

PAN AFRICAN POSTAL UNION

(Specialized Agency of the AU)

GENERAL SECRETARIAT



UNION PANAFRICAINNE DES POSTES

(Institution spécialisée de l'UA)

SECRETARIAT GENERAL



FEEDBACK FROM RESPONSES TO THE AFRICAN POSTAL REGULATION SURVEY

DRAFT

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1. BACKGROUND AND RATIONALE

In pursuing its objective of promoting postal sector reform, the Plenipotentiary Conference issued **Decision No. 16/PAPU/PC/X/2021 of 25th June 2021** adopting the African Postal Guidelines during its 10th Ordinary Session held from 24th to 25th June 2021 in Victoria Falls (Zimbabwe). The cardinal objective of the document was to propose a template outlining, among other things the mandate and characteristics of postal regulation applicable on a continental scale. Following the adoption of the Postal Guidelines, the Policy and Regulation Committee's Quadrennial Programme of Activities 2022-2025 adopted a series of activities aimed at implementing the Guidelines and/or postal regulation, including the following:

- Identify in order of priority, the areas to be harmonized as highlighted in the Guidelines;
- Propose instruments to operationalize the African Postal Guidelines
- Develop policy and legal frameworks for postal regulation;
- Introduce systems for assessing performance and service quality;
- Design a cooperation framework for regulatory bodies;
- Propose a regulatory framework for postal financial activities.

These activities, inevitably raise the need to gather sufficient information on the state of play and prospects for postal regulation in Africa. Accordingly, the PAPU General Secretariat undertook a survey on postal regulation in Africa by administering a questionnaire with all Member States, directed specifically at the postal regulatory authorities, during the period of August to October 2024.

2. SURVEY OBJECTIVES

The African Postal Regulation Survey has a main objective that is anchored by sub- objectives.

2.1 Main Objective

The overarching objective of the African Postal Regulation Survey create a database on postal regulation in Africa to be kept as a repository at the PAPU General Secretariat.

2.2 Sub Objectives

The Survey more specifically, it is aimed at

- Helping the PAPU Secretariat General to take stock of postal regulation in Africa;
- Consider the outcome through proposed relevant recommendations and strategic positions;
- Carry out the related activities in the Policy and Regulation Committee's Quadrennial Programme of Activities 2022-2025.

In order to achieve these sub-objectives, the PAPU General Secretariat formulated and followed a multi-phased methodology.

3. SURVEY METHODOLOGY

The Survey methodology applied by the General Secretariat entailed:

- Designing and validating the postal regulation questionnaire;
- Administering the questionnaire;
- Collecting, processing and analyzing responses from Member States;
- Preparing the report presenting the feedback from the survey;
- Validating the survey feedback report internally;

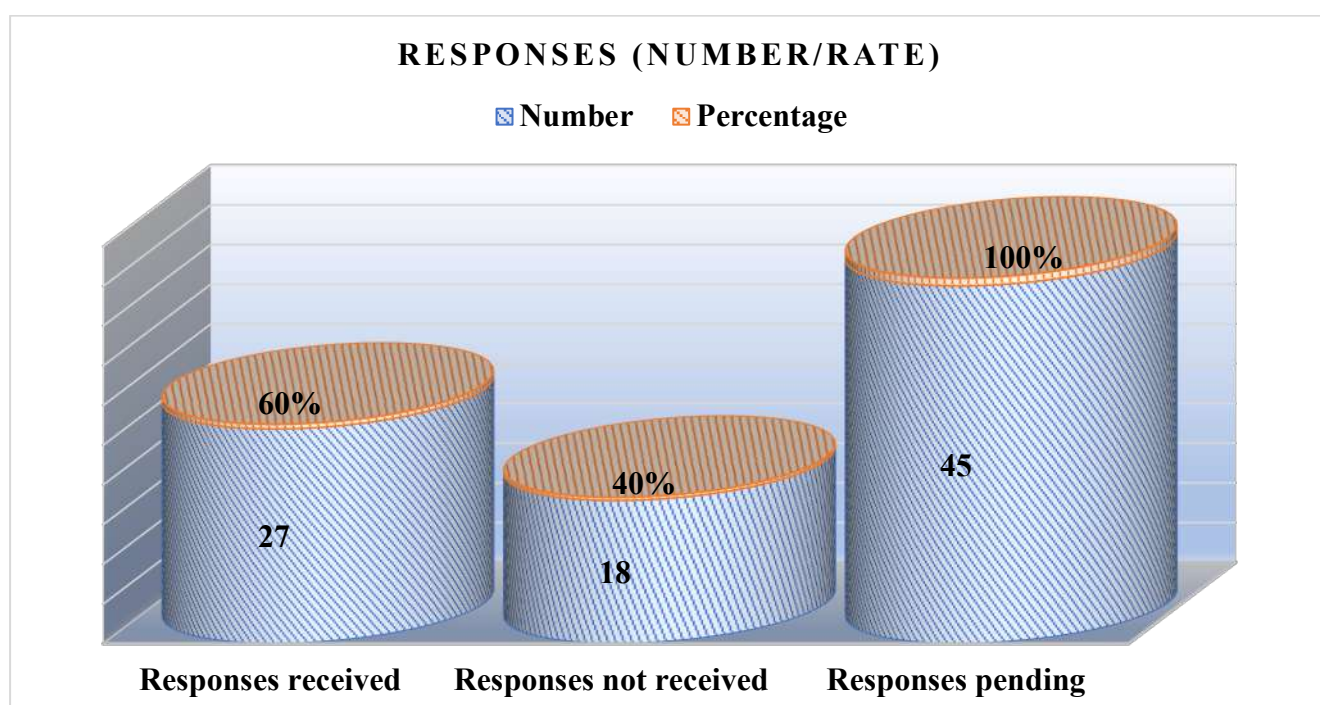
The next steps will be for the tabling of the Survey Report to the Regulation Development Working Group, right through the Policy and Regulation Committee before submission to the Administrative Council. The findings of the Survey will contribute to the identification of focus areas to be included in the regulation and policy strategic interventions to be prepared for the next quadrennial cycle by the PAPU General Secretariat.

4. SURVEY FEEDBACK

Responses to the Questionnaire on Postal Regulation in Africa were analyzed with the following results:

1) Responses (Number/Rate)

This information in this section shows the number and percentage of responses received, as well as those not received. Not all PAPU Member States responded to the questionnaire. The breakdown between responses and non-responses is as follows:



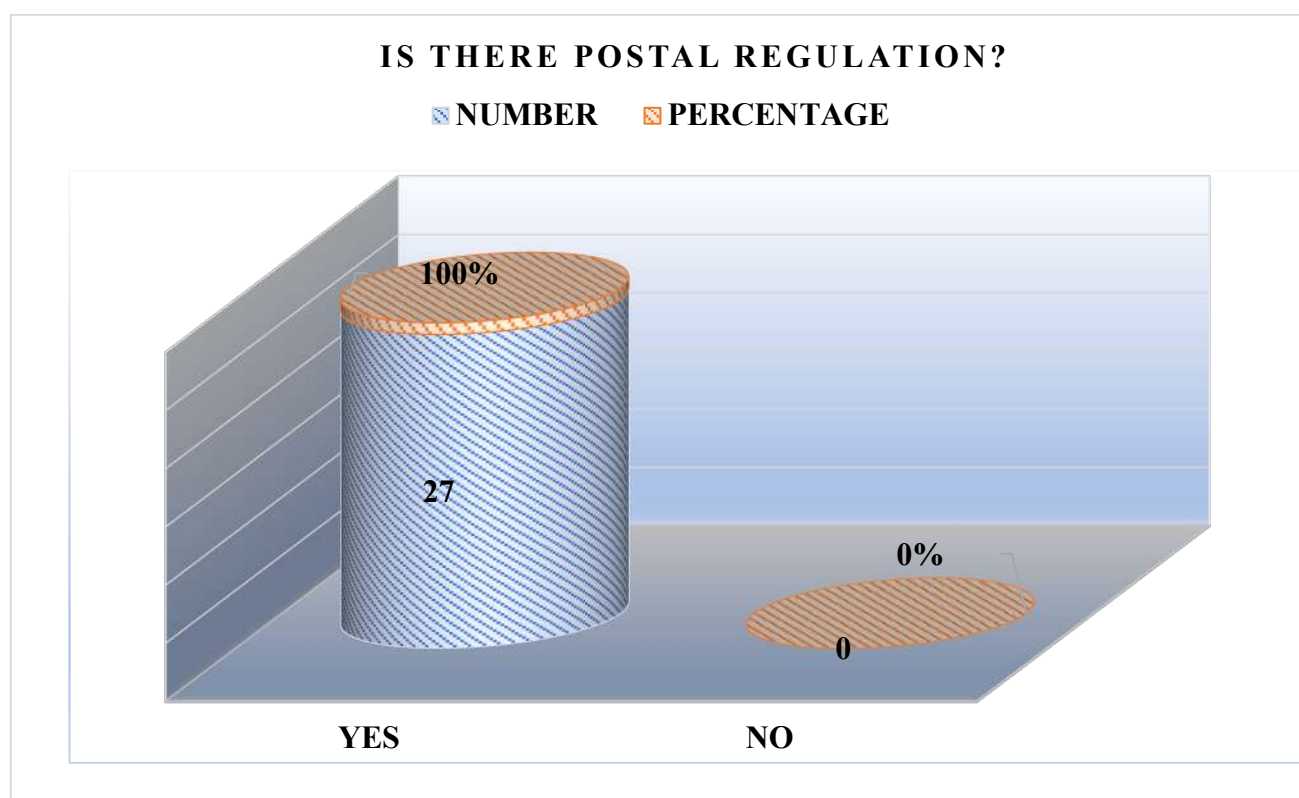
Results: Out of an expected number of 45 responses, 27 Member States responded to the questionnaire (i.e. 60% response rate) versus 18 Member States that did not respond (i.e. 40% non-response rate). Responses were received from the following Member States: Benin, Burkina Faso, Cameroon, Angola, Botswana, Eswatini, Ethiopia, Ghana, Kenya, Lesotho, Malawi, Mozambique, Namibia, South Africa, United Republic of Tanzania, Zambia, Mali, Morocco, Niger, Nigeria, Central African Republic, Republic of Côte d'Ivoire, Democratic Republic of Congo, Republic of Congo, Senegal, Comoros and Zimbabwe.

Analysis: With more than half of PAPU Member States having responded to the questionnaire, the response rate can be considered to be fairly satisfactory in light of the expected number of responses. In surveys it is generally accepted that a responsible rate of 30% is considered acceptable in determining the validity and reliability of its findings.

Recommendation: Considering the urgent need for accurate information and statistics for developing strategic positions and for making informed decisions, it is recommended that all Member States should systematically respond in good time to all surveys conducted by the General Secretariat for the Union to meet shared expectations and objectives.

2) Do you have Postal Regulation?

The feedback on this question was as follows:



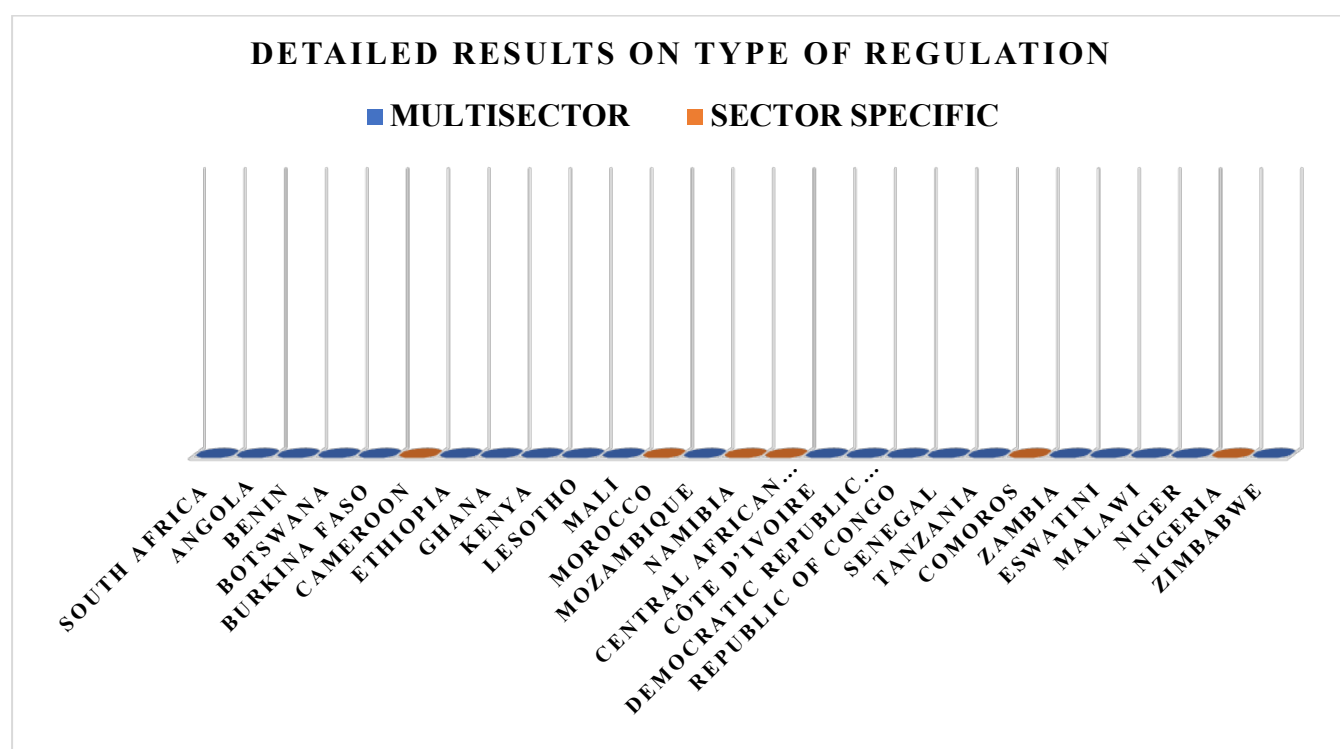
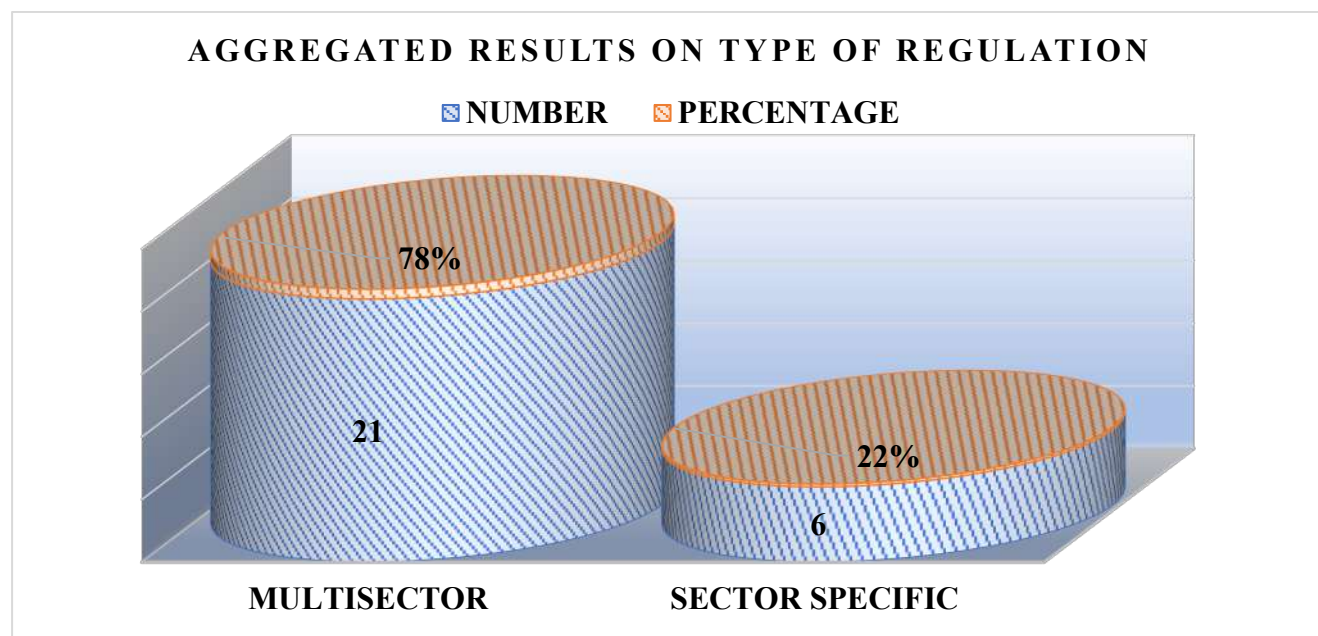
Result: All respondent Member States have a postal regulation system, i.e. **100%** of the sample.

Analysis: In the current liberalized postal market, the establishment of a regulatory authority is an absolute necessity to guarantee availability, accessibility and quality of service to all segments of the population. Therefore, having postal regulation in a majority of Member States is a positive finding that should be encouraged.

Recommendation: On the basis of the foregoing, it is recommended that the remaining Member States establish autonomous and independence postal regulatory authorities in order to achieve separation of roles from the policy function of government authorities.

3) What type of postal regulation system do you use? Multi sector or sole sector?

Following an analysis of responses to this question, many Member States have a multi-sector regulatory system, while some Member States have opted for sector-specific regulation. The results of the analysis are as follows:



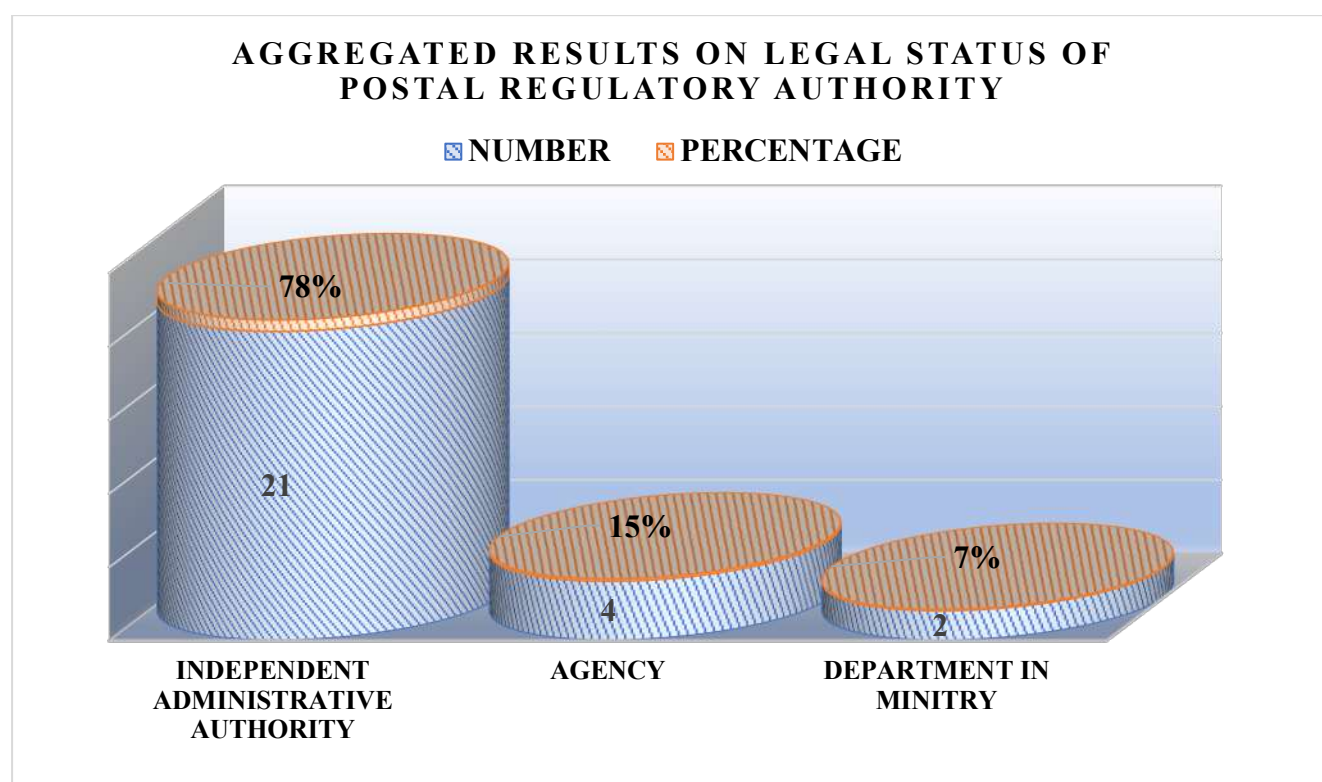
Result: Out of the 27 respondent Member States, only six Member States have opted for sector-specific regulation while 21 (i.e. 78%) have introduced multisectoral regulation. The six respondent Member States with sector-specific regulation are: **Cameroon, Namibia, Morocco, Central African Republic, Comoros and Nigeria.**

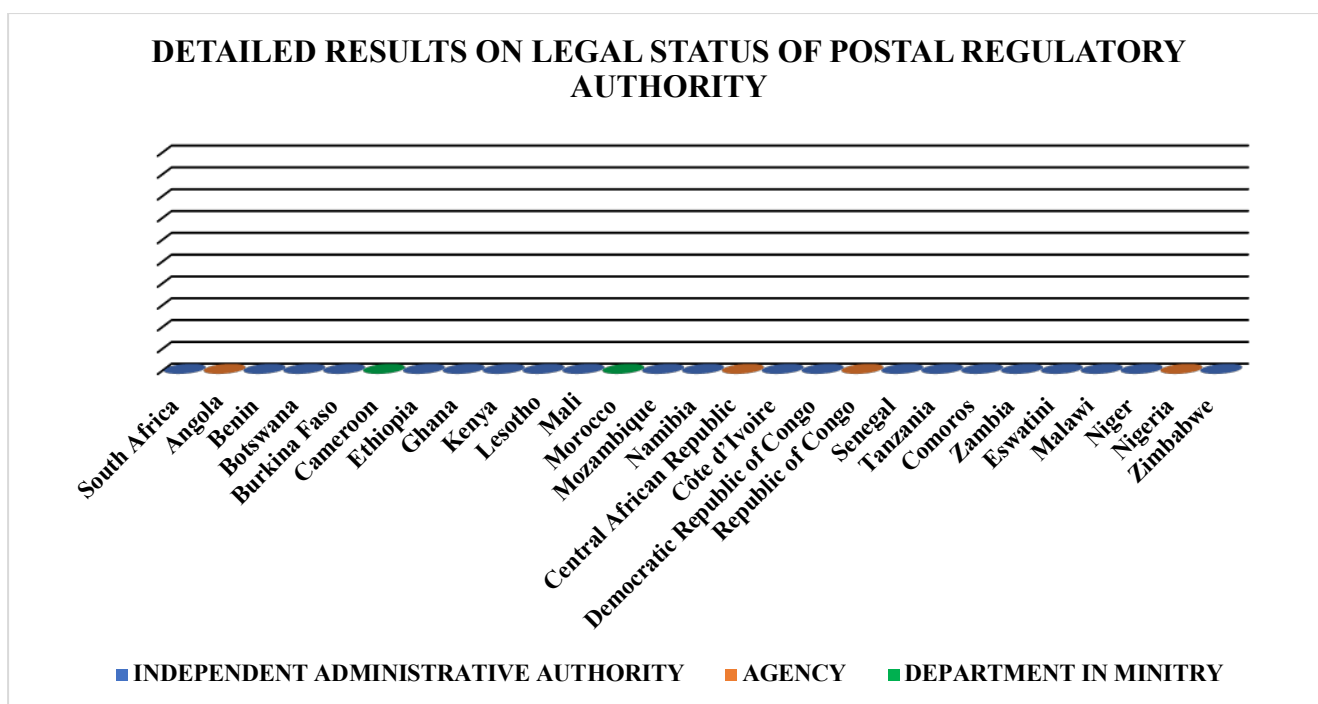
Analysis: Irrespective of the sector, regulation operates on virtually the same principles, techniques and methods. Setting up a multi-sector regulatory system therefore holds numerous benefits, including pooling financial, material and human resources, promoting experience and knowledge sharing, etc.

Recommendation: In light of the above-mentioned benefits, it is recommended that PAPU Member States seriously consider establishing multi-sector regulatory authorities to cover postal regulation as well.

4) **What is the status of the entity responsible for postal regulation?**

An analysis of responses to this question shows that the legal status of entities responsible for postal regulation varies from one Member State to another. The Regulatory Authorities were established as independent administrative authorities or agencies or departments within the ministry responsible for postal services. The results of the analysis are as follows:





Result: The majority of respondents, i.e. **21 Member States (78%)** stated that the entity responsible for postal regulation was established as an independent administrative authority. **Six Member States (i.e. 23%)** have a regulatory authority with the legal status of an agency or department within the ministries responsible for postal affairs.

The regulatory authorities of **Angola, Central African Republic, Republic of Congo** and **Nigeria** have the legal status of an agency. In contrast, the postal regulatory authorities of **Morocco** and **Cameroon** are departments in the ministries in charge of postal services.

Analysis: To carry out its regulatory mission successfully, any regulatory authority needs guarantees, the most important of which are autonomy and independence. The effectiveness of this autonomy and independence depends inter alia on the authority's legal status and institutional arrangements.

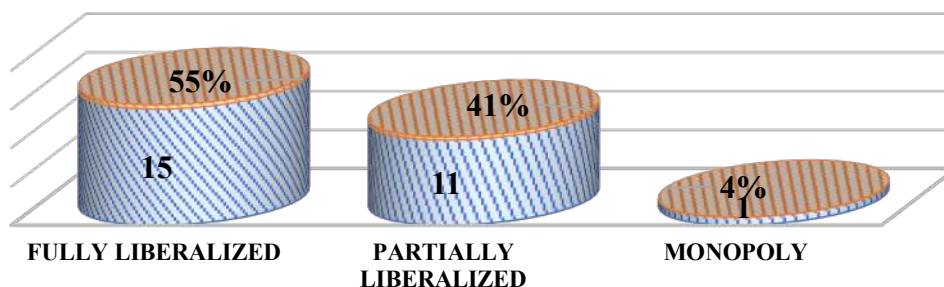
Recommendation: It is strongly recommended that Member States opt for the distinct legal status of Independent Administrative Authority in order to minimize the risks of undue interference and to guarantee the independence, autonomy and impartiality of the regulatory authorities.

5) To what extent is the postal market opened up?

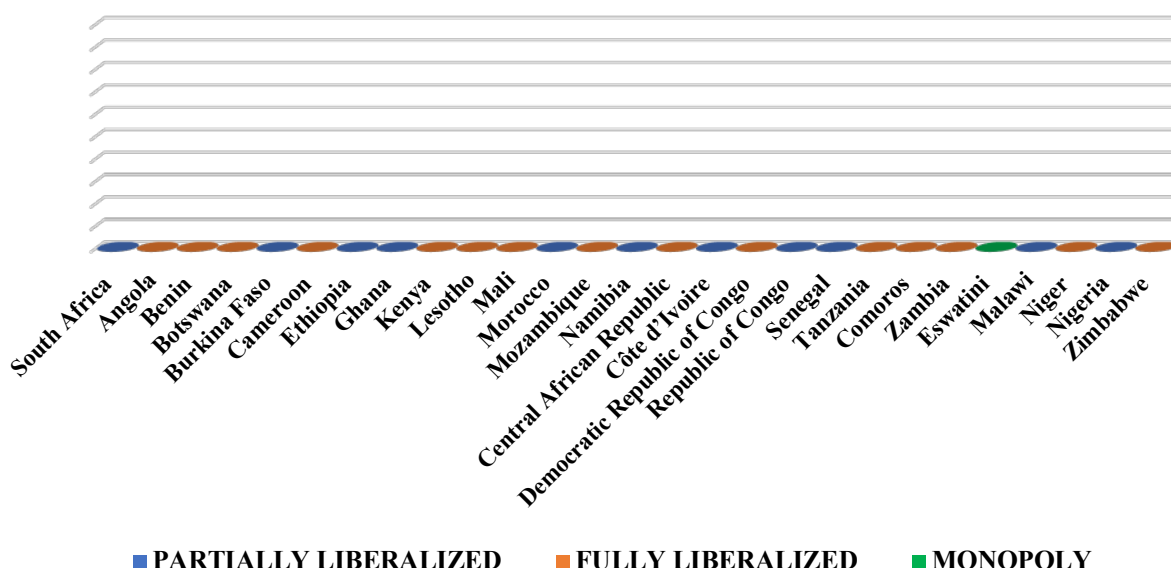
In response to the question of whether the national postal market is fully or partially liberalized (opened up to competition) the responses revealed that in some Member States the postal market is fully liberalized, while in others it is partially liberalized. The results are as follows:

AGGREGATED RESULTS ON POSTAL MARKET LIBERALIZATION

■ NUMBER ■ PERCENTAGE



DETAILED RESULTS ON POSTAL MARKET LIBERALIZATION



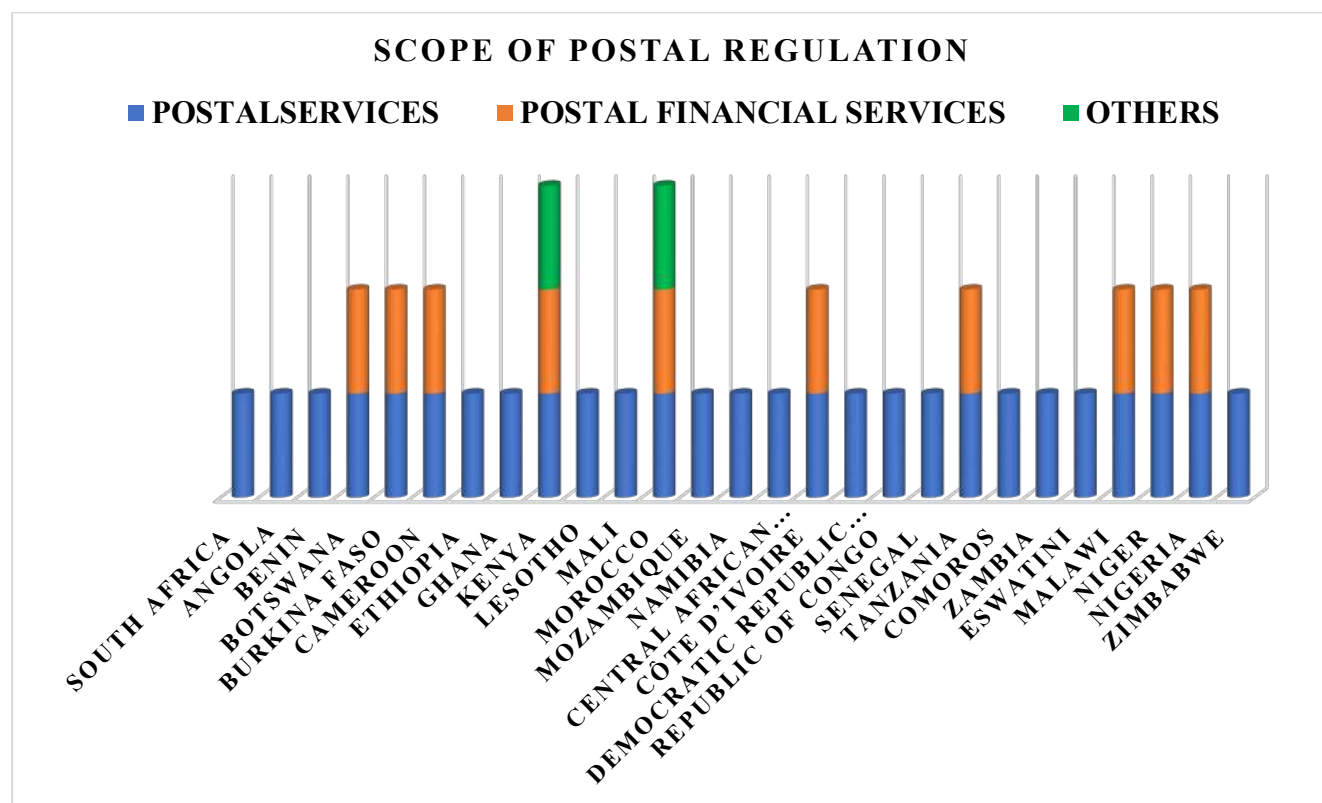
Results: The results show that **55%** of Member States have opted for full liberalization, while **41%** have partially opened up the postal market. Only Eswatini's postal sector remains a monopoly of the state-owned postal operator. However, some Member States have made provision for reserved services in addition to full liberalization. These are **Benin, Cameroon, Botswana, Kenya, Lesotho, Mozambique, Tanzania, Zambia, Mali, Niger** and **Comoros**.

Analysis: Full liberalization promotes increased competitiveness and investment in the postal sector and, consequently, greater satisfaction for consumers of postal services.

Recommendation: In order to increase competitiveness and investment in the postal sector, it is recommended that the postal sector be reasonably opened up or liberalized. In exchange for full liberalization, safeguard mechanisms ought to be developed to replace reserved services in order to compensate for the net cost of the universal postal service.

6) What is the scope of postal regulation?

The scope of regulation varies from one Member State to another. While in some States postal regulation covers only postal services, in others it covers other services in addition to postal services, particularly financial services. An analysis of responses to this question gave the following results:



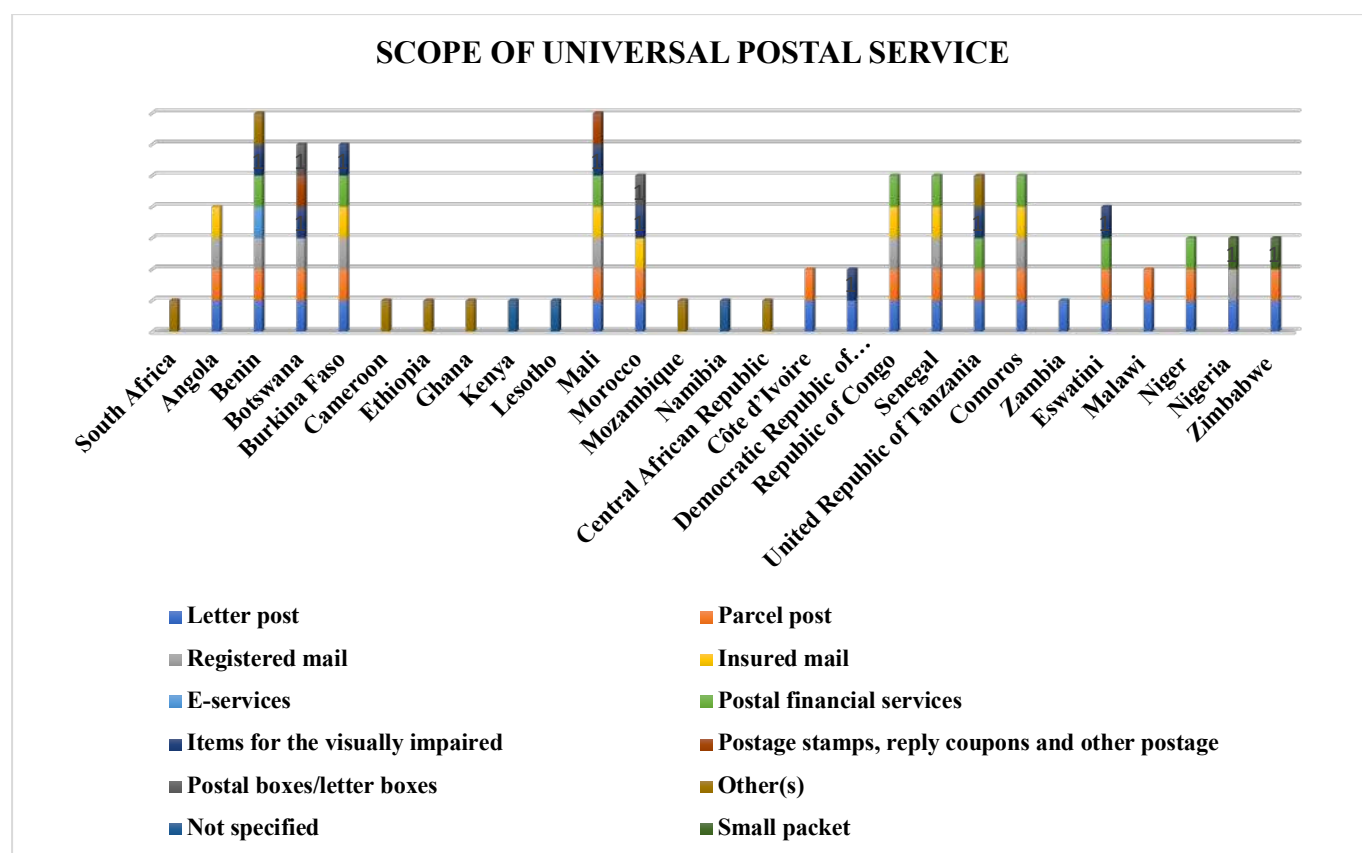
Result: Postal regulation covers postal services in all the Member States that replied to the questionnaire. In addition to postal services, it covers financial services in the following Member States: **Botswana, Burkina Faso, Cameroon, Kenya, Morocco, Côte d'Ivoire, Malawi, Niger, Nigeria and Tanzania**. However, postal regulation in **Kenya and Morocco** incorporates, in addition to postal services and postal financial services, other services including electronic transactions, e-commerce and electronic financial services.

Analysis: The main mission of postal regulation is to ensure the application of regulations in the provision of postal services which includes the **three** dimensions: physical, electronic and financial.

Recommendation: It is recommended that Member States, which have not yet done so, extend postal regulation to postal financial services and electronic services.

7) What is the scope of universal postal service in your country?

The questionnaire sought information on the content of the universal postal service in each Member State, and the scope of the universal postal service in the Member States that responded is as follows:



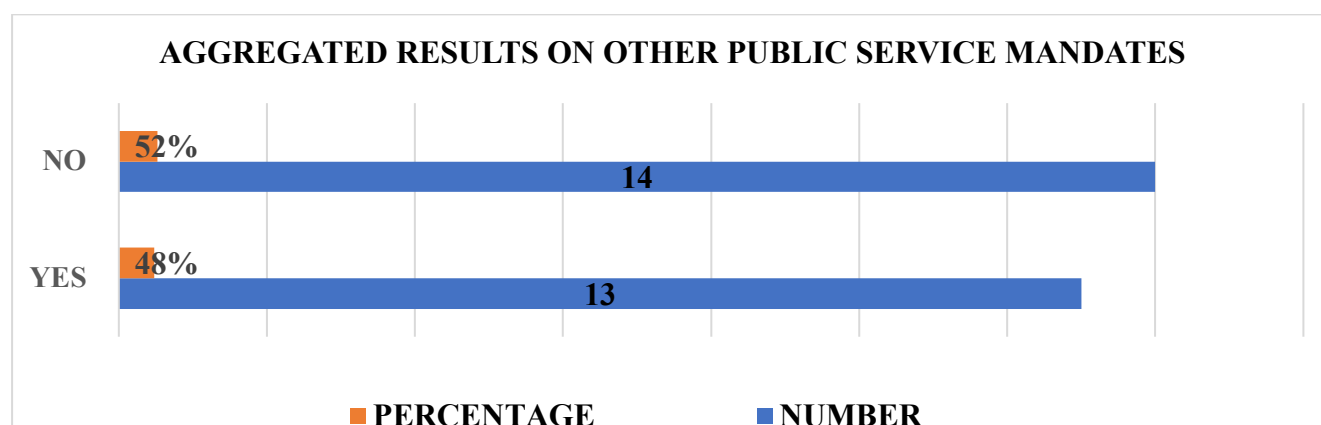
Result: The scope of the universal postal service in the Member States mainly includes items of correspondence, postal parcels, registered items, items with declared value and literature for the blind. As far as electronic services are concerned, only **Benin** has included electronic services in its scope of universal postal service. In addition to traditional postal services, **Tanzania** has included other services in its universal postal service, in particular financial representation services (bureaux de change, travel agencies, etc.) and one-stop e-government services. However, in some Member States, the scope of the postal service has not been defined or is in the process of being defined. This is the case for **Namibia, Lesotho and Kenya**. Indeed **Namibia and Lesotho** which currently apply the Acts of the Universal Postal Union (UPU) while the legislative framework of the universal postal service is being developed in **Kenya**.

Analysis: The current context, marked by the emergence of Information and Communication Technologies (ICTs) and the widespread desire to digitalize services, as well as the changing needs of consumers of postal services towards digital products, requires not only an update of the portfolio of postal products and services but also the taking into account of new consumer needs brought about by the emergence of new technologies. As a result, the scope of the universal postal service in several Member States has become obsolete in the current context.

Recommendation: In the light of the above, Member States should be recommended to update the scope of the universal postal service and include, as far as possible, electronic services and support basic public services provision (health, education, etc.).

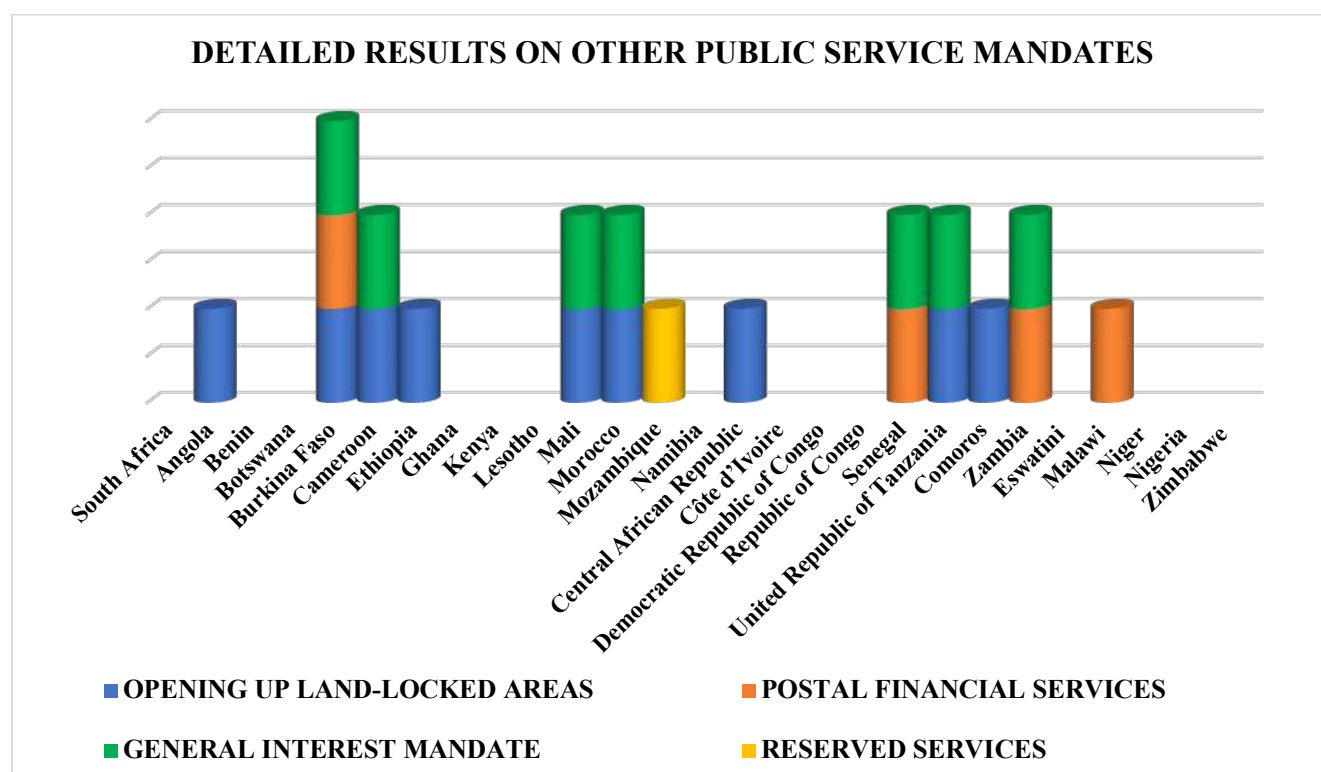
8) What other public service responsibilities are entrusted to the Designated Operator?

This question enquired whether, in addition to the universal postal service, the designated operator has one or more other public service missions. An analysis of the responses produced the following results:



Out of a total number of **27 respondents**, **13 designated operators** perform at least one public service mission other than the provision of the universal postal service. In contrast, **14 designated operators (52%)**, are exclusively responsible for providing universal postal service. These are Benin, Botswana, Ghana, Kenya, Lesotho, Namibia, the Republic of Côte d'Ivoire, the Democratic Republic of the Congo, the Republic of the Congo, Eswatini, Niger, Nigeria, South Africa and Zimbabwe.

The breakdown of the other public service tasks entrusted to the designated operators in the Member States which replied to the questionnaire is as follows:



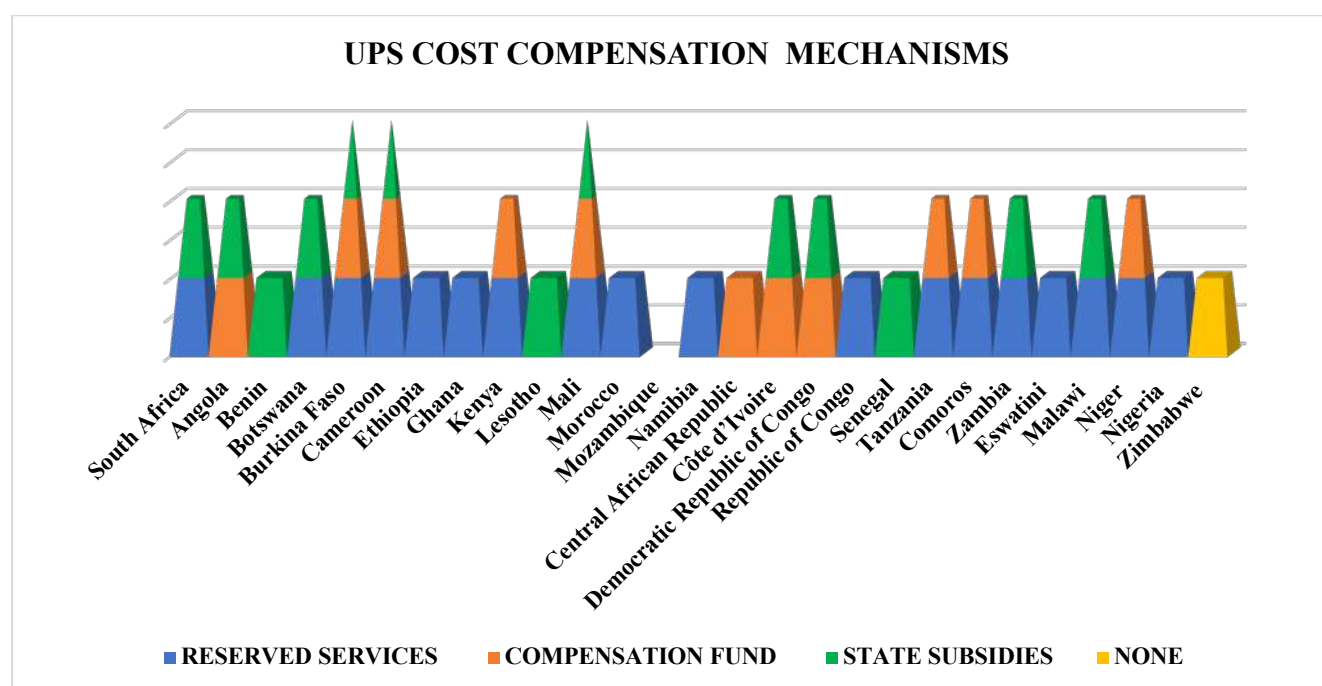
Result: With the exception of **Mozambique, Malawi, Senegal and Zambia**, all the other designated operators in the Member States have, in addition to providing the universal postal service, a mission to facilitate provision of government services in remote areas. They also carry out general interest missions, in particular: the express delivery service for biological samples in Tanzania, national defence and security missions in Mali, the distribution of financial aid to the needy, services and grants to students, the distribution of administrative documents and the management of road traffic offence complaints in Morocco.

Analysis: It is worth noting that, in addition to providing the universal postal service, many designated operators carry out other public service missions, in particular facilitation of the provision of government services in remote areas, which consists of ensuring an effective postal presence throughout the territories of the Member States. This generates additional costs distinct from those resulting from the provision of the universal postal service.

Recommendation: It is recommended that Member States provide for measures to support designated operators in carrying out public service missions other than the universal postal service, for which one or more compensation mechanisms are provided. These support measures may involve, but are not limited to, subsidies or a dedicated fund.

9) What compensation mechanism(s) are used to recoup universal postal service costs?

Several compensation mechanisms have been put in place by Member States to bear the additional costs of providing the universal postal service. The responses to this question are therefore intended to provide information on these mechanisms. The results of the analysis are as follows:



Result: With the exception of **Mozambique and Zimbabwe**, all other Member States have at least one of the following universal postal service cost compensation mechanisms: reserved services, compensation fund or state subsidies. However, while **Burkina Faso, Cameroon and Mali** have established three mechanisms to compensate for the unfair costs of the universal postal service, other Member States use **two** of the **three** compensation

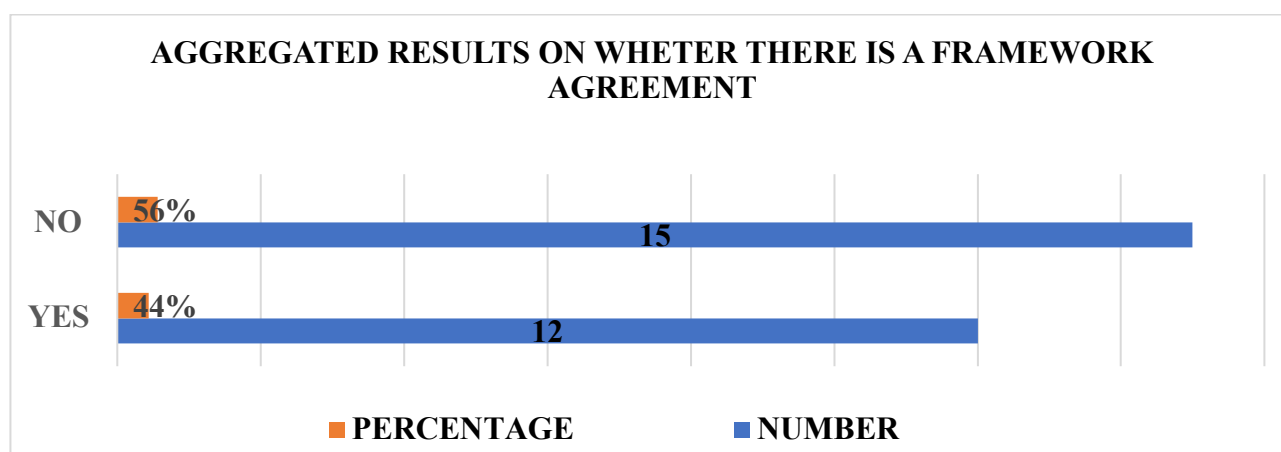
mechanisms so far in use. These are **South Africa, Angola, Botswana, Kenya, Côte d'Ivoire, Democratic Republic of Congo, Tanzania, Comoros, Malawi, Niger and Zambia.**

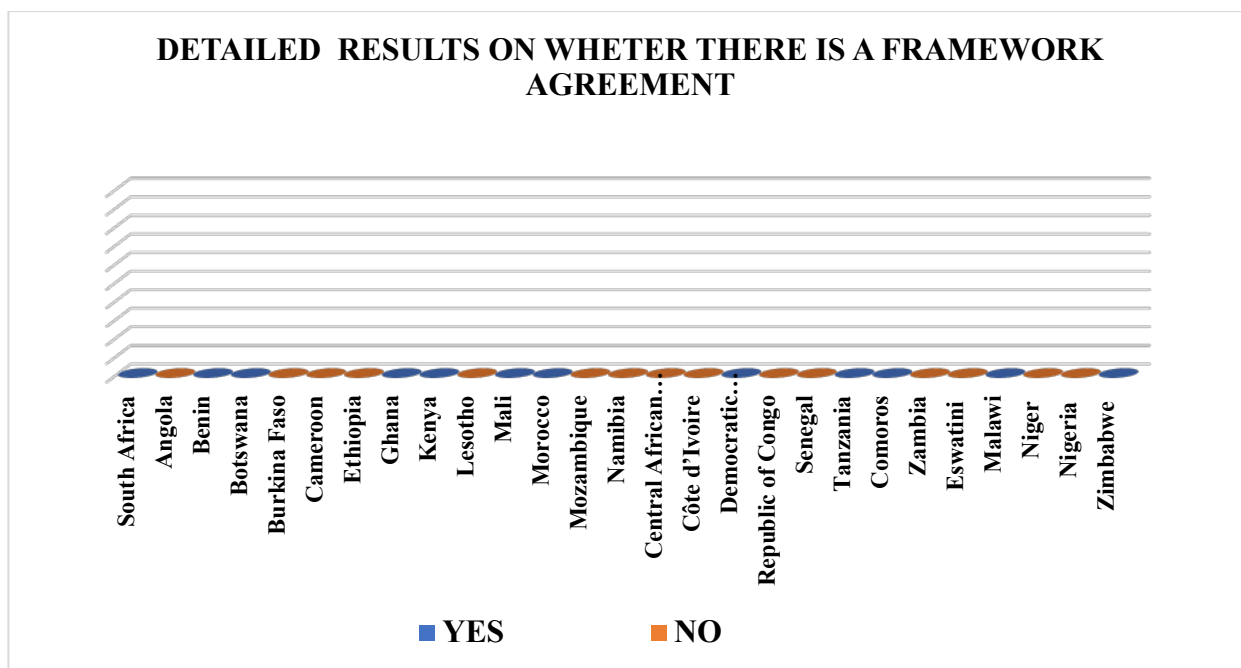
Analysis: Defined as quality services offered on a permanent basis at affordable costs to all populations, the provision of the universal postal service generates a shortfall (unfair charges) for the designated operators. It is therefore necessary to compensate for the net cost incurred in order to guarantee the continuity of the effective provision of the universal postal service.

Recommendation: it is recommended that Member States provide for and diversify the mechanisms for compensating the additional costs of the universal postal service.

10) Is there a framework agreement between the State/Government and the Designated Operator?

This question enquired whether or not Member States had made contractual commitments to designated operators in order to support the fulfilment of public service missions. The responses were as follows:





Result: Out of a total of **27 respondent Member States**, only **12** have a framework agreement signed between the State and the designated operators, while **15 (i.e. 56%)** do not. However, framework agreements are under preparation and pending renewal in **Burkina Faso, Cameroon and Côte d'Ivoire**.

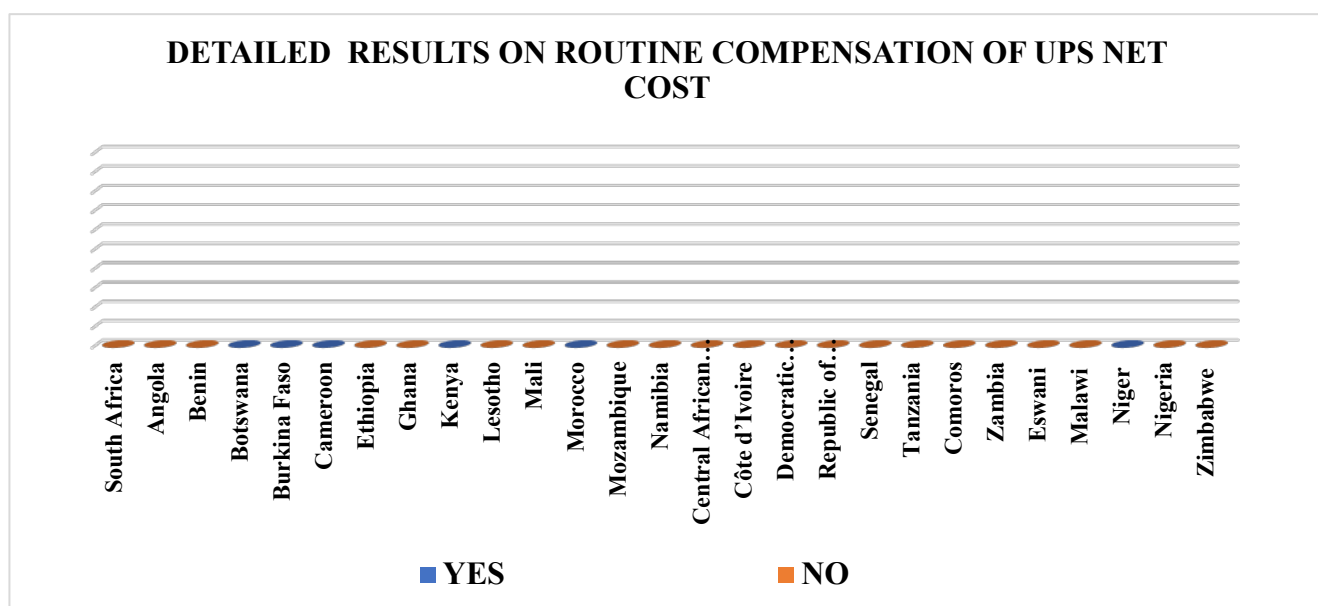
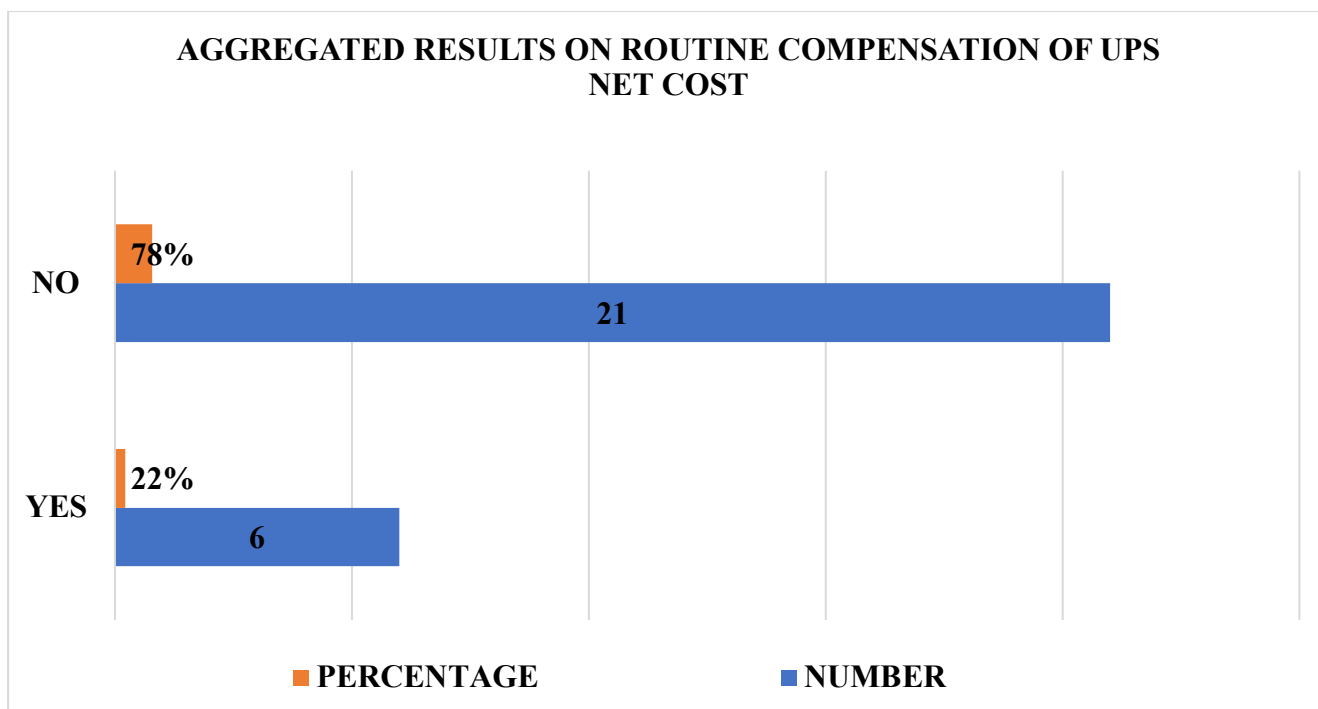
Analysis: The framework agreement is an important way of supporting designated operators in fulfilling their public service mandates. It indeed makes it possible to enshrine the commitments made and specify the State's contributions to the fulfilment of public service mandates. State contributions may be in the form of subsidies, dividend waivers, tax exemption on purchases, etc.

Recommendations: The following recommendations can be made to Member States:

- Renew expired framework agreements.
- For Member States that do not have any, negotiate and sign a framework agreement between the State and their designated operator.

11) Is the cost of providing universal postal service usually recovered?

This question enquired on whether there is, and how often compensation is made for the net cost of the universal postal service. In other words, the question was whether the cost of universal postal service is actually paid to the designated operator year-on-year or as soon as the invoice is submitted or whether the net cost is actually determined first. An analysis of the responses produced the following results:



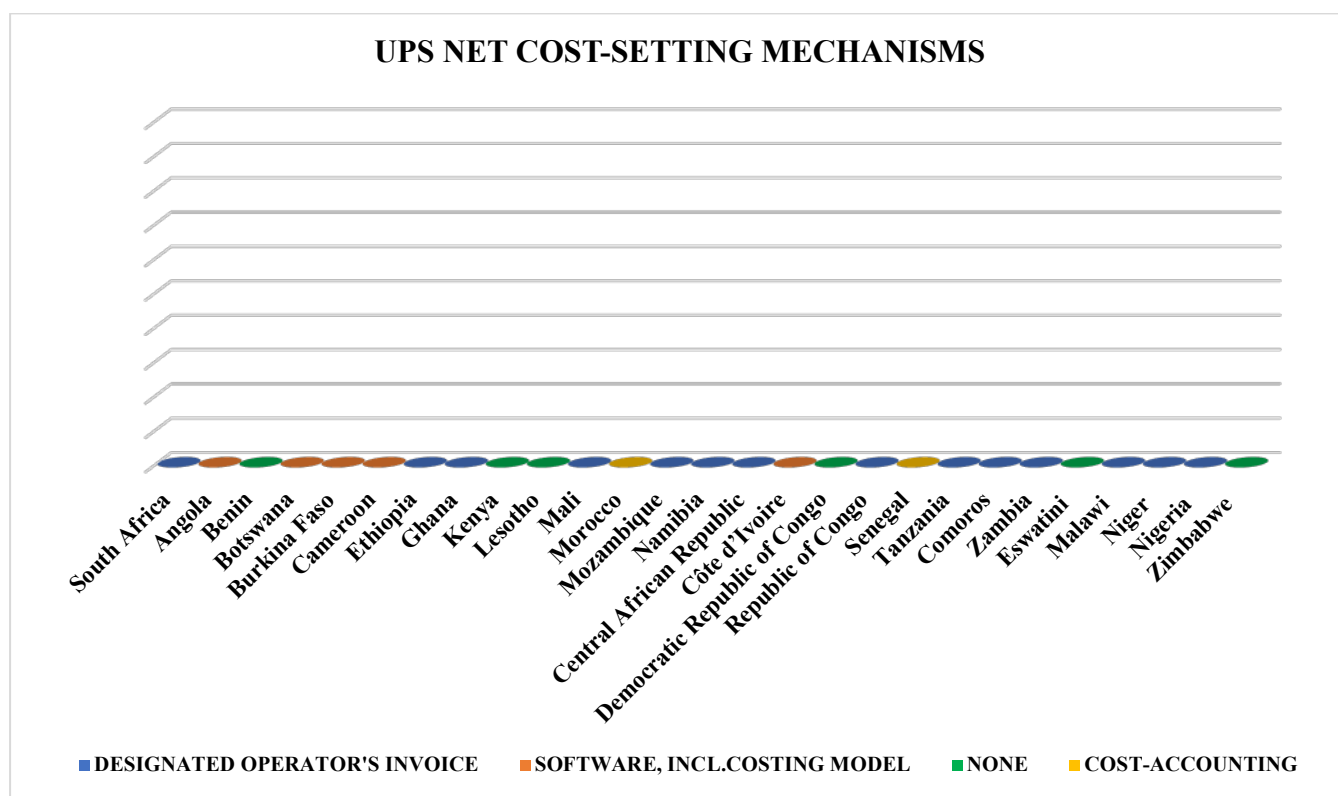
Result: 27 Member States (i.e. 78%) of respondents, do not compensate the net cost of universal postal service. In contrast, only six Member States (i.e. 22%) of respondents, routinely compensate the net cost of universal postal service.

Analysis: Failure to routinely compensate for the burdensome costs incurred in providing universal postal service leads to considerable financial losses that are likely to jeopardize the viability of postal operators and universal postal service.

Recommendation: Member States are strongly advised to routinely compensate the net cost of universal postal service at a fair price in order to guarantee viability of postal operators and continuity of service.

12) How do you establish your Universal Postal Service cost?

This question enquired whether Member States have established systems for determining the net cost of universal postal service. An analysis of responses to this question gave the following results:



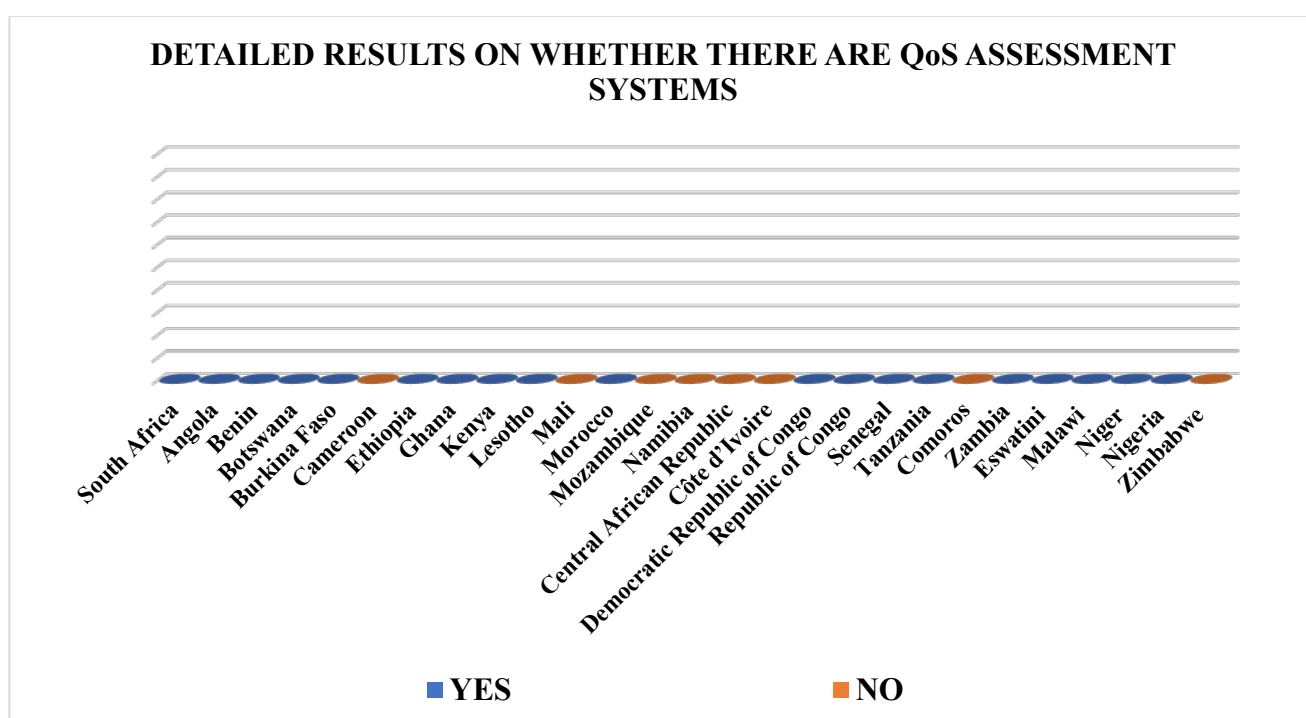
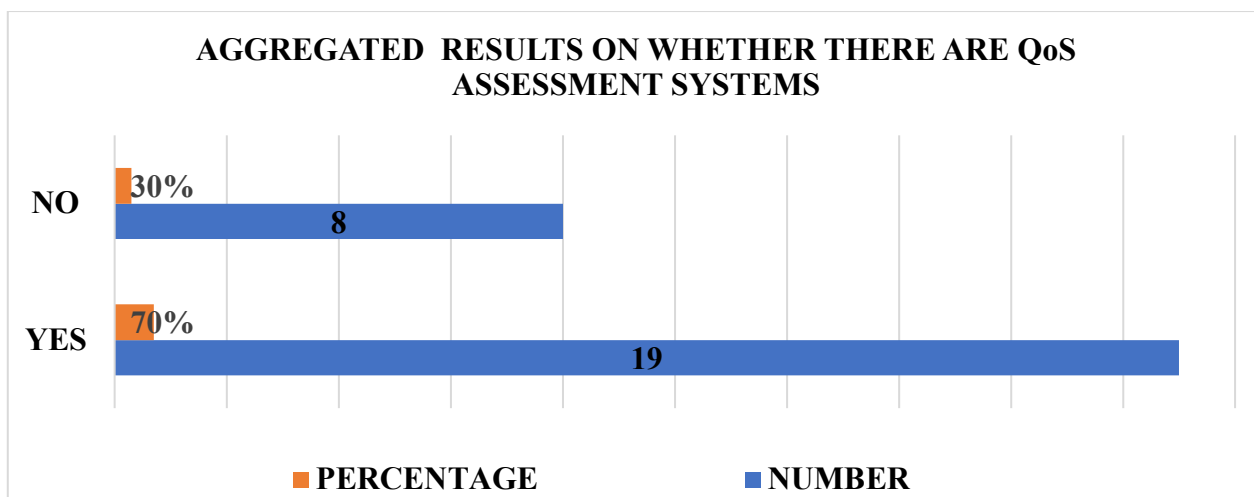
Result: Apart from **Benin, DRC, Kenya, Eswatini, Zimbabwe** and **Lesotho**, all Member States have an established mechanism for determining the net cost of universal postal service. Only Morocco and Senegal use cost accounting to determine the cost of unfair charges generated by universal postal service. As for the other Member States, they use a cost calculation model and/or the designated operator's invoice.

Analysis: Determining the actual net cost is a sine qua non for fair compensation of the net cost of universal postal service. In this respect, operators and postal regulators must introduce cost accounting.

Recommendation: The PAPU General Secretariat strongly encourages Member States to introduce cost accounting in determining the true cost of postal service provision especially UPS provision.

13) Do you have tools to assess quality of services delivered by postal operators?

The questionnaire enquired on the existence or otherwise of tools that would enable postal regulators to assess quality of services delivered by designated operators. Responses were analyzed as follows:



Results: Only **eight respondent Member States** (i.e. 30%) do not have QoS assessment systems. These are **Cameroon, Mali, Mozambique, Namibia, Central African Republic, Côte d'Ivoire, Zimbabwe and Comoros**. In contrast, **19 respondent Member States** (i.e. 70%) have introduced tools for assessing the quality of service delivered by their designated operator and/or private postal operators.

Analysis: One of the main duties of the regulatory authority is to ensure satisfaction of postal service customers by means of routine quality of service assessments. In this regard, they must develop appropriate systems for assessing quality of service.

Recommendation: Regulatory authorities of Member States are advised to develop appropriate quality of service assessment tools.

17) In your opinion, what are the main challenges facing postal regulation in Africa?

The major challenges raised by the respondent Member States are as follows:

- i. Ensuring healthy and fair competition;
- ii. Fair compensation for the net cost of universal postal service;
- iii. Reforming and harmonizing the legal framework for postal regulation in Africa, taking into account innovative postal services;
- iv. Enhancing satisfaction and protection of consumers of postal services;
- v. Building capacities of regulators, particularly in the new lines of activity brought about by technological breakthroughs;
- vi. Developing a harmonized institutional framework for postal regulation in Africa;
- vii. Strengthening cooperation between regulators;
- viii. Strengthening cooperation between postal sector players at national and international level;
- ix. Encouraging greater investment in the postal sector;
- x. Strengthening the role of the postal sector in the socio-economic development of PAPU Member States, in particular by ensuring that the postal sector is taken into account in government policies and priorities;
- xi. Ensuring effective regulation of e-commerce and digital financial services;
- xii. Reducing the environmental footprint of postal activities.

18) What will you recommend to ensure effective postal regulation in Africa?

Member States made the following recommendations to address the above-mentioned challenges:

No.	CHALLENGES FACING AFRICA'S POSTAL SECTOR	RECOMMENDATIONS	RESPONSIBLE
1.	Ensuring healthy and fair competition	- Combating illegal postal activities	- Postal Regulators
2.	Fair compensation for the net cost of universal postal service;	- Introduce cost accounting	- Postal operators - Postal Regulators
		- Diversify and adapt Universal Postal Service (USP) financing mechanisms	- Governments
		- Require private courier services to contribute to funding Universal Service Obligations (USO)	- Governments - Postal Regulators
3.	Reforming and harmonizing the legal framework for postal regulation in Africa, taking into account innovative postal services;	- Review and adopt the African Postal Guidelines;	- PAPU General Secretariat - Member States
		- Redefine postal services	- PAPU General Secretariat - Member States
		- Clearly differentiate postal services from delivery services and the logistics services	- PAPU General Secretariat - Member States
		- Develop service quality standards	- PAPU General Secretariat - Member States
		- Standardize the scope of postal regulation, taking into account postal and postal financial services	- PAPU General Secretariat - Member States
		- Redefine the scope, content and obligations of UPS	- PAPU General Secretariat - Member States
		- Strengthen the regulatory powers of postal regulators	- Governments
		- Harmonize postal regulation policies and procedures	- PAPU General Secretariat - Member States

		- Develop harmonized regulations and monitor their implementation	- PAPU General Secretariat - Member States
		- Propose postal regulation policies	- PAPU General Secretariat - Member States
4.	Enhance satisfaction and protection of consumers of postal services;	- Improve satisfaction and protection of consumers of postal services;	- PAPU General Secretariat - Member States
		- Introduce systems for assessing and inspecting service quality and compliance with obligations;	- PAPU General Secretariat - Member States
		- Strengthen controls on postal operators' obligations	- Postal Regulators
5.	Build capacities of regulators, particularly in the new lines of activity brought about by technological breakthroughs;	- Organize capacity-building sessions for postal operators and regulators	- PAPU General Secretariat -
6.	Developing a harmonized institutional framework for postal regulation in Africa;	- Strengthen the independence and autonomy of postal regulators.	- Governments
		- Pool infrastructure and other resources needed for postal regulation	- Governments - Postal Regulators
7.	Enhance collaboration among regulators	- Appoint a focal point per country to monitor and evaluate postal regulatory activities	- PAPU General Secretariat - Postal Regulators
		- Develop a road map for focal points	- PAPU General Secretariat - Postal Regulators
		- Set up an African association of postal regulators	- PAPU General Secretariat - Postal Regulators
		- Strengthen regional cooperation	- PAPU General Secretariat
		- Strengthen collaboration and cooperation between regional and international organizations, including UPU, PAPU, Restricted Unions...	- PAPU General Secretariat
8.	Strengthen cooperation between postal sector players at national and international level;	- Enhance cooperation between PAPU and UPU	- PAPU General Secretariat
		- Establish periodic consultation platforms at national level	- Postal Regulators - Governments

			- Postal operators -
9.	Encouraging greater investment in the postal sector;	- Lower postal sector entry barriers	- Governments
		- Develop an attractive tax regime	- Governments
10.	Strengthen the role of the postal sector in the socio-economic development of PAPU Member States, in particular by ensuring that the postal sector is taken into account in government policies and priorities;	- Advocate for the postal sector to be considered by Member States in setting their priorities	- PAPU General Secretariat
		- Make adequate financial resources available to postal regulators	- Governments
		- Strengthen the role of public authorities in revitalizing the postal sector	- Governments
		- Sign framework agreements between postal operators and Member States	- Governments - Postal operators
11.	Ensure effective regulation of e-commerce and digital financial services;	- Establish co-regulation between postal regulators and other relevant stakeholders	- Postal Regulators
12.	Reduce the environmental footprint of postal activities	- Form a working group on sustainable development	- PAPU General Secretariat
			- Member States

ANNEX 1: SUMMARY OF RESPONSES BY MEMBER STATE

Country:	SOUTH AFRICA
Name of Regulatory Authority:	INDEPENDENT COMMUNICATIONS AUTHORITY OF SOUTH AFRICA
Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of the Postal Regulatory Authority	Independent administrative authority
How is the postal market opened-up?	Partial liberalization
Policy or strategy frameworks in place	Regulation legal framework; National postal regulation strategy
Scope of postal regulation	Postal services
Scope of universal postal service	<ul style="list-style-type: none"> - Basic letter post services at a uniform regulated rate specified by the Authority to identified underserved areas as listed in the Annex to the licence; - Provide or deploy retail outlets where customers can be served, taking into account the size of the population and mail volumes in those areas; <p>Provide accessible mail pick-up points; Set up delivery points (physical addresses, street/virtual addresses and/or post office boxes). Maintain a mandated service performance standard, as agreed with the Authority.</p>
Other public service mission(s) assigned to the Designated Operator	-
UPS cost compensation mechanism(s)	Reserved services; State grants
Scope of reserved postal services	<ul style="list-style-type: none"> - All letters, postcards, printed matter, small packets and other postal items subject to weight or size limits set at \leq one (01) kilogram inclusive or to dimensions allowing them to fit into a rectangular box with the following characteristics: <ul style="list-style-type: none"> • length 458 mm, • width 324 mm, • thickness 100 mm. - Cylinders with a maximum length of 458 mm and a maximum thickness of 100 mm or with a mass \leq one (01) kilogram are considered as letters; - issuing postage stamps; - providing collection boxes and roadside addresses.
Existence of a State-designated operator contract plan	Yes
Routinely compensated UPS cost	No
UPS cost-calculation mechanism(s)	Designated operator's invoice
Different postal service operating regimes	<ul style="list-style-type: none"> - Permit/Licence; - Registration certificate for non-reserved postal services.
Scope of permit/licence	Both national and subregional International
Are there any service quality assessment tools?	Yes

Key challenges of postal regulation	<ul style="list-style-type: none"> - Redefine postal service, taking into account new business models and the regulatory framework; - Redefine the content of universal postal service; - Develop a model for financially assessing universal service obligations; - Develop UPS financing facilities; - Ensure compliance with postal sector rules and regulations; - Regulate e-commerce.
Recommendations for effective postal regulation	Provide adequate financial resources to postal regulators.

Country:	ANGOLA
Name of Regulatory Authority:	CORREIOS de ANGOLA

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of Postal Regulatory Authority	Agency
How is the postal market opened-up?	Completely liberalized
Policy or strategy frameworks in place	National postal sector development strategy
Scope of postal regulation	Postal services only
Scope of universal postal service (UPS)	<ul style="list-style-type: none"> - Letters, books, catalogues, newspapers and other newsletters weighing \leq two (02) kg; - Postal parcels weighing \leq 10kg; - Postal parcels from EU countries weighing \leq 20kg; - Registered items and items with declared value.
Other public service missions assigned to designated operator	Opening up access to remote parts of the country
UPS cost compensation mechanism	<ul style="list-style-type: none"> - Compensation fund; - State grants
Scope of reserved services	All natural and legal persons are entitled to the public postal services offered by Angola Post.
Existence of contract between State and DO	No
Routinely compensated UPS cost	No
UPS cost-calculation mechanism	Software;
Different postal service operating regimes	Concession
Scope of permit/licence	International
Are there any service quality assessment tools?	Yes

Key challenges of postal regulation	Ensuring digital transformation of postal services;
Recommendations for effective postal regulation	Develop harmonized regulatory instruments and monitor their implementation

Country:	BOTSWANA
Name of Regulatory Authority:	BOTSWANA COMMUNICATIONS AUTHORITY

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of Postal Regulatory Authority	Independent administrative authority
How is the postal market opened-up?	Completely liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services; Financial services
Scope of universal postal service (UPS)	<ul style="list-style-type: none"> - National and cross-border letters weighing \leq one hundred (100) grams and postal parcels to be delivered via a post office box; - National and cross-border postal parcels weighing \leq twenty (20) kilograms; - Postal orders in accordance with UPU Acts - Registered postal items and insured postal items; - Installation of post office boxes in communities, where possible; - Cecograms weighing \leq seven (07) kilograms; - Issuing stamps bearing the word 'Botswana' or bearing the image of the Head of State of Botswana; - Exchange of mail with an average frequency of five (05) times a week, or every working day that is not a public holiday; - Installation of street letter boxes for mail pick-up; - Distribution of judicial/legal documents.
Other public service missions assigned to the DO	-
UPS cost compensation mechanism(s)	Reserved services; State grants
Scope of reserved postal services	<ul style="list-style-type: none"> - National and cross-border letters weighing \leq one hundred (100) grams and delivered via a post office box; - Cross-border mail routed via the UPU mail exchange system; - Installation of post office boxes in areas with at least 5,000 inhabitants; - Issuing stamps bearing the word 'Botswana' or the image of the country's Head of State; - Installation of street letter boxes for mail pick-up.
Existence of contract between State and DO	Yes
Routinely compensated UPS cost	Yes
UPS cost-calculation mechanism	Cost calculation model
Different postal service operating regimes	Permit/licence
Scope of permit/licence	National only
Are there any service quality assessment tools?	Yes, but only for the DO

Key challenges of postal regulation	<ul style="list-style-type: none"> - Adjust postal products and services to the current context; - Tackle illegal postal activities; - Harmonize regulatory legal frameworks at regional level (Africa).
Recommendations for effective postal regulation	Develop strategic and harmonized documents at regional level

Country:	ETHIOPIA
Name of Regulatory Authority:	ETHIOPIA COMMUNICATIONS AUTHORITY

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of Postal Regulatory Authority	Independent administrative authority
How is the postal market opened-up?	Partially liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services
Scope of universal postal service (UPS)	Obligation for DO to provide high-quality essential postal services throughout the national territory
Other public service missions assigned to the designated operator	Opening up access to remote parts of the country
UPS cost compensation mechanism(s)	Reserved services
Scope of reserved services	<ul style="list-style-type: none"> - transportation of postal items and the performance of all related services, including, but not limited to, the receipt, collection, dispatch and delivery of postal items; - acceptance and remittance of limited amounts of money by means of postal orders; - establishment, management and control of the postal savings service; - management and control of a parcel and parcel post cash on delivery service; - maintenance and operation of philatelic and related services.
Existence of contract between the State and the DO	No
Routinely compensated UPS cost	No
UPS cost-calculation mechanism	DO's invoice
Different postal service operating regimes	Permit/licence
Scope of permit/licence	National and international
Existence of service quality assessment tools	Yes

Key challenges of postal regulation	<ul style="list-style-type: none"> - Clearly define the scope of UPS - Identify relevant markets and dominant players; - Compensating UPS cost - Managing reserved services
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Develop postal regulation policies; - Redefine postal service; - Clearly differentiate between postal service, delivery service and logistics service; - Develop UPS cost compensation mechanisms; - Set service quality standards; - Develop effective consumer protection systems; - Develop an enabling legal and regulatory framework.

Country:	GHANA
Name of Regulatory Authority:	POSTAL AND COURIER SERVICES REGULATORY COMMISSION

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of Postal Regulatory Authority	Independent administrative authority
How is the postal market opened-up?	Partially liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services
Scope of universal postal service	Ensure that all citizens have access to essential postal services at affordable prices anywhere and anytime.
Other public service mission(s) assigned to the designated operator	-
Routinely compensated UPS cost	Reserved services
Scope of reserved services	<ul style="list-style-type: none"> - exclusive routing of letters, postcards, printed matter, small packets and other postal items weighing \leq one hundred (100) grams; - issue and sale of postage stamps and commemorative stamps; - issue and sale of postal money orders, etc...
Existence of contract between State and DO	Yes
Routinely compensated UPS cost	No
UPS cost-calculation mechanism	DO's invoice
Different postal service operating regimes	Permit/licence
Scope of permit/license	Both national and subregional International
Are there any service quality assessment tools?	Yes

Key challenges of postal regulation	<ul style="list-style-type: none"> - Digitalize postal services - Harmonize the postal regulation legal framework;
Recommendations for effective postal regulation;	<ul style="list-style-type: none"> - Modernize postal regulation; - Promote regional integration and cooperation in postal regulation (Harmonize postal regulation rules and policies)

Country:	KENYA
Name of Regulatory Authority:	COMMUNICATIONS AUTHORITY OF KENYA

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation (excluding DO's exclusive rights on letter post (0-350 g), sale of postage stamps, rental of post boxes and private mail bags)
Status of Postal Regulatory Authority	Independent administrative authority
How is the postal market opened-up?	Completely liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services Financial services; Electronic transactions Courier services E-Commerce
Scope of universal postal service	Not provided (Kenya is currently developing the scope of the universal postal service)
Other public service missions assigned to the DO	-
UPS cost compensation mechanism(s)	Reserved services; Compensation fund.
Scope of reserved services	- post office boxes or private bags; - issuing postage stamps; - distribution of letters, postcards and aerogrammes weighing ≤ 350 g invoiced at least five times the basic letter rate of the holder of the public franking licence for this category of items.
Existence of a contract between the State and DO	Yes
Routinely compensated UPS cost	Yes
UPS cost-calculation mechanism(s)	None
Different operating regimes for postal services	Permit/licence
Scope of permit/licence	National International, including national
Existence of service quality assessment tools	Yes

Key challenges of postal regulation	<ul style="list-style-type: none"> - Adjust regulatory frameworks to the current context of the postal market; - Set regulatory standards that are conducive to the development of e-commerce, particularly with regard to logistics, delivery and cross-border operations; - Finance universal service obligations at fair cost.
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Introduce regulatory standards to promote uptake of technologies, particularly tracking systems, mobile payment solutions, etc.; - Develop a comprehensive addressing system; - Promote healthy and fair competition; - Develop reliable and efficient means of financing universal service obligations.

Country:	LESOTHO
Name of Regulatory Authority:	LESOTHO COMMUNICATIONS AUTHORITY

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of Postal Regulatory Authority	Independent administrative authority
How is the postal market opened-up?	Completely liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services
Scope of universal postal service (UPS)	Not provided (Lesotho does not have its own universal service regulatory framework but applies the guidelines set by the UPU).
Other public service mission(s) assigned to the designated operator	-
UPS cost-calculation mechanism(s)	State grants
Scope of reserved services	<ul style="list-style-type: none"> - Small packets, letters, documents weighing \leq two (02) kilograms; - Postal parcels weighing \leq thirty (30) kilograms.
Existence of a contract between the State and the designated operator	No
Routinely compensated UPS cost	No
UPS cost-calculation mechanism	None (N/A)
Different postal service operating regimes	Permit/licence
Scope of permit/licence	National and International
Are there any service quality assessment tools?	Yes

Key challenges of postal regulation	<ul style="list-style-type: none"> - Receive substantial support from the States; - Simplify cross-border procedures.
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Strengthen the role of the State in the postal sector; - Improve cooperation between postal sector players.

Country:	MOZAMBIQUE
Name of Regulatory Authority:	INCM

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of Postal Regulatory Authority	Independent administrative authority
How is the postal market opened-up?	Completely liberalized
Policy or strategy frameworks in place	Postal regulatory framework
Scope of postal regulation	Postal services
Scope of universal postal service (UPS)	Not provided ('Universal postal service' includes a range of postal services of defined quality, provided anywhere in the national territory by the designated operator, the aim of which is to meet the communication needs of both the population and public and private structures as part of the development of economic and social activities (glossary of law no. 1/2016 of 7 January - postal law).
Other public service missions assigned to the DO	Reserved services
UPS cost compensation mechanism(s)	Not yet defined
Scope of reserved services	<ul style="list-style-type: none"> - service for sending mail weighing up to ≤ 500 grams; - service for sending registered letters and letters with a declared value; - issue of stamps and other postal valuables; - issue of postal money orders; - installation of letter boxes on the public highway for the collection of postal items; - creation, management and operation of the public postal network.
Existence of a contract between the State and the designated operator	No
Routinely compensated UPS cost	No
UPS cost-calculation mechanism	DO's invoice
Different postal service operating regimes	Permit/licence
Scope of permit/licence	<ul style="list-style-type: none"> - National and subregional; - International
Are there any service quality assessment tools?	No

Key challenges of postal regulation	<ul style="list-style-type: none"> - Reform regulatory frameworks; - Establish healthy and fair competition between private courier companies; - Monitor quality of service and customer satisfaction.
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Update the regulatory frameworks to take account of the current context, particularly ICTs and e-commerce; - Strengthen cross-border cooperation; - Build the capacity of postal staff in the emerging lines of activity arising from the digitalization of postal services; - Strengthen the role of public authorities in revitalising the postal sector.

Country:	NAMIBIA
Name of Regulatory Authority:	COMMUNICATION REGULATORY AUTHORITY OF NAMIBIA (CRAN)

Is there postal regulation?	YES
The postal regulation system	Sector-specific regulation
Status of Postal Regulatory Authority	Independent administrative authority
How is the postal market opened-up?	Partially liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services
Scope of universal postal service (UPS)	NamPost offers a variety of services, including over-the-counter postal services, banking, courier, philatelic, agency and money transfer services. All these services are currently governed by the Universal Postal Union (UPU) Convention and the principles it contains. However, it should be noted that the current national legislative framework does not define the UPU component due to shortcomings in the current Communications Act No. 8 of 2009. This law is currently being reviewed and amended by the Ministry of Information and Communication Technologies (MICT).
Other public service missions assigned to the DO	-
UPS cost compensation mechanism(s)	Reserved services
Scope of reserved services	<ul style="list-style-type: none"> - Letters weighing ≤ 100 grams; - Postal parcels weighing ≤ 30 kg; - Registered items - Summonses and judicial notifications within the same weight limits as those mentioned above; - Production and delivery of post office boxes, private bags, home letter boxes, postage stubs, pre-stamped envelopes, money orders, aerogrammes and international reply coupons. - Issuing final, commemorative or special stamps (including electronic stamps). - International postal items entering Namibia through the network of the Universal Postal Union and/or its affiliated organizations.
Existence of a contract between the State and the designated operator	No
Routinely compensated UPS cost	No
UPS cost-calculation mechanism	DO's invoice
Different postal service operating regimes	Permit/licence
Scope of permit/licence	National and International
Are there any service quality assessment tools?	No

Key challenges of postal regulation	<ul style="list-style-type: none"> - Set service quality standards; - Develop consumer protection policies; - Harmonize the legal framework for postal regulation at African level; - Establish healthy and fair competition (combat illegal activities); - Digitalize postal services.
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Strengthen collaboration between PAPU and UPU; - PAPU should:

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| | <ul style="list-style-type: none">- Take regulatory measures that oblige private courier services to contribute to universal service obligations (USO);- Consider adopting a fair competition framework that allows private couriers to operate while ensuring that they do not undermine the viability of designated postal operators;- Strengthen collaboration among postal sector players and between postal sector players and other relevant stakeholders;- Promote e-commerce in Africa. |
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Country:	UNITED REPUBLIC OF TANZANIA
Name of Regulatory Authority:	TANZANIA COMMUNICATIONS REGULATORY AUTHORITY (TCRA)

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of Postal Regulatory Authority	Independent administrative authority
How is the postal market opened-up?	Completely liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services Digital financial services.
Scope of universal postal service	<ul style="list-style-type: none"> - Letters weighing ≤ five hundred (500) grams; - Parcels and packets weighing ≤ ten (10) kilograms; - Cecograms weighing ≤ ten (10) kilograms; - Postal financial services (Postal Cash and Postal Giro) - Financial representation services (bureaux de change, mobile phone financial services, travel agencies, agency services for Tanzanian banks, agency services for insurance companies (National Insurance Cooperation and the Zanzibar Insurance Corporation), collection of national examination fees, - One-stop administrative services, real estate services and e-commerce platform (issue of national identity cards, business registration).
Other public service missions assigned to the DO	<ul style="list-style-type: none"> - Opening-up access to remote areas in the country; - Express delivery service of biological samples on behalf of the Ministry of Health
UPS cost compensation mechanism(s)	<ul style="list-style-type: none"> - Reserved services; - Compensation fund
Scope of reserved services	<ul style="list-style-type: none"> - Issue of stamps; - Installation of post office boxes; - Use of the terms office, post box and postage stamps for the period set by the regulator.
Existence of a contract plan between the State and the DO	Yes
Routinely compensated UPS cost	No
UPS cost-calculation mechanism	DO's invoice
Different postal service operating regimes	Permit/licence:
Scope of permit/licence	Both national and subregional International
Are there any service quality assessment tools?	Yes

Key challenges of postal regulation	<ul style="list-style-type: none"> - Facilitate cross-border postal operations in Africa; - Speed up the process of digitalizing postal services; - Train postal workers in the new lines of activity arising from new technologies (AI, blockchain, cybersecurity, protection of personal data, etc.).
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Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Improve cooperation between players in the sector, in particular the State, the regulator and operators in Africa; - Harmonize policy and regulatory frameworks for the postal sector in Africa; - Strengthen collaboration and cooperation with regional and international organisations, in particular the UPU, PAPU and Restricted Unions; - Build the capacities of African DOs in new lines of activity.
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Country:	ZAMBIA
Name of Regulatory Authority:	ZAMBIA INFORMATION AND COMMUNICATIONS AUTHORITY (ZICTA)

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of Postal Regulatory Authority	Independent administrative authority
How is the postal market opened-up?	Completely liberalized
Policy or strategy frameworks in place	Postal regulation legal framework National postal services development strategy
Scope of postal regulation	- Postal services - Courier services
Scope of universal postal service	Letter items weighing \leq one (01) kilogram or parcels that fit into a rectangular box with the following characteristics: a) Length 458 mm b) Width 324 mm c) Thickness 100 mm d) Cylinder with a length of 458 mm and a thickness of 100 mm or a mass \leq 1 kg
Other public service missions assigned to the DO	- Money transfer - E-government services
UPS cost compensation mechanism(s)	- Reserved services; - State grants.
Scope of reserved postal services	- Postal items weighing \leq one (01) kilogram; - Provision of post office boxes; - Printing and issuing of postage stamps (philately); - Cylinders and articles of specified dimensions.
Existence of a contract plan between the State and the DO	No
Routinely compensated UPS cost	No
UPS cost-calculation mechanism	DO's invoice
Different postal service operating regimes	Permit/licence:
Scope of permit/licence	- National; - National and subregional; - International
Are there any service quality assessment tools?	Yes

Key challenges of postal regulation	- Legal reform of the postal sector to take account of the current context of the postal market; - Clearly define the universal service obligation and its content; - Compliance of designated operators with postal regulatory standards;
Recommendations for effective postal regulation	- Establish co-regulation

Country:	BURKINA FASO
Name of Regulatory Authority:	AUTORITE DE REGULATION DES COMMUNICATIONS ELECTRONIQUES ET DES POSTES DU BURKINA FASO

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of postal regulatory authority	Independent administrative authority
How is the postal market opened-up?	Partially liberalized
Policy or strategy frameworks in place	Legal regulatory framework National postal sector development strategy
Scope of postal regulation	Postal services Postal financial services
Scope of universal postal service	<ul style="list-style-type: none"> - Ordinary postal items weighing \leq two (02) kilograms; - Postal items weighing \leq twenty (20) kilograms; - Registered postal items; - Postal items with declared value; - Postal items for the visually-impaired weighing \leq seven (07) kilograms; - Issue and payment of postal orders.
Other public service mission(s) assigned to the designated operator	<ul style="list-style-type: none"> - Public utility mandate (opening up remote parts of the country); - Postal financial services
UPS cost compensation mechanism(s)	<ul style="list-style-type: none"> - Reserved services; - Compensation fund; - State subsidies/grants
Scope of reserved postal services	<ul style="list-style-type: none"> - Ordinary and express national and international postal items weighing less than five hundred (500) grams; - Right to issue postage stamps and any other fiduciary postal items bearing the words 'Burkina Faso' or any other sign, seal or symbol of the State.
Is there a framework agreement between the State and the Designated Operator?	No (expired, being renewed)
Routinely compensated UPS cost	Yes
UPS cost-calculation mechanism(s)	<ul style="list-style-type: none"> - Designated Operator's invoice; - UPS cost-calculation model - Statistical data and financial statements of DO
Different postal service operating regimes	<ul style="list-style-type: none"> - Concession; - Permit; - Declaration.
Scope of permit/licence	<ul style="list-style-type: none"> - National; - Both national and subregional; - International.

Service quality assessment systems	Yes
Key challenges of postal regulation	<ul style="list-style-type: none"> - Developing a harmonized legal framework for postal regulation in Africa; - Adopt multi-sector regulation generally in order to pool resources given the lack of resources in the postal sector; - Establish a framework for sharing experience and knowledge between postal regulation players in Africa; - Include the postal sector in government priorities.
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Develop a harmonized legal framework for postal regulation in Africa; - Develop a harmonized institutional framework for postal regulation in Africa; - Combat illegal postal activities.

Country:	DEMOCRATIC REPUBLIC OF CONGO
Name of Regulatory Authority:	AUTORITE DE REGULATION DE LA POSTE ET DES TELECOMMUNICATIONS DU CONGO (ARPTC)

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of postal regulatory authority	Independent administrative authority
How is the postal market opened-up?	Fully liberalized
Policy or strategy frameworks in place	Legal framework for postal regulation, Postal sector policy statement
Scope of postal regulation	Postal services
Scope of universal postal service	<ul style="list-style-type: none"> - Letters weighing ≤ two (0 2) kilograms; - Postcards; - Printed matter and small packets weighing ≤ two (02) kilograms - Items for the visually impaired
Other public service mission(s) assigned to the designated operator	Not provided
UPS cost compensation mechanism(s)	<ul style="list-style-type: none"> - Compensation fund; - State subsidies/grants.
Scope of reserved postal services	Not provided for by law
Is there a framework agreement between the State and the Designated Operator?	Yes
Routinely compensated UPS cost	No
UPS cost-calculation mechanism(s)	In process
Different postal service operating regimes	Permit/license
Scope of permit/licence	<ul style="list-style-type: none"> - National only; - International.
Service quality assessment systems	Yes (GMS NEXUS of the UPAP/CRASA project for OD and a system of panellists at national level for private postal operators)

Key challenges of postal regulation	<ul style="list-style-type: none"> - Establish a legal framework conducive to innovation; - Building capacity for postal employees;
Recommendations for effective postal regulation	- Develop a suitable legal framework clarifying the roles of the postal regulatory authority.

Country:	UNION OF THE COMOROS
Name of Regulatory Authority:	AUTORITE COMORIENNE DE REGULATION POSTALE (ACRP)

Is there postal regulation?	Yes
The postal regulation system	Sector-specific regulation
Status of postal regulatory authority	Independent administrative authority
How is the postal market opened-up?	Fully liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services
Scope of universal postal service	<ul style="list-style-type: none"> - Postal items weighing ≤ two (2) kilograms; - Postal items weighing ≤ twenty (20) kilograms; - Services relating to registered postal items and postal items with declared value; - Issue and payment of postal orders; - Expedited in-country mail.
Other public service mission(s) assigned to the designated operator	Opening up land-locked areas;
UPS cost compensation mechanism(s)	<ul style="list-style-type: none"> - Reserved services; - Compensation fund.
Scope of reserved postal services	<ul style="list-style-type: none"> - National and international items weighing ≤ one (01) kilogram for ordinary mail; - National and international items weighing ≤ five hundred (500) grams for national express mail; - Direct mail, services relating to registered items and items with declared value; - Postal box service; - Issuance of postage stamps, revenue stamps, official stamps, reply coupons and all other postal fiduciary values intended for franking and philately bearing the words 'Union of the Comoros' or any other sign, seal or symbol of the State;
Is there a framework agreement between the State and the Designated Operator?	Yes
Routinely compensated UPS cost	No
UPS cost-calculation mechanism(s)	Designated operator's invoice
Different postal service operating regimes	<ul style="list-style-type: none"> - Permit/license; - Authorization
Scope of permit/licence	<ul style="list-style-type: none"> - Both national and subregional; - International.
Service quality assessment systems	No

Key challenges of postal regulation	<ul style="list-style-type: none"> - Strengthening cooperation between regulators; - Strengthening cooperation among postal stakeholders.
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Develop a clear regulatory framework suited to the needs of the African postal sector (innovation, fair competition, consumer protection and promotion of sustainable development, etc.); - Build capacity for postal employees; - Promote fair and healthy competition; - Strengthen regional cooperation (exchange of information, coordination of policies and harmonization of standards, etc.); - Promote technological innovation; - Strengthen consumer protection by introducing complaints handling arrangements and respecting the time limits for handling complaints; - Foster collaboration between designated and private operators (sharing knowledge and experience, pooling infrastructure and other resources, etc.).

Country:	BENIN
Name of Regulatory Authority:	AUTORITE DE REGULATION DES COMMUNICATIONS ELECTRONIQUES ET DE LA POSTE (ARCEP BENIN)

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of postal regulatory authority	Independent administrative authority
How is the postal market opened-up?	Fully liberalized
Policy or strategy frameworks in place	Legal regulatory framework
Scope of postal regulation	Postal services
Scope of universal postal service	<p>Minimum postal service requirements include pick-up, sorting, routing and delivery of:</p> <ul style="list-style-type: none"> - Postal items weighing \leq two (02) kilograms; - Documents for the visually-impaired weighing \leq seven (07) kilograms; - Special bags weighing \leq thirty (30) kilograms; - Parcels weighing \leq thirty (30) kilograms. <p>It also includes issue and payment of postal orders.</p> <p>Mandatory additional services include:</p> <ul style="list-style-type: none"> - Registered services for airmail and priority letter-post services; - Registered services for non-priority letter-post and surface mail to destinations where there is no priority or airmail service; - Registered services for all incoming letter-post items; - Priority items sent by letter post are items that require urgent routing and delivery and for which the customer has paid the specified rate. <p>Optional additional services include:</p> <ul style="list-style-type: none"> - New ICT-based services; - Other postal services; - Postal financial services.
Other public service mission(s) assigned to the designated operator	-
UPS cost compensation mechanism(s)	State subsidies/grants
Scope of reserved postal services	- Ordinary or expedited national and international postal items weighing < 350 g;
Is there a framework agreement between the State and the Designated Operator?	Yes
Routinely compensated UPS cost	No
UPS cost-calculation mechanism(s)	In process
Different postal service operating regimes	Permit/license

Scope of permit/licence	<ul style="list-style-type: none"> - National - International
Service quality assessment systems	Yes

Key challenges of postal regulation	<ul style="list-style-type: none"> - Tackling illegal practice; - Digitalizing postal services; - Reducing the environmental footprint of postal activities; - Financing the UPS cost at fair price;
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Adapt the regulatory framework to accommodate innovative postal services; - Establish a UPS financing mechanism; - Build capacities of regulatory authorities.

Country:	MOROCCO
Name of Regulatory Authority:	MINISTERE DE L'INDUSTRIE ET DU COMMERCE (Ministry of Trade and Industry)

Is there postal regulation?	Yes
The postal regulation system	Sector-specific regulation
Status of postal regulatory authority	Ministry
How is the postal market opened-up?	Partially liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	<ul style="list-style-type: none"> - Postal services - Postal financial services; - Digitalized post
Scope of universal postal service	<ul style="list-style-type: none"> - Items of correspondence, newspapers and periodicals weighing \leq two (02) kilograms; - Postal items weighing \leq twenty (20) kilograms; - Declared-value items weighing less than a threshold set by order of the competent government authority; - Redirection of postal items; - Postal box service; - Dispatch of items for the visually-impaired free-of-charge in ordinary items weighing \leq seven (07) kilograms for the benefit of organizations of visually-impaired persons; - Special bags containing newspapers, periodicals, books and documents.
Other public service mission(s) assigned to the designated operator	<ul style="list-style-type: none"> - Opening up land-locked areas; - Distribution of financial aid to the needy; - Services and grants for students; - Deployment of compulsory health insurance; - Distribution of administrative documents to Moroccans living abroad; - Services related to the transfer of vehicle registration documents; - Management of road traffic offence claims; - Services relating to the national population register.
UPS cost compensation mechanism(s)	Reserved services;
Scope of reserved postal services	Postal items weighing \leq one (01) kilogram
Is there a framework agreement between the State and the Designated Operator?	Yes
Routinely compensated UPS cost	Yes
UPS cost-calculation mechanism(s)	Cost-accounting

Different postal service operating regimes	Permit/license
Scope of permit/licence	Authorizations granted exclusively to international express operators (International Expedited Mail Operators).
Service quality assessment systems	Yes

Key challenges of postal regulation	<ul style="list-style-type: none"> - Determining actual cost of universal postal service; - Introducing cost accounting for all postal activities; - Staff training on postal regulation and the conduct of surveys and polls.
Recommendations for effective postal regulation	Establish an autonomous regulatory authority.

Country:	CENTRAL AFRICAN REPUBLIC
Name of Regulatory Authority:	AUTORITE DE REGULATION DES COMMUNICATIONS ELECTRONIQUES ET DES POSTES

Is there postal regulation?	Yes
The postal regulation system	Sector-specific regulation
Status of postal regulatory authority	Agency
How is the postal market opened-up?	Fully liberalized
Policy or strategy frameworks in place	National postal sector development strategy
Scope of postal regulation	Postal services
Scope of universal postal service	Only in urban areas
Other public service mission(s) assigned to the designated operator	Opening up land-locked areas
UPS cost compensation mechanism(s)	Compensation fund
Scope of reserved postal services	Only in urban areas
Is there a framework agreement between the State and the Designated Operator?	No
Routinely compensated UPS cost	No
UPS cost-calculation mechanism(s)	Designated operator's invoice
Different postal service operating regimes	Permit/license
Scope of permit/licence	- National only; - International
Service quality assessment systems	No

Key challenges of postal regulation	<ul style="list-style-type: none"> - Increasing trust in the market; - Attracting more investors.
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Appoint a focal point per country to monitor and evaluate postal regulatory activities; - Develop a road map for focal points; - Monitor activities of focal points.

Country:	REPUBLIC OF SENEGAL
Name of Regulatory Authority:	AUTORITE DE REGULATION DES TELECOMMUNICATIONS ET DES POSTES (ARTP)

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of postal regulatory authority	Independent administrative authority
How is the postal market opened-up?	Partially liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services
Scope of universal postal service	<ul style="list-style-type: none"> - Postal items weighing \leq two (02) kilograms; - Postal items weighing \leq twenty (20) kilograms; - Services relating to registered postal items and postal items with declared value; - Issue and payment of postal orders.
Other public service mission(s) assigned to the designated operator	<ul style="list-style-type: none"> - Public postal service; - Postal financial services
UPS cost compensation mechanism(s)	- State subsidies/grants
Scope of reserved postal services	<ul style="list-style-type: none"> - National and international items weighing \leq five hundred (500) grams for ordinary mail; - Items postmarked up to five (05) times the rate for the first weight step, provided they weigh \leq five hundred (500) grams for domestic express mail.
Is there a framework agreement between the State and the Designated Operator?	No
Routinely compensated UPS cost	No
UPS cost-calculation mechanism(s)	<ul style="list-style-type: none"> - Products - Charges - Cost-accounting
Different postal service operating regimes	<ul style="list-style-type: none"> - Concession - Licence
Scope of permit/licence	<ul style="list-style-type: none"> - Both national and subregional; - International
Service quality assessment systems	Yes (GMS: Global Monitoring System)
Key challenges of postal regulation	<ul style="list-style-type: none"> - Regulate pricing by providing a catalog of products and services; - Ensure protection of consumers' personal data;

	<ul style="list-style-type: none"> - Update the legal framework to take account of the scope of postal activity, the integration of new regimes, the digital component of the universal postal service and new consumer needs; - Combat illegal postal activities; - Promote the digitalization and interoperability of African postal networks; - Co-regulate the postal sector with the various interested parties: financial services with the central bank, customs, the transport sector, etc; - Harmonize legislation at regional level (in Africa).
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Harmonize the legal and institutional frameworks of the postal sector in Africa; - Strengthen cooperation between designated operators and private operators; - Establish effective African postal regulation.

Country:	MALI
Name of Regulatory Authority:	AUTORITE MALIENNE DE REGULATION DES TELECOMMUNICATIONS DES TECHNOLOGIES DE L'INFORMATION ET DE LA COMMUNICATION ET DES POSTES (AMRTP)

Is there postal regulation?	Yes
The postal regulation system	Multisector regulation (telecoms and postal services)
Status of postal regulatory authority	Independent administrative authority
How is the postal market opened-up?	Fully liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services
Scope of universal postal service	<ul style="list-style-type: none"> - Issue and sale of stamps, reply coupons; postmarks; - Postal items weighing ≤ two (02) kilograms; - Postal items weighing ≤ twenty (20) kilograms; - Postal items for the visually-impaired weighing ≤ seven (07) kilograms; - Registered and declared-value postal items; - Recoverable valuables and cash-on-delivery services; - Issuing and paying postal orders.
Other public service mission(s) assigned to the designated operator	Opening up landlocked parts of the country, State missions in administrative, economic, defence and security matters
UPS cost compensation mechanism(s)	<ul style="list-style-type: none"> - Reserved services; - Compensation fund; - State subsidies/grants
Scope of reserved postal services	<ul style="list-style-type: none"> - National and international items of correspondence weighing ≤ five hundred (500) grams for ordinary and express mail; - Direct mail, registered items and items with declared value; - Issuance of postage stamps and postage value.
Is there a framework agreement between the State and the Designated Operator?	Yes
Routinely compensated UPS cost	No
UPS cost-calculation mechanism(s)	Designated operator's invoice
Different postal service operating regimes	<ul style="list-style-type: none"> - Licences (permits); - Concession
Scope of permit/licence	International
Service quality assessment systems	No

Key challenges of postal regulation	<ul style="list-style-type: none"> - Build capacity in the postal sector; - Strengthen the independence of regulators; - Combat illegal postal activities; - Reform Africa's postal sector.
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Review and adopt the African Postal Guidelines; - Advocate for the postal sector to be considered by Member States in setting their priorities; - Redefine the SPU and its scope in the current economic context, especially in countries facing endemic insecurity; - Form an African association of postal regulators, like for telecommunications, to further engage postal regulatory authorities.

Country:	REPUBLIC OF CONGO
Name of Regulatory Authority:	AGENCE DE REGULATION DES POSTES ET COMMUNICATIONS ELECTRONIQUES (ARPCE)

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of postal regulatory authority	Agency
How is the postal market opened-up?	Partially liberalized, with reserved services
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services
Scope of universal postal service	<ul style="list-style-type: none"> - Postal items weighing ≤ two (02) kilograms; - Postal items weighing ≤ twenty (20) kilograms; - Services relating to registered postal items and postal items with declared value; - Issue and payment of postal orders. Includes both national and international services.
Other public service mission(s) assigned to the designated operator	-
UPS cost compensation mechanism(s)	Reserved services
Scope of reserved postal services	<ul style="list-style-type: none"> - Expedited postal items up to 50 grams - Ordinary postal items up to 100 grams - Services relating to registered postal items and postal items with declared value; - Issue and payment of postal orders
Is there a framework agreement between the State and the Designated Operator?	No
Routinely compensated UPS cost	No
UPS cost-calculation mechanism(s)	Designated operator's invoice
Different postal service operating regimes	<ul style="list-style-type: none"> - Permit/license; - Concession; - Declaration
Scope of permit/licence	National and international
Service quality assessment systems	Number of delivery days

Key challenges of postal regulation	<ul style="list-style-type: none"> - Combat illegal postal activities; - Develop and track service quality standards; - Ensuring access to and protection of postal market; - Ensuring effective compliance with obligations contained in legal frameworks.
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Strengthen the regulatory powers of postal regulators; - Standardize the scope of postal regulation, taking into account postal and postal financial services - Harmonize the legal framework and procedures governing Africa's postal sector.

Country:	CAMEROON
Name of Regulatory Authority:	MINISTRY OF POSTS AND TELECOMMUNICATIONS, CAMEROON

Is there postal regulation?	Yes
The postal regulation system	Sector-specific regulation
Status of postal regulatory authority	Directorate in the Ministry of Posts and Telecommunications
How is the postal market opened-up?	Fully liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	Postal services Postal financial services
Scope of universal postal service	- Minimum services required; - Mandatory additional services; - Optional additional services.
Other public service mission(s) assigned to the designated operator	General interest mandate; Opening up land-locked areas; Postal public services.
UPS cost compensation mechanism(s)	Reserved services; Compensation fund; State subsidies/grants
Scope of reserved postal services	- Ordinary postal items weighing \leq five (500) kilograms; - National expedited mail weighing \leq one hundred (100) grams; - Issuance and sale of postage stamps, fax stamps, official stamps, reply coupons and all other postal fiduciary values intended for franking and philately bearing the words 'Republic of Cameroon' or any other sign or symbol of the State; - P.O. box services and the assignment, hosting and enhancement of digital postal addresses; - Direct mailing.
Is there a framework agreement between the State and the Designated Operator?	No (expired 2019-2022, currently being renewed)
Routinely compensated UPS cost	Regularly recovered
UPS cost-calculation mechanism(s)	Via a firm using a cost model
Different postal service operating regimes	- Concession; - Permit; - Declaration.
Scope of permit/licence	Not provided.
Service quality assessment systems	No

Key challenges of postal regulation	Not provided.
Recommendations for effective postal regulation	Not provided.

Country:	REPUBLIC OF COTE D'IVOIRE
Name of Regulatory Authority:	AUTORITE DE REGULATION DES TELECOMMUNICATIONS/TICS DE COTE D'IVOIRE (ARTCI)

Is there postal regulation?	Yes
The postal regulation system	Multi-sector regulation
Status of postal regulatory authority	Independent administrative authority
How is the postal market opened-up?	Partially liberalized
Policy or strategy frameworks in place	Postal regulation legal framework
Scope of postal regulation	<ul style="list-style-type: none"> - Postal services - Money transfer services via fixed equipment
Scope of universal postal service	<ul style="list-style-type: none"> - Postal items weighing < 2.1 kilograms; - Postal items weighing < 31.5 kilograms.
Other public service mission(s) assigned to the designated operator	-
UPS cost compensation mechanism(s)	<ul style="list-style-type: none"> - Compensation fund; - State subsidies/grants.
Scope of reserved postal services	Not specified
Is there a framework agreement between the State and the Designated Operator?	No, currently being prepared
Routinely compensated UPS cost	No
UPS cost-calculation mechanism(s)	UPS cost-calculation model
Different postal service operating regimes	<ul style="list-style-type: none"> - Permit/license; - Declaration
Scope of permit/licence	International and national
Service quality assessment systems	No, in progress

Key challenges of postal regulation	<ul style="list-style-type: none"> - Combat illegal postal activities, - Financing the UPS cost at fair price, - Include the postal sector in national development policies. - Comply with regulatory obligations and specifications.
Recommendations for effective postal regulation	<ul style="list-style-type: none"> - Develop an appropriate regulatory system; - Define a reserved service for UPS; - Effectively finance UPS.

Country :	ESWATINI
Name of the Regulatory Authority:	ESWATINI COMMUNICATIONS COMMISSION

Existence of postal regulation?	Yes
Postal Regulatory System	Multi-sector regulation
Status of the Postal Regulatory Authority	Independent Administrative Authority
Degree of openness of the postal market	Monopoly with a single designated operator
Available policy or strategic frameworks	- Legal framework for postal regulation
Scope of postal regulation	- Postal services
Scope of the Universal Postal Service	- Letters up to 2kg - documentation for people with special needs up to 7 kg; - Packages up to 20kg; - M bags", up to 30 kg; - Issuance and payment of postal orders; - cash on delivery shipments.
Other public service missions entrusted to the designated operator	-
UPS cost compensation mechanism(s)	- Reserved services
Scope of reserved services	- postal shipments (documents) from 0 to 1 kg, - production and issue of postage stamps, - rental of post office boxes, - use of the term "post office" to designate points of sale and other premises or establishments operated. -
Existence of a State-designated operator plan contract	No
Routinely compensated UPS cost	No
UPS cost compensation mechanism (s)	Not yet developed
Different postal service operating regimes	- Permit/License
Scope of the Permit/License	- International
Are there any service quality assessment tools?	Yes

Key challenges of postal regulation	- Implement a complete physical addressing system; - Fairly compensate the net cost of the UPS; - Strengthen regional and sub-regional cooperation; - Redefining the postal service.
Recommendations for Effective Postal Regulation	- Strengthening the capacities of regulators; - Strengthening cooperation between the international postal organization (UPAP and UPU)

Country :	MALAWI
Name of the Regulatory Authority:	MALAWI COMMUNICATIONS REGULATORY AUTHORITY

Existence of postal regulation?	Yes
Postal Regulatory System	Multi-sector regulation
Status of the Postal Regulatory Authority	Independent Administrative Authority
How is the postal market opened up?	Partial liberalization
Available policy or strategic frameworks	- Legal framework for postal regulation
Scope of postal regulation	- Postal services - Postal financial services
Scope of the Universal Postal Service	Letters and parcel with a minimum weight of 350 grams
Other public service mission (s) assigned to the Designated Operator	Contribute to financial inclusion
UPS cost compensation mechanism (s)	- Reserved services - State subsidies
Scope of reserved postal services	Shipments weighing less than 350 grams
Existence of a State-designated operator contract plan	Yes
Routinely compensated UPS cost	No
UPS cost-calculation mechanism (s)	Invoice from the designated operator including a cost model
Different postal service operating regimes	- Permit/License
Scope of Permit/License	- National - Regional - International
Are there any service quality assessment tools?	Yes

Key challenges of postal regulation	- Harmonize African postal regulations - Strengthening regional integration - Promote e-commerce
Recommendations for Effective Postal Regulation	- Establish a harmonized legal framework - Promoting investment in the postal sector - Establish a harmonized legal framework for cybersecurity and personal data protection to promote e-commerce

Country :	NIGER
Name of the Regulatory Authority:	ELECTRONIC COMMUNICATIONS AND POSTAL REGULATORY AUTHORITY

Existence of postal regulation?	Yes
Postal Regulatory System	Multi-sector regulation
Status of the Postal Regulatory Authority	Independent Administrative Authority
Degree of openness of the postal market	Total liberalization
Available policy or strategic frameworks	<ul style="list-style-type: none"> - Legal framework for postal regulation - National Postal Regulation Strategy - National Postal Sector Development Strategy
Scope of postal regulation	<ul style="list-style-type: none"> - Postal services - Postal financial services
Scope of the Universal Postal Service	Letters up to 5 kilograms Parcel up to 30 kilograms Issuance and payment of postal orders
Other public service mission (s) assigned to the designated operator	-
UPS cost compensation mechanism (s)	<ul style="list-style-type: none"> - Reserved services - Compensation fund
Scope of reserved postal services	<ul style="list-style-type: none"> - Letters up to 2kg - Packages up to 20kg
Existence of a State-designated operator plan contract	No
Routinely compensated UPS cost	Yes
UPS cost compensation mechanism (s)	Invoice from the designated operator
Different postal service operating regimes	<ul style="list-style-type: none"> - Concession - Permit/License - Statement
Scope of the Permit/License	<ul style="list-style-type: none"> - National only - National and sub-regional - International
Are there any service quality assessment tools?	Yes

Key challenges of postal regulation	<ul style="list-style-type: none"> - Update the regulatory framework - Improve UPS coverage - Promoting e-commerce and digitalizing postal services
Recommendations for Effective Postal Regulation	<ul style="list-style-type: none"> - Adapting the regulatory framework to the current context - Strengthening sub-regional and international cooperation - Accelerate the digitalization process

Country :	NIGERIA
Name of the Regulatory Authority:	NIGERIA POSTAL SERVICE

Existence of postal regulation?	Yes
Postal Regulatory System	Sectoral regulation
Status of the Postal Regulatory Authority	Agency
Degree of openness of the postal market	Partial liberalization
Available policy or strategic frameworks	<ul style="list-style-type: none"> - Legal framework for postal regulation - National Postal Regulation Strategy
Scope of postal regulation	<ul style="list-style-type: none"> - Postal services - Postal financial services
Scope of the Universal Postal Service	Letters, small packets and registered item up to 500 grams
Other public service missions entrusted to the designated operator	-
UPS cost compensation mechanism(s)	Reserved services
Scope of reserved services	Shipments weighing less than 500 grams
Existence of a State-designated operator plan contract	No
Routinely compensated UPS cost	No
UPS cost compensation mechanism (s)	Invoice from the designated operator
Different postal service operating regimes	<ul style="list-style-type: none"> - Permit/License
Scope of the Permit/License	<ul style="list-style-type: none"> - National - Regional - International
Are there any service quality assessment tools?	Yes

Key challenges of postal regulation	<ul style="list-style-type: none"> - Ensuring postal operators comply with postal regulations; - Clearly define the functions of postal sector stakeholders; - Combating the illegal exercise of postal activities.
Recommendations for Effective Postal Regulation	- Raising awareness among postal sector stakeholders

Country :	ZIMBABWE
Name of the Regulatory Authority:	POSTAL AND TELECOMMUNICATIONS REGULATORY AUTHORITY OF ZIMBABWE (POTRAZ)

Existence of postal regulation?	Yes
Postal Regulatory System	Multi-sector regulation
Status of the Postal Regulatory Authority	Independent Administrative Authority
Degree of openness of the postal market	Total liberalization
Available policy or strategic frameworks	- Legal framework for postal regulation
Scope of postal regulation	- Postal services
Scope of the Universal Postal Service	Letter up to 20 grams Small packet up to 500 grams Parcel up to 1 kg
Other public service missions entrusted to the designated operator	-
UPS cost compensation mechanism(s)	Under development
Scope of reserved services	Non-existent -
Existence of a State-designated operator plan contract	Yes
Routinely compensated UPS cost	No
UPS cost compensation mechanism (s)	Not yet developed
Different postal service operating regimes	- Permit/License
Scope of the Permit/License	- National Regional International
Are there any service quality assessment tools?	No

Key challenges of postal regulation	- Digitizing postal services
Recommendations for Effective Postal Regulation	- Create a formal framework for consultation between regulators and postal operators; - Easing barriers to entry into the postal market

ANNEX 2: QUESTIONNAIRE ON POSTAL REGULATION IN AFRICA

QUESTIONNAIRE ON POSTAL REGULATION STATUS

I. DESCRIPTION

PAPU Member States are requested to complete this form/questionnaire on “**Postal Regulation Status**”, and return it to the General Secretariat **not later than 31th May 2024**. The main objective of this exercise is to develop a reliable database on postal regulation in Africa. The analysis of the database will be used by the PAPU General Secretariat to produce strategic documents on postal regulation and make necessary recommendations to tackle challenges currently facing postal regulation in Africa.

This questionnaire is designed exclusively to target the Postal Regulatory Authorities in Africa. Should you receive this questionnaire when you are not such a recipient, PAPU General Secretariat kindly requests you forward it to the person(s) at the responsible Authority for postal regulation in your country.

Please return the completed questionnaire to sc@papu.co.tz and copy prl@papu.co.tz and lop@papu.co.tz

The General Secretariat expresses its appreciation in advance for your kind cooperation.

II. BACKGROUND INFORMATION

Country :	
Name of Organization :	
Full Name (Respondent) : <input type="checkbox"/> Mr. <input type="checkbox"/> Mrs.	
Position (Designation) :	
Mobile :	E-mail :
Date :	Signature :

.....

III. QUESTIONS

III.1. Do you have Postal Regulation?	III.2. What type of postal regulation system do you use?
<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Sector-based: entity dedicated solely to postal regulation <input type="checkbox"/> Multisector: entity regulating at least two sectors, including the Post

III.3. What is the status of the entity responsible for postal regulation?	III.4. To what extent is the postal market opened up?
<input type="checkbox"/> Agency <input type="checkbox"/> Independent Administrative Authority <input type="checkbox"/> Other(s), specify	<input type="checkbox"/> Partially liberalized <input type="checkbox"/> Fully Liberalized <input type="checkbox"/> Monopoly with one Designated Operator only

.....

III.5. What political, strategic or legal framework(s) do you have?	III.6. What is the scope of postal regulation?
<input type="checkbox"/> Postal regulation legal framework; <input type="checkbox"/> National postal regulation strategy; <input type="checkbox"/> National postal sector development strategy; <input type="checkbox"/> Other(s), specify	<input type="checkbox"/> Postal services <input type="checkbox"/> Postal Financial services; <input type="checkbox"/> Other(s), specify

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III.7. What is the scope of universal postal service in your country?

.....

III.8. What other public service responsibilities are entrusted to the Designated Operator?	III.9. What compensation mechanism(s) are used to recoup universal postal service costs?
<input type="checkbox"/> Universal postal service; <input type="checkbox"/> Opening up the territory; <input type="checkbox"/> Other(s), specify	<input type="checkbox"/> Reserved services; <input type="checkbox"/> Compensation fund; <input type="checkbox"/> State Grants; <input type="checkbox"/> Other(s), specify:

.....

III.10. What is the scope of reserved services?

.....

III.11. Is there a framework agreement between the State/Government and the Designated Operator?

☐ Yes ☐ No

III.12. Is the cost of providing universal postal service usually recovered?

☐ Yes ☐ No

.....

III.13. How do you establish your universal postal service cost?

- ☐ Using a software;
- ☐ Using the Designated Operator's invoices;
- ☐ Other(s), specify.....

III. 14. What licensing operating models are applied in your country?

- ☐ Concession
- ☐ Permit or license
- ☐ Declaration
- ☐ Other(s), specify:

.....

III.15. What is the scope of the permit or license granted to Postal Operators in your country?

- ☐ National only
- ☐ Both national and subregional
- ☐ International
- ☐ Other(s), specify :.....

III.16. Do you have tools to assess quality of services delivered by postal operators?

☐ Yes ☐ No

.....

III.17. In your opinion, what are the main challenges facing postal regulation in Africa?

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III.18. What will you recommend to ensure effective postal regulation in Africa?

