user undertakings to work there temporarily under the supervision of the agency. More information on temporary agency workers and Directive 2008/104/EC on temporary agency work is available in the *European industrial relations dictionary*, available at <https://www.eurofound.europa.eu/en/european-industrial-relations-dictionary/temporary-agency-work>

Table 15: Breadth of trade union coverage

	Parts of the sector covered										
	NACE 53.10			NACE 53.20							
	Mail	Parcels	USD	Mail	Parcels	USD	European multinational companies		Non-EU operators		
Number of trade unions covering this part of the sector	90	92	82	74	82	60	31		20		
	Blue-collar	White-collar	Management	Civil servants	Workers of contractors	TAWs	FTI	PTI	FTF	PTF	Self-employed
Number of trade unions covering categories of workers	77	91	82	31	31	34	97	89	82	81	9

Notes: FTF, full-time fixed contract; FTI, full-time indefinite; PTF, part-time fixed contract; PTI, part-time indefinite; TAW, temporary agency worker.

Source: Network of Eurofound Correspondents, 2023

Table 16 shows that that workers in companies with 250 or more employees are much more likely to be organised by unions, regardless of the country in which they are operating. This is in line with the general picture suggesting that better union representation occurs in bigger companies. Consistently, small companies (those with one to nine employees) have the lowest presence of trade unions in half the countries observed.

Table 16: Number of trade unions organising employees from different company size groups

	Size of the companies employing organised workers				
		1–9 workers	10–49 workers	50–249 workers	>250 workers
Number of trade unions	115	36	44	49	106
Share of all trade unions (%)	100	30	37	41	90
Number of Member States	27	14	17	17	27

Note: The complete list of trade unions is available in Table 64 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

Table 17 shows that about one-quarter of trade unions report a decreasing trend in their membership. The German trade union ver.di is the union covering most workers in the postal and courier activities sector (about 200,000). In contrast to the general trend, its membership is reported to be increasing. Moreover, one in four trade unions with an increasing membership trend are Finnish. Among the smallest trade unions, some present an increasing membership trend, such as Unionen in Sweden, F3C

CFDT in France, Akademikerne in Denmark and CIG – Correos in Spain. This testifies to the relative growth of some unions in the sector. In three out of four countries where the smallest trade union has an increasing membership, the largest trade union is losing members. That is the case for 3F in Denmark, SEKO in Sweden and FAPT-CGT in France. Two other largest trade unions that are losing members are CWU in Ireland and POST in Greece. Finally, Italy is the only country for which there is no information about membership strength.

Table 17: Membership strength of postal and courier activities sector trade unions

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
AT	Vida	n/a	0		n/a	Yes (DPD)	Yes (Amazon, FedEx)	No data	2nd largest	No members	Largest	Largest
AT	GPA	n/a	0		n/a	Yes (DPD)	Yes (Amazon, FedEx)	No data	3rd largest	No members	2nd largest	2nd largest
AT	GPF	<u>11,000</u>	<u>11,000</u>	<u>Yes</u>	<u>0</u>			<u>Decreasing</u>	<u>Largest</u>	<u>Largest and only</u>	<u>3rd largest²²</u>	<u>Members only in ÖPAG (USP)</u>
BE	ACV Puls	11,000	0	Yes	11,000	Yes (DHL)		No data	One of the largest, 2nd largest for white-collar workers	No members	Among the largest in the sector	Among the largest in the sector
BE	ACV-CSC Transcom	No data	No data	Yes	No data	Yes (DHL)		No data	Among the largest in the sector	Among the largest in the sector	Among the largest in the sector	Among the largest in the sector
BE	VSOA-SLFP Post	6,921	6,921	Yes	0			Stable	No data	3rd largest	No data	No data
BE	BTB (ABVV-FGTB)	3,500	0	Yes	3,500	Yes (DHL)	Yes (UPS)	No data	One of the larger ones within other postal activities	No member within this part	Among the larger ones within the non-universal activities	Unknown
BE	ACLVB-CGSLB	No data	No data	Yes	No data	Yes (DHL)		No data	One of the smallest	One of the smallest	One of the smallest	One of the smallest
BE	BBTK-SETCa	Unknown	Unknown	Yes	Unknown	Yes (DHL)		No data	One of the largest for	No data	One of the largest for	One of the largest for

²² As GPF only represents ÖPAG employees working in these activities.

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

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
									white-collar workers		white-collar workers	white-collar workers
BE	ACV-CSC CNE	No data	No data		No data	Yes (DHL)	Yes (UPS)	No data	One of the smallest (covers only French-speaking white-collar workers in the other postal activities)	No members	No data	No data
BE	ACOD-Poste (ABVV-FGTB)	No data	No data	Yes	No data			No data	One of the largest	One of the largest	One of the largest	One of the largest
BG	СФС/TUFC	6,500	No data	Yes	No data			Decreasing	Largest	Largest	Largest	Not relevant
BG	PTTF Podkrepa	2,500	No data	Yes	No data			Stable	2nd largest	2nd largest	2nd largest	Not relevant
BG	ДСС/DCS	350	No data	Yes	No data			Decreasing	3rd largest	3rd largest	3rd largest	Not relevant
CY	PASY-DY	307	307	Yes	0			Stable	Largest	Largest	No data	No data
CY	PASYEK PEO	24	24	Yes	0			Stable	3rd largest	3rd largest	No data	No data
CY	OEKDY – SEK	62	62	Yes	0			Stable	2nd largest	2nd largest	No data	No data
CY	SEGDA MELIN – PEO	~5	0		~5			Decreasing	Very small	No data	Largest	No data
CY	FTPAW – SEK	~7	0		~7			Decreasing	Very small	No data	No data	No data
CZ	OSZPTNS	~5,000	~5,000	All ~5,000				Decreasing	No data	Largest	Largest	Largest
CZ	OHZ ČP	No data, estimation a few thousand	Yes, no data	Yes, all members				Increasing	2nd largest	n/a	n/a	n/a

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

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
DE	DPVKOM	20,000	20,000		0			No data	2nd largest	2nd largest	n/a	n/a
DE	ver.di	200,000	More than 130,000	Yes	70,000	Yes (DHL)	Yes (UPS)	Increasing	Largest	Largest	Largest	Largest
DE	CGPT	No data	No data		No data			No data	No membership data, 3rd largest	3rd largest	3rd largest	3rd largest
DK	3F ²³	A few thousand	60–65% of ~6,000 workers in the USP	Yes	n/a ²⁴	Yes (DHL)		Decreasing	Largest	Largest	Largest	Largest
DK	HK	~500 members	~350 members	Yes	~150 members	Yes (DHL)		Stable	2nd largest	2nd largest	2nd largest	2nd largest
DK	Akademikerne (AC)	AC has only organisations as members ²⁵	159 ²⁶		None			Increasing	Very small	Very small	No members in NACE 53	Very small
EE	ETTA	5	5		0			Decreasing	2nd largest	2nd largest	2nd largest	2nd largest
EE	Pro Ametiühing	350	350	Yes	0			Decreasing	Largest	Largest	Largest	Largest

²³ 3F cannot provide a full account of the number of members in the entire postal sector. The section of 3F that has provided answers for the questionnaire only has access to numbers regarding NACE 53.10. However, there are approximately 1,000 employees distributing newspapers and magazines under NACE 53.20. If 3F organises 50% of these, it should be considered a maximum, since this sector is characterised by many part-time workers (the exact number is unknown) and also there is a large influx and outflow of (mainly young) employees over the course of a year.

²⁴ According to 3F, the members of 3F are almost all employed in NACE 53.10 as postal workers or specialists.

²⁵ The collective agreement signed by AC covers members from seven of its member unions in the postal sector.

²⁶ Of whom the trade union IDA has 29 members and the trade union DM has 9 members.

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

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
EL	POST	3,250	3,100	Yes	150			Decreasing	Largest	Largest	Not among 3 largest	No data
EL	OIYE	6 trade unions with 900 individual members ²⁷	None		6 trade unions with 900 individual members			Stable	It is the only federation representing the employees in the sector	No data	No data	Largest
EL	ACS MAEE Workers' Union	370	None		300				2nd largest	Not among 3 largest	Largest	No data
EL	SESP	197 + 37 ²⁸	0		197 members			Stable	Not among 3 largest	No data	3rd largest	No data
ES	Sindicato Libre	No data	No data	Yes	No data			No data	No data	No data	No data	No data
ES	FeSP-UGT	15,500	15,500	Yes	None, only in NACE 53.10	Yes (DPD)	Yes (Amazon)	Stable	2nd largest	2nd largest	No members	No data
ES	FSC-CCOO Postal	36,238	No data	Yes	No data	Yes (DPD)	Yes (Amazon)	Increasing	Largest	Largest	Largest	Largest
ES	CIG-Correos	No data	675		No data			Increasing	2nd largest in Galicia	2nd largest in Galicia	No data	No data
ES	UGT-FESMC	No data	None, is only active in NACE 53.20		10,000		Yes (Amazon)	Increasing	No data	No data	2nd largest	No data
ES	ELA/STV	No data	No data		No data			No data	No data	No data	No data	No data

²⁷ OIYE is a second-level federation and its members are primary-level trade unions. OIYE has six trade unions in the subsector NACE 53.20, which have about 900 individual members.

²⁸ There are 197 members in Athens. In addition, there is another company-based trade union, the SPEEDEX Thessaloniki Employees Union, with 35 members.

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

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
ES	FS-USO	<10% of the sector	No data		<10% of the sector			No data	No data	No data	No data	No data
ES	LAB	No data	No data		No data			No data	No data	No data	No data	No data
ES	CSIF	No data	No data		No data			No data	No data	No data	No data	No data
FI	AKT	No data	No data	Yes	900			No data	Not among 3 largest	Not among 3 largest	3rd largest	No data
FI	PAU	8,027	6,027	Yes	2,000			Decreasing	Largest	Largest	Largest	Largest
FI	YTN	467	30	Yes	437			Stable	Not among 3 largest	Not among 3 largest	Not among 3 largest	Very small
FI	PAM	300	n/a		300			Increasing	Not among the 3 largest	Not among the three largest	Not among the three largest	Not among the three largest
FI	IL	~78 (~16.5% of YTN) (estimate)	No data		No data			No data	Not among 3 largest	Not among 3 largest	Not among 3 largest	Very small
FI	TEK	~95 (~20% of YTN members in the sector) (estimate)	No data		No data			Increasing	Not among 3 largest	Not among 3 largest	Not among 3 largest	Very small
FI	Ekonomit	120	No data		No data			Increasing	Not among 3 largest	Not among 3 largest	Not among 3 largest	Very small
FI	Tradenomit	30 (estimate)	No data		No data			Increasing	Not among 3 largest	Not among 3 largest	Not among 3 largest	Very small

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

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
FI	YTY	130	No data		No data			Increasing	Not among 3 largest	Not among 3 largest	Not among 3 largest	Very small
FI	Teollisuusliitto ry	1,100	No data		No data			Stable	2nd largest	2nd largest	2nd largest	No data
FI	Ammattiliitto PRO	350	300		50			Stable	Not among 3 largest	3rd largest	Not among 3 largest	Not among 3 largest
FR	F3C CFDT	16,800	No breakdown available	Yes	No breakdown available			Increasing	F3C-CFDT is the largest trade union in Le Groupe La Poste, which represents almost the whole postal and courier activities sector ²⁹	2nd largest (no breakdown)	3rd largest (no breakdown)	No data
FR	FAPT-CGT	20,629	11,007	Yes	9,622	Yes (DPD)		Decreasing	FAPT-CGT is the second largest trade union in Le Groupe La Poste ³⁰	Largest	No data	No data
FR	SUD-PTT	~15,000 (estimate)	No data provided by	Yes	No data provided by	Yes (DPD)		Decreasing	No data	4th largest	No data	No data

²⁹ In the workplace election of 2022, F3C CFDT reached 24.55% of the vote, more than FAPT-CGT (22.58%), 1FO Com (19.49%), SUD (17.11%), CFE-CGC (9.21%) and UNSA (6.16%).

³⁰ In the workplace election of 2022, FAPT-CGT reached 22.58% of the vote.

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

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
			the trade union		the trade union							
FR	UNSA-Postes	~5,000 (estimate)	No data provided by the trade union	Yes	No data provided by the trade union		Yes (UPS)	Stable	No data	Not among 3 largest	Not among 3 largest	No data
FR	<u>CFTC La Poste</u>	<u>~500–1,000</u>	<u>No data provided by the trade union</u>	<u>Yes</u>	<u>No data provided by the trade union</u>			<u>No data</u>	<u>No data</u>	<u>No data</u>	<u>Not among 3 largest</u>	<u>Not among 3 largest</u>
FR	FO com	~15,000	No data provided by the trade union		No data provided by the trade union	Yes (DPD)	Yes (UPS)	Stable	No data	Third largest, according to the trade union	Third largest, according to the trade union	Largest, according to the trade union
FR	CFE-CGC Le Groupe La Poste	2,360	2,190		72	Yes (DPD)		Increasing ³¹	Not among 3 largest	Not among 3 largest	Not among 3 largest	No data
HR	HSP	5,413	5,413	Yes	0			Decreasing	Largest	Largest	No	No
HR	RSHT	2,000	2,000		0			Increasing	2nd largest	2nd largest	2nd largest	No
HR	RSR	385	385		0			Decreasing	3rd largest	3rd largest	No members	No members
HU	Pofész	2,000	1,980		20			Decreasing	2nd largest	2nd largest	Very small	Very small
HU	PSZ	4,500	4,500	Yes	0			Decreasing	Largest	Largest	Largest	Largest
IE	Fórsa	~270	0	Yes	279			Stable	2nd largest	Very small	2nd largest	3rd largest

³¹ CFE-CGC recorded a 2.51 percentage point increase in their share of the vote in the last workplace elections of 2022.

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

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
IE	CWU	8,863	8,523	Yes	340	Yes (DPD, DHL)	Yes (UPS)	Decreasing	Largest	Largest	Largest	Largest
IE	ACHPS	118	68	Yes	50			Decreasing	No data	No data	No data	No data
IE	SIPTU					Yes (DHL)						
IT	<u>Confisal</u>	<u>No data</u>	<u>No data</u>	<u>Yes</u>	<u>No data</u>			<u>No data</u>	<u>No data</u>	<u>No data</u>	<u>No data</u>	<u>No data</u>
IT	<u>FAILP-CISAL</u>	<u>No data</u>	<u>No data</u>	<u>Yes</u>	<u>No data</u>			<u>No data</u>	<u>No data</u>	<u>No data</u>	<u>No data</u>	<u>No data</u>
IT	SLC-CGIL	No data	No data	Yes	No data	Transport branch of CGIL, DHL	Transport branch of CISL, UPS	No data	No data	No data	No data	No data
IT	UILPoste	No data	No data	Yes	No data	Transport branch of UIL, DHL	Transport branch of UIL, UPS	No data	No data	No data	No data	No data
IT	<u>Confedir</u>	<u>No data</u>	<u>No data</u>		<u>No data</u>			<u>No data</u>	<u>No data</u>	<u>No data</u>	<u>No data</u>	<u>No data</u>
IT	SLP CISL	No data	No data	Yes	No data	Transport branch of CISL, DHL	Transport branch of CISL, UPS	No data	No data	No data	No data	No data
IT	FNC-UGL	No data	No data	Yes	No data			No data	No data	No data	No data	No data
IT	Assidipost-Federmananger	No data	No data		No data			No data	No data	No data	No data	No data
LT	LRDPS	760	760	Yes	760			Decreasing	Largest	Largest	Largest	No data
LT	AB Lietuvos paštas profesinė sąjunga	730	730	Yes	730			Decreasing	2nd largest	2nd largest	Largest	n/a
LU	LCGB	1,200 (estimate)	No data	Yes	No data			Increasing	Largest	Largest	Largest	No data
LU	OGB-L	No data	No data	Yes	No data			No data	No data	No data	No data	No data

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

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
LU	<u>Syndicat des P&T</u>	<u>1,800 (estimate)</u>	<u>~1,000</u>	<u>Yes</u>	<u>~800</u>			<u>n/a³²</u>	<u>No data</u>	<u>No data</u>	<u>The trade union is only connected with the employees of POST Luxembourg</u>	<u>None, only employees of POST Luxembourg</u>
LV	LSAB PRO	~1,000	~700	Yes	~300			Increasing	Largest	Largest	Largest	Largest
MT	GWU	400–600	400–600	Yes	400–600	Yes (DHL)		Increasing	Yes	Yes	Yes	Yes
NL	<u>CNV</u>	<u>3,000 (estimate, data not disclosed)</u>	<u>2,000 (estimate, data not disclosed)</u>	<u>Yes</u>	<u>1,000 (estimate, data not disclosed)</u>	<u>Yes (DPD, DHL)</u>	<u>Yes (UPS)</u>	<u>Decreasing</u>	<u>3rd largest</u>	<u>3rd largest</u>	<u>3rd largest</u>	<u>Very small</u>
NL	<u>BVPP</u>	<u>4,000</u>	<u>3,835</u>	<u>Yes</u>	<u>165</u>			<u>Increasing</u>	<u>Largest</u>	<u>Largest³³</u>	<u>3rd largest</u>	<u>Very small</u>
NL	FNV	Not sure	~5,000	Yes	No data	Yes (DPD, DHL)	Yes (UPS)	Decreasing	Largest	Largest	Largest	Largest
PL	NSZZ Solidarność	>10,000	>10,000	Yes	No data			Decreasing	2nd largest	2nd largest	No data	No data
PL	ZZPP	>11,000	>11,000	Yes	No data			Decreasing	Largest	Largest	No data	No data
PT	Sincor	350	300	Yes	50			No data	Small	Small	Very small	Small
PT	Sinquadros	150	140	Yes	10			No data	Small	Small	Very small	Very small
PT	Fentcop	~70	~65	Yes	~5			No data	Very small	Very small	Apparently, none	Very small
PT	Sicomp	~40	~35	Yes	~5			No data	Very small	Very small	Very small	Very small

³² POST Luxembourg is classified under NACE 61.10, not under NACE 53.10 or NACE 53.20.

³³ In the Netherlands, both BVPP and FNV are considered the largest for the activities under NACE 53.10, as BVPP is the biggest union among postal delivery workers (it handles collective bargaining for PostNL delivery workers) while FNV is the largest for the other collective bargaining (within other PostNL operations) and thus covers the rest of the personnel in the sector.

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

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
PT	Sinttav	~20	~20	Yes	0			No data	Very small	Very small	Apparently, none	Very small
PT	CGSI	~10	~10	Yes				No data	Very small	Very small	No members	No members
PT	Sictex	~200	~150		~50			No data	Small	Small	Small	Small
PT	SITIC	1,630	1,470	Yes	163			Increasing	Very small	Medium-sized	Medium-sized	Medium-sized
PT	SNTCT	5,000	4,900	Yes	100	Yes (DPD)	Yes (UPS, FedEx)	Decreasing	Largest	Largest	Largest	No data
PT	Sindelco	4,000	3,500	Yes	500	Yes (DPD)		No data	2nd largest	2nd largest	2nd largest	No data
RO	FSPC	~15,900	99% ³⁴	Yes	A few dozen in NACE 18.12, no members in NACE 53.20			No data	Largest	Largest	Largest	Largest
RO	SLPR	15,000	Yes, no number available	Yes	Yes, no number available			Decreasing	Largest	Largest	Largest	No data
SE	SEKO	10,600	Majority	Yes	-			Decreasing	Largest	Largest	2nd largest	Largest
SE	Unionen	671	12	Yes	659	Yes (DHL)	Yes (UPS)	Increasing	Not among 3 largest	Not among 3 largest	Not among 3 largest	3rd largest
SE	SACO-Posten	1,800	1,800 (at PostNord)	Yes	0			No data	3rd largest	2nd largest	3rd largest	Not among 3 largest

³⁴ FSPC's members are mostly employees of the Romanian Post (the sole USP). The federation has three affiliated trade unions: SNPLR (Sindicatul National al Lucratorilor Postali din Romania), which has members in NACE 53.10; Sindicatul Posta Romana Constanta (also in NACE 53.10); and Sindicatul Liber Fabrica de Timbre (in NACE 18.12).

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

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
SE	Transport	5,000 ³⁵	0		5,000	Yes (DHL)	Yes (UPS)	Decreasing	2nd largest	Not among 3 largest	Largest	2nd largest
SE	ST	3,416	In the USP PostNord as well as CityMail and Bring: 3,340; In the Swedish Post and Telecom Authority: 76	Yes	0			-	3rd largest	3rd largest	Very small	Very small
SE	SRAT	Its members are part of SACO-Posten, which has 1,800 members	All its members are at PostNord	Yes	0			-	Not among 3 largest	Not among 3 largest	Not among 3 largest	Not among 3 largest
SE	Ledarna	170	75	Yes	95		Yes (UPS)	Stable	Not among 3 largest	Not among 3 largest	Not among 3 largest	Not among 3 largest
SE	Akavia	Its members are part of SACO-Posten, which has 1,800 members	-		-			Stable	Not among 3 largest	Not among 3 largest	Not among 3 largest	Not among 3 largest
SE	SI	350			Yes	Yes (DHL)		No data	Not among 3 largest	Not among 3 largest	Not among 3 largest	Not among 3 largest

³⁵ The number is an estimate, because Transport does not organise the main postal service in Sweden, and does not categorise its members according to NACE codes as strictly as do other trade unions. Often, its members work with various types of transport.

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

EU27	Trade union	Membership strength						Trend	Ranking			
		Entire sector	NACE 53.10	USP	NACE 53.20	European multinational companies	Non-EU		Entire sector	NACE 53.10	NACE 53.20	Small and medium-sized enterprises (SMEs)
SI	SZS Alternativa	1,200 (Post of Slovenia)	Yes	Yes	Yes				2nd largest	2nd largest	n/a	n/a
SI	ZSSS-SDPZ	1,500 (all sector)	Yes	Yes	Yes				Largest	Largest	n/a	n/a
SI	Trade union DHL	<5	No	No	Yes	Yes (DHL)	No	No data	Very small	n/a	Very small	n/a
SK	OZ PaL	>4,100 members in 49 organisations	>4,100 members in 49 organisations	Yes	No members in NACE 53.20, only in USP			Decreasing	Largest	Largest	Not among 3 largest	Company-level trade union
SK	<u>SOZPaT</u>	<u>No data</u>	<u>No data</u>	<u>Yes</u>	<u>No data</u>			<u>No data</u>	<u>Not among 3 largest</u>	<u>Not among 3 largest</u>	<u>Not among 3 largest</u>	<u>Not among 3 largest</u>

Note: Trade unions listed in bold font are UNI Europa affiliates; trade unions listed in underlined font are CESI affiliates; blank cells in the 'USP', 'European multinational companies' and 'Non-EU' columns indicate no coverage.

Source: Network of Eurofound Correspondents, 2023

Table 18: Organisational density of trade unions

Member States	Employment in the sector (SBS)	Number of trade unions covered by membership data	Numbers of trade union members in the sector	Membership density (%)
AT	28,375	1 out of 3	At least 11,000	38
BE	38,307	3 out of 8	At least 21,421	55
BG	19,769	All	9,350	47
CY	2,114	All	450	21
CZ	35,409	1 out of 2	At least 5,000	14
DE	681,991	2 out of 3	At least 220,000	32
DK	27,589	All	At least 4,000	14
EE	3,420	All	355	10
EL	11,805	All	At least 4,752	40
ES	123,800 ³⁶	4 out of 9	62,413	50
FI	20,100	10 out of 11	At least 11,597	57
FR	220,000	All	At least 75,789	34
HR	11,013	All	At least 7,798	70
HU	43,500	All	6,500	14
IE	22,274	3 out of 4	At least 9,251	41
IT	140,062	None	-	-
LT	5,790	All	1,490	26
LU	2,014	2 out of 3	At least 1,500	74
LV	5,049	All	At least 1,000	20
MT	1,240	All	400–600	40
NL	58,000	All	At least 12,000	20
PL	90,463	All	At least 21,000	23
PT	15,582	All	At least 11,470	73
RO	44,350	All	30,900	70
SE	27,914	All	At least 22,000	79
SI	6,962	All	2,700	39
SK	25,400	1 out of 2	At least 4,100	16

Source: Network of Eurofound Correspondents, 2023; and Eurostat SBS

The assessment of organisational density considers the employment level in the sector and the number of sectoral trade union members. The latter as a percentage of the former is the share of trade union members among the total workforce in the sector (that is, the membership density), as shown in Table 18 for each Member State. Based on available data, we can observe that the highest

³⁶ As noted in Table 4, according to Spain's National Institute of Statistics, the number of employed persons in NACE 53 in Spain in 2022 was 112,815.

organisational density is in Sweden, with almost 80% of workers members of trade unions. This is not surprising given the high trade union density characterising the Swedish model of labour market regulation. In this regard, we should also note how Denmark interestingly presents a relatively small membership density (about 14%), despite being a country where trade union density is comparatively high. Luxembourg and Portugal register trade union density close to that of Sweden, with more than 70% of unionised workers in this sector, followed by Croatia and Romania, both with a coverage around 70%. These Member States demonstrate that the strong unionisation of the sector preceding liberalisation has been maintained. Conversely, other eastern European countries present among the lowest membership densities – Czechia at 14%, Hungary at 14% and Slovakia at 16% – and Estonia presents at the lowest density at 10%.

2.2. Involvement of trade unions in collective bargaining

This chapter discusses the involvement of the trade unions included in this study in collective bargaining. Out of the 115 trade unions, Table 19 shows that company-level bargaining is significantly stronger than sector-level bargaining in absolute terms (with 91 trade unions involved in the former and only 47 in the latter). Looking at the different parts of the sector covered by collective bargaining, in the activities under USO and USD (NACE 53.10), company-level bargaining dominates, as 86 trade unions out of the 91 involved in any type of bargaining cover this part of the sector. Furthermore, 82 of the 86 specifically cover the national USP. Conversely, 46 of the 47 trade unions involved in collective bargaining at sector level are signatories of collective agreements for the postal services that are not under USO (NACE 53.20). There are no precise data on which part of the sector is covered by one of the trade unions signing sectoral agreements: the Italian trade union Confedir, which is involved in both sectoral- and company-level bargaining in the postal and courier activities sector.

It is noteworthy that in some Member States, as a result of the coverage of companies and workers in the postal and courier services that are not under USO (NACE 53.20) by transport trade unions, as shown in Section 1.4, the collective bargaining agreements of the transport sector apply and are not captured in the data included in this section, which focuses on activities from the postal and courier activities sector only. For example, in **France**, there are several trade unions that organise workers in the transport by road and logistics sectors, specifically in private companies, but they are not involved in social dialogue and collective bargaining for the postal and courier activities sector at sectoral level, even if some negotiate company-level agreements in companies delivering parcels to customers. In **Italy**, the situation is similar, as the trade unions representing the employees of the largest employers in NACE 53.20 are all transport unions involved in collective bargaining for the transport sector. More details are available in the respective country profiles in Annex 2.

Table 19: Involvement of trade unions in collective bargaining in the postal and courier activities sector

	Number of trade unions	NACE 53.10 – Universal services		NACE 53.20 – Other postal services			
		USO	USP	53.20	USP	EU multinational companies	Non-EU operators
Number of total trade unions	115	91	91	83	55	31	20
Number of Member States	27	27	27	22	18	13	10
Trade unions involved in any collective bargaining	101	86	82	82	55	20	14
Number of Member States	26	26	26	18	18	12	8
Sector-level bargaining	51	31	31	46	31	0	0
Company-level bargaining	87	86	82	70	55	20	14
Number of trade unions not involved in collective bargaining	12 (3 in CY, 2 in CZ, 1 in DE, 1 in EL, 1 in FI, 1 in FR, 2 in HR, 1 in RO)						
Number of trade unions with no data on collective bargaining	2 (1 in ES, 1 in IE)						

Note: The complete list of trade unions is available in Table 65, and additional information on collective bargaining agreements is available in Table 71 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

Table 20: Workforce categories and company size groups covered by collective bargaining

Trade unions	Types of workers											Company size group			
	Blue-collar workers	White-collar workers	Management	Civil servants	Workers of contractors	TAWs	FTI	PTI	FTF	PTF	Self-employed	1–9	10–49	50–249	>250
Number of trade unions	77	91	82	31	31	34	95	89	82	81	9	36	44	49	106
Number of Member States	27	27	25	14	12	14	27	26	24	23	5	14	17	17	27

Source: Network of Eurofound Correspondents, 2023

Table 21 shows that 101 trade unions are considered representative at national level. There is at least one representative trade union in each country but Estonia. Estonia is also the country with the lowest membership density. Moreover, 66 trade unions derive their representativeness from mutual recognition, while 32 are recognised as representative by meeting a legal requirement. The number of trade unions that have both a legal and a mutual recognition basis for their representativeness is marginal. Half of trade unions in almost all the Member States are regularly consulted by the government. Croatia, Romania and Slovenia are the only three countries where trade unions are not regularly consulted by the government. Finally, it is important to note that 85 trade unions in all countries but Malta are affiliated to a national trade union federation.

Table 21: Trade unions' involvement in social dialogue and public policy at national level

	Total number	Trade union recognised as representative based on national recognition	Involved in bipartite and/or tripartite bodies	Consulted by government	Affiliated to a national federation
Number of trade unions	115	101, 32 based on legal requirements, 66 based on mutual recognition, 3 based on both	34	56	85
Share of all trade unions (%)	100	86	29	47	72
Number of Member States	27	26	10	24	26

Note: The complete list of trade unions is available in Table 65 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

2.3. Coverage, sector-relatedness and organisational density of employer organisations and business associations

In this section, the sector-relatedness and strength of employer organisations in each Member State and in the EU27 in total are assessed. This study identifies 44 national sectoral employer organisations and business associations from 18 different Member States, a significant increase compared with the 23 sectoral employer organisations, from nine countries, included in the 2017 postal representativeness study, for which the year of reference was 2015 (Table 22). Belgium, France, Latvia and Slovakia all experienced a notable increase in employer organisations (each country gaining two or more employer organisations), while Croatia, Denmark, Germany, Hungary, Poland, Romania and Spain each gained one additional employer organisation. The Netherlands is the only case in which a decrease is observed, as the employer organisation Post Distribution Employers' Federation (WPN), which was included in the previous representativeness study, has ceased its activity.

Table 22: Comparative overview of the number of sectoral employer organisations in the postal and courier activities sector in each Member State, in 2015 and 2023

	AT	BE	BG	CY	CZ	DE	DK	EE	EL	ES	FI	FR	HR	HU
2023	5	4	0	0	0	1	2	0	0	4	3	4	1	1
2015	5	0	0	0	0	0	1	0	0	3	3	0	0	0
	IE	IT	LT	LU	LV	MT	NL	PL	PT	RO	SE	SL	SK	EU
2023	0	4	0	1	2	0	1	1	0	1	4	2	3	44
2015	0	4	0	1	0	0	2	0	0	0	4	2	0	25

Note: The list of employer organisations active in the postal and courier activities sector in 2015 is available in Table A5 of the previous representativeness study (Eurofound, 2017, p. 58). Red font indicates discrepancies between the number of employer organisations identified in 2015 and 2023.

Source: Network of Eurofound Correspondents 2015, 2023; Eurofound, 2017

Table 23 shows that 38 out of the 44 employer organisations from 18 Member States organise companies active in the other postal services part of the sector (NACE 53.20), as this is the part of the sector in which the majority of the companies in the postal and courier activities sector are recorded (see Section 1.1). In contrast to trade union representation, which dominates the postal activities under USO subsector, only 18 of 44 employer organisations represent companies active in NACE 53.10. There are 16 of these 44 employer organisations from 12 countries that include the national USP among their members. This is the case in Austria, Croatia, Denmark, Finland, France, Germany, Hungary, Italy, the Netherlands, Slovakia, Slovenia and Sweden. Of the 18 countries in which employer organisations exist, only in Belgium, Latvia, Luxembourg, Poland, Romania and Spain is the national USP not a member of the postal employer organisations identified in this study. In Luxembourg, the employer organisation predominantly covers the transport sector, as well as

companies active in other postal services. In Poland, Romania and Spain, the employer organisations specifically represent companies active in other postal services (NACE 53.20).

In terms of the representation of the European multinational companies active in the other postal services, eight employer organisations represent these companies in Denmark, France, Germany, Latvia, Luxembourg, the Netherlands, Spain and Sweden. The Dutch employer organisation TLN and Swedish employer organisation Transportindustriförbunden also represent non-European operators active in their country in the other postal services.

In terms of coverage of other sectors, 27 out of the 44 employer organisations for which data were available had member companies active in other sectors, of which transport and logistics recorded the highest number, with 17 organisations. Another five organisations also have companies active in newspapers, media, publishing, marketing and entertainment sectors, and two are cross-industry organisations covering all sectors.

Table 23: Sector-relatedness of the national postal and courier activities sector employer organisations

Member States	Number of employer organisations	NACE 53.10 – Universal services				NACE 53.20 – Other postal services					Other sectors	
		Entire NACE 53.10	Mail	Parcels	USP	Entire NACE 53.20	Mail	Parcels	USP	European multinational company		Non-EU operators
Number of employer organisations	44	18	16	17	16	38	33	34	16	8	2	27 (17 transport)
Share of all employer organisations (%)	100	41				86						61 (39)
Number of Member States	18	12	14	11	12	18	16	16	12	8	2	12

Note: The complete list of employer organisations is available in Table 66 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

Table 24 and Table 25 show that member companies of employer organisations are evenly distributed across sizes, in contrast to trade unions, which are significantly more present in larger companies. Looking at the size group that contributes the most in terms of membership fees, the small and medium-sized enterprises (SMEs) with between 10 and 249 employees are the most important contributors in 11 of the countries in which employer organisations are present in the postal and courier activities sector.

Table 24: Membership domain of postal and courier activities sector employer organisations

Member States	Number of employer organisations	Member companies by size				Largest contribution of membership fees		
		1–9	10–49	50–249	>250	Large >250	SMEs 10–249	Micro 0–9
Number of employer organisations	44	26	27	28	32	10	19	5
Share of all employer organisations (%)	100	59	61	64	72	23	43	11
Number of Member States	18	10	10	12	15	8	11	4

Note: The complete list of employer organisations is available in Table 67 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

Table 25: Breadth of employer organisations' coverage

	Parts of the sector covered			
	NACE 53.10	NACE 53.10	NACE 53.20	NACE 53.20
	Mail	Parcel	Mail	Parcel
Number of employer organisations covering the subsector (by NACE code)	15	17	31	34
Number of employees	1–9	10–49	50–249	>250
Number of employer organisations covering companies of this size	25	26	27	31

Source: Network of Eurofound Correspondents, 2023

Looking at the membership trend of employer organisations, in 13 cases the membership was stable and for 19 out of the 44 employer organisations there were no data on membership trend (see Table 26). In seven cases the trend is increasing, indicating a growing need for representation on the employers' side in Austria (with the employer organisation WKO FVSp), Denmark (with DI), Finland (with Palta), France (with FNTR and OTRE), Poland (with Pracodawcy RP) and Spain (with AEM). This significantly differs from trade unions, where the trend was mostly decreasing as a result of difficulties in organising workers. Only three employer organisations report decreasing membership: WKO-FGW in Austria, Stratosz in Hungary and TLN in the Netherlands.

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

Table 26: Employer organisation membership strength

Member State	Employer organisation/ business association	Membership strength					Trend	Affiliated companies					Sectoral workforce	Ranking	
		Total number of companies	<250	50–249	10–49	1–9		NACE 53.10 (including USP)	Workforce	NACE 53.20 (including USP)	Workforce	Non-EU/EU multi-national company		NACE 53.10	NACE 53.20
AT	VÖZ	48	No data	No data	No data	No data	No data	None	None	48	Several thousands, but few sector-related	No	n/a	Very small	Very small
AT	WKO-FGW	160	No data	No data	No data	No data	Decrease	None	None	160	n/a	No	n/a	Not among three largest	Not among three largest
AT	WKO BS Handel	n/a	No data	No data	No data	No data	No data	None	None	n/a	n/a	No	n/a	Third largest	Third largest
AT	WKO FVSp	n/a	No data	No data	No data	No data	Increase	1 (USP)	No data	n/a	n/a	No	n/a	Largest	Second largest
AT	WKO FVG	n/a	No data	No data	No data	No data	No data	None	None	n/a	n/a	No	n/a	Second largest	Largest
BE	WFFE	18	No data	No data	No data	No data	No data	None	None	18	4,242 employees	No	36,152 in entire sector	No data	No data
BE	Febetra	No data	No data	No data	No data	No data	No data	No data	No data	No data	No data	No	No data	No data	No data
BE	UPTR	No data	No data	No data	No data	No data	No data	No data	No data	No data	No data	No	No data	No data	No data
BE	TLV	~1,500	No data	No data	No data	No data	No data	None	None	Unclear	21,500 total members in all sectors	No	No data	No data	No data
BG	No EO														

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

Member State	Employer organisation/ business association	Membership strength					Trend	Affiliated companies					Sectoral workforce	Ranking	
		Total number of companies	<250	50–249	10–49	1–9		NACE 53.10 (including USP)	Workforce	NACE 53.20 (including USP)	Workforce	Non-EU/EU multi-national company		NACE 53.10	NACE 53.20
CY	No EO														
CZ	No EO														
DE	AGV Postdienste	n/a	No data	No data	No data	No data	No data	1 (USP)	228,024	1 (USP)	No data	Yes (DHL)	No data	Largest	Largest
DK	DI	16	2	3	7	4	Increase	1 (USP)	7,000	15 (including USP)	7,500	Yes (DHL)	No data	Largest	Largest
DK	DMA	10–20	None	None	~10	~10	Stable	None	n/a	~10	~1,000	No	~5	Second largest	No data
EE	No EO														
EL	No EO														
ES	AEM	800	10	89	191	510	Increase	None	None	800	~15,000	Yes (DHL)	~19% in NACE 53.20	Largest	No data
ES	ANEB	42	No data	No data	No data	No data	No data	None	No data	42	3.5% in NACE 53.20	No	2.3% for the entire economy; 3.5% for in NACE 53.20	No data	No data
ES	Asempre	n/a	No data	No data	No data	No data		None	None	No data	No data		No data	No data	No data
ES	UNO	127	No data	No data	No data	No data	No data	No data	No data	No data	No data	Yes (DHL)	No data	Not among three largest	Not among three largest

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

Member State	Employer organisation/ business association	Membership strength					Trend	Affiliated companies					Sectoral workforce	Ranking	
		Total number of companies	<250	50–249	10–49	1–9		NACE 53.10 (including USP)	Workforce	NACE 53.20 (including USP)	Workforce	Non-EU/EU multinational company		NACE 53.10	NACE 53.20
FI	ALT	672	17	75	280	300	Stable	0	0	672	Cannot be separated from NACE 49.41	No	Cannot be separated from NACE 49.41	No	No
FI	Finmedia	27	10	9	4	4	Stable	0	0	27	10,100	No	~15,000 distribution sectors	Second largest	Largest
FI	Palta	2,000 in all sectors	No data	No data	No data	No data	Increase	1 (USP)	8,500	No data	No data	No	No data	Largest	Second largest
FR	FNTR ³⁷	No data (1,591 for all sectors, no breakdown for postal activities)	159	880	2,357	1,895	Increase	None	n/a	No data	No data	No	No data	No data	No data
FR	Union TLF	No data	No data	No data	No data	No data	No data	None	Not relevant	No data	No data	No	No data	Not among three largest	Not among three largest
FR	OTRE ³⁸	No data (2,927 members in total, no breakdown for postal activities)	25	170	1,306	1,426	Increase	None	Not relevant	No data	No data	No	No data	Not among three largest	Not among three largest

³⁷ Data refer to the whole federation, not only postal activities.

³⁸ Data refer to the whole employer organisation, not only postal activities.

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

Member State	Employer organisation/ business association	Membership strength					Trend	Affiliated companies					Sectoral workforce	Ranking	
		Total number of companies	<250	50–249	10–49	1–9		NACE 53.10 (including USP)	Workforce	NACE 53.20 (including USP)	Workforce	Non-EU/EU multi-national company		NACE 53.10	NACE 53.20
FR	SOP	46	No data	No data	No data	No data	No data	46 (including USP)	No data	No data	No data	Yes (DPD)	No data	No data	No data
HR	HUP	1	1	0	0	0	Stable	1 (USP)	9,500	1 (USP)	No clear data	No	83%	Only one	No small companies
HU	Stratosz	1	1	0	0	0	Decrease	1 (USP)	25,225	0	0	No	60%	Largest	No data
IE	No EO														
IT	Confindustria	No data	No data	No data	No data	No data	No data	At least 1 (USP)	No data	At least 1 (USP)	No data	No	~50,000 members in all sectors	No data	No data
IT	FISE-Assoposte	No data	No data	No data	No data	No data	No data	No data	2,000 (based on website)	No data	No data	No	No data	No data	No data
IT	FISE-ARE	No data	No data	No data	No data	No data	No data	30 (based on website)	6,000 (based on website)	No data	No data	No	No data	No data	No data
IT	CNA	No data (620,000 companies employing 1.2 million workers in all sectors)	No data	No data	No data	No data	No data	No data	No data	No data	No data	No	No data	No data	No data
LT	No EO														

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

Member State	Employer organisation/ business association	Membership strength					Trend	Affiliated companies					Sectoral workforce	Ranking	
		Total number of companies	<250	50–249	10–49	1–9		NACE 53.10 (including USP)	Workforce	NACE 53.20 (including USP)	Workforce	Non-EU/EU multinational company		NACE 53.10	NACE 53.20
LU	GT	1	1	2	2		Stable	No data	No data	Yes (no number specified)	Yes (no number specified)	Yes (DHL)	No data	No data	No data
LV	PKB	6	1	3	2	0	Stable	0	0	6	789	Yes (DPD)	15%	Largest	Largest
LV	LLA	2	0	2	0	0	Stable	0	0	2	311	No	6%	Second largest	Largest
MT	No EO														
NL	TLN	312	4	22	114	142	Decrease	1 (USP)	35,000	311 (including USP)	~20,000	Yes, (DHL, DPD, UPS)	95%	Largest	Largest
PL	Pracodawcy RP	11	Yes	Yes			Increase	0	0	11	No data	No	No data	Largest	Largest
PT	No EO														
RO	PSC	11	0	0	Yes	Yes	No data	0	0	11	No data, very few estimated	No	Very small one	Very small	Very small
SE	Kommunikationsföretagen	19	6	3	3	7	Stable	5 (including USP)	About 27,914	14 (including USP)	No data	No	No data	Largest	Largest
SE	Transportindustriförbunden	88	No data	No data	No data	No data	No data	2 (including USP)	8,000	86	No data	Yes (DHL, UPS)	No data	Second largest	Largest
SE	Medieföretagen	78	18	22	22	14	Stable	No data	No data	78	11,919	No	No data	Second largest	Second largest

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

Member State	Employer organisation/ business association	Membership strength					Trend	Affiliated companies					Sectoral workforce	Ranking	
		Total number of companies	<250	50–249	10–49	1–9		NACE 53.10 (including USP)	Workforce	NACE 53.20 (including USP)	Workforce	Non-EU/EU multi-national company		NACE 53.10	NACE 53.20
SE	BA	113	No data	No data	No data	No data	Stable	No data	No data	113 ³⁹	14,673	No	No data ⁴⁰	Not among three largest	Second largest
SI	GZS-ZPZ	3	1	1	n/a	1	Stable	1 (USP)	~6,000	n/a	n/a	No	85%	Largest	Largest
SI	ZDS	1, Slovenia Post	1	n/a	n/a	n/a	Stable	1 (USP)	~5,900	n/a	n/a	No	84%	Second largest	n/a
SK	ÚDPT SR	1	1	0	0	0	No data	1 (USP)	12,743 in 2020 and 11,962 in 2021	No data	No data	No	~23%	No data	No data
SK	AZZZ SR	1	1	0	0	0	Stable	1 (USP)	~12,000 at Slovak Post	1	~12,000 at Slovak Post	No	~50%	Largest	Largest
SK	ZLZ SR	104 regulars + 35 associated members	No data	No data	No data	No data	No data	1 (USP)	11,962	No data	No data	No	No data	No data	No data

Note: Yellow shaded cells indicate that the national companies providing services under USDs are members of the employer organisation. EO = employer organisation; n/a = not applicable.

Source: Network of Eurofound Correspondents, 2023

³⁹ No distinction between NACE 53.10 and NACE 53.20. These are primarily companies involved in logistics and terminals.

⁴⁰ The postal sectoral workforce is difficult to estimate, as the employer organisation works in the transport sector.

This report examines the organisational density of the employer organisations considered on two levels. First, in terms of companies covered, the number of employer organisation members is shown as a share of the total number of companies in each country. Second, in terms of workforce covered, the affiliated companies' employment level is shown as a share of the total employment level in each country in the sector. As in the case of trade union density, here too the densities are estimations calculated on the basis of the available data provided by the Network of Eurofound Correspondents (Table 27).

Table 27: Organisational density of employer organisations in EU27 Member States

Member State	Density in terms of companies covered				Density in terms of employees covered			
	Number of companies in the sector	Number of EOs covered by membership data	Number of EO members in the sector	Membership density (%)	Employment in sector	Number of EOs covered by employees' data	Employees covered by EOs	Employment density (%)
AT	16*	2 out of 5	At least 208	n/a	~30,000	-	-	-
BE	13,277	2 out of 4	1,518 ⁴¹	11.4	-	2 out of 4	At least 25,742 ⁴²	-
BG	178*	No EO	-	-	19,769	-	-	-
CY	252	No EO	-	-	2,114	-	-	-
CZ	28	No EO	-	-	35,409	-	-	-
DE	15,446 + DP DHL ⁴³	None	1	0.0006	681,991	None	-	-
DK	1,643	1 out of 2	16	0.97	27,589	1 out of 2	At least 14,500	52.5
EE	24	No EO	-	-	3,420	-	-	-
EL	724	No EO	-	-	11,805	-	-	-
ES	27,120	3 out of 4	4	0.014	123,800	2 out of 4	At least 17,625	14.2
FI	996	All	3	0.3	20,100	2 out of 3	At least 18,600	92.5
FR	4,191	All	4	0.095	220,000	None		
HR	160	All	1	0.6	11,013	All	9,500	86.2

⁴¹ Very rough estimate. Figure is excessive as it includes companies of the broader sector JC140.03 (road transports and logistics on behalf of third parties).

⁴² Very rough estimate. Figure is excessive as it includes workers of the broader sector JC140.03 (road transports and logistics on behalf of third parties).

⁴³ There are no data for Germany; the national correspondent who contributed to this study could only provide data for the total number of companies, not only the postal ones, so no calculation is possible.

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

Member State	Density in terms of companies covered				Density in terms of employees covered			
	Number of companies in the sector	Number of EOs covered by membership data	Number of EO members in the sector	Membership density (%)	Employment in sector	Number of EOs covered by employees' data	Employees covered by EOs	Employment density (%)
HU	14,137	All	1	0.007	43,500	All	25,225	57.9
IE	5	No EO	-	-	-	-	-	-
IT	1,672	None	4	-	-	2 out of 4	8,000	-
LT	44	No EO	-	-	5,790	-	-	-
LU	39	No EO	-	-	-	-	-	-
LV	1,151	All	2	0.17	5,049	All	1,100	21.7
MT	No EO	No EO	-	-	1,240	-	-	-
NL	9,915	All	1	0.01	58,000	All	35,000	60.3
PL	134	All	1	0.74	90,463	None	-	-
PT	82	No EO	-	-	15,582	-	-	-
RO	2,787	All	1	0.035	44,350	None	-	-
SE	1,512	All	4	0.2	27,914	All	Not clear	-
SI	957	All	2	0.2	6,962	All	~6,000	86.1
SK	266	All	3	1.1	25,400	All	~12,000	47.2

Note: - indicates not applicable; * indicates data from Eurostat SBS; EO = employer organisation.

Sources: Network of Eurofound Correspondents, 2023; and Eurostat SBS

2.4. Involvement of employer organisations in collective bargaining

The previous section considered the sector-relatedness and membership of the employer organisations in the postal and courier activities sector. This section will concentrate on their involvement in collective bargaining. Table 28 shows the involvement of employer organisations in either single-employer (also called company-level) or multi-employer (also called sector-level) collective bargaining, and the different parts of the sector covered by collective bargaining.

Table 28: Involvement of postal and courier activities sector employer organisations in collective bargaining in different parts of the sector

Member States	Number of employer organisations	NACE 53.10 – Universal Services		NACE 53.20 – Other postal services			
		USO	USP	NACE 53.20	USP	EU multi-national companies	Non-EU operators
Total number of employer organisations	44	10	10	26	10	4	2
Number of Member States	18	8	8	10	8	4	2
Employer organisations involved in any collective bargaining	29	10	10	26	10	4	2
Number of Member States	12	8	8	11	8	4 + FR* and LU*	2
Sector-level bargaining	29 in 12 Member States	10 in 8 Member States	10 in 8 Member States	18 in 8 Member States	10 in 8 Member States	4 in 4 Member States	
Company-level bargaining	6 in 5 Member States	6 in 5 Member States	6 in 5 Member States	6 in 5 Member States	6 in 5 Member States	0	0
Employer organisations not involved in collective bargaining	14 in 10 Member States (1 in FI, 4 in FR*, 1 in HR, 1 in HU, 1 in LU*, 2 in LV, 1 in PL, 1 in RO, 1 in SE, 1 in SK)						
Employer organisations with no data on collective bargaining	1 (SK)						
Member States in	FR* (none of the 4),						

which none of the employer organisations are involved in collective bargaining for the sector	HR (1), HU (1), LU* (1), LV (neither of the 2), PL (1), RO (1)
--	--

Note: * In France and Luxembourg, the employer organisations included in this study are signatories of collective bargaining agreements in the transport sector, which cover some of the employees in the other postal activities. A complete list is available in Table 68 in Annex 1. Additional information on collective bargaining agreements is available in Table 71 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

There are nine countries in which there are no employer organisations in the postal and courier activities sector. Out of the 18 Member States in which employer organisations exist, they are not involved in collective bargaining for the postal and courier activities sector in Croatia, France, Hungary, Latvia, Luxembourg, Poland and Romania. As already mentioned in Section 1.4 and Section 2.3, in some Member States, companies in the other postal and courier services part are represented by employer organisations in the transport sector, so the collective bargaining agreements of the transport sector apply and are not captured in the data included in this report, which focused on activities from the postal and courier activities sector only. This the case in France and 258, where the employer organisations representing companies in this part of the sector are signatories of collective bargaining agreements in the transport sector. More details are available in the respective country profiles in Annex 2. Table 28 shows that sector-level collective bargaining is more frequent than company-level collective bargaining in absolute terms (in 29 instances versus 6) as well as in country terms (in 12 Member States versus 5).

Employer organisations, approximately half of which are regularly consulted by the government, derive their legitimacy from mutual recognition as well as from legal bases (Table 29). This differs from trade unions, whose legitimacy is mostly based on mutual recognition. Significantly, the bulk of collective bargaining coverage is in the other postal and courier activities part of the sector. This may be because large UPS companies negotiate for themselves and are therefore not represented by any employer organisations.

Table 29: Employer organisations' involvement in social dialogue and public policy at national level

	Total number	Recognised as representative based on national recognition	Involved in bipartite or tripartite bodies	Consulted by government	Affiliated to a national confederation
Number of employer organisations	44	34 14 based on legal requirements, 15 based on mutual recognition, 5 based on both 10 have no data or are not applicable.	12 bipartite 17 tripartite	19	28
Share of all employer organisations (%)	100	86	29	43	63
Number of Member States	18		10	18	13

Note: A complete list of employer organisations is available in Table 68 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

2.5. Postal companies in the national industrial relations landscape

As shown in Section 1.3 and Table 10, 30 companies providing postal and courier services under USO were identified in the data collection for this study. Table 30 provides an overview of the number of companies active in the different activities in NACE 53.10 and NACE 53.20 and lists the 30 companies. Out of the 30 companies, 23 are active both in activities of postal services operating under USO, covered under NACE 53.10, and in other postal and courier services, covered by NACE 53.20.

Only the Slovak Parcel Service, a subsidiary of Slovenská pošta, has no activities at all in NACE 53.10, neither in mail nor in parcel services. Out of the remaining 29 companies, the Portuguese CTT Contacto S.A., a national subsidiary of Correios de Portugal, has reported no mail activities. The remaining 28 companies are active in both activities related to mail and parcels in NACE 53.10. Cyprus Post, Irish An Post, Polish Post and the aforementioned Correios de Portugal reported no activities in either mail or parcels in NACE 53.20. Czech Post reported no mail activities in NACE 53.20. There are 24 companies that are also active in other sectors such as banking, finance and insurance activities, logistics, warehousing and packaging, commerce and retail, telecommunications, and road transport.

Table 30: Sector coverage of the national postal companies providing USD included in this study, 2023

Member State	Name (in original language)	Active in mail services		Active in parcel services		Active in other sectors
		NACE 53.10	NACE 53.20	NACE 53.10	NACE 53.20	
AT	Österreichische Post AG (ÖPAG)	x	x	x	x	Banking
BE	Vpost	x	x	x	x	Banking
BG	Български пощи ЕАД	x	x	x	x	Logistics and commerce
CY	Cyprus Post	x		x		No
CZ	Česká pošta, s. p.	x		x	x	Freight transport by road, telecommunication activities, other financial activities, packaging activities and other activities
DE	Deutsche Post DHL	x	x	x	x	Logistics
DK	PostNord Danmark	x	x	x	x	Logistics
EE	AS Eesti Post	x	x	x	x	Finance and commerce
EL	Ellinika Tahidromia A.E. – ELTA (Ελληνικά Ταχυδρομεία Α.Ε. – ΕΛΤΑ, ELTA)	x	x	x	x	Financial, retail, network products and courier services
ES	Sociedad Estatal Correos y Telégrafos	x	x	x	x	Logistics, retail, financial services, administrative. Subsidiaries of the Correos Group: courier and express services (Correos Express) and telecommunications (Correos Telecom)
FI	Posti Group	x	x	x	x	Logistics
FI	Åland Post	x	x	x	x	Logistics, e-commerce, road transport, stamp design and sales
FR	Le Groupe La Poste	x	x	x	x	Banking, insurance, telecommunications,

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

Member State	Name (in original language)	Active in mail services		Active in parcel services		Active in other sectors
		NACE 53.10	NACE 53.20	NACE 53.10	NACE 53.20	
						digital and real estate services
HR	Hrvatska Pošta d.d.	x	x	x	x	Logistics
HU	Magyar Posta	x	x	x	x	Financial and intermediary activities, retail trade
IE	An Post	x		x		Banking, insurance, mobile services, government tax collection
IT	Poste Italiane S.p.A.	x	x	x	x	Logistics, financial and insurance services, payment systems and telephony
LT	AB Lietuvos paštas	x	x	x	x	No
LU	POST Luxembourg	x	x	x	x	Philately, telecommunications and financial activities
LV	Latvijas Pasts	x	x	x	x	Trade, philatelic services and financial services
MT	MaltaPost plc	x	x	x	x	Logistics, banking, document management and insurance
NL	PostNL	x	x	x	x	Logistics
PL	Poczta Polska SA	x		x		No
PT	CTT Correios de Portugal, S.A.	x		x		Banking, financial services, retail trade
PT	CTT Contacto S.A.				x	No
RO	Compania Națională Poșta Română S.A.	x	x	x	x	No
SE	PostNord Group AB	x	x	x	x	Logistics (warehousing), and transporting parcels and letters as part of logistics/road transport

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

Member State	Name (in original language)	Active in mail services		Active in parcel services		Active in other sectors
		NACE 53.10	NACE 53.20	NACE 53.10	NACE 53.20	
SI	Pošta Slovenije	x	x	x	x	Logistics, commerce and IT solutions
SK	Slovenská pošta, a.s.	x	x	x	x	Road freight transport, financial services and logistics
SK	Slovak Parcel Service (SPS)		x		x	No
Total number of companies		28	24	28	26	
Number of Member States		27	27	22	23	

Source: Network of Eurofound Correspondents, 2023

Table 31 shows the involvement in collective bargaining of the postal companies: only 2 out of the 30 companies are not covered by any form of collective bargaining. Czechia Post, where negotiations are ongoing but no agreement has been reached (see country profile for Czechia in Annex 2 for details), and the Slovak Parcel Service, a subsidiary of Slovenská pošta. In Cyprus, while there is no collective bargaining agreement per se, there are two regulations regarding the working conditions of the permanent employees and the hourly pay for employees working in the public sector, which the management of Cyprus Post discusses with the trade unions.

Only 4 of the 30 companies are involved directly in bipartite or tripartite social dialogue bodies, in Belgium, Bulgaria (where there is no employer organisation), France and Hungary. Twenty of the 30 companies are affiliated to a sectoral or cross-sectoral employer organisation, which means that they can be represented indirectly in the respective social dialogue bodies where such bodies exist. Given that the majority of the companies are still under partial or full public ownership, as described in Section 1.3, only two companies are not consulted by the government in relation to sector-related matters: Hellenic Post (ELTA) in Greece and Croatian Post (Hrvatska Pošta). In Greece there is no employer organisation in the postal and courier activities sector, and, out of the four sectoral trade unions, only one is consulted, in an ad hoc matter. In Croatia, although there is one employer organisation, it is not consulted by the government, and neither are any of the three trade unions.

Table 31: Involvement in collective bargaining and consultation by the government of the national postal companies providing USD included in this study, 2023

	Number	Member States
Involved in any type of collective bargaining	28	26, all except CZ
Involved in sector-level collective bargaining	9	9, BE, DE, DK, FI, IE, IT, NL, SE, SI
Involved in company-level collective bargaining	28	26, all except CZ; CY* (no collective bargaining but regulation)
Involved directly in social dialogue bodies	4	4, BE, BG, FR, HU
Consulted by the government	25	25, all except EL, HR
Affiliated to a national employer organisation in the postal and courier activities sector	20	13, AT, DE, DK, ES, FI, FR, HR, HU, IT, NL, SE, SI, SK

Note: * indicates that there is no collective bargaining agreement in Cyprus, per se, but the two regulations on the working conditions of the permanent employees and the hourly pay of employees working in the public sector are discussed by the management of Cyprus Post with the trade unions. A complete list of companies is available in Table 70 and Table 71 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

2.6. Collective bargaining and social dialogue practices in the postal and courier activities sector

There is a strong trend of single-employer bargaining in the sector. This is because the incumbent national postal companies providing universal postal services have a historical background as state-owned companies having the monopoly in the sector, in combination with strong trade unions and well-established collective bargaining and social dialogue practices. The role of sectoral employer organisations, especially in collective bargaining, is rather limited in the postal and courier activities sector, because collective bargaining in this sector is mainly a company matter.

Table 32: Collective bargaining patterns in the sector, EU27 (number and % of organisations)

	Trade unions				Employer organisations				USD companies			
No data		2				1				0		
No collective bargaining		12				14				2		
Multi-employer bargaining only	13		115	100%	23		44	100%	0			
Both single- and multi-employer bargaining	42	101			29	29			8	28	30	100%
Single-employer bargaining only	46				0				20			

Source: Network of Eurofound Correspondents, 2023

Table 32 and Table 33 confirm the predominance of single-employer bargaining. Most single-employer bargaining happens in the USO and USD parts of the sector, with 20 of the 30 companies included in this study having collective bargaining agreements at company level. This is consistent with relatively low figures of employer organisations in USPs, and also shows how the postal and courier activities sector maintains a stable industrial relations structure despite liberalisation and profound changes occurring over the last few decades.

As mentioned in Section 2.2 and Section 2.3, in some Member States the workers and companies in the other postal and courier services (NACE 53.20) are covered by the collective agreements between transport trade unions and employer organisations, as is the case in France, Italy Luxembourg and Sweden. More details on each country are available in the respective country profiles in Annex 2.

Table 33: Type of collective bargaining, by Member States

Type of collective bargaining	Member States
Multi-employer bargaining only	BE, SE, SI
Both single- and multi-employer bargaining	AT, DE, DK, ES, FI, FR, IT, NL, SK
Single-employer bargaining only	BG, CY,* EE, EL, HR, HU, IE, LT, LU, LV, MT, PL, PT, RO
No collective bargaining	CZ

Note: * = in Cyprus, there is no collective bargaining agreement per se, but the two regulations on the working conditions of the permanent employees and the hourly pay of employees working in the public sector are discussed by the management of Cyprus Post with the trade unions.

Source: Network of Eurofound Correspondents, 2023

Looking at the coverage of collective bargaining (Table 34), out of the 25 Member States for which data were available, in 21 Member States, more than half of the workforce in the entire postal and courier activities sector was covered by some form of collective bargaining when the Network of Eurofound Correspondents collected data for this sector during 2023. In Bulgaria, Cyprus and Greece, collective bargaining covered between a quarter and almost half of the sector, while for Italy and Luxembourg the share of data on coverage could not be calculated due to the significant number of missing data. Only in Czechia was there no valid collective bargaining agreement, despite the ongoing negotiations between trade unions and the management of the largest employer in the sector, Czech Post. As explained in the country profile for Czechia in Annex 2, no agreement has been reached since 2018.

Table 34: Coverage of collective bargaining in the postal and courier activities sector, by Member State

Type of collective bargaining	Collective bargaining coverage						Information not available
	>94%	75–94%	50–74%	25–49%	1–24%	0%	
Multi-employer bargaining only	BE, SE, SI						
Both single- and multi-employer bargaining	AT	ES, FI, FR	DE, DK, NL, SK				IT
Single-employer bargaining only		HR, IE, PT	EE, HU, LT, LV, MT, PL, RO	BG, CY, EL			LU
No collective bargaining						CZ	

Source: Network of Eurofound Correspondents, 2023

By cross-referencing data on social partners' consultation, Table 35 shows that in the Member States where employers organisations are consulted at least one trade union organising workers in the postal and courier activities sector is consulted in all Member States except Poland. In the case of employer

organisations, from the 18 Member States in which these are present, in 9 they are consulted on sector-related matters in an ad hoc or regular matter. In three countries – Croatia, Romania and Slovenia – neither trade unions nor employer organisations are consulted, despite the fact that they represent both workers and employers in the sector. Looking at the consultations of USPs in the postal and courier activities sector by the government, Croatia and Greece are the only countries in which these companies are not consulted by the government. As there are no postal employer organisations present in Greece, we can assume that the postal employers are not consulted at all by government on sector-related matters in this country. Considering the fact that ELTA, the Greek USP, has not been under public ownership since 2013 (Table 70 in Annex 1), there is no, or very limited interaction, between the largest employer in the postal and courier activities sector and the government. In Croatia, while the USP is under public ownership, despite the lack of formal consultations, we can assume that there is some form of interaction between the largest employer in the sector and the government. On the workers’ side, none of the three trade unions organising workers in the sector are consulted.

Table 35: Consultation of trade unions, employer organisations and national USD companies in the postal and courier activities sector, by Member States, 2023

	At least one trade union consulted	No trade union consulted
At least one employer organisation consulted	AT, BE, DK, ES, FI, LV, NL, SE, SK	PL
No employer organisation consulted	DE, FR, HU, IT, LU	HR, RO, SI
National USD company consulted	AT, BE, BG, CY, CZ, DE, DK , EE, ES , FI , FR, HU, IE, IT, LT, LU, LV , MT, NL , PT, SE , SI, SK	PL, RO
National USD company not consulted	EL	HR

Note: *Bold font indicates countries in which neither trade unions, nor employer organisations or USD companies are consulted.*

Source: *Network of Eurofound Correspondents, 2023*

Table 36 shows the involvement of employer organisations and USD companies in the social dialogue bodies identified in the data collection for this study. It is noteworthy that the trade unions and employer organisations in the postal and courier activities sector are involved in social dialogue bodies for the postal and courier activities sector in four Member States: Belgium, Denmark, Finland and Spain. In another three countries – Malta, the Netherlands and Slovakia – the trade unions and employer organisations with members in the postal and courier activities sector are involved in general tripartite social dialogue bodies that also cover the postal and courier activities sector. In the Netherlands, the trade unions and employer organisations representing the postal and courier activities sector are also involved in the bipartite social dialogue body for the transport and logistics sector, given that aspects related to the other postal services are also covered in those bodies. In four Member States – Belgium, Bulgaria, France and Hungary – the national USD company participates directly in the bipartite social dialogue body for the postal and courier activities sector. The 22 bodies

are distributed across ten countries, and most of them are bipartite and established by mutual agreement. The complete list of these social dialogue bodies is available in Table 69 in Annex 1.

Table 36: Involvement of employer organisations and national USD companies in tripartite and bipartite social dialogue bodies

	Bipartite postal social dialogue body	Tripartite postal social dialogue body	General tripartite social dialogue body	Transport bipartite social dialogue body
Member States where only the employer organisation is involved	ES, FI	DK, ES, FI	DK, MT, NL, SK	NL
Member States in which the employer organisation and USD company are involved	BE			
Member States in which only the USD company is involved	BG, FR, HU			
Member States with no social dialogue bodies in the sector	AT, CY, CZ, DE, EE, EL, HR, IE, IT, LT, LU, LV, PL, PT, RO, SE, SI			

Note: A complete list is available in Table 69 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

3. European level of interest representation

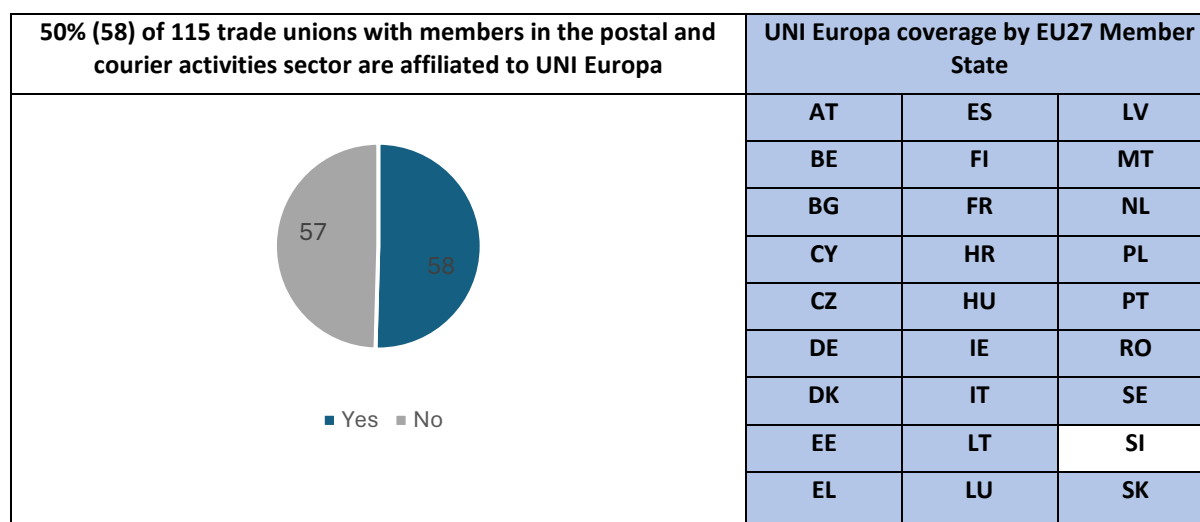
Out of the 115 postal and courier activities sector trade unions in the EU27 Member States, 58 in 26 Member States are affiliated to UNI Europa. Only in Slovenia does UNI Europa not have a trade union affiliated for its members in the postal and courier activities sector. CESI has 12 sectoral trade unions affiliated, in 8 Member States. One trade union from Austria – GPF – is affiliated to both UNI Europa and CESI. There are 46 trade unions that are not affiliated to either UNI Europa or CESI, and thus not represented in the ESSDC for the postal and courier activities sector. Nine of the national sectoral trade unions are affiliated to other European organisations.

On the employers' side, none of the 44 employer organisations in the postal and courier activities sector identified in this study are PostEurop members. However, 20 of the PostEurop member companies are affiliated to a sectoral or cross-sectoral employer organisation.

3.1. Representativeness of UNI Europa

UNI Europa has 58 sectoral trade unions (50%) affiliated in 26 EU Member States, which constitutes around 30% of the total sectoral workforce in the EU27.⁴⁴ Only in Slovenia does UNI Europa not have a postal and courier activities sector trade union affiliated for its members in the postal and courier activities sector (Figure 16).

Figure 16: Share (and number) of trade unions organising workers in the postal and courier activities sector represented by UNI Europa, EU27



Note: Blue shaded cells indicate countries with trade unions in the postal and courier activities sector represented by UNI Europa; cells with no shading indicate countries with no postal trade unions represented by UNI Europa.

Source: Compilation based on data in Table 64 in Annex 1

⁴⁴ Percentage calculated based on the available membership data. Given the high share of national-level trade unions that did not provide data or have provided estimations (as listed in Table 17), this calculation should be treated with caution.

Out of the 58 trade unions affiliated to UNI Europa, 26 trade unions from 15 Member States (or 49%) cover all the activities in the postal and courier activities sector and are marked in bold font in Table 37. Trade unions affiliated to UNI Europa cover both parts of the postal and courier activities sector equally (NACE 53.10 and NACE 53.20), but the number of Member States in which UNI Europa members organise workers is higher for the NACE 53.10 subsector. Forty-two (37%) of the UNI Europa members from 26 Member States cover the employees of the national USD companies in the postal and courier activities sector, while 15 (13%) of the 58 trade unions also cover the employees of the European multinational companies and those of the non-EU postal operators.

Table 37: Sector-relatedness of UNI Europa-affiliated trade unions

Member State	Trade union	NACE 53.10		USP	NACE 53.20		EU multinational companies/ non-EU operators	European affiliation
		Mail	Parcels		Mail	Parcels		UNI Europa
Number of trade unions		44	44	42	42	44	15	58
% of all trade unions covering this part of the sector		38	38	37	37	38	13	50
Number of Member States		25	25	26	20	19	10	26
AT	Vida	No	Yes		No	Yes	-	Yes, directly
AT	GPA	No	No		Yes	Yes	-	Yes, directly
AT	GPF	Yes	Yes	Yes	No	No	-	Yes, directly
BE	ACV Puls (ACV-CSC)	No	Yes	Yes	Yes	Yes	Yes (DHL)	Yes, directly
BE	ACV-CSC Transcom	Yes	Yes	Yes	Yes	Yes	Yes (DHL)	Yes, directly
BE	BTB (ABVV- FGTB)	No data	No data	Yes	Yes	Yes	-	Yes, directly
BE	VSOA-SLFP Post	Yes	Yes	Yes	No	No	-	Yes, directly
BE	ACLVB- CGSLB	No data	No data	Yes	No data	No data	Yes (DHL)	Yes (indirectly via ACLVB- CGSLB UNI Europa)
BE	BBTK-SETCa	Yes	Yes	Yes	Yes	Yes	Yes (DHL)	Yes, directly
BE	ACV-CSC CNE	No	No		Yes	Yes	-	Yes (via ACV-CSC)
BE	ACOD-Post (ABVV- FGTB)	Yes	Yes	Yes	No data	No data	-	The broader ABVV-FGTB confederation is part of UNI Europa.
BG	СФC/TUFC	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
BG	PTTF Podkrepa	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
CY	PASY-DY	Yes	Yes	Yes	No	No	-	Yes, directly

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

Member State	Trade union	NACE 53.10		USP	NACE 53.20		EU multinational companies/ non-EU operators	European affiliation
		Mail	Parcels		Mail	Parcels		UNI Europa
CZ	OSZPTNS	Yes	Yes	Yes	Yes	No	-	Yes, directly
DE	ver.di	Yes	Yes	Yes	Yes	Yes	Yes (DHL) Yes (UPS)	Yes, directly
DK	3F	Yes	Yes	Yes	Yes	Yes	Yes (DHL)	Yes, directly
EE	Pro Ametiühing	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
EL	POST	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
EL	OIYE	No	No		Yes	Yes	-	Yes, directly
EL	ACS MAEE Workers' Union	No	No		Yes	Yes	-	Yes (via OIYE)
EL	SESP	No	No		No	Yes	-	Yes (via OIYE)
ES	FeSP-UGT	Yes	Yes	Yes	No	No	-	Yes, directly
ES	FSC-CCOO Postal	Yes	Yes	Yes	Yes	Yes	Yes (Amazon)	Yes, directly
ES	UGT-FeSMC	No	No		Yes	Yes	-	Yes, directly
ES	ELA/STV	Yes	Yes		Yes	Yes	-	Yes (not confirmed)
FI	PAU	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
FI	YTN	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
FI	IL	Yes	Yes		Yes	Yes	-	Yes, directly
FI	TEK	Yes	Yes		Yes	Yes	-	Yes, directly
FI	Industrial Union	Yes	Yes		Yes	Yes	-	Yes, directly
FI	PRO	No data	No data		No data	No data	-	Yes, directly
FI	PAM	No	No		No	Yes	-	Yes, directly
FR	F3C CFDT	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
FR	FAPT-CGT	Yes	Yes	Yes	Yes	Yes	Yes (DPD)	Yes, directly
FR	FO com	Yes	Yes		Yes	Yes	-	Yes, directly
HR	HSP	Yes	Yes	Yes	No	No	-	Yes, directly
HU	PSZ	Yes	Yes	Yes	No	No	-	Yes, directly
IE	CWU	Yes	Yes	Yes	Yes	Yes	Yes (DPD, DHL, UPS)	Yes, directly
IE	ACHPS	Yes	Yes	Yes	Yes	Yes		Yes, directly
IT	SLC-CGIL	Yes	Yes	Yes	Yes	Yes	Yes (transport branch: DHL, UPS)	Yes, directly
IT	SLP CISL	Yes	Yes	Yes	Yes	Yes	Yes (transport branch: DHL, UPS)	Yes, directly
LT	LRDPS	Yes	Yes	Yes	No	Yes	-	Yes, directly

Member State	Trade union	NACE 53.10		USP	NACE 53.20		EU multinational companies/ non-EU operators	European affiliation
		Mail	Parcels		Mail	Parcels		UNI Europa
LU	LCGB	Yes	No	Yes	Yes	No	-	Yes, directly
LU	OGB-L	Yes	No	Yes	Yes	No	-	Yes, directly
LV	LSAB PRO	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
MT	GWU	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
NL	FNV	Yes	Yes	Yes	Yes	Yes	Yes (DPD, DHL, UPS)	Yes, directly
PL	NSZZ Solidarność PPP	Yes	Yes	Yes	No	No	-	Yes, directly
PT	Sinttav	Yes	Yes	Yes	Yes	Yes	-	Yes (UNI Europa ICTS)
PT	SNTCT	Yes	Yes	Yes	Yes	Yes	Yes (DPD, UPS)	Yes, directly
PT	Sindelco	Yes	Yes	Yes	Yes	Yes	Yes (DPD)	Yes, directly
RO	FSPC	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
RO	SLPR	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
SE	SEKO	Yes	Yes	Yes	Yes	Yes	-	Yes, directly
SE	Transport	No	No		Yes	Yes	-	Yes, directly
SE	SI	Yes	Yes		Yes	Yes	-	Yes, directly
SK	OZ PaL	Yes	Yes	Yes	No	No	-	Yes, directly

Note: Trade unions marked with bold font indicate coverage of all the activities in the postal and courier activities sector. A complete list available in Table 64 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

In terms of covering of different companies in the sector, more than half of the 106 unions organising workers in large companies (57 trade unions) are members of UNI Europa. Additionally, almost 70% of the UNI Europa-affiliated trade unions, in about half of the EU Member States, organise and represent the employees in the postal SMEs with fewer than 250 employees (Table 38). About two thirds of unions organising workers in companies with 10–49 and 50–249 employees are members of UNI Europa, and 25 out of 36 unions organising workers in companies with 1–9 employees are members of UNI Europa. Based on the above, we can conclude that, the smaller the company, the more important the role of UNI Europa becomes for representing its workers.

Table 38: Trade union coverage of company size groups in the postal and courier activities sector affiliated to UNI Europa

	Total	Number of employees of the companies employing organised workers			
		1–9	10–49	50–249	>250
Number of trade unions	58	25	30	30	57
% of all trade unions		22	26	26	50
Number of Member States	26	12	15	16	26
Member States with no trade unions covering this group	1 SI	15	12	11	1

Note: A complete list of trade unions' coverage of different categories of workers is available in Annex 1 (Table 64).

Source: Network of Eurofound Correspondents, 2023

Table 39 shows that trade union members of UNI Europa organise white-collar workers, management and blue-collar workers under full-time open-ended contracts in particular. Nonetheless, UNI Europa members also cover other types of contracts (including part-time open-ended, full-time fixed-term, and part-time fixed-term contracts), partly contradicting evidence suggesting that unions struggle to represent 'non-standard' workers. That said, two categories of non-standard postal workers that are poorly covered by collective bargaining and union organisation are the workers of contractors and temporary agency workers. Moreover, UNI Europa members are less successful in organising civil servants. However, of the approximately 30 unions organising civil servants, 20 are members of UNI Europa (see Table 14). Lastly, self-employed workers are by far the least represented category of workers. Nonetheless, of the nine unions organising self-employed workers, six are members of UNI Europa (Table 14). This illustrates the central role of UNI Europa in the representation of the self-employed.

Table 39: Categories of workers organised by postal trade unions affiliated to UNI Europa

	Total	Blue-collar workers	White-collar workers	Management	Civil servants	Workers of contractors	Temporary agency workers active in the sector	Employee contracts				Self-employed workers
								FTI	PTI	FTF	PTF	
Number of trade unions	58	44	49	46	20	23	23	53	49	43	42	6
Share of all trade unions (%)		75	84	79	34	39	39	91	84	74	72	10
Number of Member States	26	26	25	23	13	13	12	25	24	20	19	5 (AT, EE, FI, IT, NL)

Note: FTF, full-time fixed contract; FTI, full-time indefinite; PTF, part-time fixed contract; PTI, part-time indefinite. A complete list of trade unions' coverage of different categories of workers is available in Table 64 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

Table 40 illustrates that the general trend of decreasing membership described in Section 2.1 is valid for all the UNI Europa members in the postal and courier activities sector. Only nine trade unions report an increase in membership: ver.di in Germany, FSC-CCO Postal and UGT-FeSMC in Spain, PAM and TEK in Finland, F3C CFDT in France, LSAB PRO in Latvia, LCGB in Luxembourg and GWU in Malta. In terms of ranking, UNI Europa represents the largest, or the only, trade union in the entire postal and courier activities sector in 24 Member States: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Portugal, Romania, Slovakia, Spain and Sweden. In Belgium, Bulgaria, Finland, Portugal, Romania, Spain and Sweden, UNI Europa also represents the second largest union in the sector. In Poland it represents the second largest but not the largest. There are no clear data delineating which is the largest trade union in the postal and courier activities sector in Belgium, making the ranking difficult, but, given that all eight trade unions organising postal workers in the country are UNI Europa members, both the largest and the smallest ones are covered. There are no data on the sectoral membership of any of the Italian trade unions, making any ranking impossible.

Table 40: Overview of UNI Europa-affiliated trade unions' membership strength in the postal and courier activities sector

	Total	Trend	Ranking in the entire postal and courier activities sector
Number of trade unions	58	Increasing: 9 Stable: 9	Largest: 24 2nd largest: 8
Number of Member States	26	Decrease: 20 No data: 20	No data: 1 (IT)
Number Member States with no trade unions	1 (SI)		

Note: A full list of trade unions is available in Table 17 in Section 2.1.

Source: Network of Eurofound Correspondents, 2023

Table 41 shows that, out of the 58 UNI Europa member unions, 54 are involved in some type of collective bargaining in the postal and courier activities sector. Only the UNI Europa affiliate from Czechia is not a signatory of collective bargaining agreements. As explained in Section 2.5, there was no valid collective bargaining agreement in Czechia, despite the ongoing negotiations between trade unions and the management of the largest employer in the sector, Czech Post. More details are available in the country profile for Czechia in Annex 2. In Cyprus, there is no collective bargaining agreement per se, but the two regulations on the working conditions of the permanent employees and the hourly pay of employees working in the public sector are discussed by the management of Cyprus Post with the trade union affiliated to UNI Europa. In Romania, one of the two trade unions affiliated to UNI Europa is not involved in collective bargaining for the postal and courier activities sector, nor is one of the four affiliates in Greece, while in Finland just one of the seven affiliates is not engaged in bargaining for the postal and courier activities sector. Looking at the level of bargaining, company-level collective bargaining is more prevalent than sector-level collective bargaining in absolute terms (48 agreements versus 25 agreements) and in country terms (agreements in 26 Member States versus 9 Member States).

Looking at the different parts of the sector, 16 UNI Europa members are signatories of sector-level bargaining agreements for their members in NACE 53.10, while the number is higher, at 25 members, for the sector-level agreements covering the workers in NACE 53.20. Given that the largest employers in the sector, the national USD companies, dominate the activities NACE 53.10, all UNI Europa members covering USD are also involved in collective bargaining, except for those in Czechia.

Table 41: Overview of UNI Europa-affiliated trade unions' involvement in collective bargaining

	Total	NACE 53.10	USP	NACE 53.20	EU multi-national companies/non-EU operators
Number of UNI Europa trade unions	58	44	42	44	15
Number of Member States	26	25	26	20	10
Number of UNI Europa trade unions involved in any collective bargaining	54	40	40	39	15
Number of UNI Europa trade unions involved in sector-level collective bargaining	25	16	16	25	9
Number of Member States	9 AT, BE, DE, DK, ES, FI, IE, IT, SE	9 AT, BE, DE, DK, ES, FI, IE, IT, SE	9 AT, BE, DE, DK, ES, FI, IE, IT, SE	9 AT, BE, DE, DK, ES, FI, IE, IT, SE	5 BE, DE, DK, ES, IT
Number of UNI Europa trade unions involved in company-level collective bargaining	48	37	37	39	15
Number of Member States	26 All but CZ	18	18	18	10

Note: A complete list of trade unions is available in Table 64 and Table 65. Additional information on collective bargaining agreements is available in Table 71 in Annex 1. No data are available on involvement in collective bargaining for one UNI Europa member trade union from Spain.

Source: Network of Eurofound Correspondents, 2023

The vast majority of UNI Europa members (54 out of 58) are considered representative based on mutual recognition or as a result of meeting legal criteria set in national legislation (Table 42). There are two trade unions in Greece and one in Romania that do not meet the representativeness requirements. The Estonian affiliate is not counted, as there is no applicable concept for the representativeness of social partners in Estonia. More than half of UNI Europa members are regularly consulted by the government. Twenty-three out of 58 are also involved in bipartite or tripartite social dialogue bodies for the postal sector or adjacent sectors.

Table 42: Overview of UNI Europa-affiliated trade unions' role in the national industrial relations landscape

	Total	Trade union recognised as representative based on national criteria	Involved in bipartite or tripartite bodies	Consulted by government	Affiliated to a national confederation
Number of trade unions affiliated to UNI Europa	58	54 25 based on legal requirements, 25 based on mutual recognition, 3 based on both	23	37	50
Share of all trade unions	50%				
Number of Member States	25	23	13	17	25
Member States with no trade unions	21	2	14	8	4

Source: Network of Eurofound Correspondents, 2023

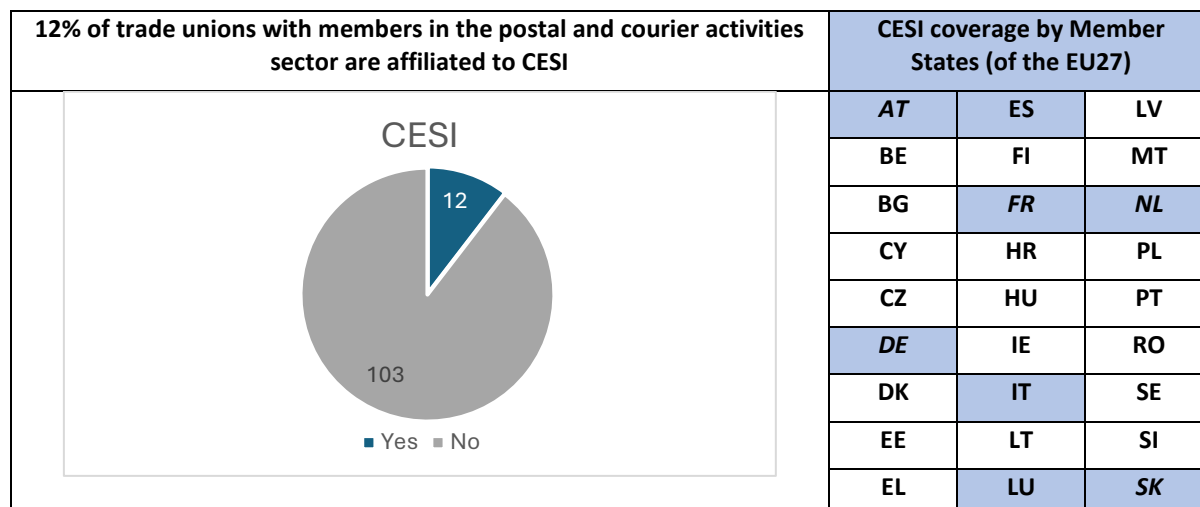
3.2. Representativeness of CESI

Of the 115 trade unions in the EU27 Member States, 12 unions in 8 Member States are affiliated to CESI for their members in the postal and courier activities sector, constituting at least 3% of the entire sectoral workforce in the EU27 (Figure 17).⁴⁵ For the entire postal and courier activities sector, CESI has one member in Austria, one member in France, two members in Germany, three members in Italy, one member in Luxembourg, two members in the Netherlands, one member in Slovakia and one member in Spain. The trade unions in Austria, France, one of the two in the Netherlands and one in Slovakia are CESI members via their affiliation to Eurofedop. As explained by the German CESI member dbb during the checking of interim findings, in practice there is no distinction between direct and indirect members for CESI. The trade unions affiliated via Eurofedop pay affiliation fees to CESI per member, including for their indirect affiliates, and representatives of the indirect affiliates can be nominated as representatives for CESI statutory committees.⁴⁶

⁴⁵ Percentage calculated based on the available membership data. Given the high share of national-level trade unions that did not provide data or have provided estimations (as listed in Table 17), this calculation should be treated with caution.

⁴⁶ For example, the President of CESI's Postal Services Expert Commission is the President of the Austrian FCP-Post union (an indirect member), following a nomination from Eurofedop (a direct member).

Figure 17: Share (and number) of trade unions organising workers in the postal and courier activities sector represented by CESI, EU27



Note: Blue shaded cells used for countries with trade unions in the postal and courier activities sector represented by CESI; cells with no shading indicate countries with no postal trade unions represented by CESI; italic font used for indirect affiliation to CESI; in the Netherlands, CESI has both direct and indirect affiliates.

Source: Compilation based on data in Table 64 in Annex 1

As listed in Table 43, no clear data on sector-relatedness were available for four of the trade unions affiliated (directly or indirectly) to CESI. This is the case for the CGPT in Germany, CSIF in Spain, Confediri in Italy and Syndicat des P&T in Luxembourg. The remaining eight, for which data were available, all cover activities under NACE 53.10, including the activities of the national USP in the postal and courier activities sector in Austria, France, Italy, Luxembourg, the Netherlands and Slovakia. Only four CESI affiliates have members active in NACE 53.20: one from France, two from Italy and one from the Netherlands. The same trade union from the Netherlands also covers the employees of the European multinational companies. There are no CESI-affiliated trade unions representing the employees of the non-EU postal operators in any of the eight Member States.

Table 43: Sector-relatedness of CESI-affiliated trade unions

Member State	Trade union	NACE 53.10		USP	NACE 53.20		EU multi-national company	European affiliation CESI
		Mail	Parcels		Mail	Parcels		
Number of trade unions		8	8	8	4	5	1	12
% of all trade unions		>1	>1	>1	>1	>1	>1	12
Number of Member States		6: AT, DE, FR, IT, NL, SK	6: AT, DE, FR, IT, NL, SK	6: AT, FR, IT, LU, NL SK	3: FR, IT, NL	3: FR, IT, NL	1: NL	8: AT, DE, ES, FR, IT, LU, NL, SK
AT	GPF	Yes	Yes	Yes	No	No		Indirectly (via Eurofedop; only the FCG fraction of the GFP)
DE	DPVKOM	Yes	Yes	No	No	No		Yes (via dbb; however, dbb)

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

Member State	Trade union	NACE 53.10		USP	NACE 53.20		EU multi-national company	European affiliation
		Mail	Parcels		Mail	Parcels		CESI
								pays affiliation fees per member including for its affiliate DPVKOM, and nominates representatives for statutory committees. In practice at CESI, there is no distinction between direct and indirect members.)
DE	CGPT	No data	No data		No data	No data		Yes (via CGB)
ES	CSIF	No data	No data		No data	No data		Yes
FR	CFTC La Poste	Yes	Yes	Yes	Yes	Yes		Yes (indirectly via Eurofedop)
IT	Confsal	Yes	Yes	Yes	Yes	Yes		Yes
IT	FAILP-CISAL	Yes	Yes	Yes	Yes	Yes		Yes (indirectly via CISAL)
IT	Confedir	No data	No data	No data	No data	No data		Yes
LU	Syndicat des P&T	No data	No data	Yes	No data	No data		Yes (via CGFP)
NL	CNV Connectief	Yes	Yes	Yes	Yes	Yes	Yes, DPD, DHL	Yes
NL	BVPP	Yes	Yes	Yes	No	Yes		Yes (indirectly via Eurofedop)
SK	SOZPaT	Yes	Yes	Yes	No	No		Yes (indirectly, via Eurofedop)

Note: Trade unions marked with bold font indicate coverage of all the activities in the postal and courier activities sector. Complete list available in Table 64 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

Table 44 shows that CESI member trade unions represent mostly management, blue-collar workers and white-collar workers in the postal and courier activities sector. Only the Austrian trade union GPF, affiliated to CESI for postal workers, also represents temporary agency workers. It is noteworthy that GPF is the only trade union affiliated to CESI as well as UNI Europa for its postal members.

Table 44: Categories of workers in the sector organised by trade unions affiliated to CESI

	Total	Blue-collar workers	White-collar workers	Management	Civil servants	Workers of contractors	TAWs in the sector	Employee contracts				Self-employed
								FTI	PTI	FTF	PTF	
Number of trade unions	12	6	7	8	4	0	1	6	6	6	6	0
% of trade unions	12	>1	>1	>1	>1	>1	>1	>1	>1	>1	>1	-
Number of Member States	8	5	6	7	4	0	1	6	6	6	6	0

Note: FTF, full-time fixed contract; FTI, full-time indefinite; PTF, part-time fixed contract; PTI, part-time indefinite; TAW, temporary agency worker. A complete list of trade unions' coverage of different categories of workers is available in Table 64 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

CESI-affiliated trade unions in the postal and courier activities sector predominantly cover companies with more than 250 employees, with just three trade unions (one in Germany and two in the Netherlands) covering workers in companies with between 50 and 250 employees, and only the German CGTP also organising workers in companies with fewer than 50 employees (Table 45).

Table 45: Membership domain of trade unions affiliated to CESI in terms of company size groups

	Total	Number of employees in companies employing organised workers			
		1–9	10–49	50–249	>250
Number of trade unions	12	0	1	3	11
% of all trade unions		0	>1	>1	10
Number of Member States	8	0	1	2	8

Note: A complete list of trade unions' coverage of different categories of workers is available in Table 64 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

Table 46 shows that, out of the three CESI members for which membership data were available, two record a decrease in members, which is in line with the general membership trend described in Section 2.1 (Table 17). The Dutch BVPP is the only CESI affiliate recording an increase in membership. BVPP is also the largest trade union in the sector in the country, as is the Austrian member GPF.

Table 46: Overview of CESI-affiliated trade unions’ membership strength in the postal and courier activities sector

	Total	Trend	Ranking in the entire postal and courier activities sector
Number of trade unions	12	Increasing: 1 Stable: 0 Decrease: 2 No data: 9	Largest: 2 (AT, NL) 2nd largest: 1, (DE) 3rd largest: 2 (DE, NL) No data: ES, FR, IT, LU, SK

Note: A complete list of trade unions’ membership strength is available in Table 17 in Section 2.1.

Source: Network of Eurofound Correspondents, 2023

Table 47 shows that company-level collective bargaining is predominant among CESI-affiliated trade unions in the postal and courier activities sector (with 10 affiliates involved in company-level bargaining, and only 6 involved in sector-level bargaining). The bargaining in which CESI affiliates are involved, in seven Member States, covers mostly postal activities under USO (NACE 53.10). In only three countries (Germany, Italy and the Netherlands), CESI members also cover the other postal and courier activities (NACE 53.20) in collective bargaining. Only the Dutch CESI affiliate CNV also covers the workers of the European multinational companies in the collective bargaining it is involved in. The CESI members CFTC La Poste in France and DPVKOM in Germany were not signatories of any collective bargaining agreement for the postal and courier activities sector when the data for this study were collected.

Table 47: Overview of CESI-affiliated trade unions' involvement in collective bargaining

	Totals	NACE 53.10	USP	NACE 53.20	EU multinational companies/non-EU operators
Number of CESI trade unions	12	8	8	6	1
Number of Member States	7	4	4	3	1
Number of CESI trade unions involved in any collective bargaining	10	8	8	6	1
Number of CESI trade unions involved in sector-level collective bargaining	6	5	5	4	1
Number of Member States	2	2	2	2	1
Number of CESI trade unions involved in company-level collective bargaining	10	11	10	4	1
Number of Member State	7	4	4	3	1

Note: A complete list of trade unions is available in Table 65, and additional information on collective bargaining agreements is available in Table 71 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

All 12 CESI members are considered representative based on mutual recognition or as a result of meeting legal criteria set in national legislation (Table 48). Fewer than half of CESI members are regularly consulted by the government. Only three CESI trade unions are involved in bipartite or tripartite social dialogue bodies for the postal sector or adjacent sectors in France, the Netherlands and Slovakia. Three trade unions from Austria, Germany and Luxembourg are sometimes consulted by the government on matters related to the postal and courier activities sector. Seven trade unions are affiliated to national cross-sectoral organisations and two are not, while for the remaining three (Confisal and Confedir in Italy and CSIF in Spain) no data were available.

Table 48: Overview of CESI-affiliated trade unions' role in the national industrial relations landscape

	Total	Trade union recognised as representative based on national criteria	Involved in bipartite or tripartite bodies	Consulted by government	Affiliated to a national confederation
Number of trade unions affiliated to CESI	12	12 8 based on mutual recognition, 3 based on legal requirements, 1 based on both	3	4	9
Share of all trade unions	12%				
Number of Member States	8		3	3	7

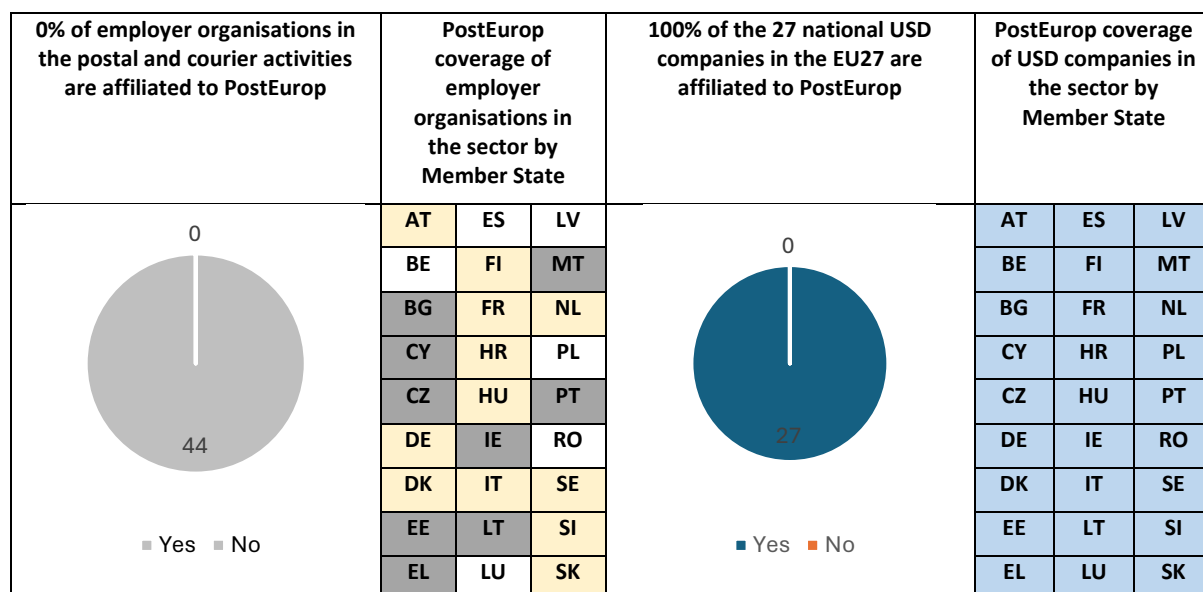
Note: A complete list of trade unions is available in Table 65 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

3.3. Representativeness of PostEurop

Out of the 44 employer organisations in the postal and courier activities sector identified in this study, none are PostEurop members, as PostEurop members are the postal companies, not the employer organisations. However, 20 of the PostEurop member companies are affiliated to a sectoral or cross-sectoral employer organisation. PostEurop has all the 27 national postal operators under a USO or by USD in all Member States, which constitutes 100% of the companies providing postal activities under a USO by one or more USPs (NACE 53.10) as shown in Figure 18. All PostEurop member companies are active in both NACE 53.10 and NACE 53.20, covering the entire postal and courier sector in their countries. The companies affiliated to PostEurop constitute less than 1% of the total number of companies in entire postal and courier activities sector in the EU27 and employ 60% of the total workforce in the sector across the EU27.

Figure 18: Share (and number) of PostEurop affiliates in the postal and courier activities sector, EU27



Notes: Yellow shaded cells indicate countries in which the PostEurop affiliate is a member of the employer organisation; grey shaded cells indicate countries with no employer organisation in the postal and courier activities sector; cells with no shading indicate countries in which there is an employer organisation representing postal companies but the employer organisation does not represent the national PostEurop affiliate. Blue shaded cells indicate countries in which the company providing postal services under USO (NACE 53.10) is represented by PostEurop.

Source: Compilation based on data in Table 50 and Table 66

In several Member States, PostEurop has two companies affiliated, the national postal company under universal services and its subsidiaries created for activities in other postal and courier services, covered by NACE 53.20, as listed in Table 49. In Finland, beside the national postal company under universal services, Posti Group, there is also the regional Åland Post, which is owned by the autonomous government of Åland. Both Finnish companies are affiliated to PostEurop, and both are active in NACE 53.10 and NACE 53.20.

Table 49: PostEurop members' coverage of the postal and courier sector, organisational structure and activities in other sectors and Member States, 2023

Member State	Name of the company	Company provides only postal services under USO (NACE 53.10)	Company provides both NACE 53.10 and NACE 53.20 services	Company acts as a umbrella company covering all postal and courier activities in the home country	Company acts as holding/umbrella company covering all postal and courier activities in the home and other countries	Separate legal entities exist within the group affiliated to PostEurop, one for NACE 53.10, and another for NACE 53.20	Separate collective bargaining agreements exist for NACE 53.10 and NACE 53.20 activities	Active in other sectors	Active in other Member States
AT	Österreichische Post AG (ÖPAG)	No	Yes	No	No	No	No, only one agreement for both NACE 53.10 and NACE 53.20	Banking	Yes, BG, HR, HU, SI, SK
BE	Bpost	No	Yes	No	No	No	No	E-commerce logistics (in Belgium and internationally) and banking services as intermediary (in Belgium)	Yes, for e-commerce logistics in DE, ES, FR, IT, NL, PL
BG	Български пощи ЕАД (Bulgarian Post PLC)	No	Yes	Yes	No	No	No, only one agreement for both NACE 53.10 and NACE 53.20	Logistics, financial services (including bill payments, payment of pensions and social benefits), administrative services, retail and other services	No
CY	Cyprus Post	No	Yes	No	No	No	No, only one agreement for both NACE 53.10 and NACE 53.20	No	No

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

Member State	Name of the company	Company provides only postal services under USO (NACE 53.10)	Company provides both NACE 53.10 and NACE 53.20 services	Company acts as a umbrella company covering all postal and courier activities in the home country	Company acts as holding/umbrella company covering all postal and courier activities in the home and other countries	Separate legal entities exist within the group affiliated to PostEurop, one for NACE 53.10, and another for NACE 53.20	Separate collective bargaining agreements exist for NACE 53.10 and NACE 53.20 activities	Active in other sectors	Active in other Member States
CZ	Česká pošta, s. p. (Czech Post)	No	Yes	No	No	No	No	Freight transport by road, tele-communication activities, other financial activities, packaging activities and other services	No
DE	Deutsche Post DHL	No	Yes	No	No	Yes	Yes	Logistics	Yes, globally
DK	PostNord Danmark	No	Yes	No	No	No	No	Logistics	Yes, FI, SE
EE	AS Eesti Post (Estonian Post)	No	Yes	No	No	No	No	Finance, commerce	Yes, LT, LV
EL	ELTA S.A. (Hellenic Post SA, or Ellinika Tahidromia AE, or Ελληνικά Ταχυδρομεία AE)	No	Yes	No	No	Yes, there are two separate legal entities/ companies: 1. ELTA S.A (USP and mother company) 2. ELTA Courier (subsidiary)	No, there is one collective bargaining agreement, covering employment conditions for 1. postal services operating under a USO, 2. other postal activities and 3. courier activities provided	Retail network products and courier services	No

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

Member State	Name of the company	Company provides only postal services under USO (NACE 53.10)	Company provides both NACE 53.10 and NACE 53.20 services	Company acts as a umbrella company covering all postal and courier activities in the home country	Company acts as holding/umbrella company covering all postal and courier activities in the home and other countries	Separate legal entities exist within the group affiliated to PostEurop, one for NACE 53.10, and another for NACE 53.20	Separate collective bargaining agreements exist for NACE 53.10 and NACE 53.20 activities	Active in other sectors	Active in other Member States
							by general authorisation.		
ES	Sociedad Estatal Correos y Telégrafos (part of Correos Group)	No	Yes	Yes, Correos Group covers Sociedad Estatal Correos y Telégrafos, Correos Express and Correos Express Portugal.	Yes, Correos Group (for Portugal)	No, only Sociedad Estatal Correos y Telégrafos is a member of PostEurop, as designated operator.	No, there is one collective agreement at national level in Spain. It covers both NACE 53.10 and NACE 53.20.	Logistics, retail, financial services and administrative services. Subsidiaries of the Correos Group: courier and express (Correos Express) and telecommunications (Correos Telecom).	No data
FI	Posti Group	No	Yes	No	No	No	No	Logistics	No
FI	Åland Post	No	Yes	No	No	No	No	Logistics, e-commerce, road transport, stamp design and sales	No
FR	Le Groupe La Poste	No	Yes	Yes, La Poste Group covers entities active in both NACE 53.10 and NACE 53.20. La Poste Group covers La Poste SA	Yes, Geopost is active in more than 50 countries worldwide and within the EU: DPD (including AT, BE, DE, EE, EL, HR, HU, IE, NL, LT, LU, UK);	Yes, La Poste SA also has other separate legal entities for NACE 53.20, Geopost in particular. La Poste Group covers entities	No, there is one common company-level collective bargaining agreement at national level in France.	Banking, insurance, telecommunications and real estate	Yes, Geopost (part of Group La Poste) is active in more than 50 countries worldwide and within the EU: DPD (AT, BE, DE, EL, EE, HR, HU,

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

Member State	Name of the company	Company provides only postal services under USO (NACE 53.10)	Company provides both NACE 53.10 and NACE 53.20 services	Company acts as a umbrella company covering all postal and courier activities in the home country	Company acts as holding/umbrella company covering all postal and courier activities in the home and other countries	Separate legal entities exist within the group affiliated to PostEurop, one for NACE 53.10, and another for NACE 53.20	Separate collective bargaining agreements exist for NACE 53.10 and NACE 53.20 activities	Active in other sectors	Active in other Member States
				and Geopost at national level.	Chronopost (FR, MA); SEUR (ES); BRT (IT); Speedy (BG).	active in both NACE 53.10 and NACE 53.20.			IE, NL, LT, LU, UK); Chronopost (FR, MA); SEUR (ES); BRT (IT); Speedy (BG).
HR	Hrvatska Pošta d.d. (Croatian Post)	No	Yes	Yes	No	No	There is only one general company-level collective bargaining agreement for Hrvatska Pošta.	Logistics	No
HU	Magyar Posta (Hungarian Post)	No	Yes	No	No	Yes?	No	Financial and intermediary activities, retail trade	No
IE	An Post	No	Yes	No	No	Yes?	No	Banking, insurance, mobile services and tax collection	No, but in UK
IT	Poste Italiane S.p.A.	No	Yes	No	No	No, all activities, including delivery activities, are carried out in Poste Italiane SpA.	No, a single national collective labour agreement applies to Poste Italiane SpA. In delivery there is no distinction between the two	Logistics, financial and insurance services, payment systems and telephony	No

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

Member State	Name of the company	Company provides only postal services under USO (NACE 53.10)	Company provides both NACE 53.10 and NACE 53.20 services	Company acts as a umbrella company covering all postal and courier activities in the home country	Company acts as holding/umbrella company covering all postal and courier activities in the home and other countries	Separate legal entities exist within the group affiliated to PostEurop, one for NACE 53.10, and another for NACE 53.20	Separate collective bargaining agreements exist for NACE 53.10 and NACE 53.20 activities	Active in other sectors	Active in other Member States
							types of activities indicated, carried out by a single network. Some courier activities are carried out by the SDA Express Courier group company, which applies a logistics, goods transport and shipping sector contract. Furthermore, the company Nexive Network Srl carries out activities not related to the universal service and applies the same national collective labour agreement as Poste Italiane SpA.		
LT	AB Lietuvos paštas (Lithuanian Post)	No	Yes	No	No	No	No	No	No

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

Member State	Name of the company	Company provides only postal services under USO (NACE 53.10)	Company provides both NACE 53.10 and NACE 53.20 services	Company acts as a umbrella company covering all postal and courier activities in the home country	Company acts as holding/umbrella company covering all postal and courier activities in the home and other countries	Separate legal entities exist within the group affiliated to PostEurop, one for NACE 53.10, and another for NACE 53.20	Separate collective bargaining agreements exist for NACE 53.10 and NACE 53.20 activities	Active in other sectors	Active in other Member States
LU	POST Luxembourg	No	Yes	No	No	No	No	Philately, tele-communications and financial activities	Yes, France, as well as Monaco and Morocco
LV	Latvijas pasts (Latvian Post)	No	Yes	No	No	No	No	Trade, philatelic services and financial services	No
MT	MaltaPost plc	No	Yes	No	No	No	No	Logistics, banking, document management and insurance	No
NL	PostNL	No	Yes	Yes	Yes	Yes, Koninklijke PostNL BV for universal services	No, there is only one general company-level collective bargaining agreement for PostNL, both for weekday mail deliverers and for Saturday mail deliverers. The PostNL company-level collective bargaining agreement is exempted from the sector-level	Logistics	Yes, Spring (BE, LU)

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

Member State	Name of the company	Company provides only postal services under USO (NACE 53.10)	Company provides both NACE 53.10 and NACE 53.20 services	Company acts as a umbrella company covering all postal and courier activities in the home country	Company acts as holding/umbrella company covering all postal and courier activities in the home and other countries	Separate legal entities exist within the group affiliated to PostEurop, one for NACE 53.10, and another for NACE 53.20	Separate collective bargaining agreements exist for NACE 53.10 and NACE 53.20 activities	Active in other sectors	Active in other Member States
							collective bargaining agreement (BGV).		
PL	Poczta Polska SA	No	Yes	No	No	No	No	No	No
PT	CTT Correios de Portugal, SA	No	Yes	No	No	Yes	No	Banking, financial services, retail trade	No
PT	CTT Contacto S.A.	No	Yes	No	No	No	No	No	No
RO	Compania Națională Poșta Română S.A. (Poșta Română)	No	Yes	No	No	No	No	No	No
SE	PostNord Group AB	No	Yes	No	No	No	No	Logistics and transporting parcels and letters as part of logistics and road transport	Yes, DK, FI
SI	Pošta Slovenije (Post of Slovenia)	No	Yes	Yes, Pošta Slovenije d.o.o. is a controlling company in the PS Group.	No	Yes, a separate legal entity for the provision of logistics services that are out of USO, Intereuropa d.d., which is a part of the Pošta Slovenije Group	Yes, two separate collective bargaining agreements that apply partially or fully to the postal sector: 1. Collective Agreement for	Logistics, commerce and IT solutions	No, Pošta Slovenije d.o.o. does not have any subsidiaries in other countries on its own; however, its subsidiary Intereuropa d.d.

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

Member State	Name of the company	Company provides only postal services under USO (NACE 53.10)	Company provides both NACE 53.10 and NACE 53.20 services	Company acts as a umbrella company covering all postal and courier activities in the home country	Company acts as holding/umbrella company covering all postal and courier activities in the home and other countries	Separate legal entities exist within the group affiliated to PostEurop, one for NACE 53.10, and another for NACE 53.20	Separate collective bargaining agreements exist for NACE 53.10 and NACE 53.20 activities	Active in other sectors	Active in other Member States
						(PS Group) of companies	Postal and Courier Services (the contracting parties are employers, ZDS and GZS) 2. Specialised company-level collective agreement (within Pošta Slovenije)		is present in 9 countries with its own business network through 12 related companies.
SK	Slovenská pošta, a.s.	Yes	No	No	No	Yes, see SPS below	No	Road freight transport, financial services and logistics	No
SK	Slovak Parcel Service (SPS)	No	Yes	No	No	No	No	No	No

Note: Grey highlight used for data not confirmed by PostEurop's member companies.

Source: Network of Eurofound Correspondents, 2023; input from the PostEurop member companies, 2024

According to data collected by the Network of Eurofound Correspondents, the PostEurop member company is the largest employer in the activities under USD (NACE 53.10) in each of the 27 Member States. Based on the same source, the PostEurop-affiliated national USP is also the largest employer in the other postal and courier activities (NACE 53.20) in eight Member States: Czechia, France, Germany, Greece, Malta, Portugal, Slovakia and Sweden. The list of companies linked to PostEurop, which dominate the NACE 53.20 subsector, includes more countries, as the German DHL and the French DPD, both part of the national USD, also dominate this segment of the European postal market (as described in Section 1.3). These two companies – DHL and DPD – which are covered by the term ‘European multinational postal companies’ across the report, are the largest or second largest employers in NACE 53.20 activities in 19 Member States (Table 50). According to the information provided by the PostEurop representative during the checking of the preliminary data, the DHL representative for PostEurop represents DHL Group activities from Germany, and the DPD representative for PostEurop represents DPD activities from France. Concerning the involvement of DHL and DPD companies in the human resources policies of their subsidiaries in other EU Member States, the replies received up to 14 June 2024 indicate that the national regulations in the countries in which these subsidiaries are active are applicable, and that DHL and DPD as mother companies have no role in these matters.⁴⁷

Only in three countries, Cyprus, Finland and Romania, do no PostEurop member companies or their subsidiaries play a major role in the other postal activities subsector. In Cyprus, there are no employer organisations for the subsector. In Finland, out of the three employer organisations, one has the PostEurop affiliate among its members, while the other two represent companies active in other postal and courier services. In Romania, the employer organisations identified in this study exclusively represent companies active in other postal and courier services (NACE 53.20) activities.

Table 50: PostEurop’s members’ strength in the postal and courier activities sector, 2022

	Total number of employees in entire postal and courier activities sector (NACE 53)	Ranking in NACE 53.10	Ranking in NACE 53.20	
			National activities	European multinational companies
EU27	965,345	27/27	8/27	17/27
AT	~20,000	Largest		Largest – DPD
BE	~32,500	Largest		Largest – DHL
BG	9,061	Largest		Largest – DPD
CY	~600	Largest		
CZ	26,675	Largest	Largest	
DE	228,024	Largest	Largest	
DK	6,731	Largest		Largest – DHL
EE	1,703	Largest		Largest – DPD 2nd largest – DHL

⁴⁷ These include human resources policies on working conditions, working time, employee representation and other matters.

	Total number of employees in entire postal and courier activities sector (NACE 53)	Ranking in NACE 53.10	Ranking in NACE 53.20	
			National activities	European multinational companies
EL	3,614	Largest	Largest	
ES	48,341	Largest		Largest – DPD
FI	18,700	Largest		
FR	214,043	Largest	Largest	
HR	9,500	Largest		Largest – DPD
HU	25,225	Largest		Largest – DHL
IE	10,421	Largest		Largest – DPD 2nd largest – DHL
IT	121,000	Largest		Largest – DHL
LT	3,125	Largest		Largest – DPD
LU	7,461	Largest		Largest – DHL
LV	3,162	Largest		Largest – DPD
MT	~800	Largest	Largest	2nd largest – DHL
NL	~35,000	Largest		Largest – DHL 2nd largest – DPD
PL	67,000	Largest		Largest – DHL
PT	10,141	Largest	Largest	Largest – DPD
RO	23,327	Largest		
SE	19,300	Largest	Largest	2nd largest – DHL
SI	5,897	Largest		Largest – DHL
SK	12,222	Largest	Largest	

Note: Light blue shading indicates countries in which the PostEurop affiliate dominates both parts of the postal and courier activities sector. Light grey shading indicates countries in which PostEurop affiliates dominate the postal activities under the USO part (NACE 53.10) only, and the other postal and courier activities (NACE 53.20) part is dominated by a European multinational company (DHL or DPD) linked to PostEurop. A complete list of largest companies in the sector is available in Table 71 in Annex 1. The number of employees was provided for the entire postal and courier activities sector.

Source: Network of Eurofound Correspondents, 2023

The PostEurop member companies play an important role in the national industrial relations landscape for the postal and courier activities sector, given the strong trend of single-employer bargaining in the sector described in Section 2.5. This is explained by the monopoly in the sector played in the past by the PostEurop members. As Sections 2.4 and 2.5 described, the national postal employer organisations play a limited role in collective bargaining in the postal and courier activities sector. In 14 Member States (Bulgaria, Croatia, Cyprus, Estonia, Greece, Hungary, Ireland, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal and Romania), only company-level collective bargaining exists in the postal and courier activities sector (Table 33). The PostEurop members in all 14 countries are involved and

signatories of collective bargaining agreements at company level (Table 51). In Cyprus, while there is no collective bargaining agreement per se, there are two regulations regarding the working conditions of the permanent employees and the hourly employees working in the public sector, which are discussed by the management of Cyprus Post with the trade unions (see country profile for Cyprus in Annex 2 for details). Only the PostEurop member in Czechia is not covered by any form of collective bargaining, despite negotiations ongoing (see country profile for Czechia in Annex 2 for details).

Looking at different parts of the sector, in three countries the PostEurop member companies, or the European multinational companies DHL and DPD, play no major role in the other postal and courier activities subsector (NACE 53.20) (Table 50). In Cyprus, there are no employer organisations for the postal and courier activities sector. In Finland, out of the three employer organisations, one has the PostEurop affiliate among its members and is involved in collective bargaining for both parts of the sector. Another Finnish employer organisation is active in the transport sector, along with the other postal and courier services sector, but is not involved in collective bargaining. The third Finnish employer organisation covers the companies in other postal and courier services and is a signatory of the sector-level bargaining agreements for this part of the sector. In Romania, the employer organisations identified in this study represent only companies active in other postal services (NACE 53.20) and is not involved in any collective bargaining. Thus, the companies active in other postal and courier services in Cyprus and Romania are not covered by any collective bargaining.

Only four PostEurop companies are involved directly in bipartite or tripartite social dialogue bodies in Belgium, Bulgaria (where there is no postal and courier employer organisation), France and Hungary (Table 51). Sixteen companies are affiliated to a sectoral or cross-sectoral employer organisation, which means that they can be represented indirectly in the respective social dialogue bodies where such bodies exist. Given that the majority of the companies are still under partial or full public ownership, as described in Section 1.3, only two companies are not consulted by the government in relation to sector-related matters: Hellenic Post in Greece and Croatian Post in Croatia. In Greece, there is no employer organisation in the postal and courier activities sector, and, out of the four sectoral trade unions, only one is consulted, in an ad hoc matter. In Croatia, although there is one employer organisation, it is not consulted by the government, and neither are the three trade unions.

Table 51: Overview of PostEurop’s members in the national industrial relations landscape

	Number	Member State
Involved in any type of collective bargaining	28	26: all except CZ
Involved in sector-level collective bargaining	9	9: BE, DE, DK, FI, IE, IT, NL, SE, SI
Involved in company-level collective bargaining	28	14: BG, CY*, EE, EL, HR, HU, IE, LT, LU, LV, MT, PL, PT, RO
Involved directly in social dialogue bodies	4	4: BE, BG, FR, HU

Consulted by the government	25	25: all except EL, HR
Affiliated to a national employer organisation in the postal and courier activities sector	16	14 of the 19 Member States with EOs: all except BE, LU, LV, PL, RO

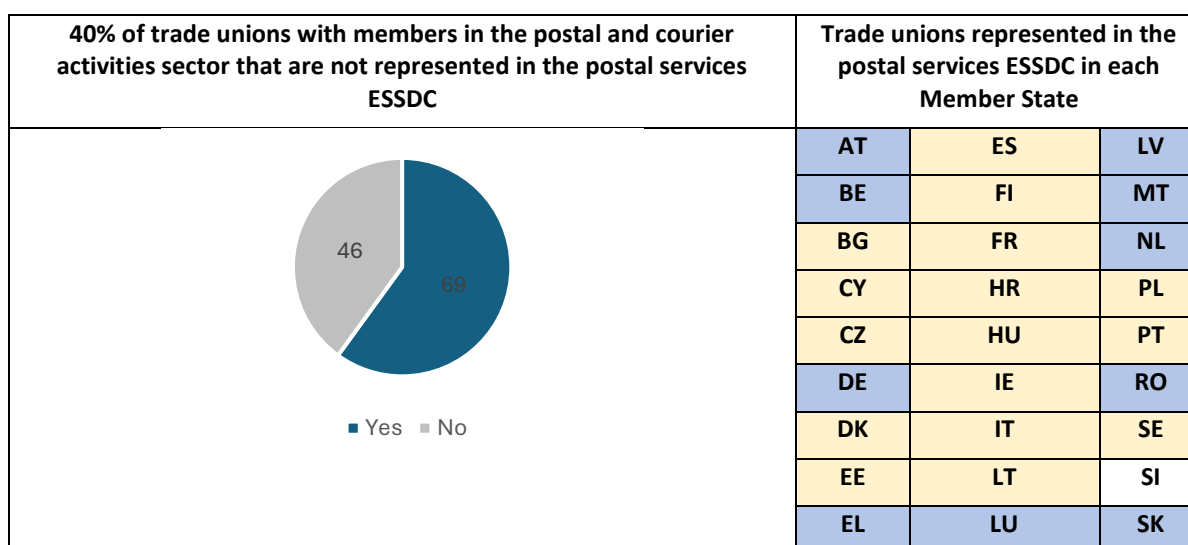
Note: * In Cyprus, there is no collective bargaining agreement per se, but the two regulations on the working conditions of the permanent employees and the hourly pay of employees working in the public sector are discussed by the management of Cyprus Post with the trade unions. Complete list available in Table 70 and Table 71 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

3.4. Trade unions not represented in the postal services ESSDC

Forty-six of the 115 trade unions organising workers in the postal and courier activities sector across the EU27 are not represented in the postal services ESSDC, as they are affiliated to neither UNI Europa nor CESI. These trade unions organise around 3% of the total sectoral workforce in the EU27.⁴⁸ The term ‘non-represented’ trade unions will be used for these national trade unions below.

Figure 19: Share (and number) of trade unions organising workers in the postal and courier activities sector not represented in the postal services ESSDC, EU27



Note: Blue shaded cells indicate countries with all trade unions in the sector represented in the postal services ESSDC; yellow shaded cells indicate only some trade unions are represented in the postal services ESSDC; cells with no shading indicate countries with no trade unions represented in the postal services ESSDC.

Source: Compilation based on data in Table 64 in Annex 1

⁴⁸ Percentage calculated based on the available membership data. Given the high share of national level trade unions that did not provide data or have provided estimations (as listed in Table 17), this calculation should be treated with caution.

As Figure 19 shows, there are 11 Member States in which all of the trade unions organising postal workers are represented in the postal services ESSDC, and a further 15 Member States in which some of the trade unions organising postal workers are represented. Slovenia is the only country that is not represented in the postal services ESSDC, with none of the three trade unions being affiliated either to UNI Europa or to CESI. Table 52 shows that 17 of the non-represented trade unions cover workers in all parts of the postal and courier activities sector in their country. This is the case for the only non-represented trade union from Bulgaria, one of the two in Denmark, all three from France, two from Italy, one from Lithuania, six out of seven from Portugal and three out of six in Sweden. Thirty-nine of the non-represented trade unions cover workers active in NACE 53.10, with 26 trade unions also organising workers of the national USD companies in Bulgaria, Croatia, Cyprus, Czechia, Denmark, Finland, France, Ireland, Italy, Lithuania, Poland, Portugal, Slovenia, Spain and Sweden. The only country in which the non-represented trade unions do not organise workers active in NACE 53.10 is Ireland, although no clear data were available for one of the two non-represented Irish trade unions. For the other postal and courier services, 34 non-represented trade unions organise workers in other postal services, with 6 of the 34 also representing workers in European multinational companies in the postal and courier activities sector. It is noteworthy that in Croatia and Poland the trade unions that are represented in the postal services ESSDC by UNI Europa do not represent the workers in NACE 53.20 in their countries. Therefore, the Croatian and Polish workers in other postal activities are not represented by any trade union.

Table 52: National trade unions organising workers in the postal and courier activities sector not represented in the postal services ESSDC

Member State	Trade union	NACE 53.10		USP	NACE 53.20		EU multi-national companies/ non-EU operators	European affiliation
		Mail	Parcels		Mail	Parcels		
BG	ДСС/DCS	Yes	Yes	Yes	Yes	Yes	-	-
CY	OEKDY – SEK	Yes	Yes	Yes	No	No	-	EPSU
CY	Pasyek PEO	Yes	Yes	Yes	No	No	-	-
CY	Segdamelin PEO	No	No	-	Yes	Yes	-	-
CY	Ο.ΜΕ.ΠΕ.ΓΕ – ΣΕΚ	No	No	-	Yes	Yes	-	-
CZ	OHZ ČP	Yes	Yes	Yes	Yes	No	-	-
DK	HK	Yes	Yes	Yes	Yes	Yes	Yes (DHL)	UNI ICTS, UNI Graphical, UNI Commerce
DK	Akademikerne (AC)	Yes	Yes	-	No	No	-	-
EE	ETTA	No	Yes	-	No	Yes	-	ETF – actively involved in

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

Member State	Trade union	NACE 53.10		USP	NACE 53.20		EU multi-national companies/ non-EU operators	European affiliation
		Mail	Parcels		Mail	Parcels		
								statutory bodies
ES	CIG-Correos	Yes	Yes	Yes	No	No	-	-
ES	FS-USO	No data	No data		Yes	Yes	-	-
ES	Sindicato Libre	Yes	Yes	Yes	No	No	-	-
ES	LAB	Yes	Yes	No data	Yes	Yes	-	-
FI	AKT	No	Yes	Yes	No	Yes	-	ETF
FI	Ekonomit	Yes	Yes	-	Yes	Yes	-	-
FI	Tradenomit	Yes	Yes	-	Yes	Yes	-	-
FI	YTY	Yes	Yes	-	Yes	Yes	-	-
FR	SUD-PTT	Yes	Yes	Yes	Yes	Yes	Yes (DPD)	-
FR	UNSA-Postes	Yes	Yes	Yes	Yes	Yes	Yes (UPS)	-
FR	CFE-CGC Le Groupe La Poste	Yes	Yes	Yes	Yes	Yes	Yes (DPD)	-
HR	RSHT	Yes	Yes	Yes	No	No	-	-
HR	RSR	Yes	Yes	-	No	No	-	-
HU	Pofész	Yes	Yes	-	Yes	Yes	-	-
IE	Fórsa	No data	No	Yes	No	No	-	-
IE	SIPTU	No data	No data	No data	No data	No data	-	-
IT	UILPoste	Yes	Yes	Yes	Yes	Yes	Yes (transport branch of UIL, DHL, UPS)	-
IT	FNC-UGL	Yes	Yes	Yes	Yes	Yes	-	-
IT	Assidipost-Federmananger	No data	No data	No data	No data	No data	No data	-
LT	AB Lietuvos paštas profesinė sąjunga	Yes	Yes	Yes	Yes	Yes	-	-
PL	ZZPP	Yes	Yes	Yes	No	No	-	-
PT	Sincor	Yes	Yes	Yes	Yes	Yes	-	-
PT	Sinquadros	Yes	Yes	Yes	Yes	Yes	-	-
PT	Fentcop	Yes	Yes	Yes	Yes	Yes	-	-
PT	Sicomp	Yes	Yes	Yes	Yes	Yes	-	-

Member State	Trade union	NACE 53.10		USP	NACE 53.20		EU multi-national companies/ non-EU operators	European affiliation
		Mail	Parcels		Mail	Parcels		
PT	CGSI	Yes	Yes	Yes	Yes	Yes	-	-
PT	Sictex	Yes	Yes	-	Yes	Yes	-	-
PT	SITIC	Yes	Yes	-	Yes	Yes	-	-
SE	Unionen	Yes	Yes	Yes	Yes	Yes	Yes (DHL, UPS)	-
SE	SACO-Posten	Yes	Yes	-	No	Yes	-	-
SE	ST	Yes	Yes	Yes	Yes	Yes	-	-
SE	SRAT	Yes	Yes	-	No	Yes	-	-
SE	Ledarna	Yes	Yes	-	Yes	Yes	-	-
SE	Akavia	Yes	Yes	Yes	Yes	Yes	-	-
SI	SZS Alternativa	Yes	Yes	-	No	No	-	-
SI	ZSSS-SDPZ	Yes	Yes	Yes	No	Yes	-	-
SI	Trade union of DHL	No	No	-	No	Yes	-	-

Note: Trade unions marked with bold font indicate coverage of all the activities in the postal and courier activities sector. A complete list is available in Table 64 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

Table 53 shows that, out of the 26 non-represented trade unions for which membership data on the membership trend were available, 10 recorded an increased membership, which contrasts with the general membership trend described in Section 2.1 (see Table 17). Nine non-represented trade unions reported a decrease in their membership; that is close in number to the seven trade unions reporting a stable number of members in the past three years. In terms of the ranking of trade unions in the postal and courier activities sector in their countries, as already mentioned above, none of the three trade unions representing postal workers in Slovenia are represented in the postal services ESSDC. The largest trade union from Poland is also not represented. The second largest trade unions in the postal and courier activities sector from Croatia, Cyprus, Czechia, Denmark, Estonia, Hungary, Ireland and Lithuania are also not represented.

Table 53: Overview of national trade unions not represented in the postal services ESSDC

	Total	Trend	Ranking in the entire postal and courier activities sector
Number of trade unions	46	Increasing: 10 (CZ, DK, FR, ES, FI, HR, PT, SE) Stable: 7 (CY, DK, FR, IE, SE) Decreasing: 9 (BG, CY, EE, FR, HR, HU, LT, PL) No data: 20 (ES, FI, IE, IT, PT, SE, SI)	Largest: 2 (PL, SI) 2nd largest: 8 (CY, CZ, DK, EE, HR, HU, IE, SI) 3rd largest: 4 (BG, CY, HR, SE, SI) No data: 3 (DK, ES, IT)

Note: A complete list of trade unions and their membership strength is available in Table 17 in Section 2.1.

Source: Network of Eurofound Correspondents, 2023

Table 54 shows that 36 of the 46 non-represented trade unions from 17 Member States (Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Hungary, Ireland, Italy, Lithuania, Poland, Portugal, Slovenia, Spain and Sweden) are involved in collective bargaining for the postal and courier activities sector. Looking at the level of collective bargaining for the non-represented trade unions, involvement in sector-level bargaining was recorded for 22 trade unions from seven Member States. Additionally, 25 trade unions from 14 Member States engaged in company-level bargaining. In terms of the different parts of the sector, the non-represented trade unions bargain for both NACE 53.10 and NACE 53.20. Twenty-five of the 46 non-represented trade unions cover the employees of national USPs in their bargaining in twelve countries, while 6 trade unions from four countries cover the workers employed in the other postal and courier services by European multinational postal companies and/or by non-EU operators.

Table 54: Overview of non-represented trade unions involved in collective bargaining

	Totals	NACE 53.10	USP	NACE 53.20	EU multinational companies/non-EU operators
Number of non-represented trade unions	46	39	25	34	6
Number of Member States	17	16	12	13	4
Number of non-represented trade unions involved in any collective bargaining	36	31	25	24	5
Number of non-represented trade unions involved in sector-level collective bargaining	22	22	22	15	2
Number of Member States	7	7	7	6	2
Number of non-represented trade unions involved in company-level collective bargaining	25	25	25	23	5
Number of Member States	14	13	13	13	4
Member States with no trade unions involved in collective bargaining	1				

Note: A complete list of trade unions is available in Table 65, and additional information on collective bargaining agreements is available in Table 71 in Annex 1.

Source: Network of Eurofound Correspondents, 2023

The vast majority of the non-represented trade unions (37 out of 46) are considered representative based on mutual recognition or as a result of meeting legal criteria set in national legislation (Table 55). There are seven trade unions in Bulgaria, Croatia, Cyprus, Hungary, Slovenia and Spain that do not meet the representativeness requirements. The Estonian affiliate is not counted as there is no applicable concept for the representativeness of social partners in Estonia. Only 15 of the 46 non-represented trade unions are involved in bipartite or tripartite social dialogue bodies for the postal sector or related sectors. More than half of the non-represented trade unions (37 out of 46) are regularly consulted by the government. Only in Croatia, France and Slovenia are none of the non-represented trade unions consulted. It is noteworthy that no trade unions in the postal and courier activities sector in Croatia and Slovakia are consulted, as listed in Table 35 in Section 2.5. More than half of the non-represented trade unions (31 out of 46) are also affiliated to a national cross-sectoral federation.

Table 55: Situation in the industrial relations landscape of national trade unions not represented in the postal services ESSDC

	Total	Trade unions recognised as representative based on national criteria	Trade unions involved in bipartite or tripartite bodies	Trade unions consulted by government	Trade unions affiliated to a national confederation
Number of trade unions affiliated to UNI Europa	46	37 26 based on mutual recognition, 11 based on legal requirements, 0 based on both	15	37	31
Number of Member States	16	14	8	11	14
No data		1 in ES	3 in ES, 1 in FI, 2 in IE, 2 in IT	3 in ES, 1 in FI, 1 in IT, 1 in PL, 5 in PT	

Note: A complete list of trade unions is available in Table 65 in Annex 1.

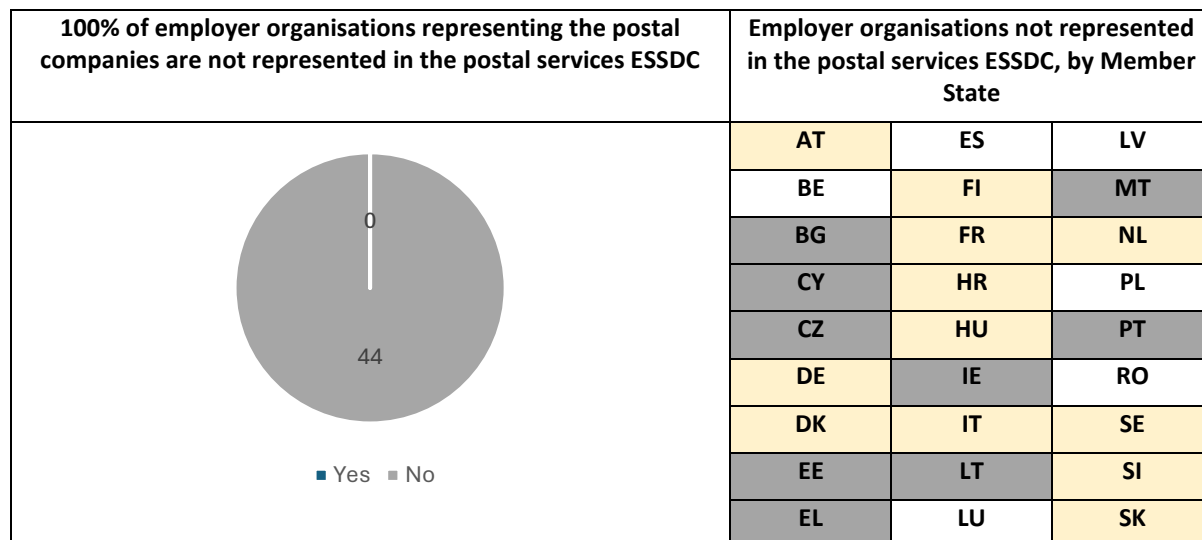
Source: Network of Eurofound Correspondents, 2023

3.5. Employer organisations not represented in the postal services ESSDC

Out of the 44 employer organisations in the postal and courier activities sector identified in this study, none is affiliated to PostEurop, as the organisation has companies, not employer organisations, as members. Based on the limited data available on the number of member companies represented by these 44 employer organisations, they represent around 12% of the over 20,000 companies in the

entire postal and courier services sector in the EU27. There were no data available on the total workforce employed by these companies.

Figure 20: Share (and number) of national employer organisations representing postal companies postal not represented in the postal services ESSDC, EU27



Notes: Grey shaded cells indicate countries with no employer organisation in the postal and courier activities sector; yellow shaded cells indicate countries in which the national USP (affiliated to PostEurop) is a member of the employer organisation; cells with no shading indicate countries in which there is an employer organisation representing postal companies, but the employer organisation does not represent the national USP, affiliated to PostEurop.

Source: Compilation based on data in Table 66 in Annex 1

However, 16 (or 36%) of the 44 employer organisations from 12 countries have the PostEurop affiliate among their members (Figure 20). This is the case in Austria, Croatia, Denmark, Finland, France, Germany, Hungary, Italy, the Netherlands, Slovakia, Slovenia and Sweden. From the 18 countries in which postal and courier employer organisations exist, the national USD companies in Belgium, Latvia, Luxembourg, Poland, Romania and Spain are not members of the postal employer organisations identified in this study. In Luxembourg, the employer organisation predominantly covers the transport sector, as well as companies active in other postal services. In Poland, Romania and Spain, the postal employer organisations exclusively represent companies active in other postal services (NACE 53.20).

As Table 56 shows, 36 (or 82%) of the 44 employer organisations are organising companies active in the other postal services part of the sector (NACE 53.20), as this is the part of the sector in which the majority of the companies in the postal and courier activities sector are recorded. Eight employer organisations represent European multinational companies active in the other postal services; these companies operate in Denmark, France, Germany, Latvia, Luxembourg, the Netherlands, Spain and Sweden. Two out of the eight also represent non-European operators active in their countries in NACE 53.20.

Table 56: Employer organisations in the postal and courier activities sector that are not represented in the postal services ESSDC

Member State	Employer organisation/ business association	NACE 53.10 – Universal postal services			NACE 53.20 – Other postal and courier services				European affiliation
		Mail	Parcels	USD	NACE 53.20	Mail	Parcels	Non- EU/EU MNCs	
	Total number of employer organisations	16	17	16	36	33	33	8	10
AT	VÖZ								No
AT	WKO-FGW								No
AT	WKO BS Handel								No
AT	WKO FVSp								No
AT	WKO FVG								No
BE	WFFE								Indirectly via VBO- FEB to BusinessEurope
BE	Febetra								IRU
BE	UPTR								UETR
BE	TLV								UETR
DE	AGV Postdienste							Yes (DHL)	No
DK	DI							Yes (DHL)	No
DK	DMA								No
ES	AEM							Yes (DHL)	No data
ES	ANEB								No
ES	Asempre								European Express Association
ES	UNO								No
FI	ALT								
FI	Finnmedia								NME, EMMA, AER, FEP and Intergraf
FI	Palta								No
FR	FNTR								No
FR	Union TLF								No
FR	OTRE								No
FR	SOP							Yes (DPD)	No data

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

Member State	Employer organisation/ business association	NACE 53.10 – Universal postal services			NACE 53.20 – Other postal and courier services				European affiliation
		Mail	Parcels	USD	NACE 53.20	Mail	Parcels	Non- EU/EU MNCs	
HR	HUP								No
HU	Stratosz								No
IT	Confindustria								No data
IT	FISE-Assoposte								No data
IT	FISE-ARE								No data
IT	CNA								No data
LU	GT							Yes (DHL)	No data
LV	PKB							Yes (DPD)	No
LV	LLA								No
NL	TLN							Yes (DPD, DHL and UPS)	No
PL	Pracodawcy RP								SGI Europe
RO	PSC								No
SE	Kommunikations- företagen								No
SE	Transportindustri- förbunden							Yes (DHL, UPS)	Clecat
SE	Medieföretagen								No
SE	BA								Clecat via Transport- företagen
SI	GZS-ZPZ								No
SI	ZDS								No
SK	ÚDPT SR								
SK	AZZZ SR								
SK	ZLZ SR								FIATA, Clecat

Note: Yellow shaded cells indicate countries in which the national USP (affiliated to PostEurop) is a member of the employer organisation. MNC, multinational company.

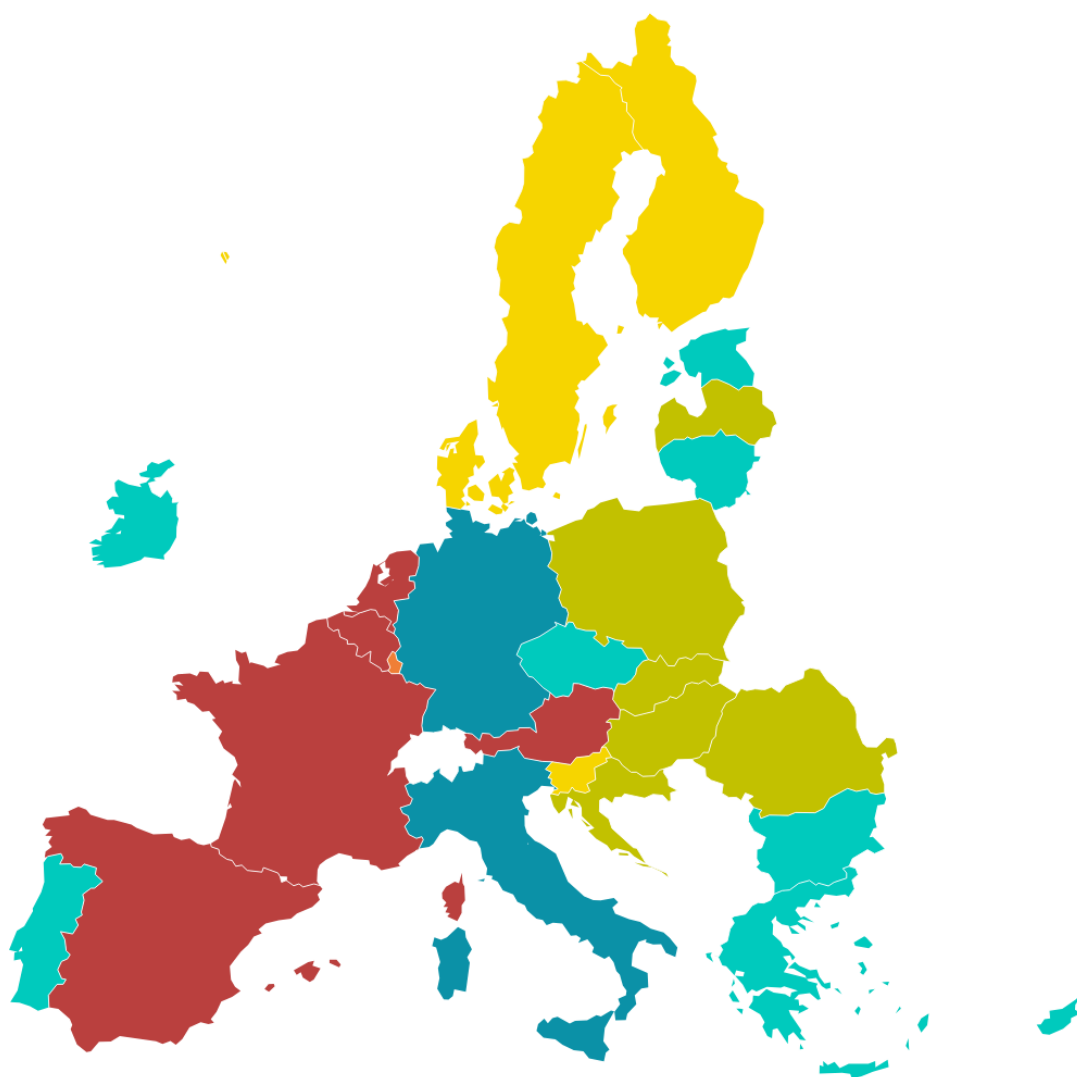
Source: Network of Eurofound Correspondents, 2023

Table 24 and Table 25 in 59 show that member companies of employer organisations are evenly distributed across different company size groups, in contrast to the PostEurop members, which represent very large companies in all Member States. Furthermore, looking at the size group of companies that contribute the most in terms of membership fees paid to national employer organisations, the SMEs (enterprises of 10–249 employees) are the most important contributors in 11 of the countries in which employer organisations are present in the postal and courier activities sector (Table 24 in 59). Thus, the SMEs active in other postal services across all the Member States are not represented in the postal services ESSDC.

In terms of involvement in collective bargaining, 29 out of 44 employer organisations are involved in collective bargaining for the postal and courier activities sector, most of them (26) in other postal and courier services (NACE 53.20) subsector. As Table 28 in 114 shows, the sector-level collective bargaining in which the employer organisations are involved produces more agreements than company-level collective bargaining in absolute terms (29 versus 6) as well as in country terms (with employer organisations in 12 countries engaged in the sector-level agreements, and employer organisations in 5 countries engaged in company-level agreements). In 6 of the 18 Member States in which postal and courier employer organisations exist, they are not involved in any type of bargaining: Croatia, Hungary, Latvia, Luxembourg, Poland and Romania. As mentioned previously, companies in France and Luxembourg operating in NACE 53.20 are represented by employer organisations in the transport sector, so the collective bargaining of the transport sector applies (Figure 21).

Figure 21: Companies in the postal and courier activities sector covered by the employer organisations' collective bargaining

■ All types of companies and in both parts of the sector ■ Both parts of the sector but not all types of companies ■ No employer organisation ■ None ■ Only NACE 53.20 ■ Transport collective bargaining



Source: NEC 2023 • Created with Datawrapper

Source: *Compilation based on data in Table 29 in 59*

Just under half of the employer organisations in the postal and courier activities sector are regularly consulted by the government on matters related to the postal and courier activities sector, and the majority of them (34 out of 44) are recognised as representative based on national legislation or mutual recognition (Table 29 in 59).

3.6. Other European organisations with some sectoral national membership

There are nine national sectoral trade unions in seven Member States affiliated to other European organisations. Five of these trade unions are affiliated to UNI Europa for the postal and courier activities sector.

Table 57: Other European organisations to which some national postal trade unions are affiliated

Member State	Trade union	NACE 53.10 – USO and USD		NACE 53.20 – Other postal services		Other European affiliation
		Mail	Parcels	Mail	Parcels	
Number of trade unions	9	4	7	6	8	9
Share of trade unions (%)	8	3	6	5	7	8
Number of Member States	7	4	6	5	6	7
BE	ACV Puls (ACV-CSC)	No	Yes	Yes	Yes	ETF
BE	BTB (ABVV-FGTB)	No data	No data	Yes	Yes	ETF
CY	OEKDY – SEK	Yes	Yes	No	No	EPSU
DE	ver.di	Yes	Yes	Yes	Yes	EPSU, ETF, EFJ
DK	HK	Yes	Yes	Yes	Yes	UNI ICTS, UNI Graphical, UNI Commerce
EE	ETTA	No	Yes	No	Yes	ETF (actively involved in statutory bodies)
FI	AKT	No	Yes	No	Yes	ETF
FI	Industrial Union	Yes	Yes	Yes	Yes	IndustriAll, EFBWW
SE	Transport	No	No	Yes	Yes	ETF

Note: Light blue shaded cells indicate trade unions affiliated to UNI Europa for the postal and courier activities sector. Bold text indicates coverage of the activities in the entire sector.

Source: Network of Eurofound Correspondents, 2023

Table 57 shows that 8% of trade unions identified in this study are members of other European organisations. Among them, parcel activities are prevalent, both NACE 53.10 and NACE 53.20 activities. In Denmark, Finland and Germany, at least one trade union is active in both NACE 53.10 and NACE 53.20. Furthermore, six out of nine trade unions are affiliated to the European Transport Federation (ETF), indicating the proximity of the transport and postal and courier activities sectors. Two trade unions from Cyprus and Germany are also members of EPSU. EFJ, IndustriAll, EFBWW, UNI Graphical,

UNI ICTS and UNI Commerce have also been mentioned as European-level organisations to which at least one trade union with members in the postal and courier activities sector is affiliated.

On the employers' side, Table 58 shows that 22% of employer organisations identified in this study are members of European organisations. All of them represent companies in the parcel activities in NACE 53.20. In Finland, Slovakia and Sweden, at least one of the employer organisations affiliated to a European association outside the postal and courier activities sector covers all the activities in both NACE 53.10 and NACE 53.20. Furthermore, 7 out of 10 employer organisations are affiliated to European organisations covering the transport sector, which again indicates the proximity of the sectors, as was the case for the trade unions (Table 57).

Three employer organisations from Slovakia and Sweden, with companies active in both parts of the postal and courier activities sector, are affiliated to the European Association for Forwarding, Transport, Logistics and Customs Services (Clecat). The same employer organisation from Slovakia is also a member of the International Federation of Freight Forwarders Associations (FIATA). Two employer organisations from Belgium, covering only the other postal and courier services (NACE 53.20), are members of the European Road Haulier Association (UETR). Another employer organisation from Belgium with members only in the other postal and courier services (NACE 53.20) is a member of the World Transport Organisation (IRU). An organisation representing Spanish companies in the other postal and courier services (NACE 53.20) is a member of the European Express Association. One Finnish employer organisation is a member of News Media Europe (NME), the European Magazine Media Association (EMMA), the Association of European Radios (AER), the Federation of European Publishers (FEP) and Intergraf. Finally, the Polish employer organisation is a member of SGI Europe.

Table 58: Other European organisations representing national employer organisations organising postal companies

Member State	Employer organisation/ business association	Members in NACE 53.10			Members in NACE 53.20			European affiliation
		Mail	Parcels	USD	Mail	Parcels	EU multi-national companies/ non-EU	
Number of employer organisations	10	2	4	3	9	10	1	10
Share of employer organisations	22%							
Number of Member States	6	2	3	3	6	6	1	6
BE	WFFE				Yes	Yes		Indirectly via VBO-FEB to BusinessEurope
BE	Febetra				Yes	Yes		IRU
BE	UPTR				Yes	Yes		UETR
BE	TLV				Yes	Yes		UETR

Member State	Employer organisation/ business association	Members in NACE 53.10			Members in NACE 53.20			European affiliation
		Mail	Parcels	USD	Mail	Parcels	EU multi-national companies/ non-EU	
ES	Asempre				Yes	Yes		European Express Association
FI	Finmedia		Yes	Yes	Yes	Yes		NME, EMMA, AER, FEP, Intergraf
PL	Pracodawcy RP				Yes	Yes		SGI Europe
SE	Transportindustri förbunden	Yes	Yes	Yes	Yes	Yes	Yes, DHL and UPS	Clecat
SE	BA		Yes			Yes		Clecat via Transport-företagen
SK	ZLZ SR	Yes	Yes	Yes	Yes	Yes		FIATA; Clecat

Note: Light yellow shaded cells indicate employer organisations representing the USP in the postal and courier activities sector. Bold text indicates coverage of the activities in the entire sector.

Source: Network of Eurofound Correspondents, 2023

3.7. Capacity to negotiate and represent member organisations

One of the European Commission's criteria for EU-level social partners to be consulted, as described in European Commission Decision 500, is that:

they shall consist of organisations, which are themselves an integral and recognised part of Member States' social partner structures and have the capacity to negotiate agreements, and which are representative of several Member States.

(European Commission, 1998)

Based on Article 155 of the TFEU, European sectoral social partner organisations need to prove their capacity to negotiate on behalf of their members and to enter 'contractual relations, including agreements' (Article 155 TFEU), that is, they must have the capacity to commit themselves and their national affiliates. A European organisation has the capacity to negotiate such an agreement if it has received a mandate to do so from its affiliates, or if it can receive such a mandate in accordance with a given mandating procedure.

Eurofound has applied the criterion of the 'capacity to negotiate' to both the EU-level partner associations and, in the bottom-up approach, the national organisations in order to assess their relevance. Following these arguments, the standard Eurofound methodology for assessing the criteria of being an 'integral part of Member State industrial relations' and the 'capacity to negotiate' applies the 'capacity to negotiate agreements' at both EU and national levels. The mandate or mandating

procedure can be either **statutory** (that is, laid down in the constitution of the organisation or annexed to them) or **non-statutory** (that is, laid down in secondary documents, such as rules of procedure, memoranda of understanding or ad hoc decisions by the governing bodies of the organisation). Finally, in the absence of the above procedures, management and labour may have an **intrinsic capacity to negotiate** as proven by their practical involvement in matters such as binding agreements, declarations or joint opinions.

As described in Section 0.2, PostEurop and UNI Europa have been working in a Joint Postal Committee and proposing sector-related opinions and suggestions to the national and European institutions since as early as 1995. **PostEurop** represents the postal operators that provide universal services and have designations as postal operators to the UPU. PostEurop is based in Brussels, Belgium, and is governed by a Board of Directors, elected by members during the annual General Assembly. The Board is led by an elected Chairperson. PostEurop is a member-driven association, where postal operators conduct the activities. The General Secretariat is in charge of coordination work; however, the coordination is implemented by PostEurop members, namely the postal companies. The Social Affairs Committee, an autonomous internal body, is authorised to make decisions under the umbrella of PostEurop's member companies on issues regarding social dialogue in the postal sector.

UNI Europa has a dedicated structure for the postal and courier and logistics industries: UNI Europa Post & Logistics. It is headquartered in Brussels, Belgium, and its role is to support and implement decisions of its statutory bodies in order to build a social and democratic Europe. The main statutory body is the UNI Europa Regional Conference, which has a Regional Executive Committee elected by a simple majority of the delegates. The Regional Executive Committee is formed of a President, Vice-Presidents, a Regional Secretary and presidents representing different UNI Europa sectors, including Post & Logistics, the Women's Committee, the Youth's Committee, and the Professional and Managerial Staff Committee. The UNI Europa Post & Logistics section and its executive are elected every four years. The Regional UNI Europa Post & Logistics Conference occurs every four years and elects the UNI Europa Post & Logistics steering group representing each area in the European region and its regional president. The Post & Logistics Committee meets at least once a year to decide on its activities and actions. The UNI Europa Post & Logistics Committee is composed of trade unions affiliated to UNI Europa Post & Logistics. The Secretariat is responsible for implementing the decisions of the regional conference and the steering group.

Since 2017, **CESI** has also participated in the postal services ESSDC based on a memorandum of understanding (MoU) between UNI Europa and CESI, which provides CESI with two seats on the postal services ESSDC, as described in Section 0.2. CESI's supreme governing body is the Congress, consisting of delegates representing trade unions based on their size. The Congress meets at least once every four years and is convened by CESI's Board, which meets at least once per year. The decisions of CESI's operations are administered by a Presidium, in accordance with decisions taken by the Congress and the Board. The General Secretariat, headed by a Secretary General, runs the policy and administrative business in line with directions provided by the Congress, Board and Presidium. Content-related work to prepare policy advocacy and social dialogue activities is carried out by sectoral expert commissions, which feature expert representatives from CESI's member organisations. In the field of postal services, CESI runs an Expert Commission on Post & Telecoms, headed by a President and Vice President.

To date, the ESSDC for the postal services has issued some 30 texts since the formal establishment of the postal services committee in 1999 (Table 59). These texts include 11 joint declarations, 1 set of guidelines, 10 joint opinions, 7 policy orientations and 1 procedural text.

Table 59: Joint texts of the European social partners participating in the postal services ESSDC

Date	Topic of the joint opinion or agreements
3 April 1995	Opinion on the development of postal services
13 May 1995	Statement of the Joint Committee on Postal Services' working party on postal services policy
21 November 1995	Opinion adopted on the measures proposed by the European Commission for the organization of postal services within the European Union
6 March 1996	European Union Joint Postal Committee – Opinion of the draft communication of the European Commission
21 November 1996	Postal Joint Committee opinion on the Notice from the Commission on Services of General Interest in Europe
21 November 1996	Joint Postal Committee opinion on the regulatory framework for the organisation of the postal sector
21 November 1996	Joint Postal Committee opinion on the Commission's draft notice on the development of social dialogue at Community level
21 November 1996	Joint Postal Committee opinion on the survey on employment in the postal sector launched by the European Commission
14 April 1997	Proposals for studies to be carried out in 1997
14 April 1997	Proposals for a colloquium on universal postal service within the European Community
14 April 1997	Opinion on the regulatory framework for the organisation of the postal sector
1 December 1997	Opinion on the study of the European Commission on employment trends in the European postal sector published in July 1997
1 December 1997	Opinion on the study programme of the Commission currently being launched
26 March 1998	Draft glossary and comparative table on work accidents in the postal sector
1 June 1998	Agreement between the trade unions and the employers in the postal sector in Europe – Promoting employment in the postal sector
24 November 1998	Memorandum on the surveys
1 January 1999	Rules of procedure of the Social Dialogue Committee within the postal sector

29 November 2000	Round table – ‘Training and skills development’
1 January 2001	Equal opportunities in the postal sector – Good practices
14 December 2001	Joint declaration by the Conference of the European social partners from the postal sector on enlargement
16 January 2004	Common website postal sector – ‘Social dialogue online PostSocialDialogue’
23 November 2005	Joint statement of the European social partners in the postal sector on corporate social responsibility
22 June 2006	Joint declaration on training and skills development
22 June 2007	Joint declaration on the evolution of the postal sector
12 June 2009	Joint declaration on accident prevention in the postal sector
18 April 2012	New joint declaration on postal sector evolution
4 April 2013	Joint conclusions on environment
21 November 2014	Joint declaration on matching skills and jobs in the European postal sector
17 July 2015	Joint declaration on demographic change in the European postal sector
1 December 2016	Joint declaration on the role of social dialogue in the transformation of the postal sector
21 November 2019	Joint declaration on the review on the Postal Services Directive
6 December 2019	Joint declaration on training in the digital era
13 November 2020	Joint contribution of the European social dialogue in the postal sector – Consultation on the Postal Services Directive
30 November 2022	Joint declaration on training and work environment in the digital transition

Source: European Commission, Social dialogue texts database, undated

PostEurop

Following the adoption of PostEurop’s statutes on 1 June 2022, PostEurop does not have a statutory mandate to negotiate agreements. Since no agreements have been signed in the postal services sector, PostEurop has not displayed an intrinsic capacity to negotiate. However, PostEurop’s autonomous internal body, the Social Affairs Committee (SAC), dating from 14 June 1999, has since its establishment been authorised to make decisions in the relevant area on behalf of the enterprises concerned. Each document to be signed is shared within the SAC of PostEurop, which is composed of the employers

who represent PostEurop in European social dialogue. According to the SAC's rules of procedure, this committee 'shall take decisions under the umbrella of PostEurop on issues concerning social dialogue in the postal sector'. This involves in particular the fact that 'it shall take ... the initiatives required to further the common interests between employers and employees in the postal sector'. If agreed by its members, the SAC decides, based on a case-by-case evaluation, to enter into negotiations with the trade unions of the sector. As stated in the rules of procedure, 'the Chair shall report on Committee activities to the ... Management Board direct. ... The Committee Members are authorised to take decisions in the relevant area of behalf of the enterprises concerned.' The PostEurop Board is in particular informed of the signature of joint documents through regular progress reports on the activities of all its working groups.

UNI Europa

According to Article 3.1 (o) of its statutes from 5 October 2011, **UNI Europa is endowed with a clear statutory mandate:** UNI Europa shall seek to fulfil the objectives by, inter alia, 'undertaking collective bargaining and negotiating agreements in the region upon mandate of the UNI Europa Executive Committee'. Additionally, 'UNI Europa shall seek to fulfil the objectives as identified in Article 2 by ... undertaking collective bargaining and negotiating agreements in the region upon mandate of the UNI Europa Executive Committee.' The statutes do not contain more specific provisions on how this mandate is given or on the process of ratification of agreements concluded. Any social partner agreement that is concluded would require an endorsement by the sectoral responsible body and the UNI Europa Executive Committee.

CESI

On the basis of its December 2020 constitution, CESI does not have a statutory mandate to negotiate, and non-statutory documents proving a non-statutory mandate are not available. In 2015, CESI signed the *General framework for informing and consulting civil servants and employees of central government administrations* (see EUPAE and TUNED, 2015), and in 2022 CESI signed the *European framework agreement of European social dialogue committee for central government administrations on digitalisation* (see EUPAE and TUNED, 2022). Having done so, **CESI has displayed an intrinsic capacity** to negotiate agreements, as per Article 155 of the TFEU.

3.8. Effective participation in postal services ESSDC

In order to assess the effective participation of UNI Europa and PostEurop in the postal services ESSDC, the attendance of the meetings held during 2020, 2021, 2022 and 2023 was analysed. Three meetings per year were held in each of the four years, either face to face or via videoconference, in February/March, June and November/December each year. It is noteworthy that, as explained in Section 0.2, CESI is part of the postal services ESSDC based on the 2017 MoU between UNI Europa and CESI, which states that the CESI representation on the ESSDC is composed of two seats only. For this reason, CESI is not included in the analysis below (Table 60).

Table 60: Effective participation in the postal services ESSDC, 2020–2023

	2020	2021	2022	2023
Member States with trade unions participating in the postal services ESSDC (out of 26)	16 Member States: BE, BG, DE, EE, EL, ES, FI, FR, HU, IE, IT, LT, NL, PL, PT, SE	15 Member States: BE, BG, DE, DK, EE, ES, FI, FR, IT, LT, LV, NL, PL, PT, SE	14 Member States: BE, BG, CZ, DE, EE, ES, FI, FR, HU, LT, LV, PL, PT, SE	17 Member States: BE, BG, CY, DE, EE, EL, ES, FR, HU, IE, IT, LT, LV, NL, PL, PT, SE
Member States where UNI Europa has an affiliate but no participation in the postal services ESSDC (out of 26)	10 Member States: AT, CY, CZ, DK, HR, LU, LV, MT, RO, SK	12 Member States: AT, CY, CZ, DE, DK, EL, HR, LU, LV, MT, RO, SK	12 Member States: AT, CY, CZ, DE, DK, EL, HR, LU, LV, MT, RO, SK	10 Member States: AT, CZ, DE, DK, FI, HR, LU, MT, RO, SK
Member States where PostEurop has members participating in the postal services ESSDC (out of 27)	15 Member States: AT, BG, DE, EL, ES, FI, FR, HR, IE, IT, NL, PL, PT, RO, SE	17 Member States: AT, BG, DE, EE, EL, ES, FI, FR, HR, IE, IT, LT, MT, NL, PL, PT, RO	18 Member States: AT, BE, BG, CY, DE, EE, EL, ES, FI, FR, HR, IE, IT, LT, NL, PL, PT, RO	13 Member States: AT, BG, CY, DE, EL, ES, FI, FR, IE, IT, LT, NL, PT
Member States where PostEurop has a company affiliated but no participation in the postal services ESSDC (out of 27)	11 Member States: BE, CY, CZ, DK, EE, LT, LU, LV, MT, SI, SK	9 Member States: BE, CY, CZ, DK, LU, LV, SE, SI, SK	9 Member States: CZ, DK, HU, LU, LV, MT, SE, SI, SK	14 Member States: BE, CZ, EE, DK, HR, HU, LU, LV, MT, PL, RO, SE, SI, SK

Notes: Red font indicates Member States from which delegates did not attend some postal services ESSDC meetings between 2020 and 2023, despite being affiliated to a European social partner organisation participating in the postal services ESSDC; bold font indicates Member States from which delegates never attended the postal services ESSDC meetings between 2020 and 2023.

Source: Authors' compilation based on data from European Commission (undated)

Table 60 shows that, from 2020 to 2023, trade unions affiliated to UNI Europa from 14 to 16 Member States have been represented in the postal services ESSDC. Belgium, France and Portugal were represented by more than one trade union in most of these meetings. UNI Europa members from eight Member States (Austria, Croatia, Czechia, Denmark, Luxembourg, Malta, Romania and Slovakia) did not attend any of the postal services ESSDC meetings organised between 2020 and 2023.

The trade unions affiliated to CESI are represented by the sector Trade and Council representative and the deputy representative, based on the MoU between UNI Europa and CESI, which provides CESI with two seats only.

On the employers' side, between 13 and 18 PostEurop members had delegates on the postal services ESSDC from 2020 to 2023. PostEurop member companies from six Member States (Czechia, Denmark, Latvia, Luxembourg, Slovakia and Slovenia) did not attend any of the meetings between 2020 and 2023.

Looking at the effective participation, it is noteworthy that the meetings organised in the framework of EU co-funded projects with the postal services ESSDC record a high level of attendance from both

employers affiliated to PostEurop and trade unions affiliated to UNI Europa and CESI, as described in Section 0.2.

The situation of each European social partner in the postal and courier activities sector, regarding their sector-relatedness, their role in the Member States' social partner structures, their capacity to negotiate agreements on behalf of their members and their adequate structures to ensure effective participation in the work of the postal services ESSDC, is summarised in Table 61 for the entire postal and courier activities sector, and in detail for the two parts of the sector in Table 62.

Table 61: Comparative overview of the social partners in the postal and courier activities sector based on Decision 500 criteria

Criteria	UNI Europa	CESI	PostEurop	Trade unions not in the postal services ESSDC	Employer organisations not in the postal services ESSDC
Sector-relatedness	58 out of 115 trade unions	12 out of 115 trade unions	0/44 employer organisations ⁴⁹ 27 national USPs (NACE 53.10) 8 companies (NACE 53.20)	46 out of 115 trade unions	44 out of 44 employer organisations
Coverage of Member States	~30% of the total EU27 workforce* in 26/27 Member States	~3% of the total EU27 workforce* in 8/27 Member States	~60% of the total EU27 workforce* in 27/27 Member States	~3% of the total EU27 workforce* in 26/27 Member States	~40% of the total EU27 workforce* in 18/27 Member States
Capacity to negotiate	Statutory mandate	Intrinsic capacity	No statutory mandate, no intrinsic capacity. Internal body (SAC) authorised to take to further initiatives for the common interests of members.	n/a	n/a
Adequate structures	14–16 Member States represented in ESSDC in 2020–2023, out of 26 Member States where UNI Europa has affiliates	2 seats, as stated in the 2017 MoU between UNI Europa and CESI	13–18 Member States represented in ESSDC in 2020–2023, out of 27 Member States where PostEurop has affiliates	n/a	n/a

Note: * Percentage calculated based on the available membership data. Given the high share of estimated data at national level, these calculations should be treated with caution.

Source: Authors' compilation based on UNI Europa, 2011; CESI, 2020; PostEurop, 2021

⁴⁹ According to the organisation's statutes, only companies can become PostEurop members.

Table 62: Comparative overview of the social partners' coverage of the postal and courier activities sector, by different parts of the sector

Criteria	UNI Europa		CESI		PostEurop		Other EU trade unions		Other EU employer organisations	
	NACE 53.10	NACE 53.20	NACE 53.10	NACE 53.20	NACE 53.10	NACE 53.20	NACE 53.10	NACE 53.20	NACE 53.10	NACE 53.20
Sector-relatedness	44/92 trade unions	44/83 trade unions	8/92 trade unions	5/83 trade unions	0 employer organisations 27 national USPs	0 employer organisations 8 companies	7/92 trade unions	8/83 trade unions 6 in ETF	4/44 employer organisations	10/44 employer organisations 3 in Clecat
Sector breakdown of social partners' coverage (out of the total number of Member States in which a social partner operates)	25/26 Member States	20/26 Member States	6/8 Member States	3/8 Member States	27/27 Member States	8/27 Member States	6/7 Member States	6/7 Member States	3/6 Member States	6/6 Member States
Capacity to negotiate	Statutory mandate		Intrinsic capacity		No statutory mandate, intrinsic capacity. Internal body (SAC) authorised to take to further initiatives for the common interests of members.		n/a		n/a	
Adequate structures	14–16 Member States represented in ESSDC in 2020–2023, out of 26 Member States where UNI Europa has affiliates		2 seats, as stated in the 2017 MoU between UNI Europa and CESI		13–18 Member States represented in ESSDC in 2020–2023, out of 27 Member States where PostEurop has affiliates		n/a		n/a	

Source: Authors' compilation based on UNI Europa, 2011; CESI, 2020; PostEurop, 2021

4. Conclusion

The postal and courier activities sector employed 1.6 million people in over 20,000 companies in the EU27 in 2022. There are 115 trade unions organising workers in the postal and courier activities sector in each of the 27 Member States, and 44 employer organisations representing postal companies in 18 Member States.

UNI Europa has 58 sectoral trade unions affiliated (50%) in 26 EU Member States. Only in Slovenia does UNI Europa not have a member trade union affiliated for its members in the postal and courier activities sector. Twenty-six (45%) trade unions from 15 Member States affiliated to UNI Europa cover all the activities in the postal and courier activities sector equally. Only in Croatia and Poland do the UNI Europa member trade unions not represent the workers in NACE 53.20 in their countries. Forty-two (72%) of the UNI Europa members from 26 Member States cover the employees of the national companies providing universal services under designation (USD) in the postal and courier activities sector, while 15 (26%) of the 58 trade unions also cover the employees of the European multinational companies and those of the non-EU postal operators. More than half (57) of the 106 unions organising workers in large companies are members of UNI Europa. Two-thirds of unions organising workers in companies with 10–49 and 50–249 employees are members of UNI Europa, as are 25 out of 36 unions organising workers in very small companies (1–9 employees). For the postal and courier activities sector, the smaller the company size, the more important the role of UNI Europa becomes for its employees. UNI Europa organises white-collar workers, management and blue-collar workers under all types of contracts, partly contradicting evidence suggesting that unions struggle to represent workers on non-standard contracts. Self-employed workers, who are by far the least represented category, are organised by nine unions, out of which six are UNI Europa members. This shows the central role of the organisation in the representation of self-employed workers. Two categories of postal workers that are poorly covered by unions are the workers of contractors and temporary agency workers. UNI Europa member trade unions have a lower coverage of civil servants in the postal and courier activities sector.

CESI has 12 sectoral trade unions affiliated from eight Member States. Based on the available data for the CESI-affiliated trade unions, eight trade unions cover activities under a universal service obligation (USO) by one or more universal service providers (USPs) (NACE 53.10) in eight Member States. Only five CESI affiliates have members active in other postal services (NACE 53.20): one trade union from France, two from Italy and two from the Netherlands. One trade union from the Netherlands also covers the employees of the European multinational companies. There are no CESI-affiliated trade unions representing the employees of the non-EU postal operators in any of the eight Member State in which these operators are active. Most of the CESI affiliates (11, or 10% of all trade unions) organise workers in companies with more than 250 employees. Only three of the CESI affiliated unions cover the companies with between 50 and 250 employees, and only one union covers companies with fewer than 50 employees. CESI member trade unions represent mostly management, blue-collar workers and white-collar workers in the postal and courier activities sector. Only the Austrian trade union GPF, with sections affiliated to both CESI and UNI Europa for the postal and courier workers, also represents temporary agency workers.

In terms of effective participation in the postal services ESSDC, UNI Europa members from nine Member States did not attend any of the postal services ESSDC meetings organised between 2020 and 2023. CESI participates in the postal services ESSDC based on a memorandum of understanding between UNI Europa and CESI, which allows two seats only for CESI. There are 46 trade unions not represented in the postal services ESSDC. None of the three trade unions organising postal workers in Slovenia are represented in the postal services ESSDC. The largest trade union from Poland is also not represented. The second largest trade unions in the postal and courier activities sector from Croatia, Cyprus, Czechia, Denmark, Estonia, Hungary, Ireland and Lithuania are also not represented in the postal services ESSDC. Out of the 115 trade unions organising workers in the postal and courier activities sector, nine are affiliated to other European organisations. Six of these nine trade unions that represent workers in the postal and courier activities sector are affiliated to the European Transport Federation (ETF), demonstrating the proximity of the transport sector to the postal and courier activities sector.

UNI Europa has a clear sector-related coverage of the workers in the postal and courier activities sector, and its member trade unions are an integral and recognised part of 26 Member States' social partner structures. UNI Europa has a clear statutory mandate to negotiate on behalf of its members and has ensured the effective participation of members in the postal services ESSDC via its structures. CESI has a clear sector-related coverage of the workers in the sector, and its member trade unions are an integral and recognised part of eight Member States' social partner structures. CESI has displayed an intrinsic capacity to negotiate agreements as per Article 155 of the Treaty on the Functioning of the European Union in the central government administrations sector and has ensured the effective participation of one of its members in the postal services ESSDC via its structures. In conclusion, UNI Europa and CESI are the most representative European organisations of postal and courier trade unions.

PostEurop has member companies in all 27 Member States. All the national postal companies providing USD are affiliated to PostEurop, and PostEurop represents the largest employers in the activities under USO (NACE 53.10). The PostEurop affiliate is the largest employer in both parts of the postal and courier activities sector (NACE 53.10 and NACE 53.20) in eight Member States: Czechia, France, Germany, Greece, Malta, Portugal, Slovakia and Sweden. In Cyprus, Finland and Romania, the largest employers in the other postal and courier activities services (NACE 53.20) are not represented by PostEurop.

Of the 44 employer organisations representing companies in the postal and courier activities sector identified in this study, none is affiliated to PostEurop, as, according to PostEurop's statutes, only postal operators, therefore companies, are eligible to be members. Ten out of the 44 employer organisations are affiliated to different European organisations. Seven of the 44 employer organisations are affiliated to European organisations for the transport sector. All seven represent companies in the parcel activities in the NACE 53.20 subsector. The European Association for Forwarding, Transport, Logistics and Customs Services (Clecat) has some representativeness in the postal and courier activities sector, having three national postal and courier employer organisations affiliated in Slovakia and Sweden, which represent companies active in both parts of the postal and courier activities sector.

PostEurop has a clear sector-related coverage of the postal sector, as the only organisation representing the postal operators under a USO by designated USPs that have activities in both parts of the postal and courier sector. PostEurop member companies are an integral and recognised part of all 27 Member States' social partner structures. PostEurop has no clear statutory mandate to negotiate on behalf of its members, but the possibility of entering into negotiations can be found within the rules of procedures of the Social Affairs Committee, a dedicated body under the umbrella of PostEurop that has ensured the effective participation of its members in the postal services ESSDC via its structures.

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Annexes

Annex 1: National data tables

Table 63: Forms of employment in the postal and courier activities sector

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
AT	In the universal service provider (USP) ÖPAG, about 20% of employees are career public servants. When also considering the subsector NACE 53.20, the proportion of civil servants among all sectoral workers is about 13%.	In the USP ÖPAG, about 55% of the workforce are unionised. This high proportion of unionised employees is inherited from when ÖPAG was a fully state-owned monopoly provider with almost all employees being civil servants. Meanwhile, working conditions have become much less attractive and fluctuation among the workforce is high, which is detrimental to a strong union membership base in the enterprise. ÖPAG as the USP is active in both NACE 53.10 (as the only provider) and NACE 53.20. No separate data are available for each NACE code, as trade union (GPF) membership is based on the employer, not NACE subsector.	Due to the high number of self-employed and temporary agency workers, and the temporary nature of work in many instances, it is extremely difficult for trade unions to organise workers. Only about 5% of the workforce is estimated to be unionised. Unionisation among self-employed and undeclared workers is estimated at zero.	Information not available. The new sorting and delivery infrastructures of ÖPAG have created new demand for unskilled work in the postal distribution centres rather than platform-mediated work. Many of the unskilled workers in the distribution centres are migrant workers working on a temporary agency worker basis.	In express and parcel delivery, subcontractors play a crucial role and are primarily hired for delivery services for cost efficiency reasons. Drivers sometimes prefer to work as self-employed subcontractors, as they are not bound by the Working Time Act or other provisions relevant to labour law and can therefore earn more in the short term. Typically, subcontractors are small firms with few vehicles, easily obtaining trade licences for operations. These companies, especially those with vehicles under 3.5 tonnes, require an Austrian base and trade licence. Frequently, subcontractors and their employees have migrant backgrounds. Payment is usually per parcel or stop, contingent on the client's order volume, shifting the risk of underutilised vehicles to the subcontractor. Subcontractors are responsible for covering

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
					expenses such as uniforms, logos, scanners and phones.
BE	In 2021 there were 7,402 civil servants (a decreasing number). Based on rough estimations, this is a minority within the entire sector.	Within the USP Bpost there are well-established trade union delegations and social dialogue organs in place, with enough members to have an impact within the sector (for instance, strikes and actions at Bpost have not been unusual in the past couple of years).	There are a lot of freelancers and temporary agency workers active within this part of sector. These workers are traditionally a lot harder for the unions within the sector to reach. Trade unions have launched initiatives and branches to represent freelancers over the past few years. However, as they are still harder to reach, they are not included within collective agreements.	Platform work is mainly active in food delivery, an activity that is not covered by the major postal companies.	Subcontracting practices are present in all phases, but especially within the delivery phase of the process. For last mile delivery services, large logistical companies make use of subcontractors, especially during periods of the year when there is a lot of demand (such as holiday periods).
BG	No civil servants in the sector.	According to the trade unions, working conditions in the state-owned USP Bulgarian Post are not good. This is largely due to lack of funding for public enterprises over the last 10 years (with many liabilities and almost no new revenue contracts), including lack of funding for repairs and equipment. Employees are affected, as they do not receive uniforms or working clothes. Digitisation is not catching on: employees do not have GPS, scanners or direct payment devices. The manual labour of sorters has not been reduced. There are not enough Euro Pallet trucks. Regarding community spirit, trade unions	There is no difference in the characteristics of the workforce of the state-owned USP in terms of NACE 53.10 and NACE 53.20. It is difficult for trade unions to organise those working in the private companies who are younger (including students) due to a high degree of work turnover. According to an interview with the trade union TUFC, atypical forms of employment were not recorded, but there was neglect in ensuring adequate working conditions (including holidays, payment of contributions due in full and length of working hours), compensated by high remuneration based on a	For the state-owned enterprise in this sector, platforms are not used. There is no information concerning their role in private enterprises.	The state-owned enterprise in the sector is used as a subcontractor to the private enterprises, with an access contract for the postal phases: sorting, transport and delivery.

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
		describe these workers as hard-working people in a collective who help each other.	bonus scheme and additional social benefits.		
CY	Out of the approximately 2,115 employees in the sector, around 600 are public employees in Cyprus Post.	The very high level of organisation indicates that organising workers and having a strong membership are easy in the sector.	Unionisation in the other providers is virtually non-existent, indicating that it is extremely difficult to organise these employees. Interviewees underlined the appearance of multinational companies and the lack of an employer organisation as the main obstacles to their organising efforts.	As of 2023, when the data for this report was collected, platform-mediated work is extremely limited in the postal sector in Cyprus. ⁵⁰	No evidence of subcontracting practices, just indications of prevalence mostly in the transport and delivery phases.
CZ	No civil servants in the sector.	Workers in NACE 53.10 are mostly employees working for Czech Post. There are no detailed data on the type of employment, but, as Czech Post is a state-owned company, the majority of employees are full-time employees with work contracts. According to the trade unions, employees do unpaid overtime work, rest and safety breaks are not observed, and wages are low, which have resulted in a high degree of turnover of employees. Trade unions are active and try to change the working conditions; however, there is a rivalry among them, which	Postal and delivery services are, in general, closely connected with bogus self-employment (except with Czech Post). Drivers, specifically within companies of self-employed workers, are not represented by any trade union. Working conditions are difficult, as no working time or health and safety rules are respected. The wages and work flexibility are, however, higher than in Czech Post, which is why men in particular prefer working in this subsector to in Czech Post. Trade unions in Czechia still do not	Platform workers are common on digital platforms providing delivery of food or home delivery of goods (such as Bolt or Wolt), not postal services.	Subcontracting as a practice is common in the NACE 53.20 subsector, specifically in the delivery phase, where the majority of workers are subcontractors (both self-employed workers and workers within companies). In other phases this practice is less common but can occur.

⁵⁰ G.A.P. Akis Express, one of the two largest companies that are not USPs in Cyprus, has recently introduced Fetch, a platform delivery service for retail shopping.

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
		makes concluding a company-level collective agreement impossible.	organise this group of workers, making this group more vulnerable.		
DE	Civil servants still work at the USP Deutsche Post DHL, which employed 21,203 civil servants in 2021–2022 (5–6% of the sectoral workforce).	In Deutsche Post DHL, civil servants still enjoy lifetime employment and other entitlements that go along with the status. They work alongside employees liable for social security contributions with no such rights. Working conditions of Deutsche Post DHL civil servants and employees are shaped by collective bargaining. At Deutsche Post DHL, the United Services Union (ver.di) and the company concluded a company-level collective agreement, which is also the largest agreement in the sector. Because the union is well established at this former state-owned company and not least because it operates with its own drivers in the delivery phase, ver.di is able to organise a strong membership with comparatively good working conditions.	There is no civil servant status in NACE 53.20. ver.di reports that, in the companies that participate in sector-level collective bargaining (such as DPD, Hermes or UPS), it is able to organise workers and have a stable membership. However, DPD and Hermes operate only with subcontractors in delivery, and these workers are hardly organised. At the company GLS, ver.di is almost not organised at all. At Amazon, ver.di is involved in organising activities but implementing collective bargaining is ‘very difficult’.	According to the ver.di representative, Amazon is working on a platform for delivery, but it is not operational yet. There seem to be some legal challenges to this kind of business model.	Subcontracting plays a role when it comes to the delivery of items. According to ver.di, there are 29,000 subcontractors active in delivery, with an average workforce of 2 employees per company.
DK	There are only a few statutory civil servants left since the privatisation of the postal sector.	It is not difficult to organise the greater part of the sector. There may be some small distributors that the unions do not know and therefore do not approach to demand collective agreements.	No clear data.	None.	There is no evidence of subcontracting practices by the USP PostNord Denmark.

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
EE	No clear data, but most likely none.	The only employer in universal service, Estonian Post, prefers full-time workers. Temporary agency workers and workers on short-term contracts make up about 1% of all workers in the postal and courier activities sector. There are no immigrant workers and no self-employed workers. The average age of the workers is 48 years. According to social partners, workers sometimes work overtime, but employers generally disapprove of this and aim to prevent it. In parcels activities, work is somewhat seasonal with higher demand and more work around certain periods, such as Christmas. According to a social partner, the main issue with working conditions is low salaries.	No evidence of workers in other postal service providers unionising. Other providers seem to be either branches of multinational companies or small, local companies. Part-time and temporary contracts are used in this part of the sector.	Platform-mediated work in courier services has a strong role in the food and beverage industry. However, the platforms are not registered under NACE 53 and are not officially under the postal and courier activities sector.	According to the largest trade union in the sector, subcontracting practices are not very common and employers prefer already contracted workers. Subcontracting is somewhat more often used in rural areas than in towns. In towns, subcontracting is sometimes used in filling or emptying parcel machines. While subcontracting is uncommon, partnerships with other companies are used in each postal phase.
EL	After the full liberalisation of the Greek postal market in 2013 and as part of the transformation plan of the USP ELTA (implementing the framework for the operation of the Hellenic Post in 2020), the number of employees was reduced through a	The majority of the employees of the USP ELTA are permanent employees, with only a few employed periodically. The permanent staff of ELTA are organised in 41 unions throughout Greece, which are members of the Panhellenic Federation of Postal Unions (POST) and traditionally sign a company-level agreement with ELTA.	The employees in NACE 53.20 working in the major companies are organised at company level and sign company-level agreements. Employees in small, local companies or small partner agents of large companies face difficulties in terms of organisation, representation and negotiation of wages and working conditions.	No information. ELTA has recently announced a large-scale modernisation programme, with an emphasis on digitalisation and actions (such as the 'Digital Postman', 'Smart P.O. Boxes' and 'Smart Queuing' pre-defined appointment service), but these programmes have not yet been implemented.	No data are available on the use of subcontracting in the sector today. Trade union representatives indicate that large courier companies use a limited number of employees hired through temporary employment agencies. The practice of subcontracting was used extensively during the COVID-19 pandemic (2020–2021) due to an excessive workload.

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
	voluntary redundancy scheme and employees ceased to be civil servants.				
ES	Civil servants constitute around 14% of employment in NACE 53.10, which means 10.3% of the whole postal and courier activities sector.	In 2021, the USP Sociedad Estatal Correos y Telégrafos had over 90% of its employees on full-time contracts. The average prevalence of temporary workers in NACE 53.10 was significantly higher than the average for all sectors in 2019 (36.1% compared with 26.6% in sector average).	The average prevalence of temporary work in NACE 53.20 was significantly higher than the average for all sectors in 2019 (35.6% compared with the sector average of 26.6%). In 2019, only 15.2% of sectoral employees were women.	No information available, but platform workers mainly operate in the food delivery sector, which is not covered in this sectoral definition.	The most common form used by postal operators to provide universal services across the country is the network of franchises, partners, agents and other actors. In 2021, 61.8% of the registered operators were part of a network, and 10 brands accounted for 60% of the operators. Of the 20,067 enterprises active in NACE 53.20, 84% had no employees, as their workforces were predominantly made up of subcontractors.
FI	No civil servants in the sector, as both Posti Group and Åland Post function as private companies.	In the early morning delivery service, the workforce turnover rate is high, as the job is perceived as a labour-intensive and poorly compensated transport job. The unionisation of this part is low (under Industrial Union). When USP Posti attempted in 2019 to shift its 700 parcel sorters to a collective agreement with worse conditions (that of Industrial Union rather than PAU), the unionisation	Industrial Union indicates that it has members conducting undeclared work in the sector. PAU does not. However, the trade unions' unemployment fund would not approve income gained through undeclared work as a basis for income-related unemployment allowance.	The role of platform-mediated work is large if considering food delivery services. In other services, the role appears to still be small. However, Sanoma Group (operating in magazines and newspapers) uses an Early Bird concept that partially relies on platforms. The Early Bird delivery team consists of platform workers who follow their designated routes independently. The Early Bird app shows the employee the length of the delivery route, the estimated	According to Industrial Union, subcontracting practices are used in every phase.

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
		<p>rate among the employees hiked as a result.</p> <p>Posti announced that it would transfer its parcel-sorting services to Posti Palvelut, a joint-stock company owned by Posti, from the beginning of September 2019. Unlike the parent company, the subsidiary is organised by the employer organisation Finnmedia, which has a collective agreement with Industrial Union rather than PAU. The agreement between Finnmedia and Industrial Union is more favourable for the employer than Palta's and PAU's agreement.</p>		<p>time and the number of newspapers to be delivered as well as earnings. The employee decides when and how much to work.</p>	
FR	Civil servants are still active within Le Groupe La Poste.	The universal service is only provided by La Poste. The workers are mainly employed on permanent	The workforce in this part of the sector is very heterogenous. La Poste acknowledged during a	Platform work exists in the parcel delivery sector (on, for instance, the courier service Stuart), outside	Several court cases exist related to the use of subcontracting in this sector. ⁵¹

⁵¹ On 8 July 2017, the correctional court of Nanterre (Hauts-de-Seine) sentenced La Poste to a fine of €120,000 for illegal labour lending after the 2012 accidental drowning of a courier employed by a subcontractor of its subsidiary, Coliposte. The events took place in late 2012. A 34-year-old courier of Malian nationality died on 8 January 2013, after falling into the Seine three weeks earlier in Boulogne-Billancourt (Hauts-de-Seine) while trying to retrieve a parcel that he had dropped in the river during a delivery on a barge. The Labour Inspectorate's investigation revealed that this young father, who had just obtained his residence permit, was not declared by his employer, DNC Transport, and that the client, Coliposte, a subsidiary of La Poste, could not have been unaware of the situation. The investigation also showed that his declaration was not made until an hour after his death. The Court of Cassation overturned La Poste's conviction in 2021, sending the case to a new trial.

During September 2023, the company Stuart (a subsidiary of La Poste operating in six countries and 125 towns), and its former director, had to answer to the Paris judicial court in relation to suspected concealed work in France in 2016 and 2012. Stuart is suspected of having maintained a wage-earning relationship with its couriers, even though they officially had the independent status of self-employed entrepreneurs. During the hearings, Stuart appeared to be the main client of the courier due to indicators such as reminders following late deliveries, account deactivation in the event of repeated refusal of a delivery and training sessions on the behaviour to be adopted. However, the Paris court considered that the elements in its possession 'were

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
	About 60,000 employees are civil servants (and 140,000 workers have an employment contract), according to the trade unions.	private working contracts or are civil servants.	hearing at the National Assembly that ‘some of La Poste’s subsidiaries could not function without subcontracting’. In addition to the employees of La Poste who work in express delivery subsidiaries such as Chronopost, there are a number of companies that apply the road transport collective agreement to their employees and self-employed workers. The number of these companies has exploded in recent years. Among the people employed by subcontractors, there are undeclared workers (employees whose hours are not declared or self-employed workers who are not registered in the trade register) and undocumented workers. There is a significant increase in the number of workers in NACE 53.20 in various atypical forms of employment (over 20,000 employees according to the FAPT-CGT trade union estimate).	the universal service subsector. Other platforms exist, but there are no data on them. Workers using these platforms are mainly independent but there are also companies with employees or cooperatives. A recent study about workers of the delivery sector in the north-east of Paris provides some data on both food and parcel delivery: 41% of the platform workers are independent, 17.8% are employees, 12% work under another status (such as cooperative or temporary workers), 10.6% combine it with another activity and 18.2% are students under different type of contract (mostly independent).	The proportion of subcontractors increased from less than 25% to 73% in Île-de-France between 2006 and 2012, according to the SUD-PTT union. This use of subcontractors seems to concern all four types of activity.
HR	No civil servants in the sector.	Working conditions are quite favourable and the community spirit	There is a significant fluctuation of employees in the observed sector,	While initially insignificant, platform-mediated work in the	While subcontracting was not widespread in the past, there is

insufficient to acquire the conviction that a salaried relationship linked the couriers to the platforms’. Stuart and its director, on the other hand, were convicted of illegal labour lending. They were accused of having used a company called Branis Courses, to which Stuart subcontracted certain deliveries but whose ‘existence was purely theoretical’ because the platform represented the entire activity of Branis Courses’ employees.

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
		among colleagues is at an adequately high level. For trade unions, it is quite easy to organise workers and they have a strong membership basis in the sector.	which hinders trade unions in including more members.	postal and courier services has gained prominence. These platforms often function as intermediaries rather than employers, connecting individuals seeking additional income for a few hours daily. A smaller group are self-employed persons who are registered in the register of insured persons on the basis of self-employment. These workers are active in the courier service as their main or sole occupation.	now an increasing trend, especially in the parcel and item delivery sector. In many cases, subcontracting linked to platform work involves pseudo self-employment, where workers consistently serve a single employer despite being registered as self-employed. This poses a significant challenge to existing regulatory frameworks. Experts anticipate a substantial rise in self-employment in Croatia over the next decade due to the platform economy, marking a shift from the previous trend of declining numbers since the economic crisis in 2010.
HU	No civil servants in the sector.	Despite predominantly providing full-time employment on an indefinite contract, Hungarian Post has a high staff turnover rate. ⁵² To combat labour shortages, in 2017 the company started to employ temporary and casual workers, which created tension between the	This is the opposite of those working for the USP. Other providers often employ large numbers of contract or subcontracted workers (including individual contractors) instead of permanent employees, which means much lower wage costs for	In postal and courier services, platform-mediated work has not spread in the same way that it has in food delivery. There is one company, Hajtás-Pajtás KFT, a bicycle courier service, which was founded long before the COVID-19 pandemic in 1999. At the very	Subcontracting practices are applied in the areas of transport, clearance and delivery. ⁵⁵ Hungarian Post subcontracted transport capacity, for example, in the vicinity of the capital. BHS Trans and Waberer (road backbone transport) are big transport

⁵² In 2021 alone, 19% of the staff left the company and a further 17% were newly hired. Similar proportions were observed in the previous years as well. More than half of them were people under 30 years old. According to the Hungarian Post's *Sustainability Report*, in the postal outlets, 'much of the reduction in staff numbers were seen in delivery, line operator and mobile postal operator jobs, where the number of employees fell by 5.5%. There was a similar decline in the number of people in the execution area of logistics, with drops in the number of parcel processors and vehicle drivers, partly offset by an increase in the number of parcel delivery workers' (Magyar Posta, 2021).

⁵⁵ The Hungarian Public Procurement Law defines which economic operators qualify as a subcontractor and which as a capacity provider or resource provider.

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
		<p>permanent and casual staff. The company faces a persistent shortage of staff in logistics and delivery, caused by low wages. Since 2010, the company has applied an employment system for persons with disabilities, resulting in the employment of several hundreds of employees with disabilities since its implementation.</p> <p>Despite a historically high unionisation rate in this sector,⁵³ currently trade unions face difficulties due to staff turnover, young workers replacing older workers (sometimes within postal dynasties) without union experience and tradition, atypical forms of employment and the emergence of new professions. Workers are sometimes pressured by redundancies, in spite of existing labour shortages.</p> <p>The working morale has deteriorated after the latest mass closure of post offices due to energy saving in 2022,⁵⁴ and a decrease in</p>	<p>the employers, as they are exempt from high payroll taxes. This type of workforce is almost impossible to organise.</p>	<p>beginning it was a two-man start-up company with two bicycles and with a phone number on a leaflet. Later, Hajtás-Pajtás KFT had 160 couriers, and it has started to be organised in a platform-mediated way.</p>	<p>companies subcontracted by Hungarian Post. Hungarian Post also subcontracted postal service facilities including postmasters and postal agencies; however, their number is constantly decreasing, from 714 in 2010 to only 200 in 2021. The number of self-operated postal service facilities (post offices) has increased from 2,031 in 2010 to 2,430 in 2021. However, the number of municipalities with a mobile mail service (providing clearance and delivery operations mostly in rural areas) is stable, slightly more than 1,000. This is a notable increase from 2022, when their number was near to 300. Since June 2022, the postal clearance service in villages with fewer than 2,000 inhabitants has been taken over by a local company, not Hungarian Post. In larger villages, however, postal services have been integrated into the 220 village shops renewed under the Village Programme of Hungarian Post. Delivery continues</p>

⁵³ It was a highly unionised sector with enthusiastic employees and with a rich cultural life. It was no coincidence that in January 1945, when the fighting in the Second World War was still going on in Budapest, some of the postal workers were already planning to organise a post-war trade union.

⁵⁴ Workers were not made redundant but redistributed among remaining post offices.

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
		real wages that could not be prevented by the union.			to be carried out by Hungarian Post.
IE	There are civil servants in the postal and courier activities sector, but no data on their proportion have been found.	Trade unions have a strong membership basis in the postal and courier activities sector through USP An Post. The strong union density already in existence (in particular with the CWU trade union) in the sector makes it easy for trade unions to organise workers in the sector.	Smaller providers may be more difficult for trade unions to organise, as employees are spread out less densely in smaller depots across Ireland. Some other providers may not have links with unions. Some couriers utilise subcontractors, which can make it difficult for a trade union to organise those workers.	No data.	An Post indicated the use of subcontracting, but not in the post phases (instead, maintenance or procurement services are subcontracted). The courier industry is marked by a fragmented employment system, with layers of contracting and subcontracting – often resulting in delivery drivers being self-employed.
IT	No civil servants in the sector.	The vast majority of the non-executive workforce of the USP Poste Italiane is employed under permanent contracts (93% in full-time equivalent). By 2024, Poste Italiane aims to conclude its industrial plan and welcome a renewed workforce, which should lead to employing approximately 10,000 professionals (8,000 in 2022). These new hires will renew 25% of the workforce and lower the average age to 49.2 years.	No data available.	Poste Italiane provides a digital delivery service (Poste Delivery Web) for sending packages up to 30 kg, both domestically and internationally (a 2D code is used instead of printed shipping labels for domestic deliveries and online customs forms are used for international deliverables). The standard Poste Delivery International service is limited to parcels up to 20 kg and is only available in post offices.	There is some evidence of the use of subcontracting in Poste Italiane in the context of the subscription sale of valuable postcards and stamp collecting products. No evidence in other companies.
LT	No civil servants in the sector.	The main USP in Lithuania, AB Lithuanian Post, the largest company in the sector, is owned by the state. In general, working conditions in this subsector are better regulated, a	More smaller companies operate in this subsector, and the workforce is not organised. There are no trade unions organising workers in any of the	There is no information on the role of platform-mediated work in the postal and courier activities sector in Lithuania. Self-employed platform workers in Lithuania are	There is no comprehensive information, but from some publicly available information suggests that some postal service

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
		long-existing trade union operates in the company and a collective agreement has been signed.	main companies operating in this subsector. ⁵⁶	mainly engaged in food delivery and passenger transport, or ride-hailing, activities.	providers are subcontracting transport services. According to information provided by the trade union LRDPs, Lithuanian Post uses courier delivery services (LP Express).
LU	In 2023, 33% of the employees in postal services were civil servants.	No specific indications discovered.	No specific indications discovered.	None.	The 2012 law on postal services enshrines the complete liberalisation of postal services while guaranteeing the maintenance of a quality universal postal service. This law opens up the sector to competition, while entrusting the universal postal service to POST Luxembourg for seven years. The Luxembourg Regulatory Institute monitors compliance with the universal postal service's obligations.
LV	No civil servants in the sector.	As it is one company with long traditions, it is easier to organise workers.	There are several international companies in the sector, with understanding of social dialogue because of their mother companies.	No role.	No evidence of subcontracting.
MT	No civil servants in the sector.	In regard to the universal services in the sector, there is strong unionisation, with the majority of	There is less of a culture of joining a trade union within the wider sector, particularly among workforces made up of foreign	This is not something that is commonly used in Malta.	Companies that are not USPs have adopted the process of subcontracting (mainly in delivery). Such subcontracting is mostly

⁵⁶ These companies are DPD Lietuva, Omniva Lithuania, Venipak Lietuva, Pašto paslaugos, Itella Logistics, Apskonta, DHL Lietuva, Skubios siuntos and Šiaulių naujienos.

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
		employees of MaltaPost being members of the GWU.	workers. Less is known about the other private companies. In one of these companies (DHL), there is a collective agreement.		focused on delivery of parcels. However, such practices are limited and are mostly implemented among small-sized companies.
NL	No civil servants in the sector.	<p>Recently, PostNL, the biggest company operating in the postal and courier activities sector categorised under NACE 53.10, has announced it will offer a full-time contract (full-time contracts equal 25 hours per week) to all employees with a part-time contract, meaning that 1,000 employees will get a full-time contract.</p> <p>Among the employees of PostNL, there is a good community spirit. Most of the employees are active in mail delivery.</p>	Workers of other providers work either in larger companies (such as DHL, GLS or FedEx) or as subcontractors for PostNL in parcel delivery. The workers of the larger companies are generally covered by a collective bargaining agreement, while the subcontractors are not. Most of the workers in this subsector are harder to organise, according to trade union respondents.	Platform-mediated work is not (yet) used in the sector.	<p>PostNL works with subcontractors in the transport phase and in the delivery phase. They look for professional entrepreneurs who can transport packages and letters, or transport in one or more of their networks.</p> <p>The trade union FNV estimates that 70% of parcel delivery is done by subcontractors.</p>
PL	No civil servants in the sector.	According to the operators' reports, in 2021 the average annual employment in the postal and courier activities sector was 90,463 employees (70,314 in USP Poczta Polska). In 2021, postal services were provided at 38,575 postal contact points, including 7,626 within the USP and 30,949 outlets of alternative operators. Around 50% of all employees of Poczta Polska are trade union members.	In total, as of 31 December 2021, the register included 299 alternative operators not providing universal services. They had hired around 20,149 employees. There were eight operators among companies not providing universal services, employing over 500 employees. A relatively large group are single-person operators (45).	Platform-mediated work is only available in courier services, but applicable to food delivery, not postal services.	There is no evidence of the use of subcontracting practices in Poland in the postal and courier activities sector.

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
PT	No civil servants in the sector. In 1992, CTT ceased to be a public enterprise and was transformed into a business corporation. The employees who belonged to CTT before this transformation 'maintained a status similar to that of civil servants' (according to a Court Decision in May 2021). While these CTT employees are not civil servants, they keep certain rights resulting from their earlier status as civil servants.	The specificities of the workforce in NACE 53.10 are very favourable to trade union organisation. This is confirmed by the trade union density of 73.6% registered by the largest operator, CTT.	The specificities of the workforce in NACE 53.20 are less favourable to unionisation. In 2018, the trade union density in NACE H, Transport and storage (including postal and courier activities), reported by the Ministry of Labour was 24.7%, which was still higher than the total national average of 7.5%.	Insignificant, with only one or a few start-ups.	There is evidence that CTT uses subcontractors for a part of its network of post offices and that CTT and CTT Expresso use subcontracted dispatchers for delivery. No information regarding the share of subcontractors could be found.
RO	No civil servants in the sector.	In the state-owned USP Poșta Română, the only company in NACE 53.10, the standard, full-time employment contract prevails. Only around 10% of the subsector workforce have part-time contracts and around 3% have short-term contracts. The size of the company, but also the public ownership, facilitates the unionisation of workers.	In contrast to NACE 53.10, non-standard employment is prevalent in NACE 53.20. Over half (55%) of the subsector workforce have part-time contracts. There is empirical evidence of self-employment in the subsector, but the proportion is difficult to assess. Self-employed persons, as well as undeclared workers, cannot be unionised and therefore are not represented by the trade unions. One third of the	In Romania, platforms such as Glovo or Bringgo are not part of the postal and courier activities sector; they belong to the information and communications technology (ICT) sector.	Big courier companies subcontract smaller firms to perform different activities, from clearance and sorting to transport and delivery. No data are available on the companies for which subcontracting is prevalent.

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
			subsector employees work in companies with fewer than 20 employees, where collective bargaining is not possible by law.		
SE	There are civil servants in the postal and courier activities sector, but no data on their proportion have been found.	<p>The characteristics of the sector have traditionally allowed for a well-organised sector, both for the employer organisations and trade unions.</p> <p>Additionally, USPs are relatively few. There are currently 25 approved companies for universal service obligation (USO) activities, but PostNord has 80% of the market share, followed by CityMail, which has 19%. Within the USO activity sector, it is therefore relatively easy to organise.</p>	<p>PostNord, the largest actor in the market, does also provide other services, about 50–60% of the subsector volume, and it is generally well organised. However, there are new players, primarily actors setting up postboxes for e-shopping delivery, which are smaller start-up companies and have chosen not to sign a collective bargaining agreement.</p> <p>Some of the new players are in conversation with their relevant trade union. The largest company among the new players (Instabee) has signed a declaration of intent in signing a collective agreement during 2023. These new players have approximately 700 employees.</p>	There are a few new actors in the parcel market, specifically targeting e-shopping. BudBee, a Swedish company later acquired by Instabox, employed a similar model to many other platform work employers. Every employee was self-employed through an invoicing service, Pay Salary. This means that the company did not directly employ its delivery workers, but each worker was operating similar to how a self-employed person would. However, the extent of such practices is unclear. In 2021, the transport workers union made a list of the new companies that did not have collective bargaining agreements for their workers, although most still directly employ their workers.	Subcontracting is used mostly in transport and delivery among the smaller and newer actors in the online shopping delivery subsector.
SI	No civil servants in the sector.	Workers in this subsector are mostly employed for an indefinite period of time (such as at Slovenia Post) and are well covered by sectoral and company trade unions. According to the trade unions, it is not difficult to have strong membership, except the	Workers in this subsector work in small courier companies and foreign companies (such as DHL, DPD, TNT and GLS) as self-employed or contractual workers. Trade unions report that it is difficult to organise these workers,	None.	<p>Subcontracted post offices mostly carry out transport and delivery, including working abroad.</p> <p>Slovenia Post has 600 contractual offices across the country.</p>

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

Member State	Civil servants in the sector	Employment characteristics and impact on unionisation		Evidence of platform-mediated activities in the sector	Subcontracting practices in the sector
		NACE 53.10 – Universal services	NACE 53.20 – Other		
		employees in contractual post offices (Slovenia Post has 600 contractual offices across the country).	especially in small contractual companies and delivery companies.		
SK	No civil servants in the sector.	The prevalent form of employment at Slovenská pošta is regular full-time employment or part-time employment. Flexible working time and part-time work are applied to support work–life balance. Employees of Slovenská pošta are represented by four company-level trade unions.	No data.	None.	No data.

Source: Network of Eurofound Correspondents, 2023

Table 64: Trade unions' sector-relatedness

Member State	Trade union	53.10 – Universal services		USP	53.20 – Other		EU multinational corporation or non-EU operators	European affiliation		No or other affiliation
		Mail	Parcels		Mail	Parcels		UNI Europa	CESI	
AT	Vida	No	Yes		No	Yes	Yes (DPD, Amazon, FedEx)			
AT	GPA	No	No		Yes	Yes	Yes (DPD, Amazon, FedEx)			
AT	GPF	Yes	Yes	Yes	No	No			Yes (only the FCG faction of GFP is affiliated to CESI via Eurofedop)	
BE	ACV Puls (ACV-CSC)	No	Yes	Yes	Yes	Yes	Yes (DHL)			ETF
BE	ACV-CSC Transcom	Yes	Yes	Yes	Yes	Yes	Yes (DHL)			No data
BE	VSOA-SLFP Post	Yes	Yes	Yes	No data	No data		Yes		
BE	BTB (ABVV-FGTB)	No data	No data	Yes	Yes	Yes		Yes		ETF
BE	ACLVB-CGSLB	No data	No data	Yes	No data	No data	Yes (DHL)	Yes (indirectly via ACLVB-CGSLB and UNI Europa)		
BE	BBTK-SETCa	Yes	Yes	Yes	Yes	Yes	Yes (DHL)	Yes		No data
BE	ACV-CSC CNE	No	No		Yes	Yes		Yes (via ACV-CSC)		
BE	ACOD Post (ABVV-FGTB)	Yes	Yes	Yes	No data	No data		Yes (the broader ABVV-FGTB confederation is affiliated)		No data

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

Member State	Trade union	53.10 – Universal services		USP	53.20 – Other		EU multinational corporation or non-EU operators	European affiliation		No or other affiliation
		Mail	Parcels		Mail	Parcels		UNI Europa	CESI	
BG	СФC/TUFC	Yes	Yes	Yes	Yes	Yes		Yes		
BG	PTTF Podkrepa	Yes	Yes	Yes	Yes	Yes		Yes		
BG	ДСС/DCS	Yes	Yes	Yes	Yes	Yes				
CY	PASY-DY	Yes	Yes	Yes	No	No		Yes		
CY	Pasyek PEO	Yes	Yes	Yes	No	No				
CY	OEKDY – SEK	Yes	Yes	Yes	No	No				European Public Services Union (EPSU)
CY	ΣΕΓΔΑΜΕΛΙΝ ΠΕΟ/ Segdamelin – PEO	No	No		Yes	Yes				
CY	ο.Με. ΠΕ.ΓΕ – ΣΕΚ/ FTRAW-SEK	No	No		Yes	Yes				
CZ	OSZPTNS	Yes	Yes	Yes (all ~5,000)	Yes	No		Yes		
CZ	OHZ ČP	Yes	Yes	Yes (all members)	No	No				
DE	DPVKOM	Yes	Yes		No	No			Yes (via dbb)	
DE	ver.di	Yes	Yes	Yes	Yes	Yes	Yes (DHL, UPS)			EPSU, ETF, EFJ
DE	CGPT	No data	No data	No data	No data	No data			Yes (via CGB)	
DK	3F	Yes	Yes	Yes	Yes	Yes	Yes (DHL)			
DK	HK	Yes	Yes	Yes	Yes	Yes	Yes (DHL)	No (but has influence on UNI)		Yes (UNI ICTS, UNI Graphical)

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

Member State	Trade union	53.10 – Universal services		USP	53.20 – Other		EU multinational corporation or non-EU operators	European affiliation		No or other affiliation
		Mail	Parcels		Mail	Parcels		UNI Europa	CESI	
								Europa Post & Logistics through Nordic Postal Union)		and UNI Commerce)
DK	Akademikerne (AC)	Yes	Yes		No	No				
EE	ETTA	No	Yes		No	Yes				The union is a member of (and directly involved with) ETF and actively involved in statutory bodies.
EE	Pro Ametiühing	Yes	Yes	Yes	Yes	Yes		Yes		
EL	POST	Yes	Yes	Yes	Yes	Yes		Yes		
EL	OIYE	No	No		Yes	Yes		Yes		
EL	ACS MAEE Workers' Union	No	No		Yes	Yes		Yes (via OIYE)		
EL	SESP	No	No		No	Yes		Yes (via OIYE)		
ES	Sindicato Libre	Yes	Yes	Yes	No	No				
ES	FeSP-UGT	Yes	Yes	Yes	No	No				
ES	FSC-CCOO Postal	Yes	Yes	Yes	Yes	Yes	Yes (Amazon)			
ES	CIG-Correos	Yes	Yes		No	No				
ES	UGT-FeSMC	No	No		Yes	Yes	Yes (Amazon)			
ES	ELA/STV	No data	No data	No data	Yes	Yes				

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

Member State	Trade union	53.10 – Universal services		USP	53.20 – Other		EU multinational corporation or non-EU operators	European affiliation		No or other affiliation
		Mail	Parcels		Mail	Parcels		UNI Europa	CESI	
ES	FS-USO	No data	No data		Yes	Yes				
ES	LAB	Yes	Yes	No data	Yes	Yes				
ES	CSIF	No data	No data	No data	No data	No data				
FI	AKT	No	Yes	Yes	No	Yes				ETF
FI	PAU	Yes	Yes	Yes	Yes	Yes				
FI	YTN	Yes	Yes	Yes	Yes	Yes				
FI	IL	Yes	Yes		Yes	Yes				
FI	TEK	Yes	Yes		Yes	Yes				
FI	Ekonomit	Yes	Yes		Yes	Yes				
FI	Tradenomit	Yes	Yes		Yes	Yes				
FI	YTY	Yes	Yes		Yes	Yes				
FI	Industrial Union	Yes	Yes		Yes	Yes				IndustriAll, EFBWW
FI	PRO	No data	No data		No data	No data				
FI	PAM	No	No		No	Yes				EFFAT (directly affiliated, involved in the management bodies, paying affiliation fees and actively involved)
FR	F3C CFDT	Yes	Yes	Yes	Yes	Yes				
FR	FAPT-CGT	Yes	Yes	Yes	Yes	Yes	Yes (DPD)			

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

Member State	Trade union	53.10 – Universal services		USP	53.20 – Other		EU multinational corporation or non-EU operators	European affiliation		No or other affiliation
		Mail	Parcels		Mail	Parcels		UNI Europa	CESI	
FR	SUD-PTT	Yes	Yes	Yes	Yes	Yes	Yes (DPD)			
FR	UNSA-Postes	Yes	Yes	Yes	Yes	Yes	Yes (UPS)			
FR	CFTC La Poste	Yes	Yes	Yes	Yes	Yes				
FR	FO com	Yes	Yes		Yes	Yes	Yes (DPD, UPS)			
FR	CFE-CGC Le Groupe La Poste	Yes	Yes	Yes	Yes	Yes	Yes (DPD)			
HR	HSP	Yes	Yes	Yes	No	No				
HR	RSHT	Yes	Yes		No	No				
HR	RSR	Yes	Yes		No	No				
HU	Pofész	Yes	Yes		Yes	Yes				
HU	PSZ	Yes	Yes	Yes	No	No				
IE	Fórsa	No	No	Yes	No	No				
IE	CWU	Yes	Yes	Yes	Yes	Yes	Yes (DPD, DHL, UPS)			
IE	AHCPS	Yes	Yes	Yes	Yes	Yes				
IE	SIPTU	No data	No data		No data	No data	Yes (DHL)	No data		No data
IT	Confsal	Yes	Yes	Yes	Yes	Yes				No data
IT	FAILP-CISAL	Yes	Yes	Yes	Yes	Yes			Yes (via CISAL)	No data
IT	SLC-CGIL	Yes	Yes	Yes	Yes	Yes	Yes (transport branch of CGIL, DHL, UPS)			

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

Member State	Trade union	53.10 – Universal services		USP	53.20 – Other		EU multinational corporation or non-EU operators	European affiliation		No or other affiliation
		Mail	Parcels		Mail	Parcels		UNI Europa	CESI	
IT	UILPoste	Yes	Yes	Yes	Yes	Yes	Yes (transport branch of UIL, DHL, UPS)	No data		
IT	Confedir	No data	No data	No data	No data	No data				
IT	SLP CISL	Yes	Yes	Yes	Yes	Yes	Yes (transport branch of CISL, DHL, UPS)			
IT	FNC-UGL	Yes	Yes	Yes	Yes	Yes		No data		
IT	Assidipost-Federmanager	No data	No data	No data	No data	No data				
LT	LRDPS	Yes	Yes	Yes	No	Yes				
LT	AB Lietuvos paštas profesinė sąjunga	Yes	Yes	Yes	No	Yes				Eurofedop
LU	LCGB	Yes	No	Yes	Yes	No				
LU	OGB-L	Yes	No	Yes	Yes	No				
LU	Syndicat des P&T	No data	No data	Yes	No data	No data			Yes (via CGFP)	
LV	LSAB PRO	Yes	Yes	Yes	Yes	Yes				
MT	GWU	Yes	Yes	Yes	Yes	Yes	Yes (DHL)			
NL	CNV	Yes	Yes	Yes	Yes	Yes	Yes (DPD, DHL, UPS)			
NL	BVPP	Yes	Yes	Yes	No	Yes			Yes (indirectly to CESI, via Eurofedop)	Yes (to Eurofedop, directly, paying)

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

Member State	Trade union	53.10 – Universal services		USP	53.20 – Other		EU multinational corporation or non-EU operators	European affiliation		No or other affiliation
		Mail	Parcels		Mail	Parcels		UNI Europa	CESI	
										affiliation fees, but not involved in management)
NL	FNV	Yes	Yes	Yes	Yes	Yes	Yes (DPD, DHL, UPS)			ETF, ETUC
PL	NSZZ Solidarność Pracowników Poczty Polskiej	Yes	Yes	Yes	No	No				
PL	ZZPP	Yes	Yes	Yes	No	No				
PT	Sincor	Yes	Yes	Yes	Yes	Yes				
PT	Sinquadros	Yes	Yes	Yes	Yes	Yes				
PT	Fentcop	Yes	Yes	Yes	Yes	Yes				
PT	Sicomp	Yes	Yes	Yes	Yes	Yes				
PT	Sinttav	Yes	Yes	Yes	Yes	Yes		Yes (UNI Europa ICTS)		
PT	CGSI	Yes	Yes	Yes	Yes	Yes				
PT	Sictex	Yes	Yes		Yes	Yes				
PT	SITIC	Yes	Yes	Yes	Yes	Yes				
PT	SNTCT	Yes	Yes	Yes	Yes	Yes	Yes (DPD, UPS)			
PT	Sindelco	Yes	Yes	Yes	Yes	Yes	Yes (DPD)			
RO	FSPC	Yes	Yes	Yes	Yes	Yes				
RO	SLPR	Yes	Yes	Yes	Yes	Yes				
SE	SEKO	Yes	Yes	Yes	Yes	Yes				

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

Member State	Trade union	53.10 – Universal services		USP	53.20 – Other		EU multinational corporation or non-EU operators	European affiliation		No or other affiliation
		Mail	Parcels		Mail	Parcels		UNI Europa	CESI	
SE	Unionen	Yes	Yes	Yes	Yes	Yes	Yes (DHL, UPS)			
SE	SACO-Posten	Yes	Yes	Yes	No	Yes				
SE	Transport	No	No		Yes	Yes	Yes (DHL, UPS)			ETF
SE	ST	Yes	Yes	Yes	Yes	Yes				
SE	SRAT	Yes	Yes	Yes	No	Yes				
SE	Ledarna	Yes	Yes	Yes	Yes	Yes	Yes (UPS)			
SE	Akavia	Yes	Yes	Yes	Yes	Yes				
SE	SI	Yes	Yes	Yes	Yes	Yes	Yes (DHL)			
SI	SZS Alternativa	Yes	Yes		No	No				
SI	Trade union of DHL	No	No		No	Yes				
SI	ZSSS-SDPZ	Yes	Yes	Yes	No	Yes				
SK	OZ PaL	Yes	Yes	Yes	No	No				Yes (indirectly via KOZ SR to Syndicat European Trade Union (SETU))
SK	SOZPaT	Yes	Yes	Yes	No	No			Yes (indirectly via Eurofedop)	Yes (direct involvement in Eurofedop)

Note: Trade unions marked with bold font indicate coverage of all the activities in the postal and courier activities sector; trade unions marked with green shaded cells indicate affiliation.

Source: Network of Eurofound Correspondents, 2023

Table 65: Role of trade unions in the national industrial relations landscape

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
AT	Vida	Yes	Yes	No	20–25% (rough estimate)	No	Yes (DPD) Yes (Amazon)	Yes	Both	Informal	No data	ÖGB	Yes		
AT	GPA	Yes	Yes	No	<10%	No	Yes (DPD) Yes (Amazon)	Yes	Both	Informal	No data	ÖGB	Yes		
AT	GPF	Yes	No	Yes	40%	Yes (ÖPAG, about 12,000 employees covered)	No	Yes	Both	Informal	Yes, regularly	ÖGB		Indirectly (FCG faction of GFP via Euro-fedop)	
BE	ACV Puls	Yes	Yes	Yes	All white-collar workers within the sector	No	Yes (DHL) Yes (UPS)	Yes	Legal	Bipartite	Yes, regularly	ACV-CSC			ETF
BE	ACV-CSC Transcom	Yes	Yes	Yes	All blue-collar workers within the private part of the sector and all workers	Yes	Yes (DHL) Yes (UPS)	Yes	Legal	Bipartite and tripartite	Yes, regularly	ACV-CSC			No data

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
					within the universal services part of the sector										
BE	VSOA-SLFP Post	Yes	-	Yes	The USP has a separate committee. The trade union is fully representative in this committee.	Yes	No	Yes	Legal	Yes (joint committee Bpost and the Committee of Health and Prevention)	Yes, ad hoc	-	Yes (via ACLVB-CGSLB)		
BE	BTB	Yes	Yes	Yes	-	No	Yes	Yes	Legal	Yes, bipartite	Yes, regularly	ABVV-FGTB			ETF
BE	ACLVB-CGSLB	Yes	Yes	Yes	100%	No	Yes (DHL) Yes (UPS)	Yes	Legal	Bipartite and tripartite	Yes, regularly	ACLVB-CGSLB	Indirect via ACLVB-CGSLBUN		No data
BE	BBTK-SETCa	Yes	Yes, via the joint committee	Yes	All white-collar workers within the private part of the sector	No	Yes (DHL) Yes (UPS)	Yes	Legal	Bipartite	Yes, regularly	ABVV-FGTB			No data
BE	ACV-CSC CNE	Yes	Yes	Yes	All white-collar workers	No	Yes (DHL) Yes (UPS)	Yes	Legal	Bipartite	Yes, regularly	ACV-CSC	Yes, via ACV-CSC		

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
					within the sector										
BE	ACOD Post	Yes	Yes	Yes	-	Yes	No	Yes	Legal	Bipartite	Yes, regularly	ABVV-FGTB	Yes		
BG	TUFC	Yes	No	Yes	45%	Yes	Yes	Yes	Legal	Yes	Yes, ad hoc	CITUB			
BG	PTTF Podkrepa	Yes	No	Yes	45%	Yes	Yes	Yes	Legal	Yes	No	CL Podkrepa			
BG	DCS	Yes	No	Yes	45%	Yes	Yes	No	n/a	Yes	Yes, ad hoc	None			
CY	PASY-DY	No	No ⁵⁷	Not directly	23.5%	Yes	No	Yes	MR	Yes, bipartite (government is the employer)	Yes, ad hoc	PASY-DY			
CY	Pasyek PEO	Yes	Yes	No	~4.5%	Yes	No	Yes	MR	Yes, bipartite (govern-	Yes, ad hoc	Pancyprian Federation of Labour			

⁵⁷ There is no framework for sector-level collective bargaining in the same sense as with the private sector. For issues that specifically concern the staff of Cyprus Post there is direct bargaining with Cyprus Post, but for most issues (since they concern the entire public sector) there is indirect involvement in the procedures of the Department of Public Administration and Personnel of the Ministry of Finance.

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
										ment is the employer)					
CY	OEKDY – SEK	Yes	Yes	No	~4.5%	Yes	No	Yes	MR	Yes, bipartite (government is the employer)	Yes, ad hoc	SEK			EPSU
CY	ΣΕΓΔΑΜΕΛΙΝ – ΠΕΟ/ Segdamelin – PEO	No	No	No	n/a	n/a	n/a	No	n/a	No	No	No			
CY	Ο.ΜΕ.ΠΕ.ΓΕ – ΣΕΚ/ FTRAW – SEK	No	No	No	n/a	n/a	n/a	No	n/a	No	No	No			
CZ	OSZPTNS	No	No ⁵⁸	No ⁵⁹	-	No	Yes	Yes	MR	Only at workplace level with Czech Post.	Yes, ad hoc	ČMKOS			

⁵⁸ The last higher-level collective agreement between OSZPTNS and the Czech Union of Employers in Postal Services, Telecommunications and Press Distribution (Český svaz zaměstnavatelů pošt, telekomunikací a distribuce tisku, ČSZPTDT) expired in 2014. This employer organisation fell apart and OSZPTNS, although interested in collective bargaining at higher level, has no counterpart with which to bargain.

⁵⁹ Since 2019, no company-level collective agreement has been concluded in postal sector. In Czech Post, which is the largest employer at the sector, trade unions operate and some of them block concluding collective agreement.

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
										No specific body exists.					
CZ	OHZ ČP	No	No	No ⁶⁰	n/a	Yes	No	Yes	MR	Only with Czech Post. No specific body exists	In the past, yes; in the last 5 years, no	OHZ ČP	None		
DE	DPVKOM	No	No	No data	DPVKOM was not party to the latest company-level agreement negotiated between ver.di and Deutsche Post, but regularly publishes demands for upcoming or	No	No	No data	No data	No data	No data	dbb		Yes, via dbb	

⁶⁰ Same as above.

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
					running wage dialogues. ⁶¹										
DE	ver.di	Yes	Yes	Yes	56% in 2018	Yes	Yes (DHL) Yes (UPS)	Yes	MR	Bipartite	Yes, ad hoc	DGB			EPSU, ETF, EFJ
DE	CGPT	Yes	No	Yes	No data	No	Yes	Yes	MR	No	Yes	CGB		Yes, via CGB	
DK	3F	Yes	Yes	Yes	45%	Yes	Yes (DHL)	Yes	MR	Yes	Yes, ad hoc	FH			
DK	HK	Yes	Yes	Yes	~9%	Yes	Yes (DHL)	Yes	MR	Yes	Yes, ad hoc	FH			
DK	Akademikerne (AC)	Yes	No	Yes	Very small	Yes	No	Yes, trade union	MR	No	Yes, ad hoc	Akademikerne is a federation			
EE	ETTA	Yes	No	Yes	~50%	Yes	Yes	n/a	n/a	Yes, but not via specific bodies	Yes, unknown how	Estonian Trade Union Confederation			ETF

⁶¹ In Germany only the largest union in a sector (in this case, ver.di) can sign collective agreements. Thus neither CGPT nor DKVKOM can sign agreements, even if they want to.

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
EE	Pro Ametiühing	Yes	No	Yes	~50%	Yes	Yes	n/a	n/a	Yes, but not via specific bodies	No	Estonian Trade Union Confederation			
EL	POST	Yes	No	Yes	~33%	Yes	Yes	No	-	No	Yes, ad hoc	GSEE			
EL	OIYE	No	No	No	No	-	-	Yes	Both	No	No	GSEE			
EL	ACS MAEE Workers' Union	Yes	No	Yes	~3.7%	No	Yes	No	-	No	No	-	Yes, via OIYE		
EL	SESP	Yes	No	Yes	~3.3%	No	Yes	No	-	No	No	OIYE and EKA	Yes, via OIYE	-	-
ES	Sindicato Libre	Yes	Yes	Yes	<50%	Yes	Yes	Yes	Legal	No data	No data	No			
ES	FeSP-UGT	Yes	None	Yes	39.13%	Yes	No	Yes	Legal	No	Yes, regularly	UGT			
ES	FSC-CCOO Postal	Yes	Yes	Yes	>80%	Yes	Yes (DPD) Yes (Amazon)	Yes	Legal	No	Yes, regularly	CCOO			

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
ES	CIG-Correos	Yes	Yes	Yes	~2.5%	Yes	No	Yes	Legal	Yes	No	-			
ES	UGT-FeSMC	Yes	Yes (at provincial level)	Yes	No data	No	Yes (DPD) Yes (Amazon)	Yes	Legal	-	No data	UGT			
ES	ELA/STV	No data	No data	No data	No data	No	No data	Yes	Legal	No data	No data	None	On the list, but not confirmed		
ES	FS-USO	Yes	Yes	No data	No data	No	Yes	No	Legal	No data	No data	USO			
ES	LAB	Yes	No data	Yes	No data	No	Yes	Yes	Legal	No data	No data	-			
ES	CSIF	Yes	No	Yes	-	Yes	No	Yes	Legal	No data	No data	-			
FI	AKT	Yes	Yes	No data	4.5% (assuming that transport workers in commercial activities are covered)	Yes	Yes	Yes	Legal	No data	No data	SAK			ETF

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
FI	PAU	Yes	Yes	Yes	47%	Yes	Yes	Yes	MR	Yes	Yes, ad hoc	SAK			
FI	YTN	Yes	Yes	Yes	2.3%	Yes	Yes	Yes	MR	Yes	No	AKAVA			
FI	IL	Yes (via YTN)	Yes (via YTN)	Yes (via YTN)	Reflected in the number reported by YTN	Yes	Yes	Yes	MR	No data	Yes	AKAVA			
FI	TEK	Yes (via YTN)	Yes (via YTN)	Yes (via YTN)	Reflected in the number reported by YTN	Yes	Yes	Yes	MR	Yes (via YTN)	Yes	AKAVA			
FI	Ekonomit	Yes (via YTN)	Yes (via YTN)	Yes (via YTN)	Reflected in the number reported by YTN	Yes	Yes	Yes	MR	Yes (via YTN)	Yes	AKAVA			
FI	Tradenomit	Yes (via YTN)	Yes (via YTN)	Yes (via YTN)	Reflected in the number reported by YTN	Yes	Yes	Yes	MR	Yes (via YTN)	Yes	AKAVA			
FI	YTY	Yes (via YTN)	Yes (via YTN)	Yes (via YTN)	Reflected in the number reported by YTN	Yes	Yes	Yes	MR	Yes (via YTN)	Yes	AKAVA			

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
FI	Industrial Union	Yes	Yes	No	15–20%	Yes	Yes	Yes	MR	Yes	Yes	SAK			Industri-All, EFBWW
FI	PRO	Yes	Yes	Yes	1.7%	Yes	Yes	Yes	MR	MediaTyö-2030-project	No	STTK			
FI	PAM	No	No	No	PAM does not negotiate collective bargaining agreements for the postal and courier activities sector	No	Yes	Yes	MR	Yes	Yes, ad hoc	SAK			EFFAT
FR	F3C CFDT	Yes	No	Yes	100% of the workers within Le Groupe La Poste = 52% of the total workforce	Yes	Yes (DPD)	Yes	Legal	Yes, high-level monitoring committee	Yes, unknown how	CFDT			
FR	FAPT-CGT	Yes	No	Yes	100% of the workers within Le Groupe La	Yes	Yes (DPD)	Yes	Legal	Yes, high-level monitoring committee	No	CFE-CGC (via CFE-CGC)			

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
					Poste = 52% of the total workforce							Services Publics)			
FR	SUD-PTT	Yes	No	Yes	100% of the workers within Le Groupe La Poste = 52% of the total workforce	Yes	Yes (DPD)	Yes	Legal	Yes, high-level monitoring committee	No	SUD Solidaires			
FR	UNSA-Postes	Yes	No	Yes	100% of the workers within Le Groupe La Poste = 52% of the total workforce	Yes	Yes (UPS)	Yes	Legal	-	No	UNSA			
FR	CFTC La Poste	No	No	None	None	Yes	Yes	Yes	Legal	Yes, high-level monitoring committee	No	CFTC		Via Euro-fedop	
FR	FO com	Yes	No	Yes	100% of the workers within Le Groupe La Poste = 52%	Yes	Yes	Yes	Legal	Yes, high-level monitoring committee	No data	CGT-FO (Force ouvrière)			

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
					of the total workforce										
FR	CFE-CGC Groupe La Poste	Yes	No	Yes	100% of the workers within Le Groupe La Poste = 52% of the total workforce	Yes	Yes	Yes	Legal	Yes, high-level monitoring committee	No	CFE-CGC (via CFE-CGC Services Publics)			
HR	HSP	Yes	No	Yes	83%	Yes	No	Yes	Legal	No	No	NHS			
HR	RSHT	No	No	No	-	-	-	Yes	Legal	No	No	None			
HR	RSR	No	No	None	No data	-	-	No	Legal	No	No	None			
HU	Pofész	Yes	No	Yes	60% via PSZ	Yes	No	No	-	No ⁶²	No	MOSZ			

⁶² Until 2021, Pofész was involved in the sectoral dialogue committee in the postal sector.

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
HU	PSZ	Yes	No ⁶³	Yes	60%	Yes	No	Yes	Legal	Yes	Yes, ad hoc	LIGA			
IE	Fórsa	Yes	No	Yes	~1.5%	No	Yes	Yes	MR	-	Yes, ad hoc	ICTU			
IE	CWU	Yes	No	Yes	90%	Yes	Yes (DPD) Yes (DHL)	Yes	MR	No	No	ICTU			
IE	ACHP	Yes	Yes	Yes	No data	Yes	Yes	Yes	MR	TBC	No data	UNI			
IE	SIPTU	No data	-	-	-	-	-	-	-	-	-	-			
IT	Confsal	Yes	Yes	Yes	No data	Yes	Yes	Yes	MR	No data	No data	No data			
IT	FAILP-CISAL	Yes	Yes	Yes	No data	Yes	Yes	Yes	MR	No data	No data	CISAL		Yes, through CISAL	
IT	SLC-CGIL	Yes	Yes	Yes	No data	Yes	Yes (but the transport)	Yes	MR	No data	Yes (specifics)	CGIL			

⁶³ PSZ is involved in a sectoral dialogue committee that could lead to agreement, but no such agreement exists.

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
							branch of DHL and FedEx)				un-known)				
IT	UILPoste	Yes	Yes	Yes	No data	Yes	Yes	Yes	MR	No data	Yes (specifics un-known)	UIL			
IT	Confedir	Yes	Yes	Yes	No data	-	-	Yes	MR	No data	No data	It is a cross-sectoral EO			
IT	SLP CISL	Yes	Yes	Yes	No data	Yes	Yes (but the transport branch of DHL and FedEx)	Yes	MR	No data	Yes (specifics un-known)	CISL			
IT	FNC-UGL	Yes	Yes	Yes	No data	Yes	Yes	Yes	MR	No data	No data	No data			
IT	Assidipost-Feder-manager	Yes	Yes	No data	No data	Yes	Yes	Yes	MR	No data	No data	No data			
LT	LRDPS	Yes	No	Yes	63%	Yes	Yes	Yes	MR	No	Yes, ad hoc	Lithuanian Trade Union Confederation			

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
LT	AB Lietuvos paštas profesinė sąjunga	Yes	No	Yes	63%	Yes	Yes	Yes	MR	No	Yes, ad hoc	Solidarumas			
LU	LCGB	Yes	No	Yes	95%	⁶⁴		Yes	Legal	No	Yes	None			
LU	OGB-L	Yes	No	Yes	95%	⁶⁵		Yes	Legal	No	Yes	None			
LU	Syndicat des P&T	Yes	No	Yes	99%	⁶⁶		Indirect via CGFP	⁶⁷	Yes ⁶⁸	Yes	CGFP		Yes, via CGFP	
LV	LSAB PRO	Yes	No, but discussion is ongoing	Yes	50%	Yes	No	Yes	MR	-	Yes, regularly	None			

⁶⁴ Collective bargaining agreements are signed with POST Luxembourg and POST Telecom, whose activities do not fall under NACE 53.10 and NACE 53.20.

⁶⁵ Same as above.

⁶⁶ Same as above.

⁶⁷ The trade union Syndicat des P&T has elected members in the Chambre des fonctionnaires et employés publics.

⁶⁸ Only for aspects organised by the law on postal sector social dialogue, not in specific bodies.

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
MT	GWU	Yes	No	Yes	80%	Yes	Yes (DHL)	Yes	MR	Sometimes, bipartite with MaltaPost	Yes	No			
NL	CNV	Yes	Yes	Yes	No data	Yes	Yes (DPD) Yes (DHL)	Yes	MR	Yes (SER and StvdA)	No	CNV			
NL	BVPP	Yes	Yes	Yes	65%	Yes	Yes	Yes	MR	Only EU dialogue via Eurofedop	No	None		Indirect via Eurofedop	Eurofedop
NL	FNV	Yes	No	Yes	No data	Yes	Yes (DPD) Yes (DHL)	Yes	MR	Only EU dialogue via Eurofedop	Yes, ad hoc	Cross-industry trade union			ETF, ETUC
PL	NSZZ Solidarność	Yes	No	Yes	99% in NACE 53.10	Yes	No	Yes	Legal	No	No data	NSZZ Solidarność			
PL	ZZPP	Yes	No	Yes	99% in NACE 53.10	Yes	No	Yes	Legal	No	No data	OPZZ			
PT	Sincor	Yes	No	Yes, SEB with CTT Correios and CTT Expresso	77%	Yes	Yes	Yes	MR	No	No	None			

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
PT	Sinquadros	Yes	No	Yes, SEB with CTT Correios and CTT Expresso	73%	Yes	Yes	Yes	MR	No	No data	None			
PT	Fentcop	Yes	No	Yes, SEB at CTT Correios and CTT Expresso	77%	Yes	Yes	Yes	MR	No	No data	USI			
PT	Sicomp	Yes	No	Yes, SEB at CTT Correios and CTT Expresso	77%	Yes	Yes	Yes	MR	No	No data	USI			
PT	Sinttav	Yes	No	Yes, SEB at CTT Correios and CTT Expresso	73%	Yes	Yes	Yes	MR	No	No data	CGTP			
PT	CGSI	Yes	No	Yes, SEB at CTT Correios and CTT Expresso	73%	Yes	Yes	Yes	MR	No	No data	CGSI			

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
PT	Sictex	Yes	No	Yes, SEB at CTT Correios and CTT Expresso	73%	Yes	Yes	Yes	MR	No	No data	No data			
PT	SITIC	Yes	No	Yes, SEB at CTT Correios and CTT Expresso	77%	Yes	Yes	Yes	MR	No	No	USI			
PT	SNTCT	Yes	No	Yes	77%	Yes	Yes (DPD) Yes (UPS)	Yes	MR	No ⁶⁹	Yes	CGTP			
PT	Sindelco	Yes	No	Yes ⁷⁰	77%	Yes	Yes (DPD)	Yes	MR	No	No	UGT			
RO	FSPC	No, see SLRP	No	Indirectly via its affiliated				No	n/a	No	No data	BNS			

⁶⁹ However, SNTCT is directly involved in collective bargaining with the major operator CTT Correios and with two of the major operators in NACE 53.20 (CTT Expresso and UPS Portugal). SNTCT is affiliated to the national trade union confederation CGTP, who is represented at the national body for tripartite social dialogue (CPCS). In cases of sector-related governmental consultations, SNTCT is consulted due to its membership at CGTP.

⁷⁰ Sindelco is involved in company collective bargaining with the major operator CTT Correios and with one major operator in NACE 53.20 (CTT Expresso).

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
				member, SLRP											
RO	SLPR	Yes	No	Yes	23,000 (all the employees of the Romanian Post)	Yes	Yes	Yes ⁷¹	Legal	No	No	FSPC	Indirect via FSPC		
SE	SEKO	Yes	Yes	Yes	95%	Yes	Yes	Yes	MR	No	Yes, regularly	LO			
SE	Unionen	Yes	Yes	Yes	9%	Yes	Yes (DHL)	Yes	MR	No	Yes, regularly	TCO			
SE	SACO-Posten	Yes	Yes	Yes	About 10% of those employed at PostNord AB ⁷²	Yes	No	Yes	MR	No	Yes, ad hoc	SACO			
SE	Transport	Yes	Yes	Not in postal services,	About 90%	No	Yes	Yes (DHL)	MR	Yes, via LO	Yes, regularly	LO			ETF

⁷¹ SLPR is representative at company level.

⁷² SACO-Posten does not directly sign the collective bargaining agreements, but their member unions do.

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
				only transport											
SE	ST	Yes	Yes	No	~90%	Yes	Yes	Yes	MR	Bipartite	Yes, ad hoc	TCO			
SE	SRAT	Yes	Yes	Yes	Very few (only managers)	Yes	No	Yes	MR	No	Yes, ad hoc	SACO			
SE	Ledarna	Yes	Yes	No	A small percentage of the total; only organised management staff	Yes	Yes	Yes	MR	Bipartite	Yes, ad hoc	None			
SE	Akavia	Yes	Yes	No	~90% of the white-collar staff	Yes	Yes	Yes	MR	Bipartite	Yes, ad hoc	SACO			
SE	SI	Yes	Yes	No	~90% of the white-collar staff	Yes	Yes (DHL)	Yes	MR	Bipartite	Yes, ad hoc	SACO			
SI	ZSSS-SDPZ	Yes	Yes	Yes	100% for the USP	Yes	Yes	Yes	Legal	No	No	Association of Free Trade Unions of			

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

Member State	Trade union	Collective bargaining	Sector collective bargaining	Company collective bargaining	Coverage	53.10 – Universal services (including USP)	53.20 – Other (including EU multinational corporations and non-EU operators)	Representative (national level)	Basis	Social dialogue	Consulted by government	National affiliation	EU affiliation		
													UNI Europa	CESI	Other
												Slovenia (ZSSS)			
SI	SZS Alternativa	Yes	Yes	No	100% for the USP	Yes	No	Yes	Legal	No	No	n/a			
SI	Trade union of DHL	Yes	No	Yes	<1%	No	Yes (DHL)	No (company only)	MR	No	No	None			
SK	OZ PaL	Yes	No	Yes	50%	Yes		Yes	MR	Bipartite and tripartite	Yes (specifics unknown)	KOZ SR			Via KOZ SR in SETU
SK	SOZPaT	Yes	No	Yes	No data	-	-	Yes	MR	Bipartite and tripartite	No data	KOZ SR		Indirect via Euro-fedop	Euro-fedop

Notes: MR = mutual recognition. n/a = not applicable. SEB = single-employer bargaining.

Source: Network of Eurofound Correspondents, 2023

Table 66: Employer organisations' sector-relatedness

Member State	Employer organisation or business association	NACE 53.10 – Universal services			NACE 53.20 – Other			European affiliation	
		Mail	Parcels	USP	Mail	Parcels	Non-EU/EU multinational corporation	PostEurop	Other
AT	VÖZ							No	No
AT	WKO-FGW							No	No
AT	WKO BS Handel							No	No
AT	WKO FVSp							No	No
AT	WKO FVG							No	No
BE	WFFE							No	Indirectly via VBO-FEB to BusinessEurope
BE	Febetra							No	IRU
BE	UPTR							No	UETR
BE	TLV							No	UETR
BG	No employer organisation								
CY	No employer organisation								
CZ	No employer organisation								
DE	AGV Postdienste						Yes (DHL)	Indirectly via DHL ⁷³	No
DK	DI						Yes (DHL)	No	No
DK	DMA							No	No
EE	No employer organisation								
EL	No employer organisation								

⁷³ DHL's largest member, Deutsche Post DHL, is a member of PostEurop and is actively involved in the decision-making structures and working committees of PostEurop.

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

Member State	Employer organisation or business association	NACE 53.10 – Universal services			NACE 53.20 – Other			European affiliation	
		Mail	Parcels	USP	Mail	Parcels	Non-EU/EU multinational corporation	PostEurop	Other
ES	AEM						Yes (DHL)	No	No data
ES	ANEB							No	No
ES	Asempre							No	European Express Association
ES	UNO							No	No
FI	ALT							No	
FI	Finnmedia							No	News Media Europe (NME), European Magazine Media Association (EMMA), Association of European Radios (AER), Federation of European Publishers (FEP) and Intergraf
FI	Palta							No	No
FR	FNTR							No	No
FR	Union TLF							No	No
FR	OTRE							No	No
FR	SOP						Yes (DPD)	Indirectly via La Poste	No data
HR	HUP							No	No
HU	Stratosz							No	No
IE	No employer organisation								
IT	Confindustria							No data	No data
IT	FISE-Assoposte							No data	No data
IT	FISE-ARE							No data	No data

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

Member State	Employer organisation or business association	NACE 53.10 – Universal services			NACE 53.20 – Other			European affiliation	
		Mail	Parcels	USP	Mail	Parcels	Non-EU/EU multinational corporation	PostEurop	Other
IT	CNA							No data	No data
LT	No employer organisation								
LU	GT						Yes (DHL)	No	No data
LV	PKB						Yes (DPD)	No	No
LV	LLA							No	No
MT	No employer organisation								
NL	TLN						Yes (DPD, DHL and UPS)	No	No
PL	Pracodawcy RP							No	SGI Europe
PT	No employer organisation								
RO	PSC							No	No
SE	Kommunikationsföretagen							No	No
SE	Transportindustriförbunden						Yes (DHL and UPS)	No	European Association for Forwarding, Transport, Logistics and Customs Services (Clecat)
SE	Medieföretagen							No	No
SE	BA							No	Clecat via Transportföretagen
SI	GZS-ZPZ							No	No
SI	ZDS							No	No
SK	ÚDPT SR							No	
SK	AZZZ SR							No	

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

Member State	Employer organisation or business association	NACE 53.10 – Universal services			NACE 53.20 – Other			European affiliation	
		Mail	Parcels	USP	Mail	Parcels	Non-EU/EU multinational corporation	PostEurop	Other
SK	ZLZ SR							No	FIATA; Clecat

Note: USP = universal service provider.

Source: Network of Eurofound Correspondents, 2023

Table 67: Coverage of company size groups within employer organisation and business association membership domain

Member State	Employer organisation or business association	Member companies				Largest contribution membership fees			Activities for small and medium-sized enterprises (SMEs)	European affiliation
		1–9	10–49	50–249	>250	1–9	10–249	>250		
AT	VÖZ								SMEs, yes; microenterprises, no. VÖZ is the interest representation of Austrian newspapers and journals. With regard to the postal and courier activities sector, VÖZ represents the dispatch and delivery services of newspapers and journals.	No
AT	WKO-FGW								Yes, delivering advertising material to households in Vienna.	No
AT	WKO BS Handel								Yes, both SMEs and microenterprises. Includes the dispatch of commercial goods and e-commerce through its partner ÖPAG.	No
AT	WKO FVSp								Yes, both SMEs and microenterprises. Includes haulage, delivery and storage of items of post office mail.	No
AT	WKO FVG								Yes, both SMEs and microenterprises. Includes forwarding and delivery of items of post office mail by cars, motorbikes and bicycles.	No
BE	WFFE								Yes, WFFE represents SMEs within the joint committee and provides general services such as support and information provision if needed.	IRU
BE	Febetra								Yes	UETR
BE	UPTR								Yes, including collective bargaining, information and service provision	UETR
BE	TLV								Yes, including collective bargaining, information and service provision	

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

Member State	Employer organisation or business association	Member companies				Largest contribution membership fees			Activities for small and medium-sized enterprises (SMEs)	European affiliation
		1-9	10-49	50-249	>250	1-9	10-249	>250		
BG	No employer organisation									
CY	No employer organisation									
CZ	No employer organisation									No
DE	AGV Postdienste								The employer organisation states on its website that it covers Deutsche Post DHL and medium-sized companies for all activities in postal services.	No
DK	DI								Yes, including counselling, training courses, networking and general information	No
DK	DMA								n/a	
EE	No employer organisation									
EL	No employer organisation									No data
ES	AEM								Yes, including training seminars, webinars and a newsletter	No
ES	ANEB	-	-	-	-		-	-	No data	European Express Association
ES	Asempre	-	-	-	-		-	-	No data	No
ES	UNO								Yes, including training activities	
FI	ALT								The company offers education in work contract matters for entrepreneurs and managers.	News Media Europe (NME), European Magazine Media Association (EMMA), Association of European Radios (AER), Federation of European Publishers (FEP) and Intergraf (European federation)

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

Member State	Employer organisation or business association	Member companies				Largest contribution membership fees			Activities for small and medium-sized enterprises (SMEs)	European affiliation
		1-9	10-49	50-249	>250	1-9	10-249	>250		
										for print and digital communication)
FI	Finmedia								Finmedia represents SMEs and microenterprises in the postal and courier activities sector, including in their collective agreements. This includes offering advisory and educational services.	News Media Europe (NME), European Magazine Media Association (EMMA), Association of European Radios (AER), Federation of European Publishers (FEP) and Intergraf (European federation for print and digital communication)
FI	Palta								Palta covers SMEs and microenterprises in the postal and courier activities sector and provides advisory and educational services in collective bargaining and labour law.	No
FR	FNTR								FNTR organises SMEs in the transport sector (some SMEs may also provide postal activities as parcels delivery).	No
FR	Union TLF								Union TLF organises SMEs in the transport sector (some SMEs may also provide postal activities as parcels delivery).	No

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

Member State	Employer organisation or business association	Member companies				Largest contribution membership fees			Activities for small and medium-sized enterprises (SMEs)	European affiliation
		1-9	10-49	50-249	>250	1-9	10-249	>250		
FR	OTRE								OTRE organises SMEs in the transport sector (some SMEs may also provide postal activities as parcels delivery).	No
FR	SOP								SOP covers all companies agreed by the public authorities to provide universal postal services.	No data
HR	HUP								No	No
HU	Stratosz								No	No
IE	No employer organisation									
IT	Confindustria								No data regarding SMEs and microenterprises in the postal and courier activities sector	No data
IT	FISE-Assoposte								No data	No data
IT	FISE-ARE								No data	No data
IT	CNA								No data	No data
LT	No employer organisation									No data
LU	GT								No data	
LV	PKB								The majority of companies in Latvia are SMEs (98%), so nearly all activities are for SMEs.	No
LV	LLA								The majority of companies in Latvia are SMEs (98%), so nearly all activities are for SMEs.	No
MT	No employer organisation									
NL	TLN								Yes; many of their members are SMEs and microenterprises in the sector. This includes	No

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

Member State	Employer organisation or business association	Member companies				Largest contribution membership fees			Activities for small and medium-sized enterprises (SMEs)	European affiliation
		1–9	10–49	50–249	>250	1–9	10–249	>250		
									lobbying and interest representation at EU, national and regional levels; knowledge-sharing; networking functions; and collective bargaining.	
PL	Pracodawcy RP								No data	SGI Europe
PT	No employer organisation									
RO	PSC								No data	No
SE	Kommunikationsföretagen								Kommunikationsföretagen covers SMEs and microenterprises. No data are available on its activities.	No
SE	Transportindustriförbunden								Transportindustriförbunden covers SMEs and microenterprises. No data are available on its activities.	Clecat
SE	Medieföretagen								Newspaper distribution is concentrated in a few larger companies.	No
SE	BA								Yes	Clecat via Transportföretagen
SI	GZS-ZPZ								Yes, GZS-ZPZ covers two companies in NACE 53.20 activities.	No
SI	ZDS								n/a	No
SK	ÚDPT SR								-	Indirectly via AZZZ SR international organisations (IOE, ILO, Ecosoc)
SK	AZZZ SR								AZZZ SR does not cover SMEs and microenterprises in the postal and courier activities sector.	International organisations including IOE, ILO and Ecosoc

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

Member State	Employer organisation or business association	Member companies				Largest contribution membership fees			Activities for small and medium-sized enterprises (SMEs)	European affiliation
		1-9	10-49	50-249	>250	1-9	10-249	>250		
SK	ZLZ SR								No data	FIATA; European Association for Forwarding, Transport, Logistics and Customs Services (Clecat)

Note: n/a = not applicable.

Source: Network of Eurofound Correspondents, 2023

Table 68: Role of employer organisations in the national industrial relations landscape

Member State	Name or abbreviation	EO or BA?	Representative (mutual recognition (MR) or legal)	Bipartite or tripartite bodies	Consulted	Sector-level collective bargaining	Company-level collective bargaining	Collective bargaining coverage		Collective bargaining coverage company categories				Cross-industry affiliation (national)
								NACE 53.10	NACE 53.20	1-9	10-49	50-249	<250	
AT	VÖZ	Both	Yes, both	No such bodies	No data	Yes	No							WKO
AT	WKO-FGW	Both	Yes, both	No such bodies	No data	Yes	No							WKO
AT	WKO BS Handel	Both	Yes, both	No such bodies	No data	Yes	No							WKO
AT	WKO FVSp	Both	Yes, both	No such bodies	Yes, regularly	Yes	No							WKO
AT	WKO FVG	Both	Yes, both	No such bodies	Yes, regularly	Yes	No							WKO
BE	WFFE	EO	Yes, legal	Yes, bipartite	Yes, regularly	Yes	Not directly							VBO
BE	Febetra	EO	Yes, legal	Yes, both within the relevant joint committee and with relevant ministries	Yes, regularly	Yes	Not directly							VBO-FEB, Transport & Logistics Belgium
BE	UPTR	EO	Yes, legal	Yes, bipartite	Yes, regularly	Yes	No							Transport & Logistics Belgium
BE	TLV	EO	Yes, legal	Yes, bipartite	Yes, regularly	Yes	No							VBO-FEB, Transport & Logistics Belgium
BG	No EO													
CY	No EO													
CZ	No EO													
DE	AGV Postdienste	EO	Yes, MR	No data	No data	Yes	Yes							BDA

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

Member State	Name or abbreviation	EO or BA?	Representative (mutual recognition (MR) or legal)	Bipartite or tripartite bodies	Consulted	Sector-level collective bargaining	Company-level collective bargaining	Collective bargaining coverage		Collective bargaining coverage company categories				Cross-industry affiliation (national)
								NACE 53.10	NACE 53.20	1-9	10-49	50-249	<250	
DK	DI	Both	Yes, MR	Yes, both	No	Yes	Yes							Confederation of Danish Employers
DK	DMA	EO	Yes, MR	No	No	Yes	No							Dansk Erhverv and Confederation of Danish Employers
EE	No EO													
EL	No EO													
ES	AEM	EO	Yes, legal	No data	Yes, regularly	Yes	No data							CEOE
ES	ANEB	EO	Yes, legal	No data	No data	Yes	No data							No
ES	Asempre	EO	Yes, legal	No data	Yes, regularly	Yes	No data							UNO and CEOE through UNO
ES	UNO	EO	Yes, legal	Yes, tripartite	No data	Yes	No							
FI	ALT	EO	Yes, MR	Työterveyskeskus TTK	Probably no	No	No							
FI	Finnmedia	EO	Yes, MR	MediaTyö2030-project	Yes, ad hoc	Yes	Yes							EK Confederation of Finnish Industries
FI	Palta	EO	Yes, MR	Työterveyskeskus TTK	Yes, ad hoc	Yes	Yes							EK Confederation of Finnish Industries

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

Member State	Name or abbreviation	EO or BA?	Representative (mutual recognition (MR) or legal)	Bipartite or tripartite bodies	Consulted	Sector-level collective bargaining	Company-level collective bargaining	Collective bargaining coverage		Collective bargaining coverage company categories				Cross-industry affiliation (national)
								NACE 53.10	NACE 53.20	1-9	10-49	50-249	<250	
FR	FNTR	EO	n/a	No	No	Not in the postal and courier activities sector	No							CPME (directly), MEDEF (indirectly)
FR	Union TLF	EO	n/a	No	No	Not in the postal and courier activities sector	No							MEDEF
FR	OTRE	EO	n/a	No	No	Not in the postal and courier activities sector	No							CPME
FR	SOP	EO	n/a	No	No data	No	No	No data	No data	No data	No data	No data	No data	No data
HR	HUP	EO	n/a	No	No	No	No	-	-	-	-	-	-	The USP is affiliated to the only cross-sectoral employer organisation.
HU	Stratosz	EO	n/a	No	No	No	No	-	-	-	-	-	-	-
IE	No EO													
IT	Confindustria	EO	Yes, MR	Yes, both	No data	Involved in almost all sectors, also through internal sector federations	Yes							-

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

Member State	Name or abbreviation	EO or BA?	Representative (mutual recognition (MR) or legal)	Bipartite or tripartite bodies	Consulted	Sector-level collective bargaining	Company-level collective bargaining	Collective bargaining coverage		Collective bargaining coverage company categories				Cross-industry affiliation (national)
								NACE 53.10	NACE 53.20	1-9	10-49	50-249	<250	
IT	FISE-Assoposte	EO	Yes, MR	Yes, Previambiente	No data	Yes, regarding the collective bargaining for the employees of postal service contractors	No data							FISE
IT	FISE-ARE	EO	Yes, MR	No data	No data	Yes (based on their website)	No							FISE
IT	can	EO	Yes, MR	No data	No data	Yes (based on their website)	No							-
LT	No EO													
LU	GT	EO	Yes, MR	No	No	Not in the postal and courier activities sector	Not in the postal and courier activities sector	No data	No data	No data	No data	No data	No data	Luxembourg Confederation
LV	PKB	BA	No data	No	Yes, ad hoc	None	No	-	-	-	-	-	-	None
LV	LLA	BA	No	No	No	No	No	-	-	-	-	-	-	None
MT	No EO													
NL	TLN	EO	Yes, legal	Tripartite	Yes, regularly	Yes	No, the sector has a mandatory collective							VNO-NCW

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

Member State	Name or abbreviation	EO or BA?	Representative (mutual recognition (MR) or legal)	Bipartite or tripartite bodies	Consulted	Sector-level collective bargaining	Company-level collective bargaining	Collective bargaining coverage		Collective bargaining coverage company categories				Cross-industry affiliation (national)
								NACE 53.10	NACE 53.20	1-9	10-49	50-249	<250	
							labour agreement							
PL	Pracodawcy RP	EO	Yes, legal	Yes, both	Yes, regularly	No	n/a	-	-	-	-	-	-	None
PT	No EO													
RO	PSC	EO	n/a	No	No	No	No data, probably not	-	-	-	-	-	-	None
SE	Kommunikationsföretagen	EO	Yes, MR	No such bodies	Yes, regularly	Part of Almega Tjänsteförbunden (part of Almega)	Yes							Svenskt Näringsliv
SE	Transportindustri förbunden	EO	Yes, MR	No social dialogue bodies	Yes, ad hoc	No	No							
SE	Medieföretagen	EO	Yes, MR	No social dialogue bodies	Yes, regularly	Yes	No							Svenskt Näringsliv
SE	BA	EO	Yes, MR	No social dialogue bodies	Yes, regularly	Yes	No							Transportföretagen, Confederation of Swedish Businesses
SI	GZS-ZPZ	EO	Yes, legal	No social dialogue bodies	No	Yes	No							-
SI	ZDS	EO	Yes, legal	No social dialogue bodies	No	Yes	No							-
SK	ÚDPT SR	EO	No data	No data	No data	No data	No data	No data	No data	No data	No data	No data	No data	No data

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

Member State	Name or abbreviation	EO or BA?	Representative (mutual recognition (MR) or legal)	Bipartite or tripartite bodies	Consulted	Sector-level collective bargaining	Company-level collective bargaining	Collective bargaining coverage		Collective bargaining coverage company categories				Cross-industry affiliation (national)
								NACE 53.10	NACE 53.20	1-9	10-49	50-249	<250	
SK	AZZZ SR	EO	Yes, legal	Tripartite	Yes, regularly	Yes	Not directly							
SK	ZLZ SR	EO	Yes, MR	Tripartite	No data	No data	No							APZaD

Notes: BA = business association; EO = employer organisation; n/a = not applicable.

Source: Network of Eurofound Correspondents, 2023

Table 69: Bipartite and tripartite social dialogue bodies in which sector-related issues are dealt with or in which sector-related social partners and companies are involved

Member State	Social dialogue body	Bipartite or tripartite	Domain of activity	Origin (agreement or statutory)	Sectoral trade unions participating	Participating sectoral employer organisations or companies
AT	No social dialogue bodies in the sector					
BE	Joint committee of Bpost	Bipartite	Joint committee for employees within Bpost	Agreement	BBTK-SETCa , VSOA-SLFP Post, ACOD Post , ACV-CSC CNE	Bpost
	Joint committee 226	Bipartite	Joint committee (for white-collar workers within international trade, transport and logistics)	Agreement	ACV Puls , BBTK-SETCa	WFFE, Febetra, TLV
	Joint committee 140.3	Bipartite	Joint committee (joint committee for blue-collar workers within road transport and logistics)	Agreement	ACV-CSC Transcom , BTB, ACLVB-CGSLB	UPTR, Febetra, TLV
	Sociaal Fonds van het APCB	Bipartite	Social fund for joint committee 200	Agreement	VSOA-SLFP Post and others	
BG	Social Cooperation Council	Bipartite	Health and safety, working conditions	Statutory – Labour Code	TUFC, Federation ‘Communications’, PTTF Podkrepa, DCS	Bulgarian Post
CY	No social dialogue bodies in the sector					
CZ	No social dialogue bodies in the sector					
DE	No social dialogue bodies in the sector					
DK	The Professional Committee for Office Training (Vocational training committees)	Tripartite	Office education, under courier service and logistics	Statutory	HK Danmark, HK Stat, HK Kommunal (Municipal), HK Privat, HK Handel (Trade)	DI, DMA via membership in Dansk Erhverv (Danish Chamber of Commerce), Ministry of Finance, Local Government Denmark (KL), Danish Regions

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

Member State	Social dialogue body	Bipartite or tripartite	Domain of activity	Origin (agreement or statutory)	Sectoral trade unions participating	Participating sectoral employer organisations or companies
	The Sector Working Environment Committee for Retail, Finance and Offices (BFA Office/BFA Kontor)	Tripartite	Working environment This BFA Committee's purpose is to participate in resolving health and safety issues and thereby support work environment efforts in companies within the private office and administration sector.	Statutory	HK Privat, HK Handel (Trade), PROSA (union for professional ICT employees)	DMA via membership in Dansk Erhverv, DI, Lederne (Organisation of Managerial and Executive Staff)
EE	No social dialogue bodies in the sector					
EL	No social dialogue bodies in the sector					
ES	Higher Postal Council (Consultative)	Tripartite	Sector regulation	Royal decree	FSC-CCOO Postal, UGT, CIG-Correos, LAB	Asempre, AEM, Sociedad Estatal Correos y Telégrafos
ES	Comisión Paritaria Sectorial de Entrega Domiciliaria (Sectoral Joint Committee on Home Delivery)	Bipartite	Sector/state	Collective agreement	FSC-CCOO Postal, UGT	Asempre
FI	Postal work 2030	Bipartite	Future skills and opportunities, lifelong learning in the sector	Agreement	PAU	Palta
	Media Työ2030-project	Bipartite	The project focuses on mapping future skills and opportunities for lifelong learning in the sector.	Agreement	Industrial Union, PRO, Finnish Journalists/Journalistiliitto	Finnmedia

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

Member State	Social dialogue body	Bipartite or tripartite	Domain of activity	Origin (agreement or statutory)	Sectoral trade unions participating	Participating sectoral employer organisations or companies
	The Centre for Occupational Safety of the sectoral Working Group on Communications and Logistic	Tripartite	Plan the services the Centre for Occupational Safety ought to offer in the sector.	Statutory	PAU, PAM, YTN	Palta
FR	Comité de dialogue social stratégique groupe (Group Strategic Social Dialogue Committee)	Bipartite	This body aims to provide trade unions with better information on the economic, social and financial situation of the group and on the group's strategy.	Agreement (2017)	FAPT-CGT, F3C CFDT, CFE-CGC Groupe La Poste, CFTC La Poste and FO com	La Poste
	Commissions du dialogue social de La Poste	Bipartite	The management shares information and/or engages in consultation on various topics. The body meets to negotiate collective agreements.	Agreement	FAPT-CGT, F3C CFDT, CFE-CGC Groupe La Poste, CFTC La Poste, FO com and representative trade unions at local level	La Poste
HR	No social dialogue bodies in the sector					
HU	Postai Ágazati Párbeszéd Bizottság	Bipartite	Postal activities (including NACE 53)	Statutory	PSZ and Pofész (back in 2016); since 2021 only PSZ has proved to be representative. PSZ won 18.4% of votes of the workforce in the works councils' elections. Pofész did not provide the required information in time so it was not eligible as a representative organisation.	Hungarian Post, as it covers 84.4% of the employees in NACE 53

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

Member State	Social dialogue body	Bipartite or tripartite	Domain of activity	Origin (agreement or statutory)	Sectoral trade unions participating	Participating sectoral employer organisations or companies
IE	No social dialogue bodies in the sector					
IT	Mutual Observatory on Agile Work	Bipartite	Observatory	Agreement	SLC-CGIL; SLPCISL; UILPoste; FAILP-CISAL; SAILP-Confsal; UGL Comunicazioni	Poste Italiane
	Bilateral Body for Training and Professional Requalification in Poste Italiane	Bipartite	Vocational training	Agreement	SLC-CGIL; SLPCISL; UILPoste; FAILP-CISAL; SAILP-Confsal; UGL Comunicazioni	Poste Italiane
	Committee for the Implementation of the Principles of Equal Treatment and Equal Opportunities	Bipartite	Equal opportunities	Agreement	SLC-CGIL; SLPCISL; UILPoste; FAILP-CISAL; SAILP-Confsal; UGL Comunicazioni	Poste Italiane
	National Joint Committee for Occupational Health and Safety	Bipartite	Health and safety	Agreement	SLC-CGIL; SLPCISL; UILPoste; FAILP-CISAL; SAILP-Confsal; UGL Comunicazioni	Poste Italiane
	FondoPoste	Bipartite	Pension fund	Agreement	SLC-CGIL; SLPCISL; UILPoste; FAILP-CISAL; SAILP-Confsal; UGL Comunicazioni	Poste Italiane
	Previndai	Bipartite	Pension fund (managerial)	Agreement	Federmanager	Confindustria
	Previamente	Bipartite	Pension fund	Agreement	SLC-CGIL; SLPCISL; UILPoste; Uiltrasporti	FISE-Assoposte
LT	No social dialogue bodies in the sector					
LU	No social dialogue bodies in the sector					
LV	No social dialogue bodies in the sector					

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

Member State	Social dialogue body	Bipartite or tripartite	Domain of activity	Origin (agreement or statutory)	Sectoral trade unions participating	Participating sectoral employer organisations or companies
MT	MCESD	Tripartite	General, not for postal and courier activities sector only	Yes	GWU (cross-sectoral)	MEA (cross-sectoral)
NL	Social Economic Council (SER)	Tripartite	Social-economic policy; general, not for postal and courier activities sector only	Statutory, since 1950 Law on Social Economic Council	FNV (8 seats) CNV (2 seats) VCP (1 seat)	VNO NCW (7 seats) MKB-Nederland (3 seats) LTO Nederland (1 seat)
	Labour Foundation (StvdA)	Bipartite	General, not for postal and courier activities sector only	Agreement, since 1945	FNV (4 seats) CNV (2 seats) VCP (2 seats)	VNO NCW (4 seats) MKB-Nederland (2 seats) LTO Nederland (2 seats)
	Pensioenfonds Vervoer	Bipartite	Pension fund for the transport and logistics sector	Agreement	CNV, FNV	TLN, KNV (Royal Dutch Transport Federation)
	Sectorinstituut Transport en Logistiek	Bipartite	Education and training, mobility, health and safety, job and wage rating for the transport and logistics sector	Agreement	CNV, FNV	TLN
	SOOB	Bipartite	Education and training within the transport and logistics sector	Agreement	CNV, FNV, De Unie	TLN, VVT (Vertical Transport Association)
PL	No social dialogue bodies in the sector					
PT	No social dialogue bodies in the sector					
RO	No social dialogue bodies in the sector					
SE	No social dialogue bodies in the sector					
SI	No social dialogue bodies in the sector					

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

Member State	Social dialogue body	Bipartite or tripartite	Domain of activity	Origin (agreement or statutory)	Sectoral trade unions participating	Participating sectoral employer organisations or companies
SK	Economic and Social Council of the Slovak Republic (HaSR SR)	Tripartite	Social dialogue at governmental level; general, not for postal and courier activities sector only	Legislation	Confederation of Trade Unions (KOZ SR), Joint Trade Union of Slovakia (SOS)	National Union of Employers (RÚZ SR), Federation of Employers' Associations (AZZZ SR), Association of Industrial Unions and Transport (APZD) and Slovak Municipality and Towns Association (ZMOS)

Note: Light grey shading indicates a general social dialogue body and green shading indicates a transport social dialogue body. USPs are highlighted in yellow.

Source: Network of Eurofound Correspondents, 2023

Table 70: Companies providing universal service under designation (USD) by number of employees, ownership and collective bargaining practices

Member State	Company name	Total number of employees	Share of the national postal workforce	Company status	Government/state role in ownership and management of the company	Applicable collective bargaining agreement in the company and its employees
AT	Österreichische Post AG (ÖPAG)	~20,000 (17,325 full-time equivalents in November 2022)	65%	Joint-stock corporation	Via its holding company ÖBAG, the federal state owns 52.85% of ÖPAG's shares. Management is formally independent from the government, but the government has the capability via the supervisory board to intervene if it is deemed necessary.	There are two collective agreements applying to the company, one covering private-law employees hired before 2009 and a second covering employees hired in 2009 and afterwards. More than 4,000 civil servants are not covered by a collective agreement at all (since civil servants are excluded from the right to conclude collective agreements in Austria) but covered by a so-called salary ordinance (<i>Bezügeverordnung</i>) issued by the ÖPAG management (they are allowed to do so according to the Post Structure Act). In essence, this ordinance is part of the regular annual negotiations in the framework of the bargaining rounds between the ÖPAG management and the GPF. About 11,000 employees are covered by the ÖPAG collective agreement for employees hired since 2009, and some 3,000–4,000 employees are covered by the collective agreement for employees hired before 2009.
BE	Bpost	~32,500 full time employee equivalent at group level	Unclear	Public limited company	Belgian State is the major shareholder (at 51%), but the company is operated by a non-politicised/non-governmental management body.	Yes, sector-level as well as company-level bargaining
BG	Български пощи ЕАД (Bulgarian Post PLC)	9,061	45%	Public limited company	100% state-owned and the government is involved in management of the company (Public Enterprises and Control Agency (PECA)).	Yes, company-level collective bargaining, covering only NACE 53.10
CY	Cyprus Post	~600	~28%	Department of the Ministry of	100% public ownership and management	There are no collective bargaining agreements per se, but there are two regulations regarding

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

Member State	Company name	Total number of employees	Share of the national postal workforce	Company status	Government/state role in ownership and management of the company	Applicable collective bargaining agreement in the company and its employees
				Transport, Communications and Works		the working conditions of employees working in the public sector, which are discussed with the management of Cyprus Post (as with every department), and they are included in the annual governmental budget. One affects permanent employees, and the other affects hourly employees with indefinite contracts. However, the body directly responsible for these regulations (as they affect all public workers) is the Department of Public Administration and Personnel of the Ministry of Finance.
CZ	Česká pošta, s. p. (Czech Post)	25,675 (2021)	87%	State-owned enterprise under the public administration, according to the special Act No. 77/1997 Coll.	Czech Post is a state-owned enterprise, the founder is a Ministry of the Interior of the Czech Republic (Ministerstvo vnitra České republiky, MVČR); the Director General is appointed by the Minister of Interior of the Czech Republic.	None. Although negotiations take place between the unions and the management of the company, no company-level collective bargaining has been concluded since 2019 (see Czechiafor details).

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

Member State	Company name	Total number of employees	Share of the national postal workforce	Company status	Government/state role in ownership and management of the company	Applicable collective bargaining agreement in the company and its employees
DE	Deutsche Post DHL	228,024 (as of 31 December 2021)	~50%	Stock corporation	Deutsche Post DHL is a stock corporation. As of the end of October 2022, nearly 21% of its shares were held by KfW Bankengruppe and over 76% were free floating shares (out of which around 20% are held by private investors). KfW Bankengruppe is the promotional bank of the German Federal Republic. As a stock corporation, Deutsche Post DHL has a dual structure with a management and supervisory board in place.	The company is covered by company-level agreements as well as sector-level agreements. Not all employees are covered: 'Employees beyond the agreed pay scale' (<i>außertarifliche Beschäftigte</i>) are not covered by the agreement.
DK	PostNord Danmark (PostNord is the parent organisation)	6,731	PostNord Danmark has insufficient data. The authors estimate ~25–30% based on data from Statistics Denmark.	Public limited company	The Danish government owns 40% of PostNord AB. The Swedish government owns 60% of PostNord AB. PostNord AB owns 100% of PostNord Danmark.	PostNord is covered by the collective agreement under the Confederation of Danish Industry (DI), as well as company-level agreements. All staff in all parts of the sector, except top executives of the company, are covered.
EE	AS Eesti Post (Estonian Post)	1,703	~50%	Joint-stock company	Company is state owned.	The company is covered by company-level collective bargaining agreements; workers with temporary contracts, freelancers and subcontractors are not covered.

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

Member State	Company name	Total number of employees	Share of the national postal workforce	Company status	Government/state role in ownership and management of the company	Applicable collective bargaining agreement in the company and its employees
EL	ELTA S.A. (Hellenic Post SA, or Ellinika Tahidromia AE, or Ελληνικά Ταχυδρομεία AE)	3,614 (data 2022)	~36%, based on the employment numbers of the Labour Force Survey of Elstat 2021	Limited company, (Société anonyme; subsidiary of the Hellenic Corporation of Assets and Participations SA)	None. As of 1 January 2013 (based on Law 4053/2013), the postal market was fully liberalised and, for the first time, ELTA began operating under a fully competitive system and as a universal service.	Company-level, but only permanent staff of ELTA are covered by the collective agreement.
ES	Sociedad Estatal Correos y Telégrafos (part of Correos Group)	50,114	40.4%	Public-owned company with 100% public capital and exclusive state participation	Yes, management	Company-level, covering the majority of the staff (94%)
FI	Posti Group	18,500	42.5%	Limited liability company	The Government of Finland owns the company.	Yes, sector-level and company-level
FI	Åland Post	199. The company also employs students in so-called fee-based employment in delivery services. These are not included in the figure.	1%	Limited liability company	The Government of Åland owns the company (Åland is an autonomous region of Finland).	Only company-level bargaining; persons in newspaper distribution or board members are not covered.
FR	Le Groupe La Poste (La Poste)	214,043 (Le Group headcount in France as of	No data	Limited company (Société anonyme), 100% publicly owned	The state holds 34% of the shares and two board representatives (out of 21) are named by the state as directors.	Yes, the company agreement of 4 November 1991 covers all employees.

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

Member State	Company name	Total number of employees	Share of the national postal workforce	Company status	Government/state role in ownership and management of the company	Applicable collective bargaining agreement in the company and its employees
		31 December 2021, including civil servants, permanent employees and workers on fixed-term contracts). According to the 2022 annual report, 106,863 employees work in the postal activities only and 8,300 in its parcels delivery subsidiary Geopost.				
HR	Hrvatska Pošta d.d. (Croatian Post)	9,500	83%	Public limited company, 100% owned by the government	The Supervisory Board appoints the management of the company at the proposal of the Government of the Republic of Croatia.	Yes, at company level
HU	Hungarian Post (Magyar Posta Zártkörűen Működő Részvénytársaság)	25,225	100% of workers involved in NACE 53.10 activities and 60% of workers	The Board of Directors of the company is elected by the sole shareholder, which is the Hungarian state.	The Government of Hungary, as sole shareholder of the company, is the owner and its rights are exercised by the Minister of Economic Development.	Yes, the company-level agreement since 2012 covers all employees.

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

Member State	Company name	Total number of employees	Share of the national postal workforce	Company status	Government/state role in ownership and management of the company	Applicable collective bargaining agreement in the company and its employees
			involved in the total NACE 53			
IE	An Post	10,421	~40%	Under public administration	100% state ownership with a commercial semi-state ownership.	Yes, company-level agreement covering all except the most senior company executives
IT	Poste Italiane S.p.A.	121,000	No data	Public company	The company is listed on the stock exchange, and it is 35% owned by Cassa Depositi e Prestiti (a financial institution controlled by the state, which manages postal savings) and 29.3% by the Ministry of Economy and Finance. It is in fact considered a public company. The governance model adopted is a traditional one, dually supported by both a Board of Directors and a Board of Statutory Auditors (with the statutory audit entrusted to an auditing company).	Yes, company-level collective agreement, which can be considered the national collective bargaining agreement for the sector, as Poste Italiane is the largest company with a monopoly in the postal and courier activities sector. Managers are not covered.
LT	AB Lietuvos paštas (Lithuanian Post)	3,125	~63%	Joint-stock company; all stocks are owned by the government	The Government of Lithuania (particularly the Ministry of Communication) is the only owner of the company and it decides the management structures of the company.	Yes, company-level agreement covering almost all employees
LU	POST Luxembourg	7,461		Public administration (in French: <i>établissement public</i>)	The government is a shareholder and appoints the governing board.	Yes, two company-level agreements: one covering employees of POST Luxembourg; another for POST Telecom. Civil servants and <i>cadres dirigeants</i> are not covered by either of the two.
LV	Latvijas Pasts (Latvian Post)	3,162	58%	State joint-stock company	Company is state owned and the government representatives attend stakeholders meetings.	Yes, company-level agreement covering almost all employees
MT	MaltaPost plc	~800	~70%	Public limited company and	0% ownership, but MaltaPost is regulated is by a government regulator.	Yes, company-level agreement covering all except management

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

Member State	Company name	Total number of employees	Share of the national postal workforce	Company status	Government/state role in ownership and management of the company	Applicable collective bargaining agreement in the company and its employees
				listed on the Malta Stock exchange		
NL	PostNL	~35,000 (as of December 2021)	70%	Public limited company	None	Yes, both sector- and company-level agreements in which all employees are covered, although specific collective agreements apply to specific categories of employees.
PL	Poczta Polska SA	67,000	No data	State is the sole shareholder.	No data	Yes, a company-level agreement since 2015 covering all employees
PT	CTT Correios de Portugal, S.A.	10,141	70%	Limited company (Société anonyme)	No share, privatisation began in 2013, completed in 2014.	Yes, company-level bargaining covering almost all employees
PT	CTT Contacto S.A.	No data	No data	Limited company (Société anonyme)	No share, CTT created CTT – Contacto SA after CTT had been privatised.	Yes, company-level bargaining covering almost all employees
RO	Compania Națională Poșta Română S.A. (Poșta Română)	23,327 in 2022	~50–55%	Public limited company	State-owned company; the government has no role in management but appoints the governing board of the company.	Yes, company-level bargaining covering almost all employees
SE	PostNord Group AB	19,300	50–60% (estimate) ⁷⁴	Public limited Company	Swedish state owns 60% and Danish state own 40% of mother company PostNord AB. Swedish company owned 100% of PostNord AB. Members of the board are representatives from the Danish and Swedish states, but as with other companies, the board does not actively engage in the daily activities.	Yes, both sector- and company-level bargaining with all employees covered, although specific collective agreements apply to specific occupations

⁷⁴ In a government document from 2020, the Government of Sweden estimates that PostNord AB has 80% of the market share (Riksdag, 2020).

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

Member State	Company name	Total number of employees	Share of the national postal workforce	Company status	Government/state role in ownership and management of the company	Applicable collective bargaining agreement in the company and its employees
SI	Pošta Slovenije (Post of Slovenia)	5,897	84%	Public limited company	Yes, with the government appointing the General Manager and Labour Director (most recently in 2022).	Yes, both sector- and company-level bargaining with all employees covered
SK	Slovenská pošta a.s.	11,962 as of 31 December 2021	50.2%	Private organisation – joint-stock company	A joint-stock company with 100% state ownership; one member of the Board of Supervisors is a member of the government.	Yes, company-level bargaining covering almost all employees
SK	Slovak Parcel Service (SPS)	260	1%	Private limited liability company	The company has fully private ownership without the role of the government.	No, there is no applicable company- or sector-level collective agreement.

Source: Network of Eurofound Correspondents, 2023

Table 71: Largest companies in the postal and courier activities sector in each Member State

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
AT	Largest NACE 53.10/USP	ÖPAG	Multinational	20,000	GPF	About 15 subunits of WKO are affiliated to the national employer organisation.	Company level
AT	Second largest NACE 53.10	None	-	-	-	-	-
AT	Largest NACE 53.20	DPD Austria	Part of a multinational group	1,700 (employment rather than employees)	GPA, Vida	WKO FVSp	MEB
AT	Second largest NACE 53.20	Amazon Austria	Multinational	600–1,000 (employment rather than employees)	GPA, Vida	WKO FVSp	MEB
AT	Largest non-EU	FedEx	Multinational	n/a	GPA, Vida	WKO FVSp	MEB
BE	Largest NACE 53.10/USP	Bpost	Multinational	32,000 full time employee equivalent	ACV-CSC Transcom, ACV Puls, Openbare Diensten ACV, BBTK-SETCa, VSOA-SLFP Post, ACOD Post, ACV-CSC CNE, BTB, ACLVB-CGSLB	Probably none	Both
BE	Second largest NACE 53.10	None	-	-	-	-	-
BE	Largest NACE 53.20	DHL International	Multinational	1,200	ACV-CSC Transcom, ACV Puls, BBTK-SETCa, ACV-CSC CNE, BTB, ACLVB-CGSLB	No data	Both company and sector
BE	Second largest NACE 53.20	UPS Belgium	Multinational	1,200	ACV-CSC Transcom, ACV Puls, BBTK-SETCa, ACV-CSC CNE, BTB, ACLVB-CGSLB	No data	Both company and sector

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
BE	Largest non-EU	FedEx	Multinational	600	-	-	No data
BG	Largest NACE 53.10/USP	Bulgarian Post PLC	National	9,061	TUFC, Federation 'Communications', PTF Podkrepa, DCS, National Syndicate 'Defence'	-	Company level
BG	Second largest NACE 53.10	None	-	-	-	-	-
BG	Largest NACE 53.20	Speedy (DPD)	National	3,000	None	None	None
BG	Second largest NACE 53.20	M&BM Express OOD	Part of a multinational group, member of Austrian Post Group	2,500	None	None	None
BG	Largest non-EU	In Time Courier	Part of a multinational group, authorised contractor of UPS	390	None	None	None
CY	Largest NACE 53.10/USP	Cyprus Post (Department of Postal Services of the Ministry of Transport, Communications and Works)	National	~600	PASY-DY, Pasyek PEO, OEKDY – SEK, ASDYK, Pancyprian Labour Union Isotita	n/a	Company level
CY	Second largest NACE 53.10	None	-	-	-	-	-

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
CY	Largest NACE 53.20	ACS Courier	Multinational	~50–249 (actual number unknown; the company did not reply to our efforts to find out. Estimation based on the statistical data)	None	None	None
CY	Second largest NACE 53.20	G.A.P. Akis Express	National	~50–249 (actual number unknown; the company did not reply to our efforts to find out. Estimation based on statistical data)	None	None	None
CY	Largest non-EU	UPS	Multinational	n/a		n/a	None
CZ	Largest NACE 53.10/USP	Česká pošta, s. p.	National	25,675 (2021)	OSZPTNS, OHZ ČP, FVZ, SOS-21 and others	Confederation of Industry of the Czech Republic (Svaz průmyslu a dopravy České republiky, SP ČR)	None
CZ	Second largest NACE 53.10	None	-	-	-	-	-
CZ	Largest NACE 53.20	None	-	-	-	-	-
CZ	Second largest company in NACE 53.20	PPL CZ, s. r. o.	Multinational (subsidiary)	744 (2021)	None	None	-

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
CZ	Largest non-EU operator	Direct Parcel Distribution CZ, s.r.o.	Multinational (subsidiary)	633 (2020)	None	None	-
CZ	Second largest non-EU operator	UPS Czech Republic, s.r.o.	Multinational (subsidiary)	380 (2020)	None		-
DE	Largest NACE 53.10/USP	Deutsche Post DHL	Multinational (parent)	~190,000	ver.di	AGV Postdienste	Both company and sector
DE	Second largest NACE 53.10	None	-	-	-	-	-
DE	Largest NACE 53.20	Deutsche Post DHL	Multinational (parent)	~190,000	ver.di	AGV Postdienste	Both company and sector
DE	Second largest NACE 53.20	None	-	-	-	-	-
DE	Largest non-EU operator	UPS	Multinational (affiliate)	~20,500 in Germany	ver.di	None	Company level
DK	Largest NACE 53.10/USP	PostNord Danmark	PostNord AB owns 100% of PostNord Danmark	6,731	3F , HK, HK Privat, AC ⁷⁵	DI	Both company and sector
DK	Second largest NACE 53.10	None	-	-	-	-	-
DK	Largest NACE 53.20	Forbruger-kontakt A/S	National	10,570	n/a	DI	MEB

⁷⁵ The Confederation of Professional Association is not a union, but a peak organisation/confederation that negotiates a collective agreement on behalf of the individual members.

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
DK	Second largest NACE 53.20	Tryksagsomdeling	National	1,544	n/a	n/a	
EE	Largest NACE 53.10/USP	AS Eesti Post	Multinational (parent)	1,703	Pro Ametiühing	No employer organisations in the sector	Company level
EE	Second largest NACE 53.10	AS Express Post	National	503	No employer organisations in the sector	No employer organisations in the sector	
EE	Largest NACE 53.20	DPD Eesti AS	Multinational (subsidiary of DPDgroup)	173	No information (if there is a union, it is at company level)	No employer organisations in the sector	
EE	Second largest NACE 53.20	DHL Express Estonia AS	Multinational (subsidiary)	152	No information (if there is a union, it is at company level)	No employer organisations in the sector	
EE	Largest non-EU	EKLT Limited	Partner company for multinational company UPS, operates under the name of UPS	107	No information available	No employer organisations in the sector	
EL	Largest NACE 53.10/USP	ELTA S.A.	National company	3,104	POST		Company level
EL	Second largest NACE 53.10	None	-	-	-	-	-
EL	Largest NACE 53.20	ELTA S.A. Courier	Courier service	510	POST		Company level
EL	Second largest NACE 53.20	ACS	Courier service	370	ACS MAEE Workers' Union		Company level

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
EL	Largest non-EU	None	-	-	-	-	-
ES	Largest NACE 53.10/USP	Sociedad Estatal Correos y Telégrafos	Multinational (with a subsidiary in Portugal)	48,446	FSC-CCOO Postal, FeSP-UGT, CSIF, Sindicato Libre	None	Company level
ES	Second largest NACE 53.10	None	-	-	-	-	-
ES	Largest NACE 53.20	SEUR (DPD)	National (subsidiary of the French group Geopost, which is a subsidiary of La Poste)	No data available	FSC-CCOO Postal, UGT	AME, UNO	MEB
ES	Second largest NACE 53.20	MRW	Multinational (based in Andorra, Gibraltar, Portugal, Spain and Venezuela; headquartered in Barcelona)	No data available	FSC-CCOO Postal, UGT	AME	MEB
ES	Largest non-EU	Amazon Spain	Multinational	22,000, including employees in other sectors in the same company (such as Amazon AWS)	UGT, FSC-CCOO Postal	No data available	
FI	Largest NACE 53.10/USP	Posti Group	Multinational	8,500	PAU, Industrial Union, AKT, YTN	Palta, Finnmedia	Company level
FI	Second largest NACE 53.10	Åland Post	Regional	200	PAU	Åland Post carries out its own collective bargaining	Company level

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
FI	Largest NACE 53.20	Jakeluyhtiö Suomi Oy	National	3,000	Industrial Union	Finnmedia	MEB
FI	Second largest NACE 53.20	Helsingin Jakelu-Expert Oy	National	799	Industrial Union	Finnmedia	MEB
FI	Largest non-EU	No data					
FR	Largest NACE 53.10/USP	La Poste	Multinational	214,043	FAPT-CGT, F3C CFTD , SUD-PTT, <u>CFTC La Poste</u> , UNSA-Postes, CFE-CGC Le Groupe La Poste	SOP	Both company and sector
FR	Second largest NACE 53.10	None	-	-	-	-	-
FR	Largest NACE 53.20	Chronopost, part of Le Groupe La Poste	Multinational	3,800	FAPT-CGT, F3C CFTD , SUD-PTT, <u>CFTC La Poste</u> , CFE-CGC Le Groupe La Poste	FNTR	Both company and sector
FR	Second largest NACE 53.20	DPD	Multinational	2,625	Transport sector unions: FNTL-FO UNCP, FGTE-CFDT, SNATT, CFE-CGC, FAPT-CGT , FGT-CFTC, SUD Solidaires	FNTR	Both company and sector
FR	Largest non-EU	UPS	Multinational	2,480	Transport sector unions: UNSA Transport, FNTL-FO UNCP, FGTE-CFDT, SNATT CFE-CGC, FNST-CGT	No data, most likely none	Both company and sector
HR	Largest NACE 53.10/USP	Hrvatska Pošta d.d.	National	83%	HSP	HUP	Company level
HR	Second largest NACE 53.10	None	-	-	-	-	-

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
HR	Largest NACE 53.20	DPD Croatia	Multinational (subsidiary)	2.5%	None	None	
HR	Second largest NACE 53.20	Overseas Express	Multinational, (subsidiary of an Austrian company)	1%	None	None	
HR	Largest non-EU	UPS Croatia	Multinational (subsidiary of an American company)		None	None	
HU	Largest NACE 53.10/USP	Magyar Posta Zrt	National	25,225	PSZ	Stratosz	
HU	Second largest NACE 53.10	None	-	-	-	-	-
HU	Largest NACE 53.20	GLS Hungary	Multinational (subsidiary)	604 (2022)	-	-	-
HU	Second largest NACE 53.20	DHL Hungary	Multinational (subsidiary)	422 (2022)	-	-	-
HU	Largest non-EU	None	-	-	-	-	-
IE	Largest NACE 53.10/USP	An Post	National	10,000	CWU, Fórsa, AHCPs		Company level
IE	Second largest NACE 53.10	None	-	-	-	-	-

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
IE	Largest NACE 53.20	DPD	Multinational. In February 2008, Interlink Ireland changed its name to DPD. Its parent company, La Poste, united its express parcel companies under one single brand, DPD.	700	CWU	-	Company level
IE	Second largest NACE 53.20	DHL Supply Chain	Multinational (part of Deutsche Post DHL)	451	CWU, SIPTU	-	Company level
IE	Largest non-EU	UPS	Multinational (parent)	336	CWU	-	Company level
IT	Largest NACE 53.10/USP	Poste Italiane S.p.A.	National	121,000	SLC-CGIL, SLP CISL, UILPoste, Confsal, FAILP-CISAL, FNC-UGL	Confindustria	Company level
IT	Second largest NACE 53.10	None	-	-	-	-	-
IT	Largest NACE 53.20	DHL Express	Multinational	3,400	FILT CGIL, FIT-CISL, Uiltrasporti (trade unions still related to CGIL, CISL and UIL but in the transport sector)	No data	No data
IT	Second largest NACE 53.20	FedEx Express Italy SRL	Multinational	3,100	FILT CGIL, FIT-CISL, Uiltrasporti	No data	No data
IT	Largest non-EU	No data					

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
LT	Largest NACE 53.10/USP	Lithuanian Post	National	3,125	<u>LRDPS, AB Lietuvos paštas profesinė sąjunga</u>	-	Company level
LT	Second largest NACE 53.10	None	-	-	-	-	-
LT	Largest NACE 53.20	Omniva LT, UAB	Part of a multinational group (Holding Company Omniva)	467	-	-	
LT	Second largest NACE 53.20	UAB DPD Lietuva	Part of a multinational group (DPDgroup)	426	-	-	
LT	Largest non-EU	UBA Skubios siuntos (UPS)	Part of a multinational group (UPS)	178	-	-	
LU	Largest NACE 53.10/USP	POST Luxembourg	Multinational (with subsidiaries in France, Monaco and Morocco)	7,461	<u>OGB-L, LCGB, Syndicat des P&T</u>		Company level
LU	Second largest NACE 53.10	None	-	-	-	-	-
LU	Largest NACE 53.20	DHL Express Luxembourg	Multinational	120	No data	No data	No data, might be covered by transport agreements.
LU	Second largest NACE 53.20	None	-	-	-	-	-
LU	Largest non-EU	None	-	-	-	-	-

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
LV	Largest NACE 53.10/USP	Latvijas Pasts	National	3,162	LSAB PRO		Company level
LV	Second largest NACE 53.10	None	-	-	-	-	-
LV	Largest NACE 53.20	Omniva	Multinational	306		PKB	No data
LV	Second largest NACE 53.20	DPD Latvia	Multinational	221	-	PKB	No data
LV	Largest non-EU	None	-	-	-	-	-
MT	Largest NACE 53.10/USP	MaltaPost PLC	National	~800	GWU		Company level
MT	Second largest NACE 53.10	None	-	-	-	-	-
MT	Largest NACE 53.20	MaltaPost PLC	National	~100	GWU		Company level
MT	Second largest NACE 53.20	DHL	Multinational	No information available	GWU	No information available	Company level
MT	Largest non-EU	No information, probably none	-	-	-	-	-
NL	Largest NACE 53.10/USP	PostNL	National	~37,365 as of 2021 (estimate)	BVPP, FNV, CNV	TLN	Both company and sector

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
NL	Second largest company in NACE 53.10	None	-	-	-	-	-
NL	Largest company in NACE 53.20	DHL	Multinational (subsidiary)	No data available	FNV, CNV	TLN	Company level
NL	Second largest company in NACE 53.20	DPD	Multinational (subsidiary)	~2,885 (estimate)	FNV, CNV	TLN	MEB
NL	Largest non-EU operator in postal and courier activities sector	UPS	Multinational (parent)		FNV, CNV	TLN	MEB
PL	Largest NACE 53.10/USP	Poczta Polska SA	National	67,000	NSZZ Solidarność, ZZPP and other small trade unions	None	Company level
PL	Second largest NACE 53.10	None	-	-	-	-	-
PL	Largest NACE 53.20	InPost	National	No data available		Pracodawcy RP	No data
PL	Second largest NACE 53.20	DHL	Multinational	No data available	Związek Zawodowy Pracowników (ZZP) DHL i Gerlach (no members in postal and courier activities sector, only logistics)	None	
PL	Largest non-EU	None	-	-	-	-	-

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
PT	Largest NACE 53.10/USP	CTT – Correios de Portugal S. A.	National	10,395	Sindetelco, SNTCT, SITIC, CGSI, Sinttav, Sincor, Sinquadros, Fentcop, Sicomp (SERS and SNEET have no members in postal and courier activities sector)	None	Company level
PT	Second largest NACE 53.10	Premium Green Mail	Apparently national company	~100	No data	No data	No data
PT	Largest NACE 53.20	DPD (former Chronopost Portugal)	Part of multinational group Chronopost International, a member of French group La Poste	651	SNTCT, Sindetelco	No data	No data
PT	Second largest NACE 53.20	CTT Expresso – Serviços Postais e Logística S.A.	Part of national group CTT Correios	625	SNTCT, Sindetelco	No data	No data
PT	Largest non-EU	UPS Portugal; FedEx	Part of international group with headquarters in the United States	No information available	SNTCT;	No data	No data
RO	Largest NACE 53.10/USP	Poșta Română S.A.	National	23,144	SLPR	None	Company level
RO	Second largest NACE 53.10	None	-	-	-	-	-

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

Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
RO	Largest NACE 53.20	Fan Courier Express SRL	National	3,386	No trade union	National Council of Small and Medium-Sized Private Enterprises in Romania/ (cross-sectoral umbrella organisation, not a sectoral one)	No data
RO	Second largest NACE 53.20	Cargus SRL	Multinational (subsidiary of DHL since 2008)	851	No trade union	No data	No data
RO	Largest non-EU	FedEx Romania Transportation	Multinational (subsidiary of TNT Australia)	427	No data	No data	No data
SE	Largest NACE 53.10/USP	PostNord	Multinational (parent)	19,300 (2021)	SEKO, Unionen, ST, SACO-Posten, SRAT, Ledarna	Kommunikationsföretagen, PostNord's logistics department, is also a member of Transportindustriförbundet	MEB
SE	Second largest NACE 53.10	Bring	Multinational (subsidiary)	1,281 (2021)	SEKO, Unionen	Kommunikationsföretagen	Mainly MEB, may have local provisions
SE	Largest NACE 53.20	PostNord	Multinational (parent)	19,300 (2021)	SEKO, Unionen, ST, SACO-Posten, SRAT, Ledarna	Kommunikationsföretagen, PostNord's logistics department is also a member of Transportindustriförbundet	Mainly MEB, may have local provisions
SE	Second largest NACE 53.20	DHL	Multinational	5,200	Transport, Unionen, SI	Transportindustriförbundet	Mainly MEB, may have local provisions
SE	Largest non-EU	UPS	Multinational	990 (2021)	Transport, Unionen, Ledarna	Transportindustriförbundet	Mainly MEB, may have local provisions

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


Member State	Ranking	Company name	Type of company	Number of employees	Trade union organising workers	Affiliated to national employer organisation	Collective bargaining
SI	Largest NACE 53.10/USP	Pošta Slovenije d.o.o.	National	5,897	ZSSS-SDPZ	GZS-ZPZ, ZDS	Both company and sector
SI	Second largest NACE 53.10	None	-	-	-	-	-
SI	Largest NACE 53.20	DHL Ekspres d.o.o.	Multinational group (subsidiary)	100	Trade union of DHL	n/a	MEB
SI	Second largest NACE 53.20	Probably none	-	-	-	-	-
SI	Largest non-EU	Probably none	-	-	-	-	-
SK	Largest NACE 53.10/USP	Slovenská pošta, a.s.	National	11,962	OZPaL, SOZPaT, SOZP, POS	ÚDPT SR, ZLZ SR and indirectly via AZZZ SR	Company level
SK	Second largest NACE 53.10	None	-	-	-	-	-
SK	Largest NACE 53.20	Slovak Parcel Service (SPS)	Multinational (subsidiary)	260	No trade union active in SPS	ZLZ SR	
SK	Second largest NACE 53.20	No data, most probably none	-	-	-	-	-
SK	Largest non-EU	No data, probably none	-	-	-	-	-

Notes: Yellow shaded cells indicate the companies that are PostEurop members, light green shaded cells indicate the companies that are subsidiaries of the German DHL, light blue shaded cells indicate the companies that are subsidiaries of the French DPD, **bold** font indicates the trade unions that are affiliated to UNI Europa and underlined font indicates the trade unions that are affiliated to CESI. MEB = multi-employer bargaining; n/a = not applicable.

Source: Network of Eurofound Correspondents, 2023

Annex 2: Country profiles

All data presented below are for 2022, based on information provided by the Network of Eurofound Correspondents, Eurostat's Structural Business Statistics (SBS) and the Annual Survey on Postal Statistics of the Directorate-General (DG) for Internal Market, Industry, Entrepreneurship and SMEs.

Austria 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	28,375 (SBS)	0.76%	1.76%	16 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	There are three representative trade unions in the postal and courier activities sector in Austria, and the trade union GPF organises workers of the national USP, Österreichische Post AG (ÖPAG). ÖPAG primarily provides services in NACE 53.10 but is also active in NACE 53.20. Vida organises blue-collar workers in NACE 53.20, and is involved in sector-level bargaining for NACE 53.20. The trade union GPA organises white-collar workers in NACE 53.20, and is involved in sector-level bargaining for NACE 53.20. All three trade unions are representative based on mutual recognition and legal criteria. There are no sectoral social dialogue bodies in Austria.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative ⁷⁶	Collective bargaining ⁷⁷	European affiliation	Assessment of the representativeness of UNI Europa and CESI
GPF	11,000	Decreasing	NACE 53.10 and NACE 53.20	Yes	SEB	UNI Europa, CESI (via Eurofedop)	GPF is directly affiliated to UNI Europa. The FCG division of GPF is a CESI member via Eurofedop. GPF is involved in company-level collective bargaining with the national USP (ÖPAG). Vida and GPA, both affiliated to UNI Europa but not for their postal workers, organise the workers active in the part of the sector pertaining to other postal and courier activities (NACE 53.20). Both trade unions are involved in highly fragmented sector-level collective bargaining for this part of the sector.
Vida	No data	No data	NACE 53.20	Yes	MEB	UNI Europa, but not for the postal workers	
GPA ⁷⁸	No data	No data	NACE 53.20	Yes	MEB	UNI Europa, but not for the postal workers	

⁷⁶ Based on national criteria. This applies throughout the country profile tables.


⁷⁷ MEB = multi-employer bargaining; MSB/CSB = multi-sector or cross-sector collective bargaining agreement applying to the sector; SEB = single-employer bargaining. This applies throughout the country profile tables.

⁷⁸ According to the FCG division of the trade union GPF (an indirect CESI member), the trade unions GPA and Vida have no members in ÖPAG, only in A1 Telekom Austria and Postbus.

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

Employer organisations	There are five representative sectoral employer organisations in the postal and courier activities sector. VÖZ represents the Austrian newspapers and journals, including the dispatch and delivery services of newspapers and journals (also covering other printed media). WKO-FGW is the Association of Advertising and Market Communication Companies of Vienna (local level only), a subsector branch of WKO. WKO BS Handel organises companies in all size groups active in the dispatch of commercial goods and e-commerce (also covering commerce in general) and is a partner of the national USP (ÖPAG) for delivery purposes as well as a subsector branch of WKO. WKO FVSp organises all size group companies firms active in the haulage, delivery and storage of items of post office mail (also covering transport) and is a subsector branch of WKO. WKO FVG organises all size group companies active in the delivery of items of post office mail by cars, motorbikes and bicycles and is a subsector branch of WKO.							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
WKO FVG	No data (largest for smaller companies)	No data	No data	NACE 53.20	Yes	Yes	Yes, but not for USD activities	The largest employer organisation representing smaller companies, WKO FVG, has the national USP ÖPAG among its members. So do WKO-FGW and, most likely, WKO FVSp. All three are involved in collective bargaining. There are two more, smaller, representative employer organisations – VÖZ and WKO BS Handel – which are also involved in collective bargaining but not affiliated at European level. ÖPAG is also a member of Eurodis and actively involved in its management.
WKO FVSp	No data (second largest)	No data	Increasing	NACE 53.20	Yes	Yes	Probably yes, but not for USD activities	
WKO BS Handel	No data (third largest)	No data	No data	NACE 53.20	Yes	Yes	No	
VÖZ	48 (covers only a very small part of the sector)	Several thousand, only a few hundred sector-related workers	No data	NACE 53.20	Yes	Yes	No	
WKO-FGW (Vienna only)	160 (not among three largest)	No data	Decreasing	NACE 53.20	Yes	Yes	Yes, but not for USD activities	

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

Belgium 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	38,707 (SBS)	0.99%	2.40%	704 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	<p>There are eight representative trade unions in the sector in Belgium, and these eight unions are part of part of three confederations: ACV-CSC, ABVV-FGTB and ACLVB-CGSLB. All trade unions are representative based on legal recognition. The fragmentation on the trade unions' side is due to unions organising different categories of workers (such as civil servants), different types of workers (such as blue-collar workers, white-collar workers or management), workers in different parts of the country and different groups based on ideological reasons. There are a significant number of freelancers and temporary agency workers active within the sector, and these workers are traditionally a lot harder for the unions to reach. Trade unions have launched initiatives and branches to represent freelancers over the past few years (such as Freelancers United by ACV-CSC). However, these workers are not covered by collective agreements. There are three social dialogue bodies for the postal and courier activities sector in Belgium, including a separate joint committee in which Bpost, the national USP, negotiates.</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
ACLVB-CGSLB	No data	No data	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	Indirectly via ACLVB-CGSLB and UNI Europa (not confirmed)	<p>All trade unions in the sector are affiliated (directly and indirectly) to UNI Europa for their members in the postal and courier activities sector.</p> <p>All trade unions are involved in collective bargaining at company level, and seven out of eight are involved in sector-related bargaining.</p> <p>The trade unions affiliated to UNI Europa organise workers in both parts of the sector, including the largest employers in both parts of the sector (the employees of non-EU operator FedEx are unionised by ACV Puls).</p>
VSOA-SLFP Post	6,921	Stable	NACE 53.10	Yes	Yes, SEB	UNI Europa (indirectly via ACLVB-CGSLB)	
ACOD Post (ABVV-FGTB)	No data	No data	NACE 53.10	Yes	Yes, MEB and SEB	UNI Europa (not confirmed) ⁷⁹	
BTB (ABVV-FGTB)	3,500	No data	NACE 53.20	Yes	Yes, MEB and SEB	UNI Europa, (ETF)	
ACV-CSC Transcom	No data	No data	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	UNI Europa	
ACV-CSC CNE	No data	No data	NACE 53.20	Yes	Yes, MEB and SEB	UNI Europa (indirectly via ACV-CSC) ⁸⁰	

⁷⁹ The broader ABVV-FGTB confederation is part of UNI Europa; this could perhaps be relevant (the same goes for BTB and BBTK-SETCa).

⁸⁰ The broader ACV-CSC confederation is part of UNI Europa; this could perhaps be relevant (the same goes for ACV-CSC Transcom, ACV Puls and BBTK-SETCa).


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

ACV Puls (ACV-CSC)	11,000	No data	NACE 53.20	Yes	Yes, MEB and SEB	UNI Europa, (ETF)	CESI's affiliates U4U and UNSP/UNOD have no members in the postal and courier activities sector.
BBTK-SETCa	No data, very few	No data	NACE 53.20	Yes	Yes, MEB and SEB	UNI Europa	

Note: Affiliation in '()' indicates affiliation for other sectors, not postal and courier activities sector.

Employer organisations	There are four employer organisations in the postal and courier activities sector in Belgium. None of these employer organisations represent the national USP – a state-owned company with approximately 32,500 employees, 26,000 of them in postal and courier services. Bpost negotiates for itself in its own joint committee and is active in distributing letters and packages to both consumers and companies, including the distribution of official communication by the government and the distribution of pensions to people who receive their pensions in cash (a group that is diminishing over time). Other service providers are active and are on the rise (such as DHL or UPS) in all other aspects of courier and delivery services within the country (aside from universal service provision). These companies are organised and represented by four employer organisations in the postal and transport and logistics sector. The fragmentation on the employers' side is due to the organisations representing companies in different parts of the postal and courier activities sector, as well as the adjacent sectors (transport and logistics).							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Involved in collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
WFFE	518, including 18 in postal services	4,242 in postal and courier activities sector	No data	NACE 53.20	Yes	Yes, MEB	No	The PostEurop member is not a member of any of the sectoral employer organisations. All four employer organisations are involved in collective bargaining and affiliated at European level: Febetra is a member of IRU; TLV and UPTR are members of UETR; and WFFE is indirectly (via VBO-FEB) affiliated to BusinessEurope.
Febetra	Not disclosed	Not disclosed	Not disclosed	NACE 53.20	Yes	Yes, MEB	No	
UPTR	No data	No data	No data	NACE 53.20	Yes	Yes, MEB	No	
TLV	1,500 in total	No data	No data	NACE 53.20	Yes	Yes, MEB	No	


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

Bulgaria 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	21,143 (SBS)	0.95%	1.31%	178 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	There are three representative trade unions in the postal and courier activities sector in Bulgaria. All organise workers in both parts of the sector, universal services (NACE 53.10) and other postal and courier activities (NACE 53.20). The three trade unions are representative based on mutual recognition and legal criteria. There is one bipartite sectoral social dialogue body in Bulgaria, in which TUFC, DCS and PTF Podkrepa participate on the side of workers and Bulgarian Post on the side of employers. A smaller trade union – National Syndicate ‘Defence’ (Национален синдикат „Защита”) – has very few members in the postal and courier activities sector, is not representative according to the national criteria and cannot sign agreements. The reason for this fragmentation lies in ideological differences.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
СФС/TUFC	6,500	Decreasing	NACE 53.10 and NACE 53.20	Yes	SEB	UNI Europa	The two largest trade unions organising workers in both parts of the postal and courier activities sector are affiliated to UNI Europa for their postal members. Both of them are representative and involved in collective bargaining at company level. CESI has no members for the postal and courier activities sector in Bulgaria.
PTTF Podkrepa	2,500	Stable	NACE 53.10 and NACE 53.20	Yes	SEB	UNI Europa	
ДСС/DCS	350	Decreasing	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	No	

Employer organisation	There are no employer organisations in the postal and courier activities sector in Bulgaria. Two cross-sectoral organisations – the Bulgarian Industrial Capital Association (BICA) and the Confederation of Employers and Industrialists in Bulgaria (CEIB) – organise almost all sectors (except the postal sector). The national USP, Bulgarian Post, is a member of BICA but the employer organisation has no role in either government consultation on behalf of the company or involvement in social dialogue bodies. The national USP, Bulgarian Post, is a PostEurop member.
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Representativeness of the European social partner organisations: Postal and courier activities sector

Croatia 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	11,852 (SBS)	0.95%	0.73%	24 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	<p>There are two representative trade unions in the postal and courier activities sector in Croatia. The reason for this fragmentation is related mostly to the trade unions' different approaches towards the employer and their willingness to bargain. Both trade unions are considered representative based on meeting statutory criteria.</p> <p>There is also a smaller union, RSR, with a small membership share in the sector and with no collective bargaining involvement or affiliation at European level for the postal and courier activities sector. There are no sectoral social dialogue bodies in Croatia. In general, the working conditions in provision of universal services (NACE 53.10) are better regulated, and only workers in this part of the sector are covered by the collective bargaining agreement signed by the trade union HSP and the USP Croatian Post. Workers active in other postal and courier services (NACE 53.20) are not unionised and not covered by any collective bargaining agreements, despite the fact that the USP Croatian Post covers both parts of the sector.</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
HSP	5,413	Decreasing	NACE 53.10 only	Yes	Yes, SEB with Croatian Post	UNI Europa	<p>The largest trade union organising the workers of the national USP in NACE 53.10 is affiliated to UNI Europa for its postal members and involved in collective bargaining with the national USP, covering 83% of the sectoral workforce.</p> <p>The second largest trade union also covers only workers of the national USP and is not affiliated at European level.</p> <p>The smaller trade union has too few members to be representative or involved in collective bargaining and is not affiliated at European level. CESI has no members in Croatia in the postal and courier activities sector.</p>
RSHT	2,000	Increasing	NACE 53.10 only	Yes	No	No	
RSR	385	Decreasing	NACE 53.10 only	No	No	No	
Novi Sindikat ⁸¹	10–15	Decreasing	NACE 53.10 only	No	No	No	


Employer organisations	<p>There is one sectoral employer organisation in the postal and courier activities sector in Croatia. The national USP, Croatian Post, is the largest employer. Croatian Post covers 60% of the parcels delivery subsector, NACE 53.20, 30% of the activities being covered by very small enterprises providing primarily courier services. There are subsidiaries of foreign or non-EU companies active in the sector in Croatia such as DPD Croatia, Overseas Express and UPS Croatia.</p>
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⁸¹ Novi Sindikat was not included in the current study, as the union refused to participate. According to the research conducted by the Network of Eurofound Correspondents, due to the lack of representativeness of the union, most of the members in the postal sector have left the union to become members in other, representative, organisations.

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

Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
HUP – Hrvatska udruga poslodavaca (Croatian Employers' Association – CEA)	1	83	Stable	NACE 53.10 and NACE 53.20	Yes, legal recognition	Yes	Yes	The national USP is affiliated to the only employer organisation, which is a cross-sectoral one. Croatian Post is involved in collective bargaining with the largest trade union, covering 83% of the sectoral workforce via its collective bargaining agreement.


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

Cyprus 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	3,226 (SBS)	0.86%	0.20%	20 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	<p>There are three representative trade unions in the postal and courier activities sector in Cyprus, and all three organise only workers in NACE 53.10, postal activities under USO (specifically the employees of the national USP, Cyprus Post, owned by the Department of Postal Services of the Ministry of Transport, Communications and Works). The reason for this fragmentation lies in ideological differences. All three trade unions are representative based on mutual recognition. The workers active in other postal and courier activities (NACE 53.20) are not unionised in Cyprus. There are another two trade unions with very few members in the sector, which are not considered representative: ΣΕΓΔΑΜΕΛΙΝ ΠΕΟ/Segdamelin – PEO, and ο.Με. ΠΕ.ΓΕ – ΣΕΚ/FTPAAW – SEK. Neither of them is affiliated at European level, nor are they involved in collective bargaining. Another three unions that are not representative (Democratic Labour Federation of Cyprus, ASDYK and Pancyprian Labour Union Isotita) might have members in the sector, but this was not confirmed. There are no sectoral social dialogue bodies in Cyprus.</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
PASY-DY	307	Stable	NACE 53.10	Yes	MSB/CSB	UNI Europa	<p>The largest trade unions organising workers in postal activities under USO is affiliated to UNI Europa for its postal members.</p> <p>All three representative trade unions are involved in negotiation with the governmental employer Cyprus Post, including the regulation regarding the working conditions of permanent employees and hourly employees working in the public sector.</p> <p>CESI has no members for the postal and courier activities sector in Cyprus.</p>
Pasyek PEO	24	Stable	NACE 53.10	Yes	MSB/CSB	None	
OEKDY – SEK	62	Stable	NACE 53.10	Yes	MSB/CSB	EPSU	
Segdamelin – PEO	5	Decreasing	NACE 53.20	No	No	None	
FTPAAW – SEK	7	Decreasing	NACE 53.20	No	No	None	

No employer organisations	There are no sectoral employer organisations in the postal and courier activities sector in Cyprus.
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Representativeness of the European social partner organisations: Postal and courier activities sector

Czechia 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	30,659 (SBS)	0.74%	1.90%	446 (Network of Eurofound Correspondents) or 28 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	<p>There is one representative trade union federation representing workers in the postal and courier activities sector in Czechia – OSZPTNS – and it organises workers of the national USP, Czech Post, as well as workers from some companies active in press distribution. Aside from OSZPTNS, there are also other company-level trade unions that also organise workers of Czech Post, which are not affiliated at EU level and are not interested in social dialogue at a higher level than company level. An example of such a company trade union is included in this study: OHZ ČP. All trade unions are representative based on mutual recognition. Aside from the representative trade unions, there are almost 60 trade union organisations in Czech Post, some totally independent, some organised in OSZPTNS, SOS-21, FVZ and others. The reason for this fragmentation lies in ideological differences, especially between the trade unions organised in OSZPTNS and those organised in FVZ, SOS-21 and OHZ ČP. The rivalry among trade unions in Czech Post also explains the reluctance of trade unions to providing information on their membership. There is no collective bargaining agreement for the USO part of the sector due to blocking by the different Czech Post trade unions. The national law stipulates that an employer must bargain collectively with all the trade unions at a workplace and there can be only one collective bargaining agreement,⁸² so, despite the fact that 87% of the workforce in the sector is employed by Czech Post, no agreement is concluded due to the trade union rivalry. For the other postal and courier activities – NACE 53.20 – there is one collective bargaining agreement at company level covering 1.5% of the sectoral workforce. There are no sectoral social dialogue bodies in Czechia.</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
OSZPTNS	No data, ~5,000 (estimate)	Decreasing	NACE 53.10 and NACE 53.20	Yes	Negotiations ongoing, no agreement	UNI Europa	The largest trade union organising workers in postal activities under USO is affiliated to UNI Europa for its postal members. All trade unions are involved in negotiations with the USP Czech Post, but there is no agreement concluded due to trade union rivalry. CESI has no members for the postal and courier activities sector in Czechia.
OHZ ČP	No data, company-level trade union	Increasing ⁸³ Decreasing ⁸⁴	NACE 53.10	Mutually recognised	Negotiations ongoing, no agreement	None	


⁸² There is a draft proposal to amend this requirement, in order to make collective bargaining possible at the workplace without trade unions' agreement; however, at the time of publication of this report there has been no decision on passing this draft.

⁸³ Information provided by the Network of Eurofound Correspondents during data collection through desk research and/or contact with the trade union.

⁸⁴ According to the representative of Czech Post, as indicated during the data checks of the interim findings.

No employer organisations	<p>There are no sectoral employer organisations in the postal and courier activities sector in Czechia. Until 2015, the sole organisation in the sector, the Czech Union of Employers in Postal Services, Telecommunications and Press Distribution (Český svaz zaměstnavatelů pošt, telekomunikací a distribuce tisku, ČSZPTDT) was active. It broke up in spring 2015 when Czech Post opted out of this organisation because it was not interested in collective bargaining jointly with the employer in telecommunications. The biggest employer in the sector is Czech Post, a PostEurop member, which employs 87% of the workforce in the sector. Czech Post is involved in collective bargaining with the 63 trade unions organising its employees, but no agreement has been reached since 2018. The national law stipulated in 2023, when data were collected for this study, that an employer must bargain collectively with all the trade unions at a workplace and there can be only one collective agreement. As the trade unions covering Czech Post's employees are not able to reach agreement among themselves, no collective bargaining agreement has been reached. In early 2024 this law was amended, and it remains to be seen how negotiation at Czech Post will be affected.</p>
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Representativeness of the European social partner organisations: Postal and courier activities sector

	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	29,953 (SBS)	1.40%	1.86%	10 (DG Internal Market, Industry, Entrepreneurship and SMEs)


Representative sectoral trade unions	There are three representative trade unions in the postal and courier activities sector in Denmark: 3F, HK and Akademikerne. Akademikerne, however, is a confederation of trade union organisations, not individual members. The reason for this fragmentation is that different trade unions organise members in different parts of the sector (only workers of USPs, or only workers of other providers) as well as different types of workers. All trade unions are representative based on mutual recognition. There are two tripartite sectoral social dialogue bodies in Denmark.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
3F	No precise data, estimated 60–65% of the USD workforce	Decreasing	Both NACE 53.10 and NACE 53.20	Yes	Yes	UNI Europa	3F, the largest trade union organising workers in both postal activities under USO as well as other postal services, is affiliated to UNI Europa for its postal members. The second largest union – HK – is not affiliated to UNI Europa, but it is involved in UNI Europa’s work via the Nordic Postal Union, an international organisation representing trade unions. 3F and HK are involved in collective bargaining at both company and sector levels; Akademikerne only at company level.
HK	~500	Stable	Both NACE 53.10 and NACE 53.20	Yes	Yes	Not affiliated, but cooperates via the Nordic Postal Union	
Akademikerne	159 individuals	Increasing	NACE 53.10	Yes	Yes	None	

Employer organisations	There are two representative employer organisation in the postal and courier activities sector in Denmark. The fragmentation is due to one employer organisation covering just the NACE 53.20 part, as well as the employer organisations covering different types of companies (such as microenterprises, SMEs and large companies). Both employer organisations are representative based on mutual recognition.							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop

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

DI (former Dansk Industri)	16	14,500 (~50%)	Increasing	Both NACE 53.10 and NACE 53.20	Yes	Yes, both MEB and SEB	Yes	The largest employer organisation also representing the national USP PostNord Danmark covers both parts of the sector and is involved in collective bargaining. The second largest employer organisation, DMA – which represents the media sector, having members in distribution of newspapers and magazines – is a signatory of collective bargaining agreements at sectoral level.
DMA (Danish Media's Employers Association), which is a member of the cross-sectoral Dansk Erhverv (Danish Chamber of Commerce)	~10–20	~1,000 workers	Probably stable	NACE 53.20 (distribution of newspapers)	Yes	Yes, MEB	No	


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

Estonia 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	4,021 (SBS)	0.75%	0.25%	24 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	There are two trade unions in the postal and courier activities sector in Estonia that organise workers at the national USP, Estonian Post. There are no representativeness criteria in Estonia for social partner organisations. The reason for this fragmentation is due to trade unions organising members in different parts of the sector (only workers of USPs, or only workers of other providers). The workers active in the other postal and courier activities (NACE 53.20) are generally not unionised in Estonia. Workers with temporary contracts, freelancers and subcontractors working in the postal and courier activities sector are not covered by the collective bargaining in the postal and courier activities sector. There are no sectoral social dialogue bodies in Estonia.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
Pro Ametiühing	350	Decreasing	NACE 53.10, no data for NACE 53.20	Not applicable	Yes, SEB with Estonian Post	UNI Europa	The largest trade union is affiliated to UNI Europa for its postal members.
ETTA	6	Decreasing	NACE 53.10, no data for NACE 53.20	Not applicable	Yes, SEB with Estonian Post	ETF	Both trade unions are involved in collective bargaining with the management of Estonian Post, the national USP, which employs around 50% of the workforce in the sector. CESI has no members for the postal and courier activities sector in Estonia, although ETTA mentioned cooperation with CESI.

No employer organisations	There are no sectoral employer organisations in the postal and courier activities sector in Estonia. The postal and courier activities sector is rather small in the country, with a few large dominant companies. The main actors are the universal postal service and branches of multinational companies. The postal and courier activities sector is rather well regulated, and employers have no motivation to organise. The largest company is the USP Estonian Post (Eesti Post), which is a PostEurop member, is under state ownership and operates in NACE 53.10 as well as NACE 53.20. It is a multinational parent company with subsidiaries in Estonia, Latvia and Lithuania. The second largest company (by number of employees) is Express Post, which also operates in NACE 53.10 and NACE 53.20. It is under private ownership and has been in the market for 24 years. Express Post focuses on delivery of letters, media and advertisements. Other large companies operate in NACE 53.20 and are subsidiaries of multinational companies such as DPD, DHL and UPS.
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Representativeness of the European social partner organisations: Postal and courier activities sector

	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	19,105 (SBS)	1.10%	1.18%	29 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	There are 11 representative trade unions in the sector in Finland. ⁸⁵ All trade unions are representative based on mutual recognition. The fragmentation on the trade unions' side is due to unions organising different categories of workers (such as civil servants). There are three social dialogue bodies for the postal and courier activities sector in Finland.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
PAU (Post and Logistics Union)	8,027	Decreasing	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	UNI Europa	<p>All trade unions in the sector are affiliated (directly and indirectly) to UNI Europa for their members in the postal and courier activities sector.</p> <p>All trade unions are involved in collective bargaining in the sector, five of them through YTN.</p> <p>The trade unions affiliated to UNI Europa organise workers in both parts of the sector, including the largest employers.</p> <p>The CESI-affiliated union TVML does not organise members in the postal and courier activities sector; it represents customs employees (NACE 84.11). TVML's relationship with the postal and courier services consists of monitoring</p>
Industrial Union	1,100	Stable	NACE 53.10 and NACE 53.20	Yes	Yes, MEB	UNI Europa, (IndustriAll, EFBWW)	
YTN	467	Stable	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	UNI Europa, indirectly via TEK and IL	
PRO	350	Stable	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	UNI Europa	
PAM (Service Union)	300	Increasing	NACE 53.20	Yes	Not for postal and courier activities sector, only retail home deliveries	UNI Europa, (UNI Europa)	

⁸⁵ YTN is a negotiation organisation that has no members of its own but represents the sectoral workforce in collective bargaining with private sector employers on behalf of the umbrella organisation AKAVA's member unions.

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

AKT (Finnish Transport Workers' Union)	~900	No data	NACE 53.20	Yes	Yes, probably MEB	(ETF)	international postal services. TVML is not involved in the CESI working group for the postal and courier activities sector. The trade union AKT, which is not affiliated to either UNI Europa or CESI, has members in the sector. However, it covers mostly freight transport services and adjacent courier services.
IL (Union of Professional Engineers)*	78	No data	NACE 53.10 and NACE 53.20	Yes	Yes, but YTN bargains on their behalf	UNI Europa (IndustriAll)	
TEK*	95	Increasing	NACE 53.10 and NACE 53.20	Yes		UNI Europa	
Ekonomit*	120	Increasing	NACE 53.10 and NACE 53.20	Yes		None	
Tradenomit*	30	Increasing	NACE 53.10 and NACE 53.20	Yes		None	
YTY*	~130 (estimate)	Increasing	NACE 53.10 and NACE 53.20	Yes		None	


Notes: * indicates AKAVA trade unions represented through YTN; '(/)' indicates affiliation for other sectors, not the postal and courier activities sector.

Employer organisations	There are three employer organisation for the postal and courier activities sector in Finland, all recognised based on mutual recognition. The national USP is Posti Group, a state-owned company with approximately 18,500 workers. There is also a regional USP – Åland Post – owned by the autonomous Åland Provincial Government and employing around 200 employees in both parts of the sector. Other service providers, such as DHL or UPS, are active and on the rise in all other aspects of courier and delivery services within the country (aside from universal service provision). These companies are organised and represented by three employer organisations in the postal and transport and logistics sector. The non-EU operators do not have a significant presence in Finland. The fragmentation on the employers' side is due to the organisations representing companies in different parts of the postal and courier activities sector, as well as the adjacent sectors (transport and logistics).							
Employer organisation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Involved in collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop

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

Finnmedia	27	No data	Stable	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	Yes	PostEurop has two members in the country: the national USP, Posti Group, and the regional USP, Åland Post. Both members are involved in collective bargaining and employ together approximately 50% of the sectoral workforce.
Palta	At least 1	8,500	Increasing	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	Yes	Finnmedia represents the SMEs and microenterprises in the postal and courier activities sector (as well as some of the largest companies that are not USPs) and is a member of several European organisations: News Media Europe (NME), European Magazine Media Association (EMMA), Association of European Radios (AER), Federation of European Publishers (FEP) and Intergraf.
ALT	672	No data	Stable	NACE 53.20	Yes	No	No	

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

 France	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	250,083 (SBS)	1.26%	15.7%	53 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	<p>There are seven representative trade unions in the sector in France.⁸⁶ All trade unions are representative based on meeting legal requirements. There are two bipartite social dialogue bodies for the postal and courier activities sector in France.</p> <p>There are several trade unions that organise workers in the transport by road and logistics sectors, including in private companies such as DHL or UPS that deliver parcels to customers. FGTE-CFDT, CGT-Transports, SNATT CFE-CGC and Fédération Générale des Transports CFTC are all trade unions operating in this sector. However, these trade unions are not involved in social dialogue and collective bargaining for the postal and courier activities sector at sectoral level, even if some negotiate company-level agreements in companies delivering parcels to customers. The fragmentation on the trade unions' side is due to unions organising different categories of workers.</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
FAPT-CGT	20,629	Decreasing	NACE 53.10 and NACE 53.20	Yes	Yes, MEB	UNI Europa	<p>The largest (FAPT-CGT) and second largest (F3C CFDT) trade unions in the sector are affiliated to UNI Europa for their members in the postal and courier activities sector.</p> <p>One member of CFTC Media+, Syndicat CFTC des Postes et des Télécommunications (CFTC La Poste), is indirectly affiliated to CESI via Eurofedop.</p> <p>The three trade unions not affiliated to either UNI Europa or CESI – SUD, UNSA and CFE-CGC – represent around 25% of the</p>
F3C CFDT	16,800 (NACE 53.10); no data in NACE 53.20	Increasing	NACE 53.10 and NACE 53.20	Yes	Yes, MEB	UNI Europa	
FO com (part of FNTL FO/UNCP)	~15,000	Stable	NACE 53.10 and NACE 53.20	Yes	Yes, MEB	UNI Europa	
CFE-CGC Le Groupe La Poste	2,360	Increasing	NACE 53.10 and NACE 53.20	Yes	Yes, MEB	None ⁸⁷	
SUD-PTT	~15,000	Decreasing	NACE 53.10 and NACE 53.20	Yes	Yes, MEB	None	

⁸⁶ CFDT Cadres, included in the previous study, is a structure of the CFDT confederation that brings together employees with 'cadre' status, affiliated to the various professional federations of the CFDT, and only the federation responsible for the postal sector (F3C) participates in social dialogue; F3C is included in this study. UGICT-CGT was not included in the data collection for this sector, as the membership in this sector is limited.

⁸⁷ The trade union used to be a CESI member but is not a member any more.

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


UNSA-Postes	~5,000	Stable	NACE 53.10 and NACE 53.20	Yes	Yes, MEB	None	votes of the workplace elections held at La Poste in December 2022. All trade unions are involved in collective bargaining at company level, as there is no sector-level bargaining (see the section below on the employer organisations).
CFTC La Poste (member of CFTC Media+)	500–1,000	No data	NACE 53.10 and NACE 53.20	Yes	Yes, MEB	CESI (indirect via Eurofedop)	
CFTC Transports	2,000–3,000 (for all transport activities, not postal only)	No data	NACE 49.41 (a few working in NACE 53.20)	Not in the postal and courier activities sector	Yes, SEB in NACE 53.20 (MEB in NACE 49.41)	ETF	
FGTE-CFDT	50,000 (for all transport activities, not postal only)	No data	NACE 49.41 (a few working in NACE 53.20)	Not in the postal and courier activities sector	Yes, SEB in NACE 53.20 (MEB in NACE 49.41)	ETF	
FNST-CGT	No data	No data	NACE 49.41 (a few working in NACE 53.20)	Not in the postal and courier activities sector	Yes, SEB in NACE 53.20 (MEB in NACE 49.41)	ETF	
FNTL FO-UNCP	30,000 (for all transport activities, not postal only)	No data	NACE 49.41 (a few working in NACE 53.20)	Not in the postal and courier activities sector	Yes, SEB in NACE 53.20 (MEB in NACE 49.41)	ETF	
SNATT-CFE-CGC	8,000 (for all transport activities, not postal only)	No data	NACE 49.41 (a few working in NACE 53.20)	Not in the postal and courier activities sector	Yes, SEB in NACE 53.20 (MEB in NACE 49.41)	None	
UNSA Transports	No data	No data	NACE 49.41 (a few working in NACE 53.20)	Not in the postal and courier activities sector	Yes, SEB in NACE 53.20 (MEB in NACE 49.41)	None	

Employer organisations	There are no active employer organisations for the postal and courier activities sector in France. According to Law 2005-516 of 20 May 2005 on the regulation of postal activities (<i>Loi n° 2005-516 du 20 mai 2005 relative à la régulation des activités postales</i>), a joint committee made up of delegates from the representative national trade union organisations of employees and employers was to be convened as of 1 July 2006 to negotiate a collective agreement applicable to the non-civil servant employees
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Representativeness of the European social partner organisations: Postal and courier activities sector

<p>of La Poste and to those of companies authorised to carry out mail operations. An employer organisation was created on 1 December 2006, the Syndicat des opérateurs postaux (SOP), which opened negotiations with the employees' unions. However, this negotiation never came to an end and the SOP no longer seems to play a role. Therefore, the social dialogue within the sector exists only at company level and in particular within Le Groupe La Poste. The group has a company-level social dialogue and collective bargaining.</p> <p>Other companies related to postal activities, mainly the private companies with a parcel delivery activity, are covered by the national collective agreement of the transport by road sector, which includes in its scope the activities under NACE 53.20. However, this postal activity is marginal compared with the other road transport activities, and there is no subsector dedicated to postal activities. According to the main employer organisation in the road transport sector, the FNTR, it is difficult to isolate among its members the companies operating in the postal and courier activities sector, given that the same company may carry out road freight and parcel delivery. There are companies operating with self-employed people who work without being subject to any collective agreement.</p>								
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Involved in collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
SOP	46	No data	No data	Only NACE 53.10	No	No	No	The PostEurop member La Poste is the largest company in the sector, is active in both parts of the sector, employs over 200,000 workers in the entire sector (who constitute ~90% of the sectoral workforce in the country) and is involved in collective bargaining at company level.
FNTR	1,591	No data	Increasing	NACE 49.41 (but some members in NACE 53.20)	Not in the postal and courier activities sector	Yes, but not in the postal and courier activities sector	No	
Union TLF	No data	No data	No data	NACE 49.41 (but some members in NACE 53.20)	Not in the postal and courier activities sector	Yes, but not in the postal and courier activities sector	No	
OTRE	2,927	No data	No data	NACE 49.41 (but some members in NACE 53.20)	Not in the postal and courier activities sector	Yes, but not in the postal and courier activities sector	No	

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

Germany 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	515,709 (SBS)	1.32%	31.97%	11,401 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	There are three trade unions in the postal and courier activities sector in Germany. ver.di organises workers in both parts of the sector, including employees of Deutsche Post DHL and other companies. DPVKOM has members only in the companies that formerly belonged to the state-owned German postal and communication services company. CGPT organises workers in both parts of the sector, including employees of Deutsche Post DHL. The reason for this fragmentation lies in ideological differences. ver.di and CGPT are representative based on mutual recognition, while DPVKOM did not provide information. ⁸⁸ There are no permanent sectoral social dialogue bodies in Germany. However, ver.di stated that there is a regular exchange between the trade union and the employer organisations participating in sectoral collective bargaining to discuss matters of joint interest in the sector and the maintenance of contacts.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
ver.di	200,000	Increasing	Both NACE 53.10 and NACE 53.20	Yes	MEB and SEB	UNI Europa, EPSU, ETF, EFJ	
DPVKOM	20,000	No data	NACE 53.10	Yes	Involved, but has not signed collective bargaining agreements	CESI (indirectly via dbb)	
CGPT	No data	Stable	Both NACE 53.10 and NACE 53.20	Yes	Yes	CESI (indirectly via CGB)	


Employer organisations		There is only one representative employer organisation in the postal and courier activities sector in Germany.						
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop

⁸⁸ According to CESI, DPVKOM is representative; however, this information was not confirmed by the Eurofound correspondent in Germany.

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

AGV Postdienste	No data (only 1 for the postal and courier activities sector, the USP Deutsche Post DHL)	~200,000 of Deutsche Post DHL	No data	Probably both (since Deutsche Post DHL covers both parts of the sector)	Yes	Yes, both MEB and SEB	Yes	The only employer organisation has the national USP Deutsche Post DHL among its members. It is involved in collective bargaining at both company and sectoral levels.
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Representativeness of the European social partner organisations: Postal and courier activities sector

Greece 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	21,116 (SBS)	0.62%	1.31%	724 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	There are four trade unions in the postal and courier activities sector in Greece. Only one of them is representative. The largest trade union confederation in the postal and courier activities sector represents company employees and, despite not being representative, covers both parts of the sector and is involved in collective bargaining. The reason for this fragmentation lies in the fact that the trade unions organise different categories of workers in different parts of the sector. All sectoral trade unions have organised and been involved in mobilisation actions requesting the signing of company-level collective labour agreements, as well as participating in strikes. There are no permanent sectoral social dialogue bodies in Greece.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
OIYE	6 unions with a total of 900 members	Stable	NACE 53.20	Yes	No	UNI Europa	The two largest trade unions organising workers in the postal and courier activities sector are affiliated to UNI Europa for their postal members. POST, the largest trade union, is involved in collective bargaining with the national USP. The second largest union, OIYE, is not directly involved in collective bargaining, but its member unions, company-level trade unions, bargain and sign agreements with the largest employers in NACE 53.20. CESI has no members for the postal and courier activities sector in Greece.
POST	423 unions with a total of 3,250 members	Decreasing	NACE 53.10 and NACE 53.20	No	Yes, SEB with the USP	UNI Europa	
ACS MAEE Workers' Union (regional OIYE member)	370 (counted above)	Stable	NACE 53.20	No	Yes, SEB	Indirectly to UNI Europa via OIYE	
Speedex Union (regional OIYE member)	197 (counted above)	Stable	NACE 53.20	No	Yes, SEB	Indirectly to UNI Europa via OIYE	


No employer organisations	There are no representative sectoral employer organisations in the postal and courier activities sector in Greece. There is a large concentration of activities in only six companies in the sector, which handle more than 80% of postal items. It would be easy for large companies in the sector to set up an employer organisation and conclude a sectoral employment agreement. However, following the 2010 repeal of the legislation on the scalability of sectoral collective agreements and the application of a grace period for collective agreements (due to the European Commission memoranda on the Economic Adjustment Programme for Greece), ⁸⁹ the
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⁸⁹ More information on the memoranda is available at https://ec.europa.eu/economy_finance/publications/occasional_paper/2010/op61_en.htm

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

	<p>organisation of large companies and employers and the conclusion of sectoral agreements has been avoided. Instead, individual, company-level agreements are signed by major companies in the sector: the USP ELTA, ACS, Speedex, DHL and Geniki Tachydromiki.</p> <p>There has been a recent effort to organise the small enterprises in the sector (of which there are over 500) under a 'Union of Agents of Postal Services', which was established in the summer of 2022. There were also some efforts made by the Federation of Private Employees of Greece for a sectoral agreement for courier services to be signed with representatives of small businesses in the sector, but it has not been successful yet.</p> <p>The national USP, ELTA, employs approximately 36% of the sectoral workforce, is the largest employer in both NACE 53.10 and 53.20, and is a member of PostEurop, UPU – Universal Postal Union, the Postal Union for the Mediterranean, and IPC – International Post Corporation.</p>
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Representativeness of the European social partner organisations: Postal and courier activities sector

Hungary 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	45,870 (SBS)	1.36%	2.84%	165 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	There is one representative trade union in the postal and courier activities sector in Hungary that organises workers at the USD provider, Hungarian Post. The trade union is considered representative based on statutory criteria. There are also some other unions organising workers in the sector – Pofész (and its members Pofűsz and Pomész) and Mapész – but they are no longer considered representative for the postal and courier activities sector (despite being signatories in 2012 of the only collective bargaining agreement with the USP Hungarian Post). The fragmentation is due to ideological reasons. There is one sectoral social dialogue body for the sector in Hungary. The nature of employment in NACE 53.10 is predominantly full-time, permanent contract work, while in NACE 53.20 many workers are ‘employed’ as small businesses or self-employed workers who issue invoices. Workers in NACE 53.20 are not covered by the collective bargaining agreement signed by the USP and the representative trade union.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
PSZ	4,500 ⁹⁰ or 4,300 (in 2022) ⁹¹	Decreasing	NACE 53.10	Yes	Yes, SEB	UNI Europa	The largest trade union organising workers of the national USP in NACE 53.10 is affiliated to UNI Europa for its postal members and is involved in collective bargaining with the national USP employing around 60% of the workforce in the sector. The second largest trade union covers only workers of the national USP and is not affiliated at European level. CESI has a member in Hungary – MKKSZ – but it has no members in the postal and courier activities sector.
Pofész (with Pofűsz and Pomész as members)	2,000 ⁹⁰ or 1,600 ⁹¹ (in 2022)	Decreasing	NACE 53.10 and NACE 53.20	No	Yes, previous SEB with Hungarian Post	None	

Employer organisations	There is one sectoral employer organisation in the postal and courier activities sector in Hungary. The subsector NACE 53.10 is highly centralised; Hungarian Post (Magyar Posta) is the only company operating, with 25,225 employees. The NACE 53.20 part of the sector is characterised by high fragmentation, with several small, private companies. This part of the sector greatly expanded during the COVID-19 pandemic; however, 50 smaller courier service companies with an activity in NACE 53.20 are under liquidation following the end of the pandemic. There is a sharp difference between the organisation of the two subsectors. NACE 53.10 is a
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⁹⁰ Information provided by the Network of Eurofound Correspondents during data collection through desk research and/or contact with the trade union.

⁹¹ Information provided by Hungarian Post during the checking of interim findings.

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

	traditionally well-organised industry with a long history of trade unionism, while NACE 53.20 covers relatively new types of activities and enterprises with no tradition of trade union organisation or affiliation.							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
Stratosz	1	25,225	Decreasing	NACE 53.10	No	No	Yes	<p>The national USP is affiliated to the only national employer organisation and is the only postal company in the employer organisation for the NACE 53.10 part only.</p> <p>Hungarian Post is involved in collective bargaining with the largest trade union, covering 60% of the sectoral workforce via its collective bargaining agreement.</p> <p>Neither the USP nor the employer organisation is affiliated to any other European organisation.</p>

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


	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	22,274 (SBS) or ~17,500 (Network of Eurofound Correspondents)	0.98%	1.38%	5 (DG Internal Market, Industry, Entrepreneurship and SMEs), or >3,000 (Network of Eurofound Correspondents)

Representative sectoral trade unions	<p>There are four representative trade unions in the postal and courier activities sector in Ireland. The trade unions are considered representative based on mutual recognition.</p> <p>Trade unions have a strong membership basis in the postal and courier activities sector USP, An Post. However, the workers employed by the largest employers in NACE 53.20 are also organised by the four trade unions. The fragmentation on the workers' side is explained by the fact that trade unions organise members in different parts of the sector and organise different categories of workers. The courier industry is marked by a fragmented employment system, with layers of contracting and subcontracting – often resulting in delivery drivers being self-employed. Smaller providers are difficult for trade unions to organise, as employees are spread out less densely in smaller depots across Ireland. Some other providers do not have links with unions. Some couriers utilise subcontractors, which can make it difficult for a trade union to organise. There are no sectoral social dialogue bodies in Ireland.</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
SIPTU	No data	No data	No data	Yes	Yes, SEB	No data	<p>The largest, second largest and third largest trade unions in the sector are affiliated to UNI Europa for their postal members. All three trade unions are involved in collective bargaining at company level with both the USP and the largest employers that provide other postal and courier services. According to the largest union's estimations, 90% of the workforce in the sector is covered by collective bargaining agreements.</p> <p>CESI has no members in the postal and courier activities sector in Ireland.</p>
CWU	8,863	Decreasing	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	UNI Europa	
Fórsa	270	Stable	No data, might have members in the USP (back office and financial products)	Yes	Yes, SEB	None for the sector	
AHCPS	~118	Decreasing	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	UNI Europa	

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

Employer organisations	<p>There are no sectoral employer organisations in Ireland in the postal and courier activities sector. An Post, the universal service provider in Ireland, is the most prominent body in the postal and courier activities sector. It employs over 10,000 workers in the universal service part of the sector only, which constitutes around 40% of the entire workforce of the sector. The company is consulted by the government on sector-related matters. The PostEurop member, the main USP in Ireland, is the largest employer in the USD part of the sector. The USP is involved in collective bargaining at company level with the three largest trade unions. The USP is also affiliated to International Post Corporation (ICP).</p> <p>There is a strong presence of courier services in Ireland (such as DPD, DHL and Fastway) and these are not organised by any employer organisation. It is noteworthy that DPD's parent company, La Poste, is affiliated to PostEurop.</p>
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Representativeness of the European social partner organisations: Postal and courier activities sector

	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	140,026 (SBS)	0.77%	8.68%	3,671 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	<p>There are eight representative trade unions in the sector in Italy. All trade unions are representative based on mutual recognition. The fragmentation on the trade unions' side is due to differences in terms of ideology. There are seven social dialogue bodies for the postal and courier activities sector in Italy.</p> <p>Subcontracted workers are considered regularly covered by the collective agreements of Poste Italiane, ensuring that they receive fair wages, benefits and working conditions in accordance with the established standards and regulations for employees in the postal and courier activities sector. The trade unions organising the employees of the largest employers in NACE 53.20 – FIT-CISL and Ultrasporti – are trade unions related to CGIL, CISL and UIL, but for the transport sector.</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
SLC-CGIL	No data	No data	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	UNI Europa	<p>There are no data on the membership of the trade unions, or the coverage of the workforce by the collective bargaining agreements signed, as in Italy there is no law on representativeness. However, SLC-CGIL and SLP CISL are considered to be the largest trade unions in the sector and both are UNI Europa members. CESI has two smaller affiliates in Italy: CISAL, to which the postal trade union FAILP-CISAL is affiliated at national level, and Confisal. All trade unions are involved in and signatories of collective bargaining agreements with Poste Italiane, an agreement that</p>
SLP CISL	No data	No data	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	UNI Europa	
UILPoste	No data	No data	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	No data	
Confisal	No data	Stable ⁹³	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	CESI ⁹³	
FAILP-CISAL	No data	No data	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	CESI, via CISAL	
FNC-UGL	No data	No data	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	No data	
Confedir	No data	No data	No data	Yes	Yes, MEB and SEB	CESI	

⁹³ Indicated by the CESI representative during the checking of interim findings but not confirmed by the Eurofound correspondent from Italy.


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

Assidipost-Federmanager	No data	No data	NACE 53.10 and NACE 53.20	Yes	Yes, MEB and SEB	None for the sector	covers all the company's employees, except managers. ⁹²
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Employer organisations	There is one cross-sectoral employer organisation – Confindustria – to which the national USP, Poste Italiane, is affiliated. There are three sectoral employer organisations that organise the employers in the other postal and courier part of the sector. FISE-Assoposte (Associazione Nazionale Imprese Servizi Postali) is not a signatory of the main collective bargaining agreement for the sector with Poste Italiane but is a signatory of the collective bargaining agreement concerning the employees of companies carrying out postal services under contract, together with the other two employer organisations (FISE-ARE and CNA) and three main trade unions in the sector.							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Involved in collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
Confindustria	150,000 in total, unknown postal only	5,382,382 in total, unknown postal only	No data	NACE 53.10 and NACE 53.20	Yes	Yes, through its member Poste Italiane	Yes	The PostEurop member Poste Italiane is the largest employer in the sector and is also active in logistics, financial and insurance services, payment systems and telecommunications. The company's collective agreement is considered a national agreement for the sector. The USP is not affiliated to any other EU organisations.
FISE-Assoposte	No data	2,000	No data	NACE 53.20	Yes	Yes	No	
FISE-ARE	30	6,000	No data	NACE 53.20	Yes	No data	No	
CNA	No data	No data	No data	NACE 53.20	Yes	No data	No	

⁹² The agreement is formally a company-level collective agreement, but is regarded as a national category agreement, given the monopolistic nature of Poste Italiane.

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

Latvia 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	6,330	0.92%	0.39%	62 (DG Internal Market, Industry, Entrepreneurship and SMEs)


Representative sectoral trade unions	There is one representative trade union in the postal and courier activities sector in Latvia, organising workers in both universal services and other postal and courier activities. The trade union is considered representative based on mutual recognition. There are no sectoral social dialogue bodies in Latvia. More than half of the sector employees are employed in the state-owned USP, Latvian Post.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
LSAB PRO	~1,000	Increasing	NACE 53.10 and NACE 53.20	Yes	Yes, SEB with national USP, Latvijas pasts/ Latvian Post	UNI Europa	The only representative trade union organising workers in both parts of the sector is affiliated to UNI Europa for its postal service members. Since 1999, it has been the signatory of the company-level collective bargaining agreement with the management of Latvian Post, which employs around 58% of the workforce in the sector. CESI has two members in Latvia – LVPUFDA and LĀADA – but neither has members in the postal and courier activities sector.

Employer organisations	There are two sectoral employer organisations in the postal and courier activities sector in Latvia. Both organisations represent companies active in the NACE 53.20 part of the sector only. The fragmentation is explained by the fact that some companies in the sector are also active in the logistics sector. None of the employer organisations in the postal and courier activities sector represent the main USP in Latvia, Latvian Post, which is the largest company in the sector, is owned by the state and is a PostEurop member. There are over 1,100 companies operating in NACE 53.20 in Latvia, the largest of them subsidiaries of international courier services (such as DHL, DPD, TNT and Omniva, a subsidiary of Estonian Post) as well as local companies working in the delivery of addressed and unaddressed parcels, logistics services and courier services.							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop

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

PKB	6	(789) 15%	Stable	NACE 53.20 only	Yes	No	No	The PostEurop member, and the main USP in Latvia, Latvian Post, is the largest employer in the USD part of the sector. The USP is involved in collective bargaining at company level only. The largest employers for the NACE 53.20 are Omniva and DPD Latvia, both of them affiliated to PKB.
LLA	2 (also members of PKB)	(311) 6%	Stable	NACE 53.20 only	No	No	No	


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

Lithuania 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	11,532 (SBS)	0.71%	0.93%	44 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	<p>There are two representative trade unions in the postal and courier activities sector in Lithuania, and both of them organise workers at the national USP, Lithuanian Post. This fragmentation is due to ideological reasons. Both trade unions are considered representative based on mutual recognition.</p> <p>There are no sectoral social dialogue bodies in Lithuania. In general, the working conditions in the provision of universal services (NACE 53.10) are better regulated, and only workers in this part of the sector are covered by the collective bargaining agreement signed by the two existing trade unions and the USP, Lithuanian Post. Workers active in other postal and courier services (NACE 53.20) are not unionised and not covered by any collective bargaining agreement, despite the fact that the USP, Lithuanian Post, covers both parts of the sector.</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
LRDPS	760 (1,000 in total)	Decreasing	NACE 53.10 only	Yes	Yes, SEB with Lithuanian Post	UNI Europa	<p>The largest trade union organising workers of the national USP in NACE 53.10 is affiliated to UNI Europa for its postal members.</p> <p>The second largest trade union covers only workers of the national USP and is not affiliated at European level. Both trade unions are involved in collective bargaining with the management of Lithuania Post, which employs around 66% of the workforce in the sector.</p> <p>CESI has a member in Lithuania – the General Trade Union of the Republic of Lithuania – but has no members in the postal and courier activities sector.</p>
AB Lietuvos paštas profesinė sąjunga (trade union of AB Lithuanian Post)	730	Decreasing	NACE 53.10 only	Yes	Yes, SEB with Lithuanian Post	None	

No employer organisations	<p>There are no sectoral employer organisations in the postal and courier activities sector in Lithuania. This might be determined by the rather diverse range of companies operating in the sector: one large, state-owned company; several rather big international companies; and a number of small national companies.</p> <p>The main USP in Lithuania, Lithuanian Post, is the largest company in the sector, is owned by the state and is a PostEurop member. Lithuanian Post covers 17% of parcels delivery subsector NACE 53.20, but the majority of the activities are covered by foreign capital companies (such as Omniva, DPD and TNT) and some smaller national private companies. Omniva is the trademark of the USP from neighbouring Estonia, Estonian Post (also a PostEurop member), and is also active in Latvia.</p>
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Representativeness of the European social partner organisations: Postal and courier activities sector

Luxembourg 	In Luxembourg the largest employer in the postal and courier activities sector – POST Luxembourg – is classified under NACE 61.10, Telecommunications, not under NACE 53, Postal and courier activities, as is the case in the other EU27 Member States. For this reason, the entire postal and courier activities sector is defined, for Luxembourg, as including activities under NACE 53.10 and NACE 53.20 and all postal activities of POST Luxembourg.			
	Persons employed in the entire postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the entire postal and courier activities sector
	2,014 (in 2020) (SBS)	0.51%	0.12%	39 (DG Internal Market, Industry, Entrepreneurship and SMEs)


Representative sectoral trade unions	There are three trade unions in the postal and courier activities sector in Luxembourg. All organisations represent the workers of the national postal service provider – POST Luxembourg – involved in mail (letters) and parcel activities. Two trade unions, LCGB and OGB-L, are representative based on legal recognition. The Syndicat des P&T is indirectly considered representative as a member of CGFP, a representative trade union for the general public sector. The fragmentation is due to ideological reasons and unions organising different categories of workers. There are no social dialogue bodies for this sector in Luxembourg.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
LCGB Secteur public	~1,200 (estimate)	Increasing	Both mail and parcel activities	Yes	Yes, SEB with POST Luxembourg	UNI Europa	The two largest trade unions organising workers of the largest national postal service provider are affiliated to UNI Europa for their postal members.
OGB-L	No data	Decreasing	Both mail and parcel activities	Yes	Yes, SEB with POST Luxembourg	UNI Europa	
Syndicat des P&T	1,800 in NACE 61.10	Decreasing	Both mail and parcel activities	Yes, indirectly, as a member of CGFP, which is considered representative for the public sector	Yes, SEB with POST Luxembourg	Indirectly to CESI, via CGFP	The two representative trade unions are involved in collective bargaining with the management of POST Luxembourg, which employs the largest part of the workforce in the sector. CESI has one member trade union in Luxembourg – Syndicat des P&T – which is involved in collective bargaining with the management of POST Luxembourg.

Employer organisations	There is one employer organisation in the postal and courier activities sector in Luxembourg. The main postal services provider, POST Luxembourg, is classified under NACE 61.10, not under NACE 53.10 or NACE 53.20. POST Luxembourg is owned by the state and covers both mail and parcel activities. POST Luxembourg is affiliated,
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Representativeness of the European social partner organisations: Postal and courier activities sector

	at national level, to the cross-industry organisations ABBL (Association des banques et banquiers Luxembourg), Fedil (Fédération des industriels Luxembourgeois) and the Luxembourg Chamber of Commerce (Chambre de Commerce). The employer organisation Groupement des entrepreneurs de transport covers companies in the transport sector, as well as three companies active in other postal and courier activities. There are around 90 enterprises active in 'Other postal and courier activities' in Luxembourg (increasing from 51 in 2014).							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
GT	6 in total (3 in other postal and courier activities)	No data	Stable	NACE 53.20	Yes	Not in the postal and courier activities sector	No	<p>POST Luxembourg is the most important postal enterprise in Luxembourg but is classified under NACE 61.10, not under NACE 53.10 or NACE 53.20. There is a collective bargaining agreement between the management of POST Luxembourg and the trade unions organising the workforce in the sector.</p> <p>The second most important enterprise under NACE 53.20 is DHL Express Luxembourg SA (employing 120 workers).</p>


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

	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	1,115 (in 2020) (SBS)	0.48%	0.07%	25 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	<p>There is only one representative trade union in the postal and courier activities sector in Malta organising workers in both NACE 53.10 and NACE 53.20: GWU. The trade union is recognised as representative based on mutual recognition. GWU is involved in collective bargaining covering all workers in the sector except for subcontractors, who are not considered to be employed in the postal and courier activities sector and hence not covered by the collective bargaining agreements.</p> <p>There is strong union representation within national USP – MaltaPost – where the majority of employees are members of GWU. Within the wider sector, there are a lot of foreign workers and, consequently, less trade union representation. The workers of DHL, one of the largest employers (for courier or parcel-related activities), are also covered by a collective bargaining agreement negotiated by GWU. Involvement in social dialogue is mostly indirect, through the Malta Council for Economic and Social Development (MCESD), as there are no specific bodies for the postal services sector.</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
GWU	~500	Increasing	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	UNI Europa	<p>The only trade union organising workers in the entire postal and courier activities sector is affiliated to UNI Europa for its postal members. The trade union is involved in collective bargaining with both the national USP and DHL (as defined above).</p> <p>The indirect CESI member UHM has no members in the postal and courier activities sector in Malta.</p>

Employer organisation	<p>There is no postal employer organisation in Malta. The national USP, MaltaPost, a privatised enterprise regulated by the Maltese government authorities, is a member of a cross-sectoral organisation, MEA, but the employer organisation has no role in either government consultation on behalf of the company or involvement in social dialogue bodies. The national USP, MaltaPost, is a PostEurop member. In the courier services, there is competition among MaltaPost, between some major worldwide companies and other, smaller-scale, companies. These companies are not represented by any employer organisation. The number of companies in the postal and courier activities sector increased by 292% in 2020 compared with 2011 (from 36 companies to 105 companies). A major increase was registered during the first year of the COVID-19 pandemic (from 55 companies to 105 companies), as the COVID-19 pandemic represented an opportunity for the sector.</p>
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Representativeness of the European social partner organisations: Postal and courier activities sector

The Netherlands 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	68,230 (SBS)	0.81%	4.23%	120 (DG Internal Market, Industry, Entrepreneurship and SMEs)


Representative sectoral trade unions	<p>There are three trade unions in the sector in the Netherlands. All three trade unions are representative based on mutual recognition. The fragmentation on the trade unions' side is due to unions organising different categories of workers in the sector and different parts of the sector.</p> <p>There are four sectoral bipartite social dialogue bodies in the Netherlands and one tripartite body. There is also the Dutch Categorical Trade Union Finance (NCF), which is affiliated to CESI but is not sector-related, and the Interest Group for Package Distribution (BvPD) trade union, which is rather small so far and not involved in social dialogue (yet).</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
FNV	5,000 in NACE 53.10 and some in NACE 53.20	Decreasing	NACE 53.10 and NACE 53.20	Yes	SEB	UNI Europa Post and Logistics, (ETF, ETUC)	<p>The largest trade union in the sector – FNV – is affiliated to UNI Europa for its members in the postal and courier activities sector.</p> <p>The second largest trade union – BVPP – is indirectly affiliated to CESI via Eurofedop. According to CESI, BVPP is the largest trade union. BVPP is not a UNI Europa member.</p> <p>CNV, the third largest trade union, is a CESI member. All trade unions are involved in collective bargaining.</p>
BVPP	4,000	Increasing	NACE 53.10 and NACE 53.20	Yes	MEB and SEB	CESI (via Eurofedop)	
CNV	No data	Decreasing	NACE 53.10 and NACE 53.20	Yes	MEB and SEB	CESI	
De Unie	No data, most likely not active in the sector and not involved in most recent PostNL agreements	No data	No data	No data	No data		

Note: '(I)' indicates affiliation for other sectors, not for the postal and courier activities sector.

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

Employer organisations	There is one representative sectoral employer organisation in the postal and courier activities sector: TLN. The organisations LBV, Subcopartners and WPN, included in the previous representativeness study for the sector, are no longer active, and VHP2, another organisation mentioned in the previous study, has no members in this sector.							
Employer organisation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Involved in collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
TLN	312	~2,000	Decreasing	NACE 53.10 and NACE 53.20	Yes, statutory	Yes, MEB	Yes	TLN, the only employer organisation, has the national USP, PostNL, among its members. It is involved in collective bargaining at sectoral level. TLN represents PostNL, but only in the courier sector. The mail delivery part of PostNL is represented by VNO-NCW, a cross-sectoral employer organisation, of which TLN is also a member.

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

Poland 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	94,917 (Network of Eurofound Correspondents)	0.83%	5.88%	123 (DG Internal Market, Industry, Entrepreneurship and SMEs)


Representative sectoral trade unions	<p>There are two representative trade unions in the sector in Poland. Both are representative based on statutory requirements, and both organise only workers active in NACE 53.10. The workers in NACE 53.20 are not represented by any trade union.</p> <p>There are also 96 trade unions organising employees of the USP, Poczta Polska, and 25 out of these 69 are involved in collective bargaining at company level with Poczta Polska management, but they are not representative based on national criteria. Around 52% of all employees of the USP are trade union members. The fragmentation on the trade unions' side is due to unions organising different categories and types of workers, organising workers in different parts of the country and having ideological differences. There are no specific social dialogue bodies for the postal and courier activities sector in Poland, but there is a Social Dialogue Council, a nationwide, cross-sectoral, tripartite body, in which the second largest union for the postal and courier activities sector is involved as an umbrella organisation for all sectors, including the postal sector.</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
NSZZ Solidarność Pracowników Poczty Polskiej	Under 10,000 (estimate)	Decreasing	NACE 53.10	Yes, statutory recognition	Yes, SEB	UNI Europa	<p>The largest trade union in the sector, ZZPP, only organises workers of the national USP (in NACE 53.10) and is not affiliated to UNI Europa. The second largest trade union is affiliated to UNI Europa for its members in the postal and courier activities sector. Both trade unions are involved in collective bargaining at company level, with Poczta Polska management, as there is no sector-related bargaining.</p> <p>CESI has no affiliates in the postal and courier activities sector in Poland.</p>
ZZPP	Under 11,000	Decreasing	NACE 53.10	Yes, statutory recognition	Yes, SEB	None	

Employer organisations	<p>There is one cross-sectoral employer organisation, to which the largest employer for other postal services (NACE 53.20) is affiliated. The employer organisation is involved in the Social Dialogue Council, a national, cross-sectoral tripartite body, in which aspects related to all sectors, including the postal and courier sector, are discussed.</p>
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Representativeness of the European social partner organisations: Postal and courier activities sector

	The national USP – Poczta Polska – is not affiliated to any employer organisation. Poczta Polska is a member of PostEurop. The other employers in NACE 53.20 (DPD Polska, GLS Poland, UPS Polska, FedEx Express Poland and DHL) are not affiliated to any employer organisation.							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Involved in collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
Pracodawcy RP	11 companies in the postal and courier activities sector	No data	Increasing	NACE 53.20 only	Yes, statutory recognition	Not for the postal and courier activities sector	No, the employer organisation is a member of SGI Europe	PostEurop represents the only company active in NACE 53.10, the USP Poczta Polska, which is the largest employer in the entire postal and courier activities sector in the country.

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


	Portugal	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
		23,235 (SBS)	0.53%	1.44%	82 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	There are 10 representative trade unions in the sector in Portugal. All trade unions are representative based on mutual recognition. The fragmentation on the trade unions' side is due to unions organising different categories of workers (such as civil servants). There are no specific social dialogue bodies for the postal and courier activities sector in Portugal.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
SNTCT	5,000 (estimate)	Decreasing	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	UNI Europa	<p>The largest and second largest trade unions in the sector are affiliated to UNI Europa for their members in the postal and courier activities sector. The trade unions not affiliated to UNI Europa are very small.</p> <p>CESI has no direct affiliates in the sector.</p> <p>All trade unions are involved in collective bargaining at company level, as there is no sector-level bargaining (see the section below on employer organisations).</p> <p>The trade unions affiliated to UNI Europa organise workers of the national USP, the two largest employers for NACE 53.20 and the largest non-EU operator (UPS Portugal).</p> <p>The second largest employer in NACE 53.10 (Premium Green Mail) has no trade union organising its ~100 employees.</p>
Sindelco	4,000 (estimate)	No data	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	UNI Europa	
Sinttav	200 (revised estimate)	No data	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	UNI Europa, ICTS	
SITIC	1,630 (trade union)	Increasing	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	CESI via USI	
Fentcop	70 (estimate)	No data	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	CESI via USI	
Sicomp	40	No data	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	CESI via USI	
CGSI	10 (estimate)	No data	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	None	
Sincor	350 (estimate)	No data	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	None	
Sinquadros	150 (estimate)	No data	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	None	
Sictex	200 (estimate)	No data	NACE 53.10 and NACE 53.20	Yes	Yes, SEB	None	

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

Employer organisations	<p>There is no employer organisation for the postal and courier activities sector in Portugal. The national USP, CTT Correios de Portugal, a state-owned company, was completely privatised in 2013/2014. CTT is a joint-stock company, owned by several international private entities. CTT has approximately 12,000 employees, most of them in postal and courier services. CTT is hegemonic in NACE 53.10 and the second largest employer in NACE 53.20, where its subsidiary CTT Expresso provides approximately a quarter of the total traffic. In 2022, there were 15 entities providing universal services: CTT and its subsidiary CTT Contacto, plus 13 competitors. Four operators have significant shares in NACE 53.20: Premium Green Mail, Chronopost/DPD, VASP Premium and NACEX Group.</p> <p>The dominant position of CTT and the strong competition among the new operators do not favour the work of business associations or employer organisations. The multi-employer bargaining between UPS and the trade union SNTCT in 2019 reports that UPS tried to create a group of companies to negotiate an agreement in NACE 53.20 but did not succeed.</p> <p>The companies operating in the sector, aside from CTT and its two subsidiaries, CTT Contacto and CTT Expresso, are not subject to any collective agreement.</p>
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Representativeness of the European social partner organisations: Postal and courier activities sector

 Romania	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	53,001 (SBS)	1.13%	3.29%	351 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	There are no representative trade unions in the postal and courier activities sector in Romania. The only federation in the sector, FSPC, has three affiliated trade unions: SLPR (National Trade Union of Romanian Postal Workers), which has members in 53.10; SPRC (the regional trade union of Romanian Postal Workers Constanta), also covering only NACE 53.10; and SLFT (The Free Stamp Factory Trade Union) with members in NACE 18.12 only. There are no sectoral social dialogue bodies in Romania.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
FSPC	15,900 (including SLPR)	Declining	NACE 53.10	Not recognised as representative since 2014	No	UNI Europa	The largest sectoral federation – FSPC – is affiliated to UNI Europa for its members in the postal and courier activities sector. FSPC is not involved in collective bargaining, but its member, the company-level trade union SLPR, is involved in collective bargaining with the national USP. CESI has two members in Romania, but neither union has members in the postal and courier activities sector.
SLPR (a member of FSPC)	15,000	Declining	NACE 53.10	Yes, at company level	Yes, SEB	Not directly, only via FSPC	

Employer organisations	There is no representative sectoral employer organisation in the postal and courier activities sector in Romania. The only employer organisation in the sector, PSC (Patronatul Societatilor de Curierat/Courier Companies Employer Organisations), represents 11 SMEs active in NACE 53.20 but does not meet the national representativeness criteria and cannot engage in collective bargaining.							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
PSC	11	No data, small share estimated	No data	NACE 53.20	No	No	No	The PostEurop member – national USP Poșta Română – is not a member of this organisation. None of the largest employers in NACE 53.20 are affiliated to PSC.

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

Slovakia 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	17,514 (Network of Eurofound Correspondents)	0.98%	1.09%	26 (DG Internal Market, Industry, Entrepreneurship and SMEs)


Representative sectoral trade unions	<p>There is one representative trade union in the postal and courier activities sector in Slovakia, organising members in the universal postal services only, specifically the employees of the USP, Slovenská pošta. There are also three smaller trade unions: SOZPaT, SOZP and POS. POS also organises workers at the USP, but they have very limited membership and it is unclear if they are representative. The fragmentation on the trade unions' side is due to historical reasons.</p> <p>There are no sectoral social dialogue bodies, but the sectoral trade unions are involved, via their cross-sectoral federations, in the cross-sectoral Economic and Social Council of the Slovak Republic. The workers in NACE 53.20 are not represented by any trade union in Slovakia and thus not covered by collective bargaining.</p>						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
OZ PaL	4,100	Decreasing	NACE 53.10	Yes	Yes, SEB	UNI Europa	<p>The largest sectoral trade union – OZ PaL – represents only the employees of universal postal services (NACE 53.10). It is the largest trade union established at the USP Slovenská pošta. Its company-level collective agreement covers all employees of the USP, which constitute ~45% of the sectoral workforce.</p> <p>The other, smaller, trade union is a Eurofedop member (thus indirectly affiliated to CESI) and is involved in collective bargaining with the USP Slovenská pošta, along with two more small trade unions that did not provide any data and refused to participate in this study.</p>
SOZPaT	No data	No data	NACE 53.10	No data	Yes, SEB	CESI via Eurofedop	

Employer organisations	<p>There are three representative employer organisations to which the national USP, Slovenská pošta, is affiliated in Slovakia. Only the largest employer in other postal and courier services is represented by one of the three employer organisations. There are no sectoral social dialogue bodies, but the USP is involved in the cross-sectoral Economic and Social Council of the Slovak Republic via its membership of AZZZ SR.</p>							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
ÚDPT SR (Union of Transportation,	1 (the USP)	12,743	No data	NACE 53.10	Yes	Indirectly via its member USP	Yes	The PostEurop member, the national USP Slovenská pošta, is a member of all three organisations

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

Posts and Telecommunication)								and is involved in collective bargaining.
ZLZ SR	104 in total (2 in the postal and courier activities sector, including the USP in postal and the largest employer in NACE 53.20)	11,962	No data	NACE 53.10 and NACE 53.20	Yes	Indirectly via its member USP	Yes	The largest employer in other postal and courier services, Slovak Parcel Service (SPS), is affiliated to the employer organisation ZLZ SR, which is affiliated at European level to FIATA and Clecat.
AZZZ SR	1 (the USP)	12,743	Stable	NACE 53.10	Yes	Indirectly via its member USP	Yes	

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

Slovenia 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	8,046 (Network of Eurofound Correspondents)	1.03%	0.50%	31 (DG Internal Market, Industry, Entrepreneurship and SMEs)


Representative sectoral trade unions	There are three trade unions in the postal and courier activities sector in Slovenia. Two of them are considered representative based on legal criteria and one only at company level. Around 85% of the sector employees are employed by the state-owned USP Post of Slovenia and are well represented by trade unions. The workers active in other postal and courier activities are mostly employed by small branches of foreign courier companies (such as DHL, DPD, TNT and GLS) and are less organised. In the largest employers in NACE 53.20, DHL and DPD, company-level trade unions are active and involved in collective bargaining. The fragmentation on the workers' side is explained by the fact that trade unions organise members in different parts of the sector. There are no sectoral social dialogue bodies in Slovenia.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
ZSSS-SDPZ	1,500	Stable	NACE 53.10 and NACE 53.20	Yes	Yes	None	Neither of the two trade unions that are representative of the sector and involved in collective bargaining at both sectoral and company levels is affiliated to either of the two European social partner organisations.
SZS Alternativa	1,200	Stable	NACE 53.10	Yes	Yes	None	
Trade union of DHL	<10	Decreasing	NACE 53.20	Yes, at company level	Only MEB	None	

Employer organisations	There are two cross-sectoral employer organisations in Slovenia of which the national USP, Post of Slovenia, is the only postal member. The fragmentation is explained by historic reasons (membership of GZS-ZPZ used to be mandatory). There are over 900 companies active in NACE 53.20, employing over 1,000 employees altogether. These SMEs, some of them subsidiaries of foreign companies (such as GLS, DHL, UPS or TNT), are not organised by any employer organisation. Post of Slovenia holds a monopoly in postal activities under USO and sectoral social dialogue, and is state-owned.							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
GZS-ZPZ	1 member (Post of Slovenia)	5,897	Stable	NACE 53.10 only	Yes	Yes	Yes	The PostEurop member, the main USP in Slovenia, is the largest employer in the USD

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

ZDS (Združenje delodajalcev Slovenije-Sekcija za promet in zveze)	1 member (Post of Slovenia)	(311) 6%	Stable	NACE 53.20 only	Yes	Yes	No	<p>part of the sector. The USP is involved in collective bargaining at company level and indirectly, via the two employer organisations it is affiliated to, in sectoral collective bargaining.</p> <p>The USP is also affiliated to Euromed and active in the programmes of the International Post Corporation (ICP).</p>
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Representativeness of the European social partner organisations: Postal and courier activities sector

Spain 	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
	Between 112,815 (Network of Eurofound Correspondents) ¹ and 123,800 (SBS)	0.7%	6.74%	Between 2,894 (DG Internal Market, Industry, Entrepreneurship and SMEs) and 27,120 (National Institute of Statistics)

Representative sectoral trade unions	There are nine representative trade unions in the sector in Spain. All trade unions are representative based on meeting legal requirements. There is one bipartite and one tripartite social dialogue body for the postal and courier activities sector in Spain. There are several trade unions that have limited membership in the sector, but they are not involved in social dialogue and collective bargaining for the postal and courier activities sector and have refused to participate in the study. The fragmentation on the trade unions' side is due to unions organising different categories of workers (such as civil servants) and organising workers in different parts of the country.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
FeSP-UGT	15,500	Stable	NACE 53.10	Yes	Yes, SEB	UNI Europa Post	<p>The three largest trade unions in the sector are affiliated to UNI Europa for their members in the postal and courier activities sector.</p> <p>CESI has one affiliate organising only the public servants of the USP.</p> <p>The trade unions not affiliated to either UNI Europa or CESI have minor representativeness at national level (mainly in NACE 53.10), except CIG-Correos, which organises civil servants at regional level.</p> <p>All trade unions, except ELA/STV and FS-USO, are involved in collective bargaining.</p>
FSC-CCOO Postal	36,238	Increasing	NACE 53.10 and NACE 53.20	Yes	Yes, MEB	UNI Europa Post	
UGT-FeSMC	10,000	Increasing	NACE 53.20	Yes	Yes, MEB and SEB	UNI Europa	
ELA/STV	No data	No data	NACE 53.10 and NACE 53.20	Yes	No data	UNI Europa (not confirmed)	
CSIF	No data	No data	Most likely NACE 53.10	Yes	Yes, SEB	CESI (not confirmed by trade union)	
CIG-Correos	675	Increasing	NACE 53.10	Yes	Yes, MEB	None	
Sindicato Libre	No data	No data	NACE 53.10	Yes	Yes, MEB and SEB	None	
FS-USO	<10% of the sector	No data	NACE 53.20	No	No data	None	

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


LAB	No data	No data	NACE 53.10 and NACE 53.20	No	Yes, SEB	None	
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Employer organisations	There are four representative employer organisations for the postal and courier activities sector in Spain. The only company active in NACE 53.10 is the USP: Sociedad Estatal Correos y Telégrafos (Correos). The postal operators active in NACE 53.20 often provide their services in form of networks of franchises, partners, agents and similar legal relationships. In 2021, 61.8% of the operators registered in the postal register were part of such networks. The NACE 53.20 part of the sector is characterised by high atomisation, with 97% of those working in this subsector being microenterprises. The fragmentation on the employer organisations' side is due to the fact that they represent different subsectors within NACE 53.20.							
Employer organisation abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Involved in collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
AEM	800 ⁹⁴ or 54 ⁹⁵	19% of NACE 53.20	Increasing	NACE 53.20	Yes	YES, MEB	No	The PostEurop member, USP Correos, is the only enterprise active in NACE 53.10. All other 27,119 enterprises are active in NACE 53.20 and are not members of PostEurop. The four employer organisations covering NACE 53.20 are involved in collective bargaining at sectoral level.
Asempre	No data	No data	No data	NACE 53.20	Yes	YES, MEB	No, affiliated to European Express Association	
ANEB	42	3.5% of NACE 53.20 or 2.3% entire NACE 53	No data	NACE 53.20	Yes	YES, MEB	No	
UNO	127 ⁹⁴ or 92 ⁹⁵	No data	No data	NACE 53.20	Yes	Yes, MEB	No, but organises a company that has a subsidiary engaged in USD	

⁹⁴ Number provided by the Network of Eurofound Correspondents during data collection through desk research and/or contacting the employer organisation.

⁹⁵ Number provided by Correos, during data checks of the preliminary findings.

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

	Sweden	Persons employed in the postal and courier activities sector	Proportion of the national workforce	Proportion of the EU postal workforce	Number of companies in the postal and courier activities sector
		33,801 (SBS)	0.94%	2.10%	34 (DG Internal Market, Industry, Entrepreneurship and SMEs)

Representative sectoral trade unions	There are nine representative trade unions in the sector in Sweden. All trade unions are representative based on mutual recognition. The fragmentation on the trade unions' side is due to unions organising different categories of workers (such as civil servants), different types of workers (such as blue-collar or white-collar) and workers in different parts of the sector. There are no specific social dialogue bodies for the postal and courier activities sector in Sweden.						
Trade union abbreviation	Members	Trend	Sector-relatedness	Considered representative	Collective bargaining	European affiliation	Assessment of the representativeness of UNI Europa and CESI
SEKO	10,600	Decreasing	NACE 53.10 and NACE 53.20	Yes	Yes, SEB and MEB	UNI Europa	<p>The largest and second largest trade unions in the sector are affiliated to UNI Europa for their members in the postal and courier activities sector.</p> <p>CESI has no direct affiliates in the postal and courier activities sector in Sweden.</p> <p>The trade unions affiliated to UNI Europa organise the workers of all the largest employers in all parts of the sector, and the largest non-EU operator in the country.</p> <p>All trade unions are involved in collective bargaining for the sector. In Sweden, there are different collective bargaining agreements for each occupation in this sector.</p> <p>SACO-Posten is a coordinating union present at national level with the PostEurop member PostNord and</p>
Transport	5,000 (estimate)	Decreasing	NACE 53.20	Yes	Yes, MEB	UNI Europa, ETF	
SACO-Posten*	1,800 (including SRAT, Akavia and SI)	Decreasing	NACE 53.10	Yes	Yes, SEB and MEB	No data	
SRAT*	See SACO-Posten	No data	NACE 53.10	Only representative for the white-collar postal workers (managers)	Yes, SEB and MEB	No data	
SI (Sveriges Ingenjörer)*	350, part of SACO-Posten	No data	NACE 53.10 and NACE 53.20	Only representative for the engineers in postal services	Yes, MEB	UNI Europa	
Akavia*	See SACO-Posten	No data	NACE 53.10	Only representative for the white-collar workers	Yes, MEB	No data	
Ledarna	170	No data	NACE 53.10 and NACE 53.20	Only representative for the management in postal services	Yes, SEB and MEB	None	

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

ST	3,416	No data	NACE 53.10 and NACE 53.20	Yes	Yes, SEB and MEB	No data, included on the list	includes members from the three SACO-related unions: SRAT, Akavia and SI.
Unionen	671	Increasing	NACE 53.10 and NACE 53.20	Only representative for postal delivery workers, administrative staff, human resources staff and customer service staff	Yes, SEB and MEB	No data	

Note: * SACO-Posten is a coordinating union present at the national USP and brings together members from the three SACO-related unions: SRAT, Akavia and SI.

Employer organisations	There are four employer organisations for the postal and courier activities sector in Sweden. USPs are relatively few: 25 companies are approved for USO services, but PostNord, the largest USP, has 80% of the market share, followed by CityMail, which has 19%. The USP PostNord also provides non-universal services. There are new players, primarily actors setting up postboxes for e-shopping delivery, including smaller, start-up companies, which have the freedom not to sign a collective agreement and have chosen not to do so. These new companies are not represented by any employer organisation yet.							
Employer organisation name/abbreviation	Member companies	Workforce of member companies	Trend	Sector-relatedness	Considered representative	Involved in collective bargaining	Organises the national USD	Assessment of the representativeness of PostEurop
Kommunikationsföretagen	20 (including aviation)	~27,914	Stable	NACE 53.10 and NACE 53.20	Yes	Yes, SEB and MEB	Yes	Both the largest and second largest employer organisations in the sector have the national USP PostNord as their member. The second largest employer organisation in the postal and courier activities sector, Transportindustriförbundet, is also a member of Clecat – European Association for Forwarding, Transport, Logistics and Customs Services.
Transportindustriförbundet	88 (mostly logistics companies, several provide parcel shipping services)	No data	No data	Only 2 companies in NACE 53.10 and over 80 in NACE 53.20	Yes	No	Yes, only for parcel delivery	
Medieföretagen	78	11,919	Stable	Organises newspaper delivery companies	Yes	Yes, MEB	No	
BA (Biltrafikens Arbetgivareförbund)	113 (mostly logistics companies,	14,673	Stable	Primarily companies in	Yes	Yes, MEB	No	

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

	several provide parcel shipping services)			logistics and terminals				
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Annex 3: Network of Eurofound Correspondents

Table 72: Correspondents who contributed to this study

Member State	Correspondent	Organisation
AT	Georg Adam	Working Life Research Centre
BE	Dries Van Herreweghe	HIVA – Research Institute for Work and Society, KU Leuven
BG	Gabriela Yordanova	Institute of Philosophy and Sociology, Bulgarian Academy of Sciences
CY	Alexandros Perdikes	Cyprus Labour Institute – Pancyprian Federation of Labour
CZ	Soňa Veverková	Research Institute for Labour and Social Affairs
DE	Sandra Vogel	German Economic Institute
	Thilo Janssen	Institute of Economic and Social Research, Hans Böckler Foundation
DK	Carsten Jørgensen	Employment Relations Research Centre (FAOS), University of Copenhagen
	David Lausen	
EE	Ingel Kadarik	Praxis Centre for Policy Studies
	Miriam Lehari	
EL	Penny Georgiadou	Institute of Labour of the Greek General Confederation of Labour (INE GSEE)
ES	Pablo Sanz de Miguel	University of Zaragoza
FI	Vera Lindström	Oxford Research AB
FR	Frédéric Turlan	IR Share
HR	Predrag Bejaković	Faculty of Economics, Business and Tourism, University of Split
	Irena Klemenčić	Faculty of Law, University of Zagreb
HU	Szilvia Borbély	Kopint-Tárki Institute for Economic Research
IE	Rosanna Angel	IRN Publishing
IT	Alessandro Smilari	Fondazione Giacomo Brodolini
	Silvio Bologna	
LT	Inga Blaziene	Lithuanian Social Research Centre
LU	Franz Clément	Luxembourg Institute of Socio-Economic Research
LV	Krišs Karnītis	EPC Ltd
MT	Vincent Marmara	University of Malta
NL	Martin Clarke	Panteia BV
	Thomas de Winter	
PL	Dominika Polkowska	Ecorys Poland
PT	Reinhard Naumann	Centre for Studies for Social Intervention (CESIS)
RO	Victoria Stoiciu	Centre for Public Innovation
	Nicoleta Voicu	
SE	Nils Brandsma	Oxford Research AB
SI	Barbara Lužar	Faculty of Social Sciences, University of Ljubljana
SK	Daniela Kešelová	Institute for Labour and Family Research
	Miroslava Kordošová	
	Zuzana Turkovič	

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This study provides information allowing for an assessment of the representativeness of the actors involved in the European sectoral social dialogue committee for the professional postal and courier activities sector. Their relative representativeness legitimises their right to be consulted, their role and effective participation in the European sectoral social dialogue, and their capacity to negotiate agreements. The aim of Eurofound's studies on representativeness is to identify the relevant national and European social partner organisations in the field of industrial relations in the EU Member States. This study identifies UNI Europa and CESI, representing employees, and PostEurop, representing employers, as the most representative European-level social partner organisations in the postal and courier activities sector.

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