Deliverable D2.2.

Report on Qualitative and Quantitative analysis

WP2 DESIGN OR IMPROVEMENT OF A JOINT

QUALIFICATION IN VET,

RESPONSIBLE WP

WP2, Read-Lab

Erasmus+ EACEA

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Executive summary

This report includes the findings of the implementation of the quantitative and qualitative study in Bulgaria, Greece and Romania. The aim is to provide a snapshot of the current state of play in a) current Postal sector needs and challenges, and b) skill gaps/shortages and training provisions.

Postal sector current needs and challenges

Almost all participants identified **e-commerce** as the main factor driving changes in the postal sector. The strong market penetration of e-commerce results in several challenges that need to be addressed. The once dominant public postal operators are facing considerable disruptions to their businesses due to market liberalization and the arrival of internet. They are under pressure as private companies invest time and money on digitalization of their business and they claim a significant market share, especially in parcel and courier business. This is the case in Bulgaria, Greece and Romania where the USPs serve a much smaller share of parcel & express market then the letter market. The main finding is that **parcels are now more important than letters in revenue terms** and they are growing faster than letters are falling. This means that **Postal sector is again a growing business** where the number of enterprises providing postal sectors is increasing.

The importance of digital transformation has been duly recognized by the majority of the Postal stakeholders who participated in the NeWPOST field research. New technologies are changing the Postal world and e-commerce booming is an emerging reality. New and innovative electronic postal services call for redesign and installation of new IT systems and functionalities while classical postal services like logistics and delivery are being transformed and reshaped.

Postal sector in Bulgaria and Romania can be characterized as late adopters of technology integration in their business plans while Greek Posts are considered as late majority on a EU level.

The stakeholders of the three participating countries expressed the same concern regarding working conditions in Postal offices. The job is not attractive, at least for high qualified employees, and in combination with lack of up-to-date trainings or low salaries the employee turnover is quite high.

Another interesting point was that e-commerce has altered the consumer behavior in terms of communication and consumption of products/services. The impact is that postal offices need to adapt to constantly emerging customer needs in terms of online communication while improving or enhancing their services and products. Online philatelic and postal products shops, promotional communication through online digital postage and signatures, different payment options, parcel lockers, e-invoicing, hybrid email, performance reports and analytics, online account management are only part of the postal digital services in the new era.

Skills gaps and training provisions – The new Age postal employee

In general, there is a trend of continuous training in the Postal sector in a European level related to new technologies and recent developments based on data from National Postal offices around

Europe (Bpost, Royal Mail, La Poste, Correos Group). The related training activities highlight the internal dynamics of the postal environment and reveal the impact of the digital transformation. All participants agreed that being familiar with technology in terms of software tools and equipment is a must have competency. However, following up on discussions regarding skills gaps it was made clear that soft skills are needed as well.

An interesting focal point identified was the multitasking nature of day-to-day tasks. In cases of emergency or working under pressure all this distraction takes a toll on the quality of work and postal employees are constantly in a "reactive" mode. Therefore, they do not have time to reflect and apply their knowledge or their experience. The solution to that would be in-house trainings enabling employees to gain clarity on what to prioritize. Clarity on role priorities rather than specific task priorities, attention management skills rather than time management skills and an established workflow management system are the needed skills to overcome such challenges.

The participants in the three countries have stated that soft skills related to customer management are needed. Communication skills, sales techniques, creative thinking, work ethic teamwork, time management and customer relationship are the main skills identified.

The following list highlights the most important key points regarding training provisions and could be considered as potential training areas:

- Delivery methods including Work-based learning should be promoted. Internships or mentorships along with effective evaluation strategies can provide the much needed "inside look". However, as mentioned, it is quite challenging to establish in house trainings due to lack of time and experience personnel.
- GDPR and privacy of communication competencies are already part of the needed skills set. Given the end-to-end cycle of information processing of postal products (collection, sorting, distribution, transportation, mailbox service) in compliance with data protection and privacy law is a challenging task and up-to date training is needed. The postal employee should have the knowledge and by extend be able to answer questions about:
  o Types of personal data collected
  o Handling requests for data deletion or consent forms
  o Where privacy notice is posted
  o Who is the legal contact point in case of complex cases or how escalation should be performed.
- Logistics was a potential training area identified by a lot of participants mainly because this is a key factor describing quality of service especially for corporate customers.

Finally, training schemes should definitely go beyond existing awareness raising seminars and information days. Structured courses with specific learning objectives and outcomes are needed integrating practical techniques and methods of delivery with the use of test cases, real-life scenarios, team assignments, etc.

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1   Purpose of this report

The current research is part of the Training Needs Analysis. The following report is developed based on a detailed Qualitative and Quantitative research conducted by the NeWPOST partnership. The main goal is to acquire an in-depth look on the views of Postal workforce, experts, educators and stakeholders regarding the missing and needed skills in the postal sector.

2   Methodological approach

Training Needs Analysis is required in order to identify the gap in Postal employee training and related training needs. Training activities are focused on achieving change: make a transition from a certain specific state of knowledge, skills and competencies among a specific group of people to a superior, improved and more practical one. Identifying the discrepancies between the current and needed level of knowledge and skills will help in shaping the NeWPOST training activities.

The data collection was structured in two phases:

- **Phase1:** Qualitative research. It refers to the conduction of in-depth semi-structured interviews and focus groups discussions in Bulgaria, Greece and Romania. The partnership developed a set of appropriate templates (see D2.1. Methodological Framework) for: a) facilitating the field research process and b) provide a homogeneous data collection sample accommodating data processing and pattern/trends recognition analysis. The qualitative research targets sector experts and national stakeholders with a view to validate and test the desktop research results described in D2.3.

- **Phase 2:** Quantitative research to get insights from a broader and diverse sample. An online survey was designed and implemented by the NeWPOST partnership targeting specifically current Postal workforce covering all relevant professions. The survey covers the same topics as those included in the face to face interviews and focus groups. The online survey (see D2.1 Methodological Framework) was structured around training needs and skills missing focusing on IT skills and sector specific skills such as Customer Service Skill.

3   Quantitative Research

The quantitative analysis has been implemented in Bulgaria, Greece and Romania. The target group included a diverse range of people of the postal workforce including different occupations and positions.

The survey questionnaire was implemented both online and offline to ensure the adequate number of responses. The consortium, and mainly the three national Postal offices, disseminated the survey through their well-established network and communication channels and the result

was a total of more than 600 respondents. The online version of the questionnaire was implemented through the EU survey tool[1]. The survey run from M5 to M8 of the project.

The structure of the survey was mainly based on close questions since the main aim was to measure the working hypothesis (skills gap regarding digital literacy and soft skills). The hypothesis was also tested by cross checking the results of the focus groups and interviews that were implemented in parallel in the three countries towards a more representative study.

The main findings of the NeWPOST online/offline survey are presented in the following section.

3.1 Quantitative analysis - Findings

Characteristics of the respondents were taken into consideration in an effort to track any possible trends or differences in relation to skills identification and training needs. In addition, it is anticipated that most of the respondents will be participate in the NeWPOST training activities. Thus, an overview of their profile in terms of the tracked characteristics will contribute in the design of the curriculum and in the delivery of the Training Program. The related screening questions track:

- Age group
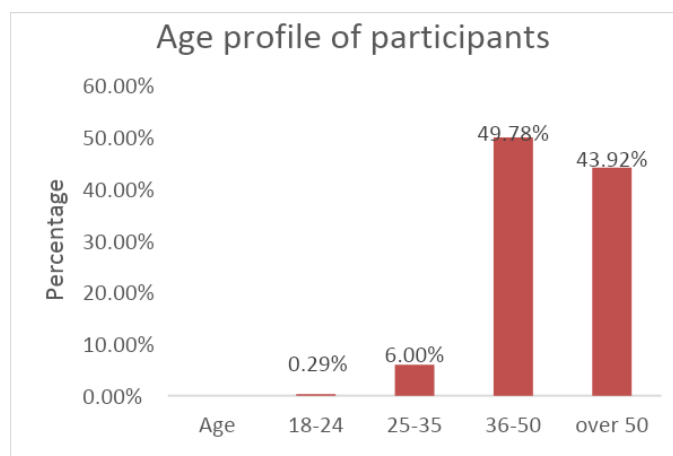- Category that best describes the current professional level and,
- Gender

Figure 1: Age group of the respondents

Figure 1 and Figure 2 visualize the profile of the respondents in the NeWPOST survey. The main insights are:

- The majority of the respondents are females which is common for all countries - nearly 78% are female respondents, with Bulgaria reaching 87%!

- Nearly one third of the respondents are classified as support or administrative staff, while a small amount is (approximately 5%) classified as Directors or Deputy Directors in several Post departments. From a data qualitative point of view, this means that the vast majority of participants are aware of everyday tasks and repetitive procedures that are related to customer interaction, front office activities, customer relation, logistics and delivery of mail products, etc.

- Most of the respondents are over 36 years old while there is a significant share of people above 50 age group (44%). This is a very crucial characteristic since the familiarity of the specific age group with ICT tools is expected to be low. On the other hand, this implies that all collected data are from persons with a strong experience in the Postal Sector and their input will provide a deeper insight regarding training needs and missing skills.

- Females and males are represented in all professional levels except Bulgaria where there are no male Directors or Deputy Directors.
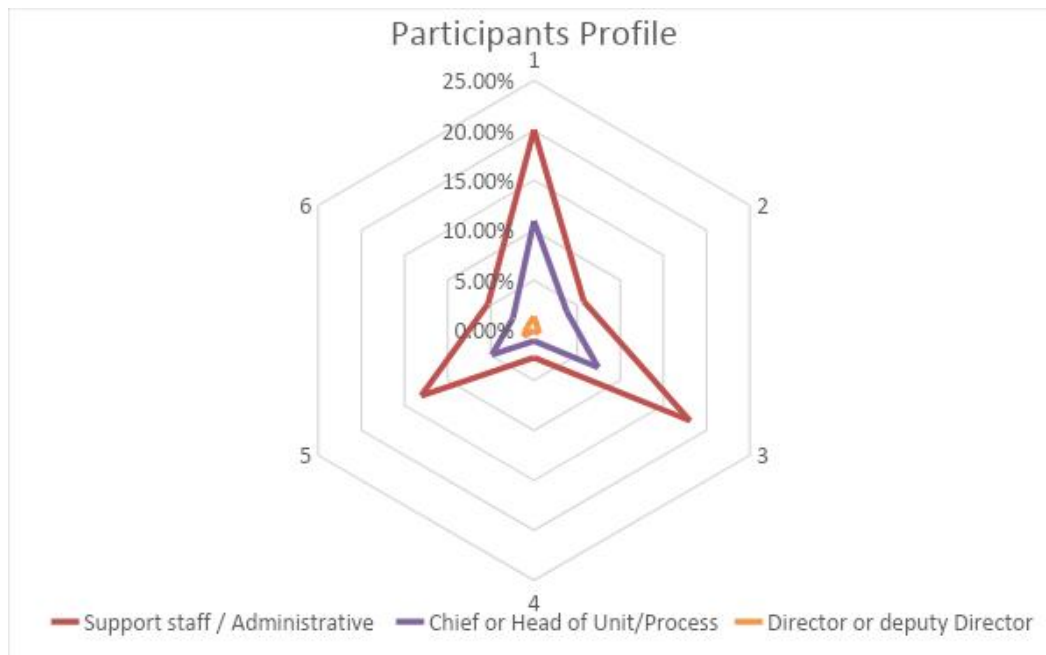

Figure 2: General characteristics of NeWPOST survey participant's profile - Gender vs Professional level

3.2　Training related findings

Four questions were dedicated to collect data regarding training needs and activities. The data collected refer to:

- Previous trainings in the Company
- Types of delivery of training received
- Assessment of training methods
- Assessment of the current offered VET courses in Postal sector

The aim is twofold:

- Understand the "as-is" situation by tracking frequency and delivery types of trainings already received
- Track the "to-be" process regarding training methods and current offered VET curricula through opinion questions.
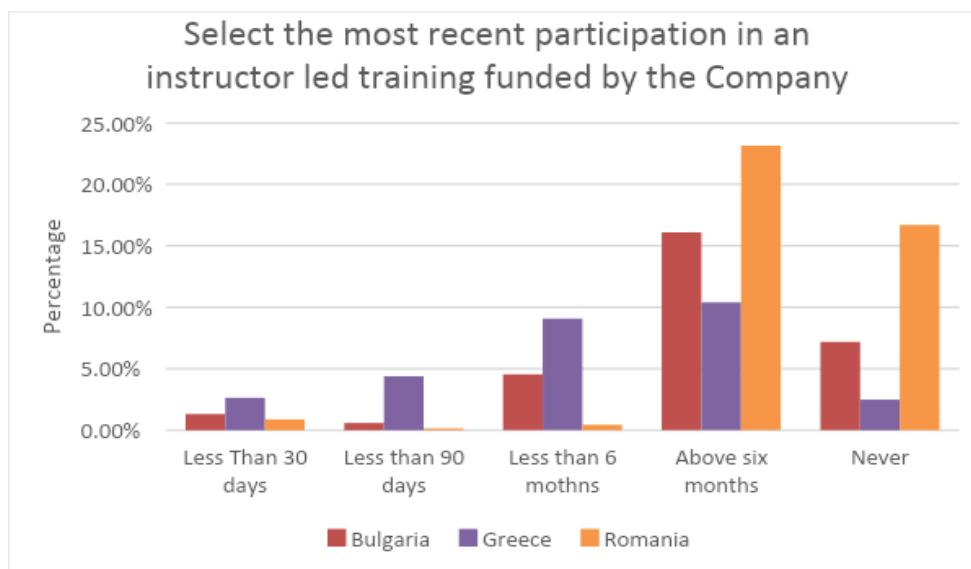
Figure 3: Participation in an instructor led training funded by the Company

Regarding the frequency of trainings, the dominant trend is that the most recent training was at above 6 months from the date of the survey. Especially in Romania, there is a significant share of respondents who **never attended a training session** (17%). On the other hand, Greek respondents seem to have received more training during last six months (nearly 16%).
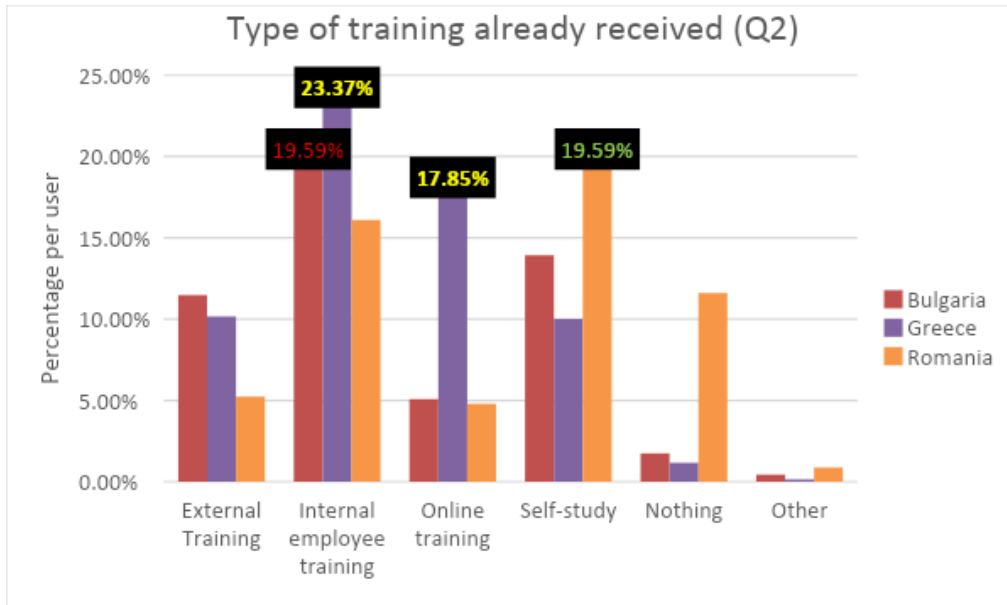
Figure 4 Type of training already received

For Bulgaria and Greece, **internal employee training** is the most common type of training while for Romania it is **self-study**, which again implies a shortage to Romanian Post employees' trainings compared to the other two countries. An important point is the great share of **online training** for Greek employees which is by far higher than the other two countries (17.85%) i.e. it is anticipated that Greek employees are more familiar with e-learning and online teaching methods and techniques. Since the respondents could select more than one option it is interesting to see how diverse the results are. Greek respondents have participated more in different types of training (62.7% sum of percentages) compared to Romania (58.2%) and Bulgaria (52.2).
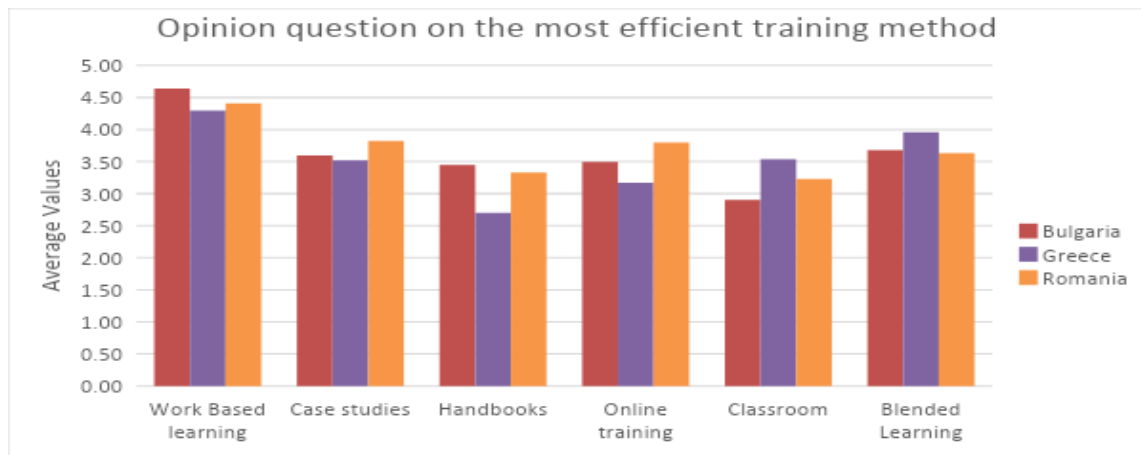

Figure 5: Opinion on efficiency of training methods - Country view

Participants in training were asked to assess the efficiency of each training method. **Work Based learning** and **blended learning** were the two dominant trends, while handbooks and classroom-based trainings received the lowest score. This trend is common for the three countries.
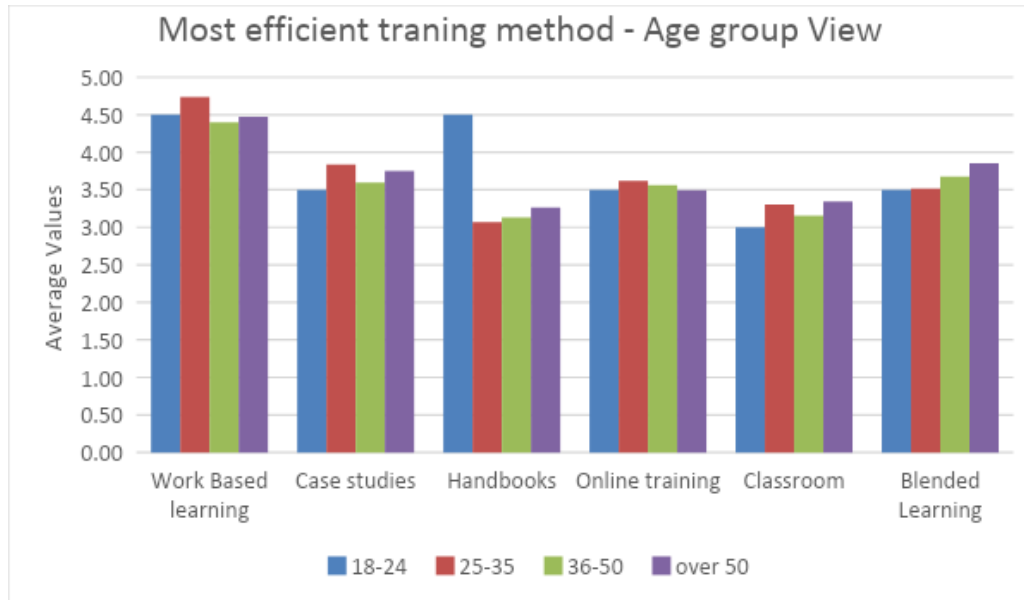
Figure 6: Opinion on efficiency of training methods - Age group View

Analyzing the opinion of the respondents per age group, the main results are:

- Handbooks is very popular in ages between 19-24 which highlights the need for better on-boarding procedures and need for standard documentation for newcomers.

- The above 50 age group, states clearly that Work based learning is the most efficient training method compared to the rest of the options. The trend is the same for the 36-50 age group, which favors Blended Learning as the second most efficient training method. This is a valuable insight since almost 90% of the respondents belong in these two age groups.

Figure 7: Opinion on current courses offered

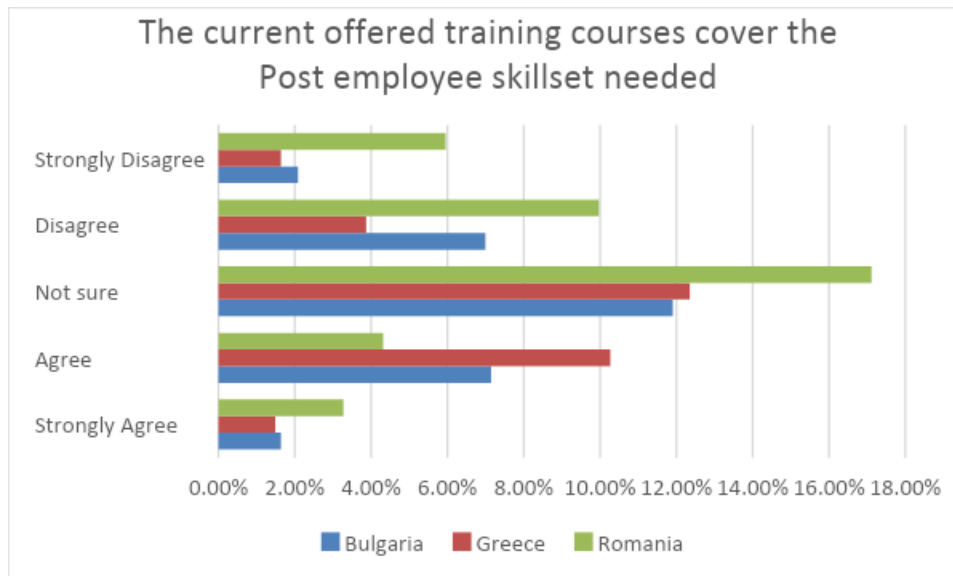Finally, respondents were not sure if the current training courses covered the needed skillset. This means that there is **no strong evidence** that current training schemes in the Postal sector have the anticipated impact. For Greece the positive views (14%) are more than the negative views (5%); Bulgaria has the most balance results (9% on both positive and negative opinions); Romania presents the most negative opinions (16%) and the lowest percentage on positive views (7%).

3.3   Skills related findings

The third bunch of questions are related to skills gaps. The analysis is based on opinion questions regarding missing and needed skills in general and domain specific skills as they have been already identified and presented in the application (Detailed Description). More specifically, respondents had to assess 7 predefined missing skills, namely Communication skills, Decision making & Risk management, Conflict Management, Digital/IT skills, Time management and planning, Analytical and problem-solving skills, Sales and marketing skills. The selection of the specific skills was driven by the NeWPOST experts in the Postal sector with a view to reflect the real challenges and conditions in the sector. In any case the respondents could select up to three different answers while they had the option to include in their answer a non-listed missing skill; the fact that only 10 out of 692 responses in total identified a non-predefined missing skill, highlights the correctness of the questionnaire design and comprehensiveness.

In order to acquire a more detailed insight on the importance of specific skills and a deeper understanding of what is actually needed in the postal sector, the survey included opinion questions related to IT/Digital skills, Customer service skills and social media and networking related skills. Finally, a question measuring motivation to adopt new tools and processes was

included since it was clearly stated as a strong challenge during the first design meetings within the NeWPOST partnership.
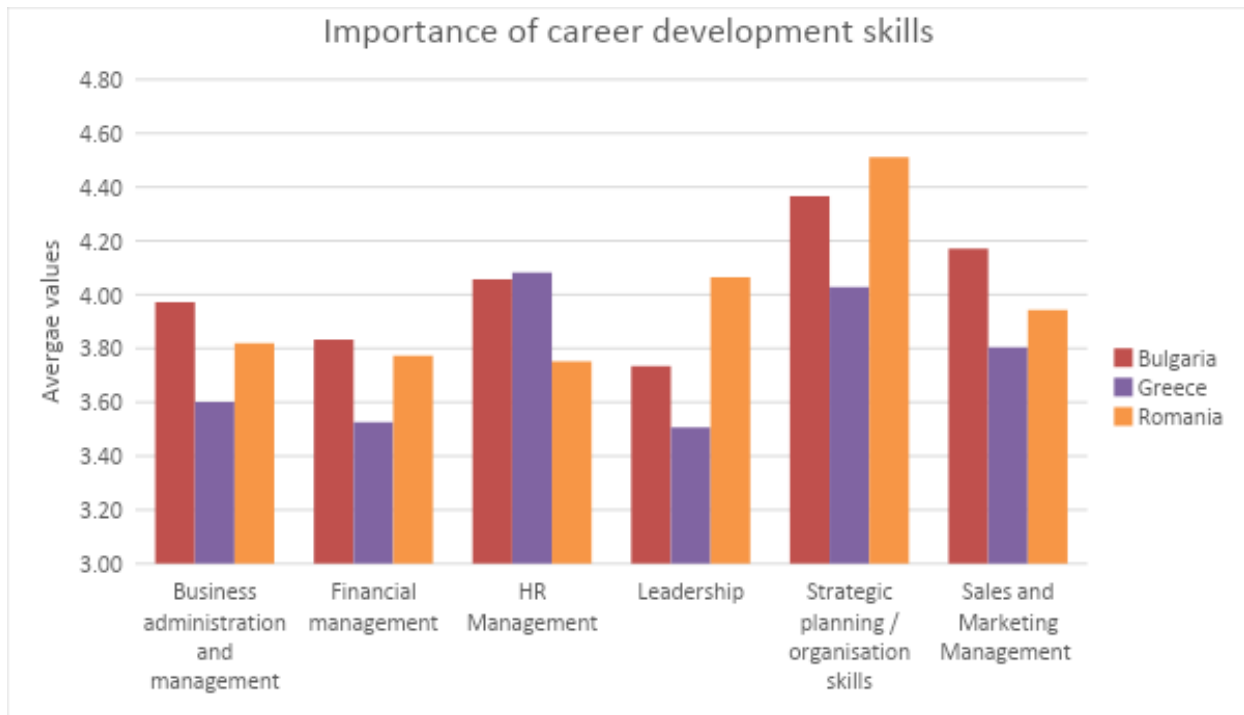
Figure 8: Importance of training needs

Strategic planning and **organizational skills** are the most important skills towards career development in the Postal sector. Given the profile of the respondents this implies that there is a diverse range of every-day tasks and repetitive processes that call for strong organizational skills. Sales and marketing related training is the second major trend that stands out from the data collected. On the other hand, financial management issues seem to be the thematic area where the employees would spend less time and effort since it contributes less in their career development.
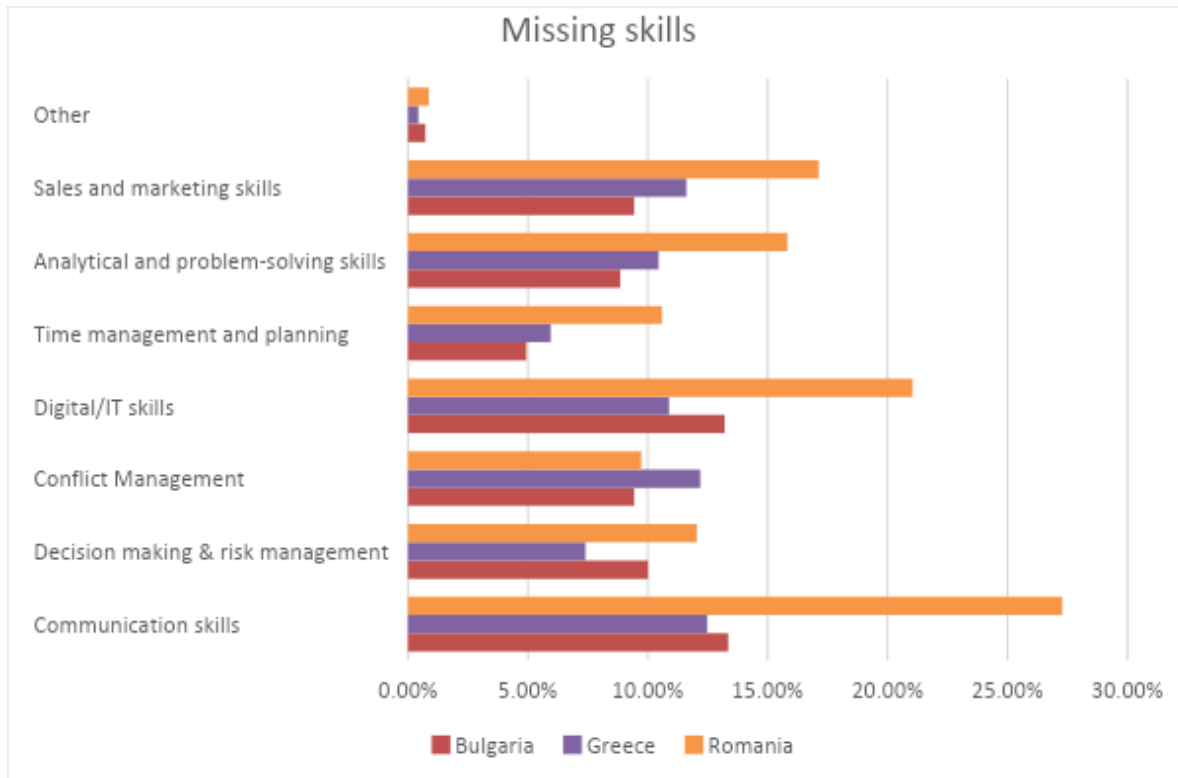
Figure 9: Missing skills

Comparing the current missing skills in the Postal Sector, the respondents selected Digital skills and Communication skills as the ones often missing – nearly half of the respondents have selected these options. Analytical problem solving and sales related skills have been selected approximately by the one third of the respondents. **These trends are common in all three countries.**

The survey participants could select up to three options. Romanian respondents tended to select all three option (2.7 options per user on average) while users from Bulgaria and Greece reached an average of 2.1 and 2.2 option per answer respectively.
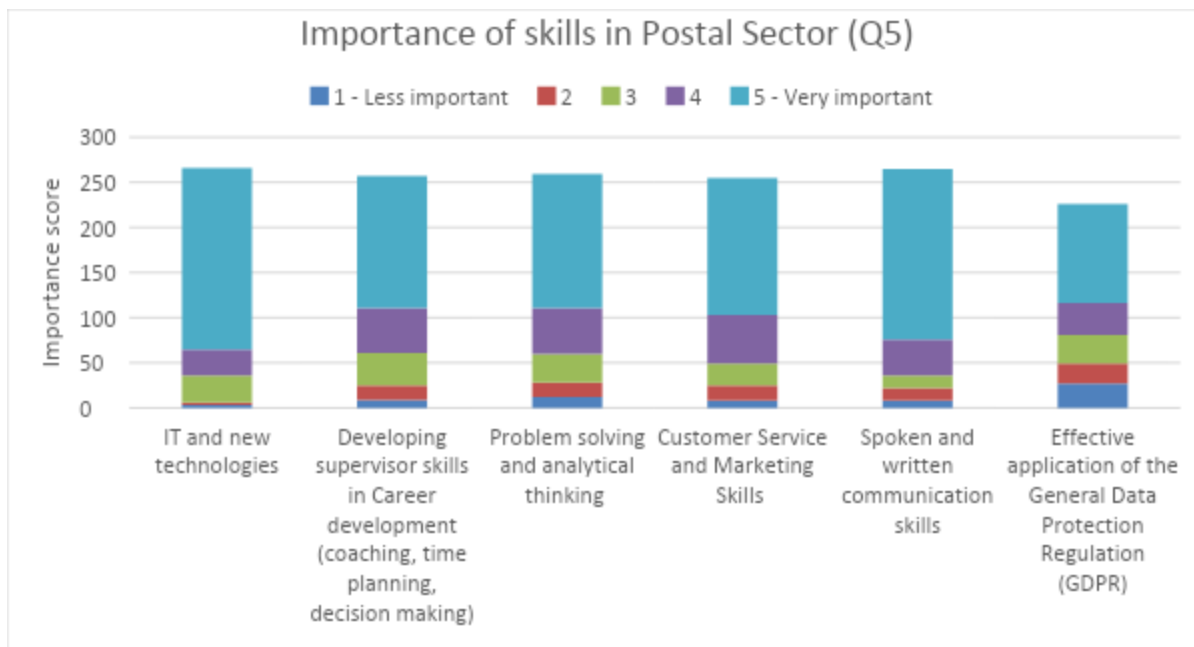
Figure 10: Importance of skills in today's Postal sector (all countries)

In the next opinion question, measuring the importance of skills, there is a clearer view: **digital skills / spoken and written communication skills** have received the majority of *most important* responses.
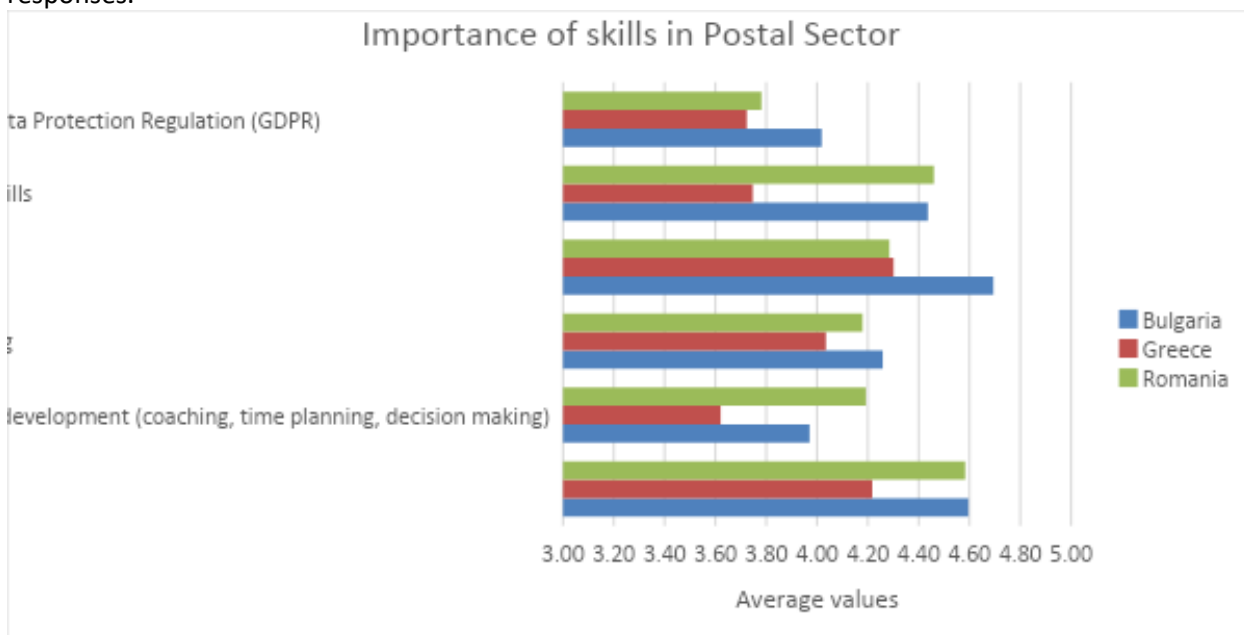
Figure 11 Importance of skills in today's Postal sector (per country)

On a Country level Greece and Romania follow this pattern while, Bulgaria rates **Customer Service skills** and **digital technologies** as more important and needed skills.

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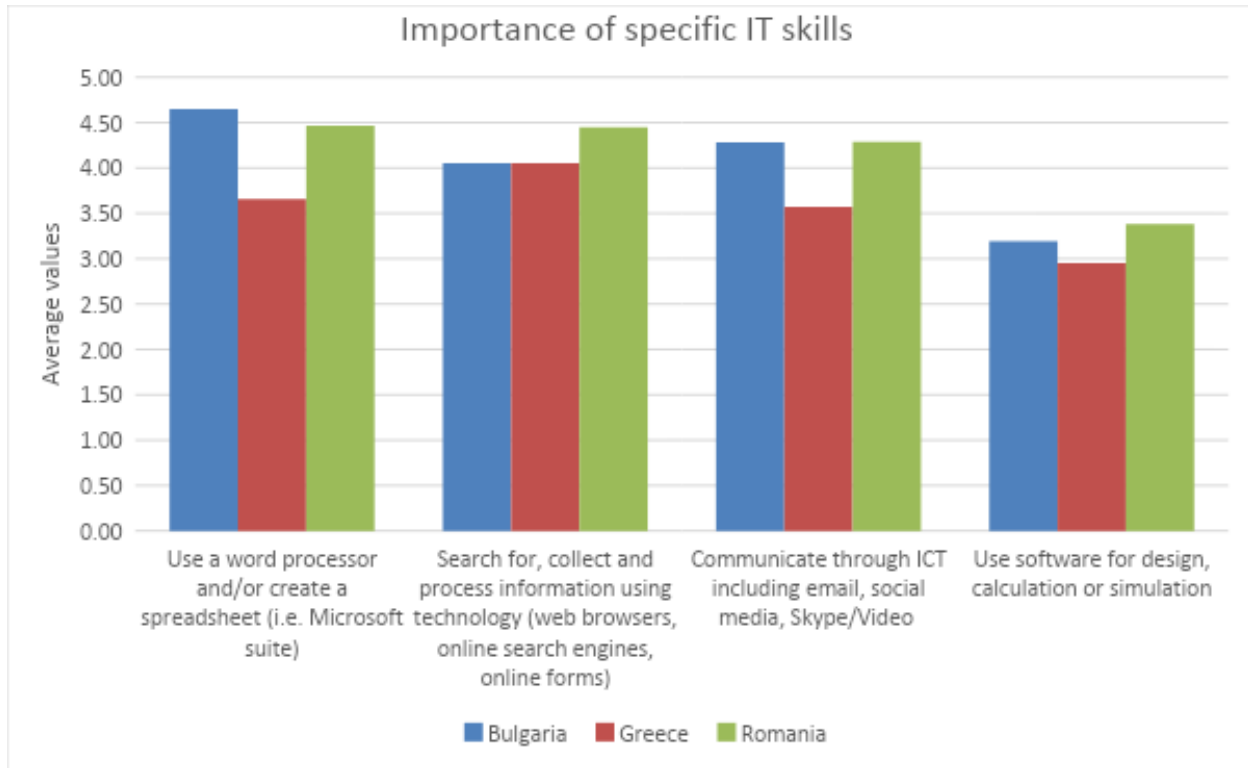
Figure 12: Importance of IT related skills (per country)
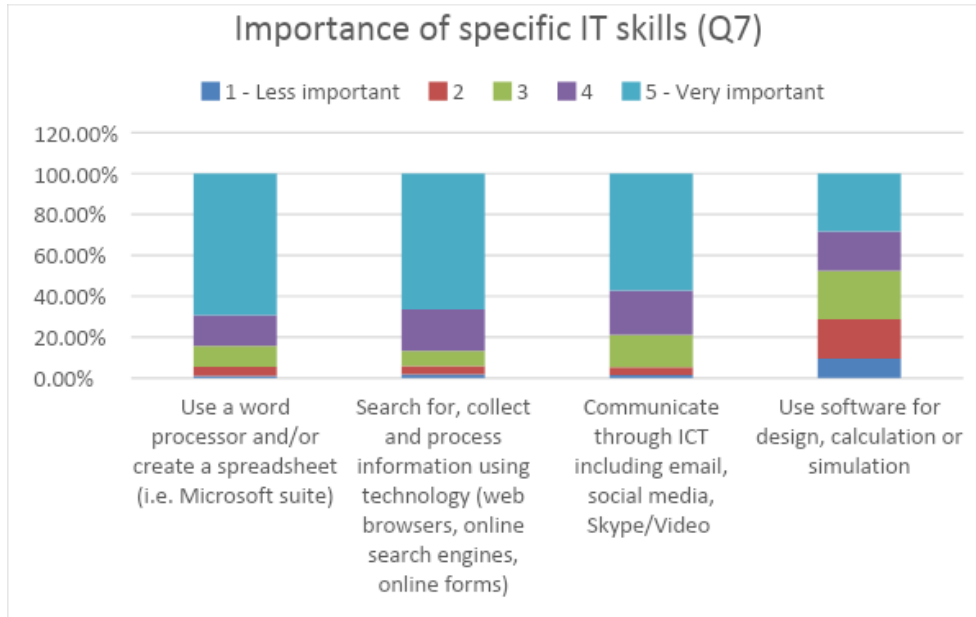
Figure 13 Importance of IT related skills (all countries)

Going deeper in the IT/Digital skills the respondents do not find important the utilization of specialized software and tools that have to do with simulation or design. However, all other

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aspects of digital skills including Office related tasks, retrieving information online and communication through ICT tools and social media are more important in all three countries.
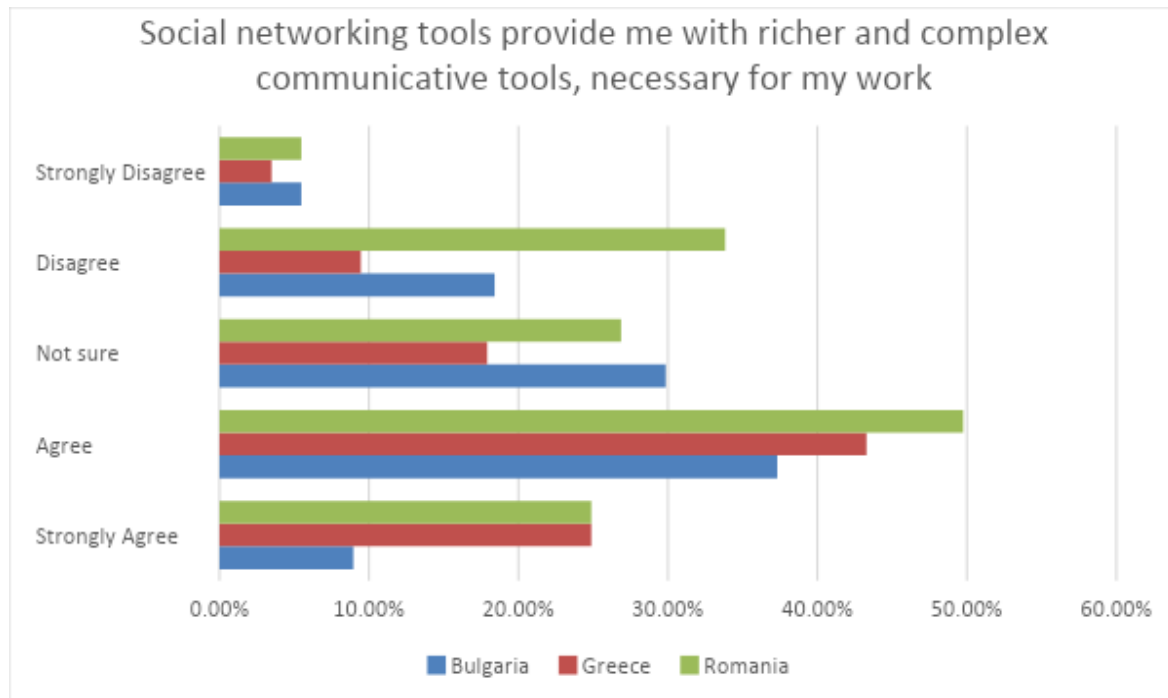
Figure 14: Importance of Social Networking tools

Use of social media has been initially identified as a potential training area in the Postal sector. The responses for all countries showed that:

- 55,64% of the respondents had positive opinions, 22,40% had negative opinions and 21,96% answered that they were not sure. The latter figure implies that the usage of social media in work tasks has a small penetration rate. **In other words, a significant amount of Postal employees have never used social media to deliver job tasks.**

- The figures projected on a national level differentiate: In Bulgaria positive values are 46,27%, in Greece the share is 68.16% and in Romania 74,63%. Bulgaria respondents do not think social media are important in everyday tasks or they are not so familiarized compared to Greek and Romanian Postal employees.

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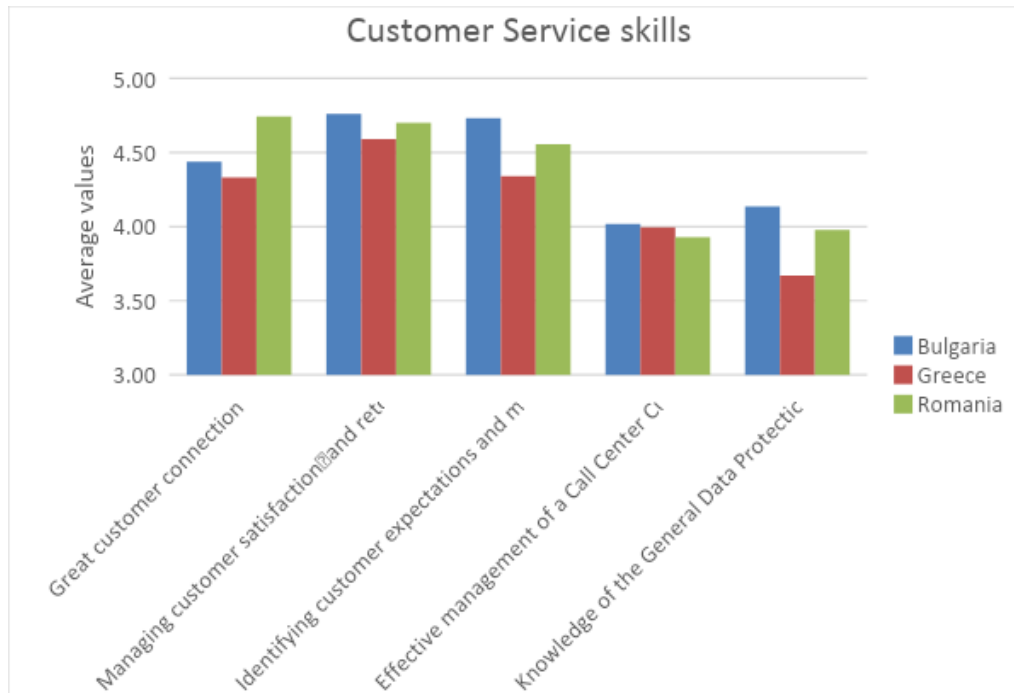
Figure 15: Customer service skills

Customer service skills are needed in the Postal sector. But how do Postal workforce assess the **importance** of related knowledge and competences? The main pattern is that **customer connection**, **managing customer satisfaction** and being able to **identify customer expectations** are high on the importance scale. On the other hand, **call center management** and **knowledge of GPDR** are characterized as less important.

I feel I am not motivated to adopt new Web/digital technologies because I am used to the current modus operandi and organizational culture
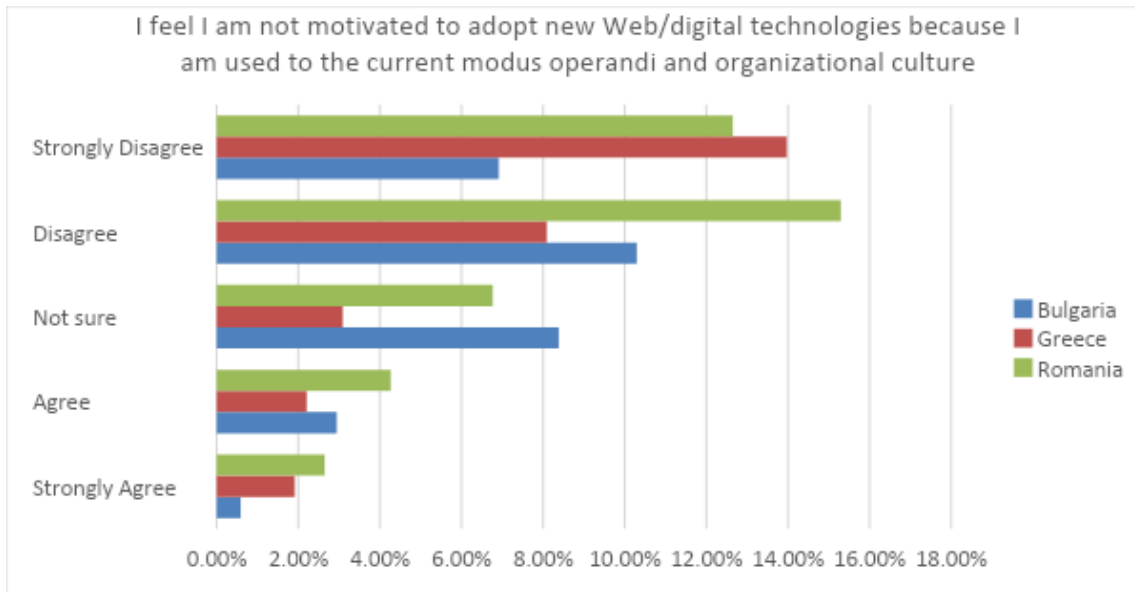
Figure 16: Motivation to adopt to new digital technologies

Finally, the participants were asked to provide their opinion regarding their motivation to adapt to new technologies and tools coming from the evolution of technology. The answers are:

- 67,21% of all respondents feel motivated enough to adjust to new technologies and tools, 18.24% feel quite reluctant and 14,56% see this transition in a negative way.

- On national level respondents of Greece (75.38%) and Romania (67,14%) feel motivated enough to adopt new Web and digital technologies while Bulgaria nearly reaches 60%. An interesting figure here is that 29% of Bulgarian participants answered "not sure", by far the higher among the three countries.

Results show that respondents are motivated to adopt to new technologies. Given the age group profile – the vast majority is experienced Post employees –this is a significant insight implying that the sector conditions are mature for the transition from traditional to innovative tools and processes.

4 Finding of Qualitative Analysis

The methodological framework for the qualitative analysis has been already described in the Deliverable D2.1 Methodological Framework.

Following the Training Needs Analysis methodology, the partnership has conducted on a country level:

- 10 in-depth interviews involving various stakeholders including:
  - Post sector Experts and policy makers
  - Employers in the Postal Sector covering a wide range of professions
- 2 focus groups involving various stakeholders including:
  - Post sector Experts and policy makers
  - Employers in the Postal Sector covering a wide range of professions

Students are not part of this field research since the objective was to analyze and understand actual needs, challenges and skills onboarding persons with expertise and different/complementary working experience in the Postal sector.

The Focus groups interviews have been implemented utilizing a common report template in order to facilitate the documentation of the results in an easy and simple manner on the one hand and be able to efficiently draw some comparisons and identify trends on the other. The three main parts comprising the Qualitative research report are:

- Part 1: introductory phase. The aim here is break the ice and have the respondent be familiarized with the procedure and feel comfortable during the discussion. General issues regarding changes and/or challenges of the Post sector are part of the discussion in this first stage.
- Part2: exploratory phase, where the focus is on the current and missing skills while related VET curricula are assessed.
- Part3: Conclusion phase where the most significant conclusions of the topics discussed are identified and recorded.

Based on this approach the following matrix per country provide an overview of the qualitative research in Bulgaria, Greece and Romania.

The last section of the Qualitative research provides an analysis in the form of conclusions based on the above mentioned three pillars:

- Identify the **context and the surrounding conditions in the Postal sector** per country, taking into account changes and challenges and how these affect the sector from both a market and an operational point of view.
- Focus on skills including tracking of missing and needed skills, cross-checking with the respective desktop research on skills needed and conclude in a final skill list.

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No.	Romania	Basic changes identified	Opinion on Skills related points	Opinion on current curricula
FG01	**Date**: 15.05.2019: **Type**: Romanian Post employees **Organisation**: Romanian Posts	Reduction of traditional letter post Increase in parcel volumes Increase in e-commerce services Need for automation in business processes	Communication skills need to be improved due to challenging working conditions Adapt to new processes introduced by the usage if IT tools (Track and Trace parcels, Analytical & problem-solving skills are needed	Mainly focus on short term needs and are not based on a long-term plan Not fully aligned to organization's vision Not covering different levels of employees Many courses do not have a learn by doing approach.
FG02	**Date**: 14.03.2019 **Type**: Training experts **Organisation**: Eurofed	Digitization Tracking customer satisfaction	Focus is on customer relationship and conflict management Completely lack of IT skills for aged personnel – no time for training Communication skills	- on online or distant learning would be very helpful but there is no time or familiarity with online trainings

Table 1 Romania Qualitative research – FG main points

No	Basic changes/challenges identified	Opinion on skills	Opinion on current curricula
Int01	Changes ● Exponential growth of e-commerce, ● increased productivity by using new technologies (artificial intelligence, blockchain), ● use of "big data", digitalization, ● customs legislation changes Challenge ● Adopt to custom legislation changes, including cross-border ● Be interoperable with other national Post offices, integrate with them through digitalisation	● professional skills, ● PC operating skills, ● client orientation, ● sociability, ● flexibility, ● Honesty.	● Not aware of VET courses in the Romanian Postal sector ● Need for training on HR topics
Int02	Changes ● the decline of traditional services, e.g. letter post ● The spectacular rise of online shopping has generated a large volume of parcels to be transported ● the existence of many courier companies Challenge ● Stay competitive, from an e-commerce point of view	● Knowledge on custom legislation at EU/global level ● computer skills, ● knowledge of foreign languages (for international exchange offices),	● Not aware of VET courses in the Romanian Postal sector ●

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	● Improvement in logistics	● customer communication skills and crisis management i	
Int03	Changes ● E-commerce and parcel delivery has increased Challenge ● Investments in logistics ● Aged employees struggle to adjust to new types of services	● customer service ● communication skills ● crisis management i	● Training should be focuses on communication skills and digital skills
Int04	The expansion of e-commerce has a big influence on the correspondence volumes of the universal postal service provider with implications for the sustainability of the universal postal service	● customer service ● communication skills ● crisis management i	● Training should be focuses on communication skills and digital skills
Int05	● Ecommerce introduces competition ● Parcel management becomes the dominant factor for success and growth	● Be motivated ● Customer service skills	● Lack of training courses in the Postal sector ● Employment of in-house instructor could be an efficient training method given that (s)he is well trained
Int06	Changes ● Ecommerce introduces competition ● Customer service requirements is transforming Challenge ● Increasing service quality ● digitalization and investment in performance sorting and delivery equipment.	● Pro-active, open-minded to learn and improve permanently, the initiative, the ability to manage multiple tasks at the same time ● Communication skills	● Lack of training courses in the Postal sector ● Need for WBL training schemes
Int07	Changes ● Ecommerce introduces competition ● The number of parcels is constantly increasing Challenges ● Increasing service quality in ecommerce	● Digital skills ● Be social ● Be honest ● Be flexible	● Need for up to date training modules
Int08	Changes ● Ecommerce introduces competition ● Tracking systems are changing - integration of international parcels Challenges ● Customers demand high quality and speed in services ● Lack of human resources	● Communication skills ● Knowledge on international ecommerce legislation ● Foreign languages ● Crisis management ● Customs and postal legislation	● Diversification for computer related training is needed ● Not aware of current training courses
Int09	Changes ● Increased number of private parcels Challenges	● Communication skills ● Digital skills	● Trainings would be more effective in out of office hours

	● Professional knowledge ● Attracting and retaining high quality staff ● Innovation in postal offices	● Policy and internal processes knowledge	● Need for establishing a permanent training policy
Int10	Changes ● Increased online transactions Challenges ● Attracting and retaining high quality staff ● Logistics	● IT skills ● Self-motivation	● Not aware of current training programmes
Int11	Changes ● More qualified staff is needed Challenges ● Innovation in Postal offices ● Logistics and human resources	● Digital skills ● Communication skills ● Time management	● Need for updated training material

Table 2 Interviews main points, Romania

No	Bulgaria	Basic changes/challenges identified	Opinion on skills	Opinion on current curricula
FG01	**Date: 07.05.2019** **Name**: FG_B01, Postal Service Sector in Dynamically changing postal sector business environment	Changes ● Competitions with private companies which can provide better, more fast and accurate services ● Establish new measures and processes employee professional improvement Challenges ● learning to operate and monetize services successfully in an unstructured market ● securing the business-to-consumer channel ● linking physical and digital services to become a multichannel operator ● developing customer relationship management opportunities within customer billing operations through multi-function, physical and digital messages ● enriching physical logistics with digital messaging adapted to the new business environment ● attracting the talent, with reference to the young ones, needed to manage these businesses	● The ability to work well with others ● Excellent verbal communication skills ● Customer service skills ● The ability to face and to manage conflict and problematic situations with the customers or with the colleagues ● The ability to use and work with the new IT/Digital tools to carry out the different job tasks ● Ability to manage multiple tasks and achieve deadlines under pressure	● VET related programs should provide and guarantee a wider offer of training programs, with an attention to those measured based on practical and theoretic approaches, able to ensure a real, deep and full acquisition of new competences and skills.
FG02	**Date: 25.04.2019**	The following factors affect the Bulgarian Posts	● The focus group participants identified the following types	● Need for external training experts

		New technological solutions, including ICT, drones, robotics, artificial intelligence, big data, etc.	of skills as essential for employees: basic computer skills, communication skills, teamwork, conflict management, customer skills, foreign languages (at least some basic English for postmen and front office employees), skills to work with elderly clients. These skills need to be improved.	Need for updated training modules to keep up with market dynamics
Name: FG_B02 - To contribute to the identification of skills and competences needed for the employees in the postal sector in view of market dynamics.		• New technological solutions, including ICT, drones, robotics, artificial intelligence, big data, etc. • Rapid increase of e-commerce. • Changing consumer requirements and attitudes, including communication channels used and buying behavior • Regulations		• Need for induction training and onboarding training procedures

Table 3 GF main points, Bulgaria

No	Bulgaria	Basic changes/challenges identified	Opinion on skills	Opinion on current curricula
Int01	**Position**: Teacher **Organization**: Centre for Vocational Education and training "Interbusiness – Radka Stamenova"	• Strong penetration of e-commerce, • Market globalization	• Communication skills • Be able to act fast	• More interactive methods of training are needed • Current WBL schemes are adequate • Gamification method should be adopted
Int02	**Position**: - Teacher **Organization**: Centre for professional Training "BPI" "	• Uptake of new technologies and ICT, the old-fashioned Postal services need to adapt	• Ambitious • Willing to learn • Be self-motivated	• Practice oriented trainings • Produce sector specific training material in terms of tools and processes employed • Lack of GDPR knowledge
Int03	**Position**: Employee **Organization**: Star Post	• Increase of eCommerce and new technologies • Customer service and complain management is challenging • Possible integration with other means of transportations like ferries • Market globalization	• Able to work with specific in-house software • Be responsible • Follow timetable • Customer service skills • Be experienced	• Lack of curricula focusing on specialized Post software, ecommerce and ICT
Int04	**Position**: Employee **Organization**: Rapido BG	• Online trade and digitalization (i.e. GPS shipments) • Digitalization should contribute towards increasing the quality of the services and revenues and reducing costs and prices.	• Be responsible • Adaptability	• Lack of updated training curricula

Int05	**Position**: professor **Organization**: Institute of post graduate studies	● Ecommerce and new technologies	● Digital skills	● Specialized training on professional skills
Int06	**Position**: Courier **Organization**: Tip Top couriers	● The respective market is expanding ● Ecommerce penetration	● Be accurate ● Be efficient ● Customer service-related skills	● Need for certifications schemes recognized in EU level
Int07	**Position**: Chairman of NACBI **Organization**: National Agency for civil and business initiatives	● Very competitive environment: On the one hand the sector presents huge potential on the other small companies will lose their share to the market	● Be responsible ● Willing to know ● Be self-motivated ● Be accurate	● Incorporate IT in trainings ● Training curricula should be more specific on specific needs
Int08	**Position**: Chairman **Organization**: National Institute for vocational and educational training	● /	● /	● Should be more focused on IT and digital skills ● Need for updated curricula
Int09	**Position**: Head of Postal Services department **Organization**: Bulgarian Post	● postal traffic is transformed with a serious reduction of letter volumes at the expense of small packages from e-commerce.	● Communication skills ● Team player ● Conflict management ● Teaching and pedagogical skills	● Lack of sustainable training programs ● Lack of Trainers with good teaching skills
Int10	**Position:** Head of Sector: Social activity, safety and health at work, staff selection and training **Organization:** Bulgarian Posts	● Changing factors are: economic conditions and development, digitalization, urbanization. ● Bulgarian postal market is driven by the rapidly increasing volume of items generated by the e-commerce. ● Need for improving current business model and strategy for development.	● Adaptive to the new market environment ● Effective communication, including feedback skills ● Team player ● Customer oriented ● Dealing with conflicts and "tough" clients.	● Trainings are focusing on technology of work, introduction of new software products, new services and products; ● Training related to upgrading skills is not sufficient due to limited financial resources in the organization; ● Workplace training is difficult to implement due to heavy workload of postal workers; ● It is necessary to organize and conduct training in specialized programs

![NeWPOST logo]

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| | | | | related to improving customer service, upgrading and improving soft skills. |

Table 4 Interviews main points, Romania

No	Greece	Basic changes/challenges identified	Opinion on skills	Opinion on current curricula
Int01	**Position**: HR Director **Organization**: Hellenic POST S.A, ELTA	Changes/Challenges ● Very contradictory environment, rapid growth of digitalization that has already led to big profit loss. ● Digital transformation takes a lot of time – difficulties in strategic planning	● Customer-centric ● Keen on learning, ● Positive to changes	● Not aware of VET courses in the Romanian Postal sector ● Need for training on HR topics
Int02	**Position**: Head of Postal Services **Organization**: Hellenic POST S.A, ELTA, Privacy Post & Couriers services dpt	● Workforce is mainly old, tired and demotivated. ● Due to globalization, privacy should be an integral part of Postal digitization	● Willing to learn ● Adaptive to changes	● Trainings in new technologies taking into consideration the ageing profile of the participants

Table 5 Interviews main points, Greece

No	Greece	Basic changes/challenges identified	Opinion on skills	Opinion on current curricula
FG01	**Date: 23.04.2019** **Name**: FG_GR01, Postal Service Sector in Dynamically changing postal sector business environment	Changes / Challenges ● Tendency to financial products ● Increase of courier services and e-commerce ● Customer relationship is more challenging since customers are better informed about related products and services	● Polite and keen on learning ● IT/digital skills are missing and most of the employees don't know how to properly use the current systems and equipment	● Practical training and /or on the job training is mainly missing
FG02	**Date: 22.04.2019** **Name**: FG_GR02 - Postal Service Sector in Dynamically changing postal sector business environment	Changes/challenges ● The increase of e-commerce increases the need for digitalization in terms of infrastructure and digital services	● Sales techniques ● Excellent knowledge of postal internal tasks ● Willingness but lack of motivation	● More training is needed on new technologies
FG03	**Date: 09.05.2019** **Name**: FG_GR03 - Postal Service Sector in Dynamically	● Increase of e-commerce and digital substitution of mail. ● High competition in relation to its size.	● customer service in an "intelligent way" ● communication skills	● Proposal about specific training "Ensuring Privacy of Communication".

| changing postal sector business environment | ● A key differentiator of services is the dimension of ensuring the privacy of mail | ● perception and communication of the necessity of privacy protection both inside and outside the company | ● The program should be addressed to permanent employees of ELTA, contract staff and agents, and should focus on privacy issues for all postal items (emphasis should also be placed on simple postal items |

Table 6 FG main points, Greece

4.1 Bulgaria

The following section describes the main findings based on interviews and focus groups discussions implemented in the Bulgaria by partners ITPIO and Bulgarian Posts.

4.1.1 Sector changes and challenges

After the liberalization of postal market in Bulgaria, the disruption especially in the courier sector is wide. In domestic market the two main competitors are targeting relatively different customers: "Econt Express" focuses on small shipments for individuals or SMEs while "Speedy" operator is targeted at corporate customers and complex/large shipments. International courier services demonstrate a very competitive landscape as well with local representatives being very active and building their own networks.

The increase in parcel transports/orders, as a direct consequence of e-commerce increase, introduces the need for updating current workflows and employing innovative tools and services towards ensuring quality of service. In general, it is stated that Bulgarian Postal operators feel well prepared for entering the new "era" despite the level of competitiveness. The respondents recognized the potential in terms of market share due to digitalization highlighting that big and robust companies will be benefited since they have the resources to invest in time and money towards more innovative and qualitative services and products.

Under this context, Bulgarian Posts have a competitive advantage based on their size, network and geographical coverage and can play a significant role in the e-commerce era. Bulgarian Posts experts went a step further regarding their business development and outlined a few potential services beyond the traditional postal services. **Financial services**, especially in small towns and villages or **establishing social services** (e.g. targeting elderly people) were the most characteristic examples.

It was made clear that Postal workforce acknowledges the importance of digital transformation. However, there are a lot of uncertainties on the actual implementation and a lack of knowledge in fully reaping the benefits of digitalization. For simple workflows, automated tasks have been carried out (generation of automated delivery notifications through SMS, collecting and reporting vast amount of data). For complex flows with several control points and multiple configurations (custom clearance procedures or tasks where manual actions are needed) a more holistic approach is needed towards digital transformation including not only software implementations but also updates on hardware/Data bases followed by the appropriate privacy and safety requirements. E-commerce is such an example where currently the delivery of one "e-commerce item" takes more time and effort than sending a letter. In addition**, cross-border e-commerce** adds a new dimension to the online shopping experience where parameters like wide range of products, numerous price options and discounts and exchange rate fluctuations should be in place and fully handled by Postal employees.

Therefore, Postal operators need to invest in **multidisciplinary capabilities**. Partnering with IT experts or lawyers specialized in data privacy and transparency or even with data managers with

background in operations or marketing are key enabling factors towards a successful digital transformation.

As stated, an important obstacle is the **age group of the postal employees**. In Bulgaria, the majority of postal employees is in the age group of 45-60. This group of workers is less flexible and reportedly demotivated on engaging themselves to acquire new competencies and digital skills. In overall the need to activate older workers and to attract/retain younger employees was one of the most common discussion topics in the interviews and focus groups with Bulgarian stakeholders.

4.1.2   Skills gaps

Bulgarian participants expressed their great interest into NeWPOST training activities and underlined the importance of continuous and high-quality trainings of the Postal employees mainly focusing on transversal or soft skills.

The discussions revealed two different trends regarding the skills needed. On the private sector the need for training in innovative and specialized software was pointed out, while for the Bulgaria Posts the trend was more on soft skills and customer management since trainings in using the established software are currently held.

More specifically the ideal employee should master:

- basic computer skills,
- communication skills and teamwork,
- conflict management,
- customer skills,

In addition, resolving conflicts and negotiation skills were considered as must have capabilities especially for employees working in front-office. Handling complaints, settling disputes and resolving grievances and conflicts are the main capabilities brought up during the research.

Finally, missing skills were focused around organizational competencies when arranging working processes, lack of teamwork skills and motivation to work. The low level of IT skills also affects the execution of daily obligations and overall performance even if the technological solution is up and running.

4.1.3   Training provisions

Regarding training provisions, the general picture was that trainings in the sector should be updated and cover the modern sector requirements. Trainings should focus on e-commerce and handling of cargo/courier services thus being in line with the current trends in Bulgaria.

Another crucial point identified through discussions with the private sector was the limited or zero onboarding activities into specialized software. It seems that there are cases where even if advanced automated tools have been put into effect there is lack of knowledge on how to use

functionalities such as automated back-office transactions or mail management and package logging tools.

The picture is reversed for the Bulgarian Posts where trainings are organized when new software solutions are introduced, or new services are offered. A train-the-trainer approach is applied towards diffusing knowledge to postal employees. However, as explicitly stated, the company must keep developing a corporate culture with emphasis on continuous learning and a comprehensive training system employing professional trainers when needed. **The types of trainings offered should be updated on a regular basis** to keep up with market dynamics and should be linked to induction training.

A worth-mentioned good practice described was the collaboration of Bulgarian posts with the University of Telecommunications and Post where targeted programs tailored to BG posts needs were offered. Unfortunately, due to lack of attractiveness of the program and low demand this is no longer the case and the impact is visible: newcomers are not so well prepared for working in the company.

In general, the potential training areas identified were focused on how to improve customer service and up skilling of soft skills. However, Bulgarian Posts regarding in-house trainings face several challenges such as:

- The lack of sustainable training sessions

- Missing teaching skills for in-house trainings

- Workplace training is a hard process and difficult to implement due to heavy workload of postal workers.

4.2 Greece

4.2.1 Sector changes and challenges

The Greek postal sector has been affected by the opening and the disruption of the market due to the booming of e-commerce and the constant penetration of electronic services.

Two main sectors are comprising the Greek postal market: 1. The Universal Services (US) consisting of the Universal Service Provider (ELTA) and 10 private companies holding an Individual license and 2. The courier services sector consisting of 538 companies under General Authorization [2].

The main highlighted point is the e-commerce penetration along with the tendency to offer financial products. On the one hand the adoption of new "e-services" and products has increased the competition in the sector, on the other hand ELTA had the opportunity to increase their sales and provide price-competitive services and products.

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[2]

https://www.eett.gr/opencms/opencms/EETT_EN/PostalServices/Register_Of_Postal_Service_Operators/showNM.html?cat=eidikes_en

Compared to Bulgaria and Romania, Postal sector in Greece is not a late adopter of digital transformation. For example, there are several ICT developments in the UPS including the establishment of an integrated Enterprise Resource Planning (ERP) system, the automation of transaction management in points of engagement, development of track & trace functionalities, etc. However, as it was made clear when discussing with staff from the Greek UPS, the views and messages received were ambiguous. New specialized systems and technologies are constantly being deployed but either they are not fully operational, or the users are not yet familiarized with them. As stated, *ELTA is losing sales because it reacts slowly to digital changes.* Concluding, the Hellenic post is still a key player due to its brand and the once established extended network.

Overall, the competition especially in the parcel sector is hard and the new strategy of the sector is to invest in an increasingly close bond: Big data and postal services. E-commerce companies and Postal operators are generating a vast amount of consolidated and some-times real-time data and the emerging trend is to translate collected data to actionable business and policy insights and to support faster data-driven decision making towards resource mobilization and intelligent.

The Greek Postal operators have many operations that deal with transactions and end-customers. Systems and technologies that are focused on data collection that can be aggregated and analyzed with a view to discover areas of improvements. As described one such example is the failed delivery attempts; cutting down on failed first attempts based on data analysis may save the parcel/post operators a substantial amount of money.

4.2.2 Skills gaps

Having new services and products it's more challenging for the employee to be fully aware and have a deep understanding of Company's products and internal procedures. IT skills are missing mainly in terms of using appropriately existing software or equipment.

As repeatedly mentioned, a lot of customers are better prepared and informed about postal products and services; in a nutshell customer relationship is much more challenging now. This calls for a bunch of must have skills:

● Be able to actively listen, decipher and empathize someone's requests. In other words, receive training on emotional intelligence.

● Problem solving, creativity and willingness to figure things out

● Crisis management employing techniques like conduct-role playing or LAST (Listen, Acknowledge, Solve, and Thank).

It is not surprising that Greek stakeholders, like Bulgarian participants, pointed out a common concern: Postal workforce, due to its ageing, is inelastic in changing the way of working or show demotivation when the time comes to learn new tools. Losing engagement of aged but experience employees means losing their knowledge and in a broad sense losing years of experience and job insights. The best way to engage this age group is to demonstrate simple but impactful training programs. Collaboration SaaS tools like slack, hangouts or Facebook could improve collaboration

among departments, encourage transparency and break down workplace silos. Demonstrating why the older tools, methods and ways of thinking are no longer viable and providing the right tools, employees are going to feel valuable.

Finally, soft skills that are related to customer relationship/management were identified as must have skills. Communications skills, customer friendly, excellent knowledge of company's portfolio and mastering sales techniques were pointed out as soft skills that need to be improved.

4.2.3   Training provisions

The basic observation for the Greek case was the lack of practical training. This should include Case studies and experiential training employing production of short films or educational videos following a micro learning approach.

E-learning was a very welcomed approach and received many positive opinions. Past experiences with online training generated a positive impact and proved to be engaging and efficient.

Video based micro learning helps employees get answers quickly to "How to" questions that arise throughout the day. Potential training areas are founded on two axes. The first is specialized training focusing on installed systems and internal procedures related to services and products offered. The second axis is a more horizontal one and focuses on soft digital skills needed in the postal sector. These include:

- Training on collaboration environments or tools (strong candidates are slack, yammer, trello, etc.)

- G suite training including Docs, Sheets, Slides, Drive, Hangouts and more

- Microsoft Office trainings

- Social business training (social networking tools with a view to marketing efficiency)

- Digital skills for customer management (ways of connection between customer and service provider, improve customer experience, enabling personalized customer experience)

Finally, an interesting focal point was **data protection and privacy**. A Postal employee interacting with end users should have the necessary knowledge to be GDPR compliant. Indicative trainings areas are related to methodologies regarding personal data collection, when and how provide a privacy notice (in person, telephone, online, etc), respecting communication preferences (marketing emails), handling requests of personal information amendments and record management. As explicitly stated privacy of communication is a "critical and weak point of the system".

Data protection and privacy trainings should target permanent employees, contract staff and agents since the term privacy is widely applicable: It covers all stages of production process, e.g. collection, sorting, distribution, transportation, mailbox services etc. Having the appropriate

perception and communication of the necessity of privacy protection both inside and outside the company.

4.3 Romania

4.3.1 Sector Changes and challenges

The Postal sector in Romania is characterized by the reduction of the traditional letter post and the volumes of traditional mail, and the increase of the parcel volumes. Therefore, as in Greece and Bulgaria, e-commerce is the key factor that drives the future developments in the sector.

Digital transformation in the Romanian Postal sector is an ongoing process facing a lot of challenges. More specifically, new customer requests regarding the delivery services and the logistics challenges generated by these, deployment of numerous online payment methods, fix pick-up points, mobile POS are the focal points identified.

Related to Romanian Posts, one of the main challenges described is that the company already lags in providing digital services. This does not only affect the transformation process inside the company but on a marketing/brand level as well. In the hypothetical scenario that what if digital services can be offered tomorrow the answer was clear: customers would keep preferring private postal operators and would feel very reluctant to opt to Romanian Posts services.

Succeeding in digitalization and being able to integrate ICT tools and systems, is absolutely needed and will bring positive changes in a horizontal manner. Some characteristic examples given were:

- A well-equipped sorting center would lead to efficient management of shipping volumes/more customers. Extra Staff could be re-positioned to delivery and distribution departments.

- GPS routing system for couriers

- Establishment of parcel lockers

- Upgrades in ERP system for administration and back office operations

In discussions with Romanian Posts, it was described that the situation affects mainly workers with physically demanding tasks like managing parcels. The call is to diminish physical work through establishing automation both systems and procedure wise.

Digitalization in Romania Postal sector is characterized as very low in terms of technology and equipment e.g. automated sorting centers now is considered to be a necessity and not a "nice-to-have" component.

Internal trainings are challenging due to the low performance of online systems.

4.3.2 Skills gaps

Communication skills and conflict management are the two common skills need in the postal sector since it's all about customer centric approach. Thus, all skills related to customer management including sales techniques, perfect knowledge of company's portfolio and conflict management, are of high priority. This is critical since real life examples show that the employee

must communicate in an efficient manner in a very limited time. Being able to summarize, to be concentrated and offer useful information fast and efficiently is the cornerstone for front-office employees.

Having a deeper knowledge of company's products and services saves not only time, but supports selling techniques such as being able to present new offers, cross-sells, etc. As stated, a lot of new employees do not enjoy an "adjustment period". The result is that they don't understand what they are actually selling or the differences between the services.

The market is moving very fast and this affects the needed competencies for the postal sector. Under this volatile environment a postal employee should:

- Be able to adapt in new processes, requests, tools when established

- Be eager to learn and broaden his or her knowledge.

- Be a team player and try to find solutions on a team level

- Be proactive and flexible / owning time-management skills

4.3.3   Training provisions

Trainings in Romanian Posts lack a long-term and sustainable plan. Current trainings offered are driven by specific and relative narrow needs; they have the sense of emergency and are not part of a well-defined training approach. Regular in-house awareness raising trainings currently offered, focus on GDPR issues and are structured around the new regulation and the principles related to processing of personal data.

Again, the main trend is about practical training while being balanced between theory and learn by doing. Interactivity is a key component here, meaning that trainees should have the opportunity to pose questions or discuss with trainers' topics that still remain unclear.

An interesting point revealed, based on past experiences, was the limited motivation in participating in trainings that are focused on personal development. The general picture is that if there are no immediate economic benefits only a few will fill excited and willing to cooperate. The majority of participants, especially the ones located in small towns or in the countryside found "no sense: in participating in such trainings.

As already said Postal sector is a developing business. This means new stakeholders and new customers with different needs; e.g. young people now interact more with Postal operators due to e-commerce). The need for personal development training rather than training on specific and strict procedures was highlighted by Romanian stakeholders.

On the other hand, e-commerce brings to light new knowledge and competencies: regulations, law and principles on national and international level and of course logistics.

5   Summary and synthesis of findings

Current needs and challenges

Almost all participants identified **e-commerce** as the main factor driving changes in the postal sector. The strong market penetration of e-commerce results in several challenges that need to be addressed. It is clear that Post offices must remain competitive in many ways with respect to digital services: providing competitive prices, being able to offer online services and products, introducing new and innovative services with a view to digitalization both in processes and tasks, introducing parcel lockers, updating logistic procedures, etc.

The once dominant public postal operators are facing considerable disruptions to their businesses due to market liberalization and the arrival of internet. They are under pressure as private companies invest time and money on digitalization of their business and they claim a significant market share, especially in parcel and courier business. This is the case in Bulgaria, Greece and Romania where the USPs serve a much smaller share of parcel & express market then the letter market. The main finding is that **parcels are now more important than letters in revenue terms** and they are growing faster than letters are falling. This means that **Postal sector is again a growing business** where the number of enterprises providing postal sectors is increasing[3].

The importance of digital transformation has been duly recognized by the majority of the Postal stakeholders who participated in the NeWPOST field research. New technologies are changing the Postal world and e-commerce booming is an emerging reality. New and innovative electronic postal services call for redesign and installation of new IT systems and functionalities while classical postal services like logistics and delivery are being transformed and reshaped.

Postal sector in Bulgaria and Romania can be characterized as **late adopters of technology** integration in their business plans. The utilization of technologies like barcoding or RFID, basic automated sorting centers or integrated end-to-end systems are being put in effect but as mentioned, the smooth integration of these developments is challenging.

The Greek Posts have many operations that deal with transactions and end-customers. Systems and technologies that are focused on data collection that can be aggregated and analyzed are potential components of improvements. As described one such example is the failed delivery attempts; cutting down on failed first attempts based on data analysis may save the parcel/post operators a substantial amount of money.

The stakeholders of the three participating countries expressed the same concern regarding working conditions in Postal offices. The job is not attractive, at least for high qualified employees, and in combination with lack of up-to-date trainings or low salaries the employee turnover is quite high.

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[3] In 2017, Bulgaria reaches 149 enterprises providing postal services, Greece has 543 and Romania 230. https://webgate.ec.europa.eu/grow/redisstat/databrowser/view/POST_CUBE1_X$NUM701/default/table ?category=GROW_CURRENT

Another interesting point was that **e-commerce has altered the consumer behavior**. in terms of communication and consumption of products/services. The impact is that postal offices need to adapt to constantly emerging customer needs in terms of online communication while improving or enhancing their services and products. Online philatelic and postal products shops, promotional communication through online digital postage and signatures, different payment options, parcel lockers, e-invoicing, hybrid email, performance reports and analytics, online account management are only part of the postal digital services in the new era.

Skills gaps and training provisions – The new Age postal employee

In general, there is a trend of continuous training in the Postal sector in a European level related to new technologies and recent developments. The examples below can be seen as best practices and show that there is tendency to invest money and time in related activities.

Bpost in Belgium gave around 27000 days of training or coaching with a focus to practical training in communication, sales, languages and leadership[4].

In 2015-16, Royal Mail invested £20,5 million in training and delivered almost 90.000 days of training for their UK employees. These numbers decreased and in 2016-17 the investment was at £13,8 million for 25.000 days of training. Also, a Leadership Academy in support of the development of Mail Centre leaders were established[5].

In France, 81% of La Poste's employees were trained in 2015 while in 2016 31.000 employees found a new position internally and more than 1.600 employees transferred to another business unit[6].

The Correos Group in Spain aims to ensure that its employees are up-to-date with new skills needed for their job, including more than 400 training activities. The focus is on innovative techniques such as mobile learning and gamification with over 200.000 participants. In 2016, training activities accumulated to 1,6 million training hours. In addition, a pilot test for learning through mobile devices used by delivery staff was initiated[7].

These case studies highlight the internal dynamics of the postal environment and reveal the impact of the digital transformation. All participants agreed that being familiar with technology in terms of software tools and equipment is a must have competency. However, following up on discussions regarding skills gaps it was made clear that soft skills are needed as well.

An interesting focal point identified was the multitasking nature of day-to-day tasks. In cases of emergency or working under pressure all this distraction takes a toll on the quality of work and postal employees are constantly in a "reactive" mode. Therefore, they do not have time to reflect and apply their knowledge or their experience. The solution to that would be in-house trainings enabling employees to gain clarity on what to prioritize. Clarity on role priorities rather than

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[4] bpost, annual report 2013, p.49, annual report 2015, p.41-42.
[5] Royal Mail (2016), annual report 2015/16, p. 45 and 2015, p.39.
[6] La Poste annual report 2015, p.77, and annual report 2016 p.33 and p.126.
[7] Correos (2017), annual report 2016, p.72.

In general, information processing is a potential training area for the intended NeWPOST curricula. More specifically, a postal employee should be able to:

- Compile, Categorize, audit or verify related information
- Classify, calculate, tabulate, summarize numerical data.
- Evaluate information to determine compliance with standards and identify specific events or processes that are in-line with in-house regulations or in general (e.g. GDPR compliance).

The following list highlights the most important key points regarding training provisions and could be considered as potential training areas:

- Trainings should definitely go beyond existing awareness raising seminars and information days. Structured courses with specific learning objectives and outcomes are needed.
- Integrate practical trainings with the use of test cases, real-life scenarios, team assignments, etc. It seems that the first cycle of getting familiarized with the topic is ending. A more hands-on approach is needed in favor of handbooks or static presentations.
- Delivery methods including Work-based learning should be promoted. Internships or mentorships along with effective evaluation strategies can provide the much needed "inside look". However, as mentioned, it is quite challenging to establish in house trainings due to lack of time and experience personnel.
- GDPR and privacy of communication competencies are already part of the needed skills set. Given the end-to-end cycle of information processing of postal products (collection, sorting, distribution, transportation, mailbox service) in compliance with data protection and privacy law is a challenging task and up-to date training is needed. The postal employee should have the knowledge and by extend be able to answer questions about:
  o Types of personal data collected
  o Handling requests for data deletion or consent forms
  o Where privacy notice is posted
  o Who is the legal contact point in case of complex cases or how escalation should be performed.

Logistics was a potential training area identified by a lot of participants mainly because this is a key factor describing quality of service especially for corporate customers. Therefore, practical training regarding logistics should include:

- Description of an end-to-end order management
- Definition of procedures of shipments, delivery and returns especially when 3rd party providers are implementing the delivery process. Some advanced types of delivery

mentioned were parcel lockers, scheduled delivery or delivery outside regular times, notice of delivery via e-mail or social media, etc.

- Postage price calculations along with information regarding shipping, delivery and conditions of return
- Parcel pickups (when applicable)
- Custom processes and regulations (when applicable).

Finally, as all stakeholders have described, soft skills related to customer management is needed. Communication skills, sales techniques, creative thinking, work ethic teamwork, time management and customer relationship are the main skills identified.