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OPERATIONS AND TECHNOLOGY COMMITTEE
3rd, 4th JUNE 2024, ARUSHA, TANZANIA

STATUS OF PHILATELY SERVICES IN AFRICA

1. Subject Report on the Status of Philately Services in Africa	References/paragraphs <ul style="list-style-type: none">• PAPU Action Plan 2022-2025• Questionnaire on the Status of Philately Services in Africa
2. Decision expected. <ul style="list-style-type: none">• Take note of the document• Provide necessary guidance	

1.0 INTRODUCTION

The Status of Philately Services in Africa Questionnaire was circulated as an outcome of the successful Promotion of Philately Working Group Meeting held on 18th March 2024. The Questionnaire was prepared in pursuit of the implementation of the Working Group Action Plan for the period 2022-2025.

Its objective was to elicit and collate information on philatelic activities being implemented by Designated Operators in Africa to ascertain the status and craft interventions and programmes to assist in filling any identified gaps.

It covered the following four (4) main areas of the philately business.

- i. Organization of Philately Business;
- ii. Stamp Production;
- iii. Marketing and Sale of Philatelic Products;
- iv. Digitalization of Stamps.

The Questionnaire was sent to Member States on 20th March 2024 and was to be returned to the PAPU General Secretariat by 30th April 2024.

2.0 ANALYSIS OF THE QUESTIONNAIRE

Twenty-nine (29) Designated Operators (DOs) responded to the Questionnaire, giving a response rate of 64%. DOs from the following Member States responded to the Questionnaire: Algeria, Botswana, Burkina

Faso, Burundi, Cameroon, Central African Republic, Congo Republic, Cote d'Ivoire, Democratic Republic of Congo, Egypt, Ethiopia, Equatorial Guinea, Eswatini, Ghana, Kenya, Lesotho, Madagascar, Malawi, Morocco, Namibia, Nigeria, Sierra Leone, Senegal, Somalia, Sudan, South Africa, Tanzania, Zambia and Zimbabwe.

The detailed analysis of the responses received from Designated Operators is contained in **Annexure 1** of this document.

From the analysis of the data obtained from the responses, the following conclusions can be drawn:

2.1.1 Organization of Philately Business

- Among the 29 Dos, or **86%** confirmed having a philatelic department;
- The department is managed at the top management level and, in most cases, by an Operations or Marketing Director/Manager;
- 22 DOs, or **76%**, have either a museum or office for the conservation of stamp issues/files;
- **45%** of the DOs are members of an international Philatelic organization, either the World Association for the Development of Philately - WADP (**54%**) or the African Philatelic Hub -APH (**13%**).

2.1.2 Stamp Production

- **90%** of the DOs issue postage stamps;
- On the number of times a DO has issued stamps in the last 3 years, the responses indicated as below:
 - **38%** of DOs issued 1-3 stamps
 - **10%** of DOs issued 3-6 stamps
 - **17%** of DOs have issued more than 6 times
 - **6%** of the DOs did not specify or issued none
- Other philatelic products issued were as follows:
 - **72%** of DOs issued First-Day Covers;
 - **59%** of DOs produced souvenir stamp sheets;
 - **55%** of DOs produce mini sheets;
 - **45%** of DOs produce stamp albums/booklets;
 - **31%** of DOs produce pre-franked/stamped postcards;
 - **28%** of DOs produce stamped envelopes
 - **24%** of DOs produce others.
- **59%** of the Designated Operators have participated in a joint stamp over the last 5 years, while **41%** have not;
- **72%** of DOs use international printers in stamp production, while 31% use local (national) printers. Two DOs work with both national and international printers;
- **76%** register their stamps with the UPU World Association for the Development of Philately Numbering System (WNS), while **24%** do not.

2.1.3 Marketing and Sale of Philatelic Products

- More than half of Designated Operators (52%) use different media platforms to market their products;
- The different channels used are as follows:
 - ✓ 12 DOs (41%) use the company website
 - ✓ 11 DOs (38%) use social networks
 - ✓ 1 DO (3%) uses the E-Commerce platform
 - ✓ 1 DO (3%) uses television (National Channel).
- 61% of the DOs have participated in an exhibition or competition in the last 3 years as below:
 - ✓ 8 Designated Operators (28%) took part in Philatelic Conferences, notably in Rabat, Morocco
 - ✓ 6 Designated Operators (21%) participated in events organized by the UPU, notably 17th, 18th, and 19th Competition Classes, including the one held in Cape Town.
 - ✓ 6 Designated Operators (21%) participated in other events, including EUROMED Postal and DUBAI Expo.
- Only 38% of the Designated Operators have created an online philatelic shop.
- Philately contributes a small percentage of the DO's annual revenue.

2.1.4 Digitalization of Stamps.

- 86% of the Designated Operators plan to digitize philatelic products in line with global trends.
- Only 39% of Designated Operators have engaged or collaborated with partners on digitalization of stamps.
- 14% of the DOs have issued digital stamps over the last three years, and among these, only 2 DOs specified the issuance of the NFT stamps.

3.0 RECOMMENDATIONS

- i. Designated Operators are urged to respond to questionnaires to ensure that the General Secretariat has a true picture of Africa's status.
- ii. Designated Operators in Africa should invest in digitalizing the philatelic business to keep up with global trends.

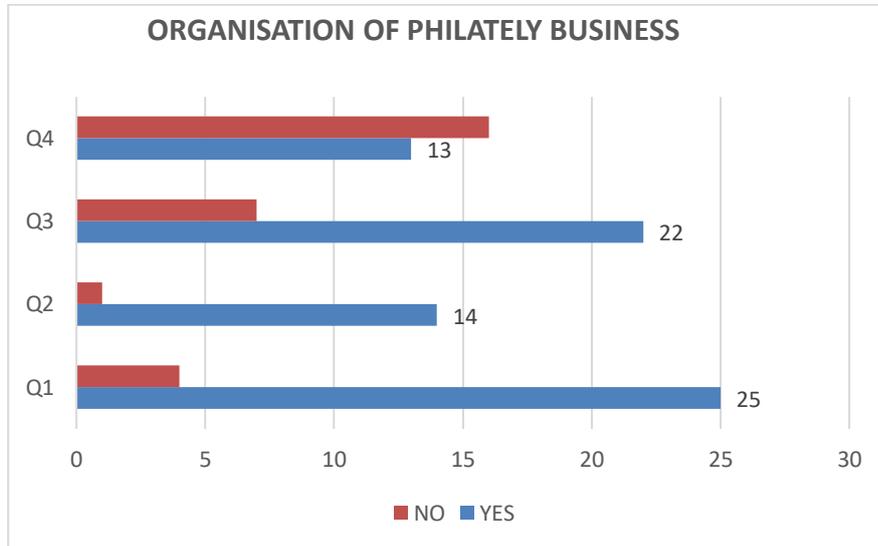
4.0 DECISION EXPECTED

The Working Group is tabling this report to the Operations and Technology Committee for consideration and to make the following decisions:

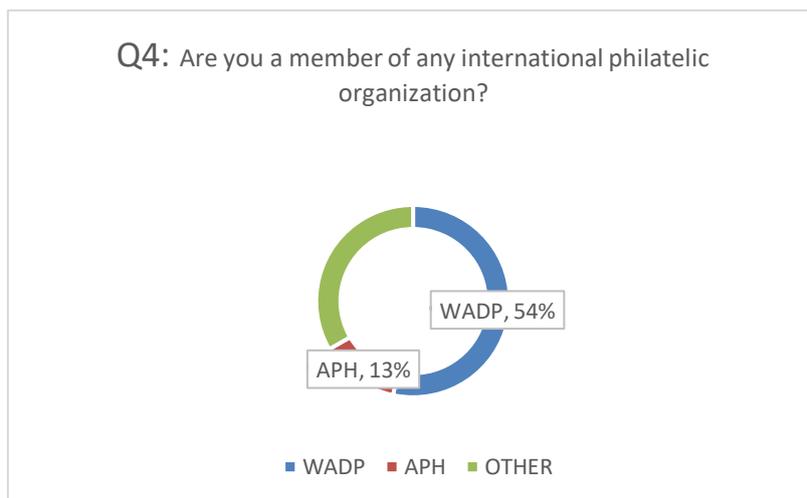
- Take note of the status of philately services in Africa;
- Urge Member States to respond to Questionnaires to ensure that the African status of Philately is fully accounted for;
- Encourage Member States to increase investment in philately and continue with the digitalization of Philatelic business in line with global trends.

ANNEXURE 1 – ANALYSIS OF QUESTIONNAIRE ON PHILATELY SERVICES IN AFRICA

I. ORGANISATION OF PHILATELY BUSINESS



- Among the 29 DOs, 86% responded that they had a philatelic department.
- The department is managed at the top management level, generally by an Operations or Marketing Director/Manager.
- 22 DOs (around 76%) have either a museum or office for the conservation of stamp issue files

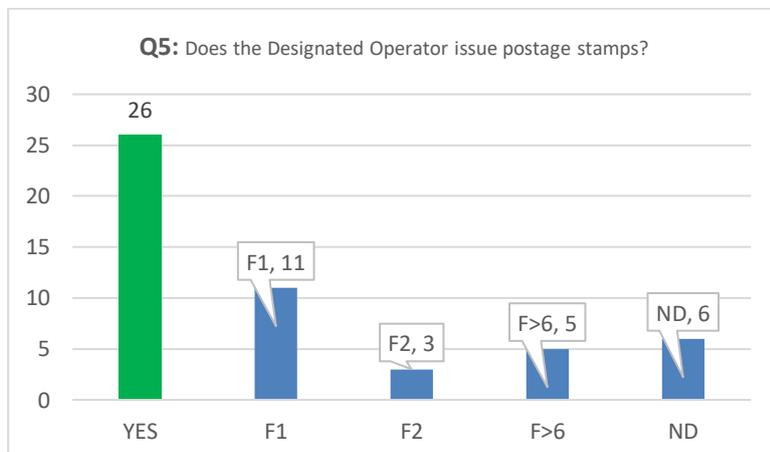


Of the 29 DOs, only 45% are members of an international philatelic organization either with WADP (54%) or APH (13%)

WADP: World Association for the Development of Philately

APH: African Philatelic Hub

II. STAMP PRODUCTION



90% of DOs issue postage stamps. The number of times a DO has issued in the last 3 years

- 38% of DOs issued 1-3 stamps
- 10% of DOs issued 3-6 stamps
- 17% of DOs have issued more than 6 times
- 6% of the DOs did not specify or none

F1: bracket 1-3

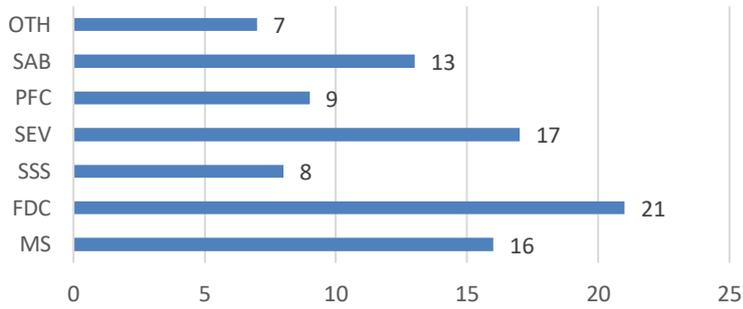
F2: bracket 3-6

F>6: more than 6 times

ND: none or not specified

Q6: What other philatelic products do you produce besides postage stamps?

e

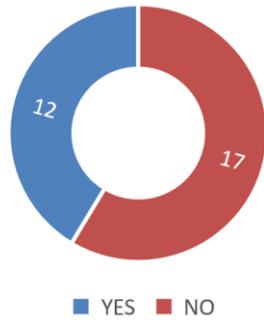


Other philatelic products issued:

- More than 72% of DOs make first day covers;
- 59% of DOs produce souvenir stamp sheets;
- 55% of DOs produce mini sheets;
- 45% of DOs produce stamp albums/booklets;
- 31% of DOs produce pre-franked/stamped postcards;
- 28% of DOs produce stamped envelopes
- and 24% of DOs produce others.

SAB: Stamp albums/booklets
 PFC: Pre-franked/stamped postcards
 SSS: Souvenir stamp sheets
 SEV: Stamped envelopes
 FDC: First day covers
 MS: Mini sheets
 OTH- Other

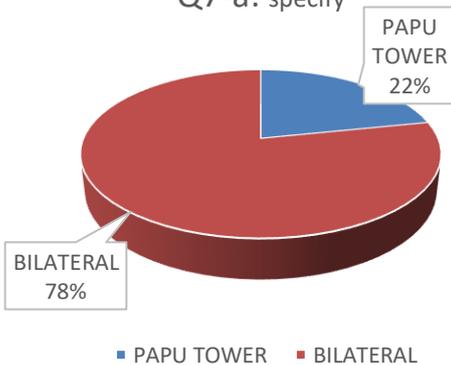
Q7: Have you participated in a joint stamp issue in the past five (5) years?



Operators who have participated in a joint stamp over the last 5 years:

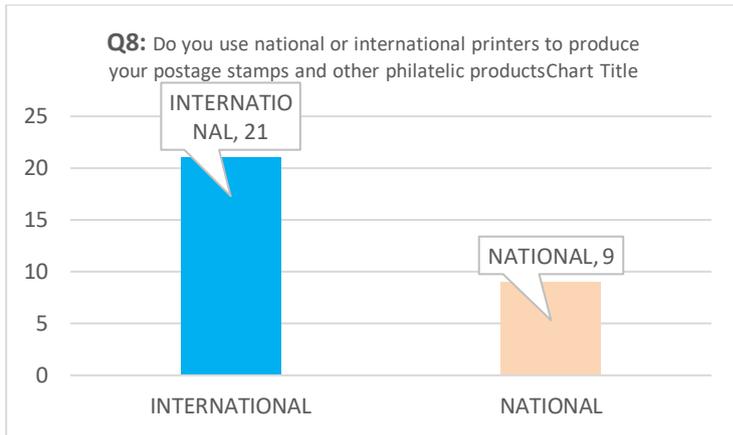
59% answered yes compared to 41% no

Q7-a: specify



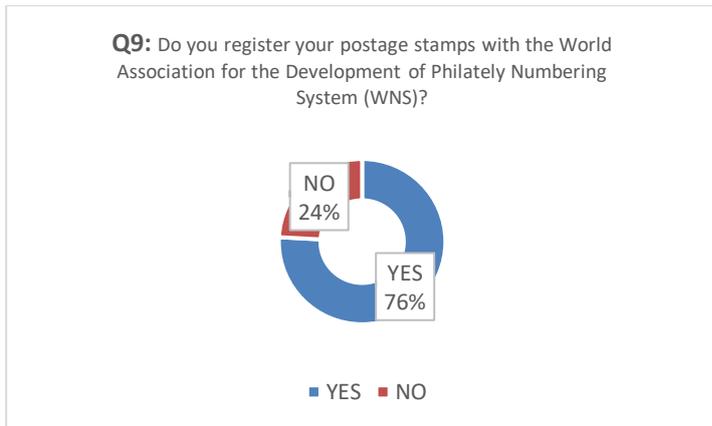
Among those who participated in a joint stamp issue

- 78% have issued joint stamps with other countries e.g.,
 - Algeria-Palestine
 - Egypt-India
 - Morocco-France
 - Tanzania Oman.
- 22% did so during the inauguration of



Operators who work with printers.

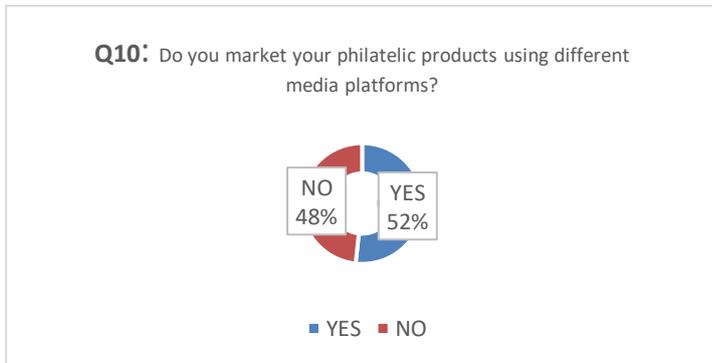
More than 72% of DOs work with international printers and 31% with local (national) printers. Two DOs work with both national and international printers.



Operators who register their stamps with the WADP numbering system:

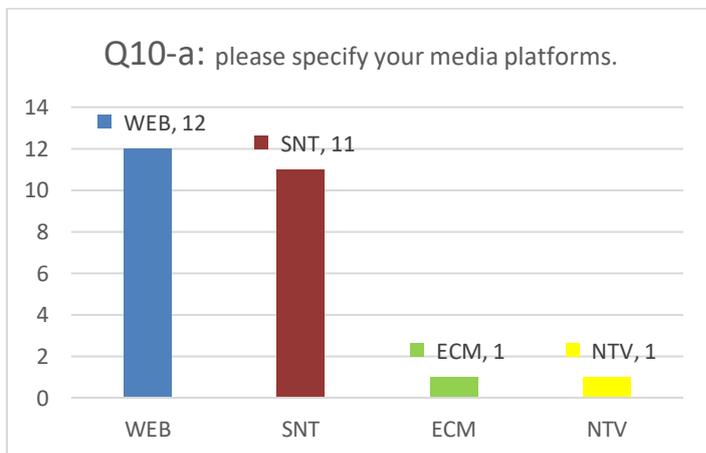
76% answered yes compared to 24% no.

III. MARKETING AND SALE OF PHILATELIC PRODUCTS



Operators who market their philatelic products on media:

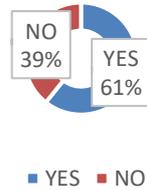
More than half of Designated Operators (52%) use media support compared to 48%.



12 DOs (41%) use the company website
 11DOs (38%) use social networks
 1 DO (3%) uses the E-Commerce platform
 1 DO (3%) uses television (National Channel).

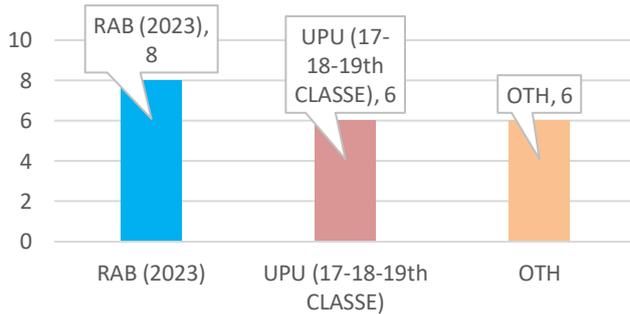
WEB: Company website
 SNT: Social networks (Facebook-...)
 ECM: E-Commerce
 NTV: Television

Q11: Have you participated in any philately exhibition/competition in the past three (3) years?



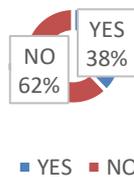
61% of ODs have participated in an exhibition or competition in the last 3 years.

Q11-a: If yes, please specify where and when



- 8 Designated Operators (28%) took part in philatelic conferences, notably Rabat, Morocco
- 6 Designated Operators (21%) took part in events organized by the UPU, notably 17th, 18th and 19th Competition Classes and that of Cape Town.
- 6 Designated Operators (21%) took part in other events including: EUROMED Postal, DUBAI Expo

Q12: Have you established an e-philately shop?

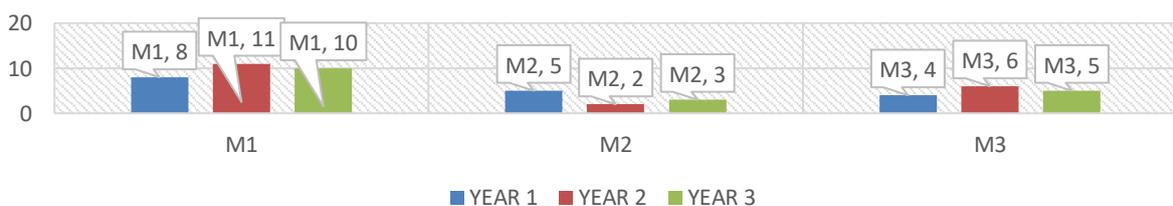


Only 38% of Designated Operators have created an online philatelic shop

The revenues generated in USD from the sale of philatelic products over the last 3 years are as follows:

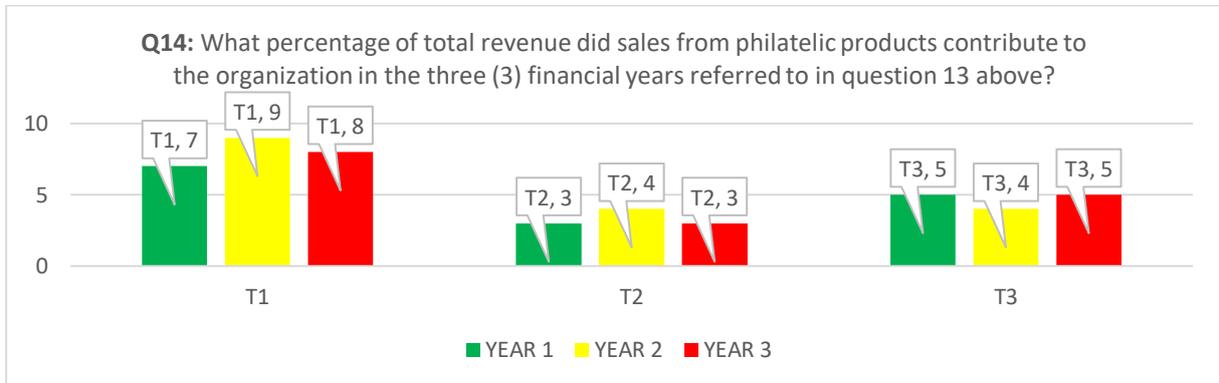
- 1st year: 8 countries are on the M1 range; 5 countries are on the M2 range and 4 countries on the M3 range (see graph Q13)
- 2nd year: 11 countries are on the M1 range; 2 countries are on the M2 range and 6 countries on the M3 range (see graph Q13)
- 3rd year: 10 countries are on the M1 range; 3 countries are on the M2 range and 5 countries on the M3 range (see graph Q13)

Q13: How much revenue in United States Dollars (USD) was raised by the sale of philatelic products (excluding revenue from the sale of postage stamps) in the past three (3) financial years, starting with the most recent?



The percentage of total revenue from sales of philatelic products over the last 3 years is as follows:

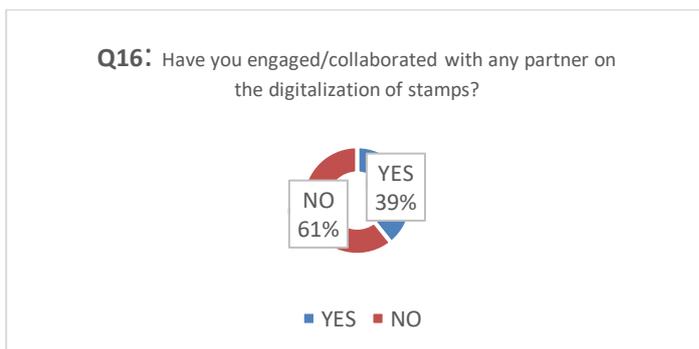
- 1st year: 7 countries are on the T1 range; 3 countries are on the T2 range and 5 countries on the T3 range (see graph Q14)
- 2nd year: 9 countries are on the T1 range; 4 countries are on the T2 range and 4 countries on the T3 range (see graph Q14)
- 3rd year: 8 countries are on the T1 range; 3 countries are on the T2 range and 5 countries on the T3 range (see graph Q14)



IV. DIGITALIZATION OF STAMPS

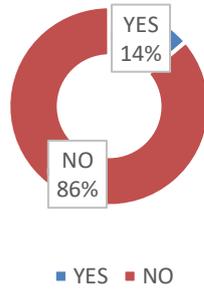


Among Designated Operators 86% plan to digitize philatelic products in line with global trends



Only 39% of Designated Operators have engaged or collaborated with partners on digitalization of stamps

Q17: Have you issued digital stamps in the last three (3) years?



14% of the 29 Designated Operators have issued digital stamps over the last three years. And among these only 2 DOs specified the issuance of the NFT stamps