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**OPERATIONS AND TECHNOLOGY COMMITTEE
18th JUNE 2025 ARUSHA, TANZANIA**

STATUS REPORT ON POSTAL DIGITALIZATION IN AFRICA

1. Subject: Status of implementation of Digitalization in Africa - Analysis of questionnaire	References/paragraphs <ul style="list-style-type: none">• PAPU Action Plan 2022-2025• Questionnaire on Status of Digitalization of Postal Services in Africa - CL/PAPU/GS/OT/DTFIO/005
2. Decision expected <ul style="list-style-type: none">• Adopt the Report• Take Note of the recommendations therein.	

1. INTRODUCTION

1.1 In accordance with the PAPU Action Plan for 2022-2025, a questionnaire was administered and circulated to Member States at different intervals from February 2023 to January 2025, to assess the level of digitalization of postal services in Africa. Ultimately, the responses to the questionnaire will be consolidated to build a database on the status of postal digitalization in Africa. The detailed findings from the questionnaire responses are provided in Annex 1, while Annex 2 includes detailed findings on each country.

2. STATUS OF POSTAL DIGITAL SERVICES IN AFRICA

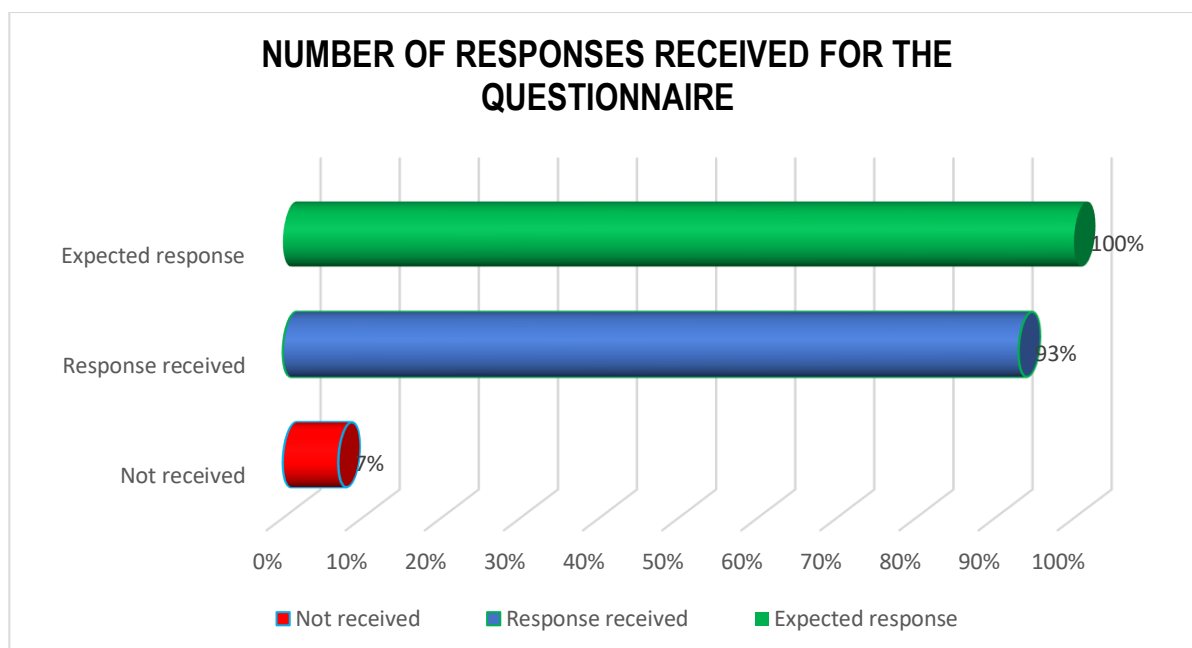
2.1 PAPU designed and circulated a questionnaire to assess the level of digitalization at the Designated Operator's Level. The questionnaire focused on the following five (5) key pillars in assessing the different stages of postal service digitalization:

- i) Postal financial and payment services;
- ii) Mail services;
- iii) Supply chain integration;
- iv) Development of IT infrastructure and mobile applications;
- v) Support functions.

3. DETAILED ANALYSIS OF THE RESPONSES

3.1 Response Rate

Diagram 1:



- a) The response rate when the Questionnaire was circulated in 2023 stood at 60%, i.e. 27 out of 45 Member States.
- b) The response rate improved for the period 2024, with 32 Member States representing 71% of the 45 members responding. The 5 new responses received in 2024 were from Cameroon, Chad, Cote d'Ivoire, Liberia, Niger.
- c) The response rate in January 2025 was at 93% i.e. 42 out of 45 countries. Fifteen (15) new responses were received.

3.1.1 A total of forty-two (42) responses were received, representing 93% of PAPU Member States. The responses were from the following Members: **Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Chad, Cameroon, Comoros, Cote d'Ivoire, Democratic Republic of Congo, Egypt, Equatorial Guinea, Gambia, Guinea, Eswatini, Ethiopia, Gambia, Ghana, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Morocco, Namibia, Niger, Nigeria, Republic of Congo, Senegal, Sierra Leone, Somalia, South Africa, Sudan, Tanzania, Togo, Tunisia, Uganda, Zambia, and Zimbabwe.**

3.1.2 The Member States that responded to the questionnaire are commended for the high response rate which will enable better coordination of projects, priority areas and monitoring of the implementation of the Union's strategy.

4. DETAILED ANALYSIS OF THE RESPONSES

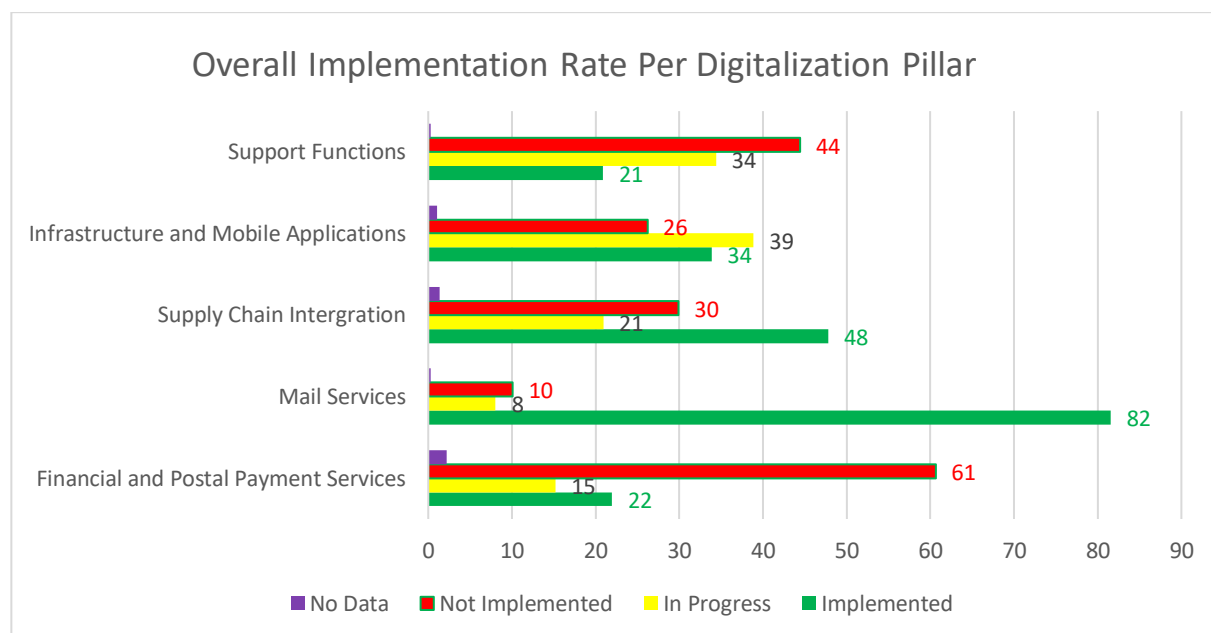
4.1 OVERALL IMPLEMENTATION RATE PER DIGITALIZATION PILLAR

Overall, the results analyzed indicate that the implementation rate for the five pillars of postal digitalization in Africa is as follows:

- i. Mail Services account for 82%,
- ii. Supply Chain account 48%;
- iii. Postal financial and payment services 22%;
- iv. Development infrastructure and mobile applications 34%;
- v. Support functions 21%.

The graph in Diagram 2 below shows the overall implementation rate per pillar.

Diagram 2



- a. The Mail Service Pillar performed the best of the five pillars, followed by the Supply Chain.
- b. The average score on the digitalization mail services pillar is 82%, which indicates the focus on digitalizing the post's core business ahead of the other segments.
- c. According to the responses, the supply chain pillar achieved 48%. This second-best-performing pillar involves interaction with third parties, including those that have strict compliance requirements.
- d. The pillars with the least digitalization scores are as follows:
 - Development infrastructure & mobile applications- 34%.
 - Postal Financial & Payment Services- 22%.
 - Support Functions - 21%.

These low scores on the three pillars indicate that much work is required in Africa to modernize postal entities, digitize services, and improve the IT infrastructure deployed.

4.2 FINANCIAL AND POSTAL PAYMENT SERVICES

- i) Providing basic postal financial services contributes significantly to global economic and social development and plays an essential role in improving living standards. The Post in Africa plays a key role in the payments market and the financial inclusion of the citizenry, diminishing consumer risk related to the usage of informal networks and money laundering.
- ii) If the African postal system upgrades its infrastructure, through its connections to the global network, it can ensure that the continent's citizens have access to efficient, reliable, secure, and affordable electronic payment services.
- iii) The global services offered by UPU also include the following: UPU Interconnection Platform (UPU-IP), International Financial System (IFS), STEFI, Bilateral Agreement Management System (BAMS), IFS Domestic System, and STEFI.

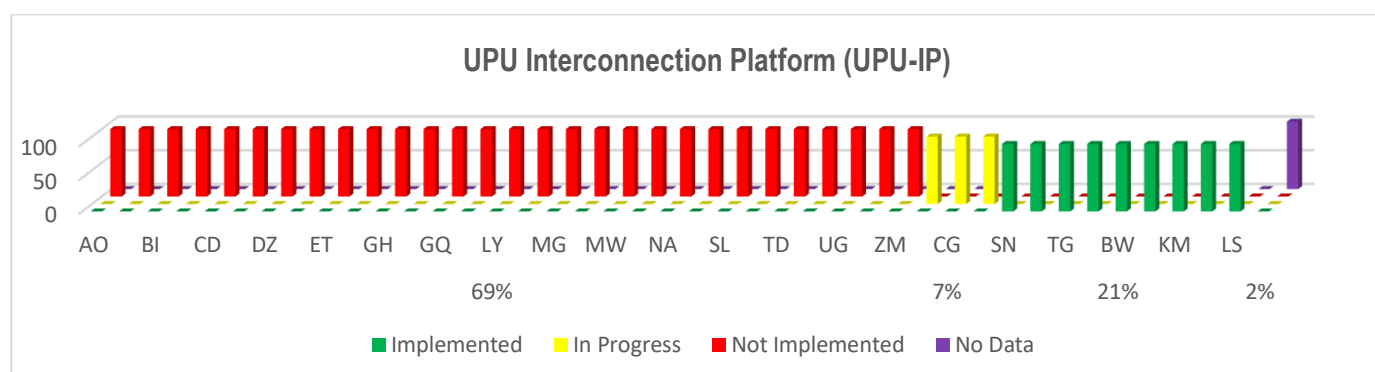
A detailed analysis of the activities under the **Financial and Postal Payment Services Pillar** is illustrated below.

4.2.1 UPU Interconnection Platform (UPU-IP)

- i) The UPU Interconnection Platform enables near real-time exchanges of postal-payment-related messages between designated operators (DOs). The UPU-IP provides application programming interfaces (APIs) for DOs to interface with their national system: a technical setup that allows instant payments to the point of sale.

The Diagram below shows the implementation status of the UPU Interconnection Platform by PAPU Member States.

Diagram 3:



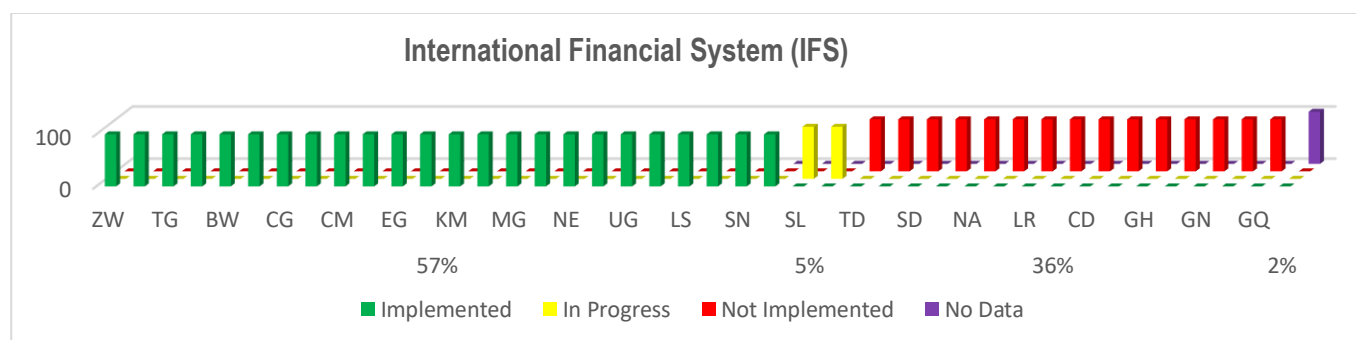
- 69% of the responses have not implemented the UPU Interconnection Platform (UPU-IP). Only 21% of Member States use the platform.
- This indicates the weak connection of the African Posts to the global technical setup that allows instant payments to the point of sale.
- African posts need to improve their connection and interface with the global systems under the UPU to leverage the single postal network economies of scale.

4.2.2 International Financial System (IFS)

- The International Financial System (IFS) is a software for operations and accounting for international and domestic electronic postal payments used by Designated Operators.

The diagram below shows the implementation status of the International Financial System by Member States.

Diagram 4

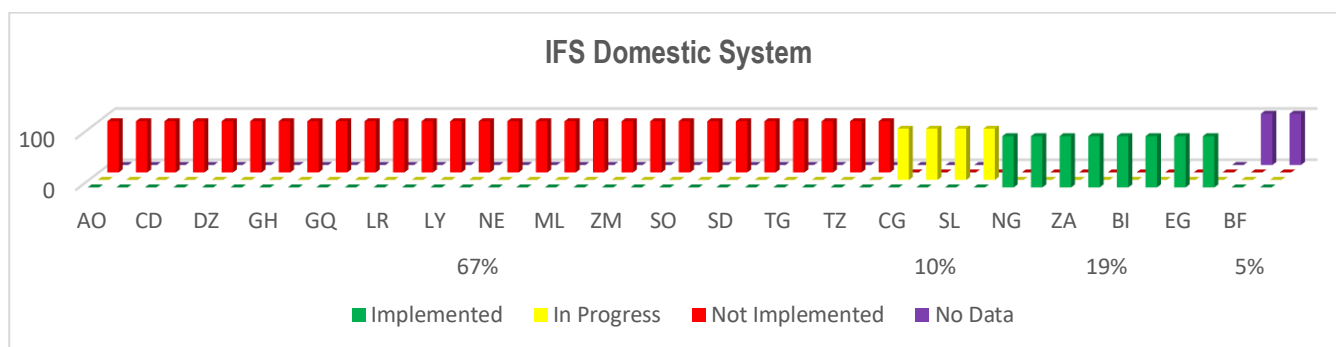


- 57% of the Member States have implemented the international financial system (IFS.)
- 5% are in the process, while 36% have not yet been implemented.
- This service provides scope for rebalancing the postal portfolio of services. The limited impact of the international remittances supported by the IFS may be due to the following
 - If the IFS efficiency is not yet at the levels of the leading and competing solutions
 - infrastructural shortcomings hamper IFS deployment.

4.2.3 IFS Domestic System

The diagram below shows the implementation status of the International Financial System by Member States.

Diagram 5



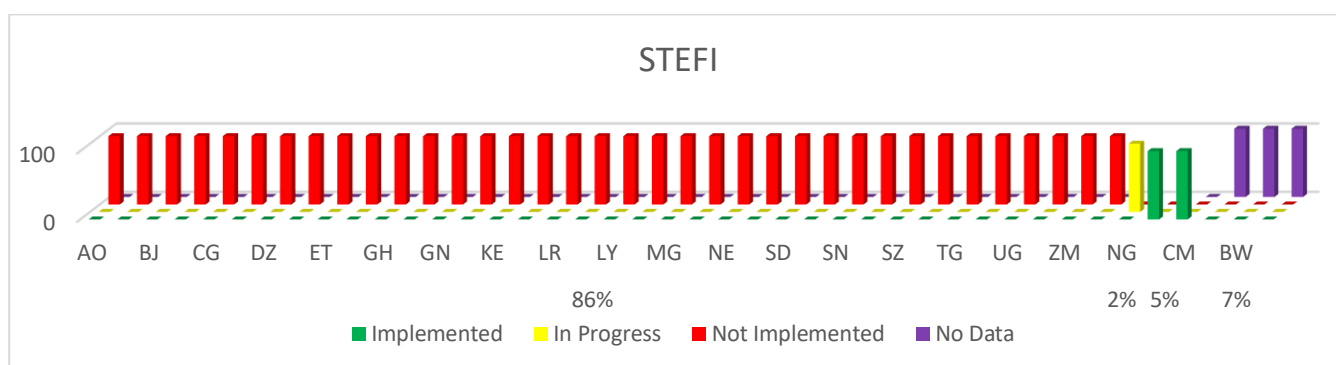
- 67% of the respondents do not implement the IFS Domestic System
- 10% are in the process, while 19% have not yet implemented it.
- The low deployment of IFS Domestic may be due to the use of other systems, and the existence of mobile wallets.

4.2.4 STEFI

- Secure Transfer of Electronic Financial Information (STEFI) was developed by the UPU Postal Technology Centre (PTC) as a solution for enterprises that need a secure method to transfer postal payments. It provides a gateway for DO's system to exchange with the PosTransfer.

The Diagram below shows the status of implementation of the STEFI by Member States.

Diagram 6



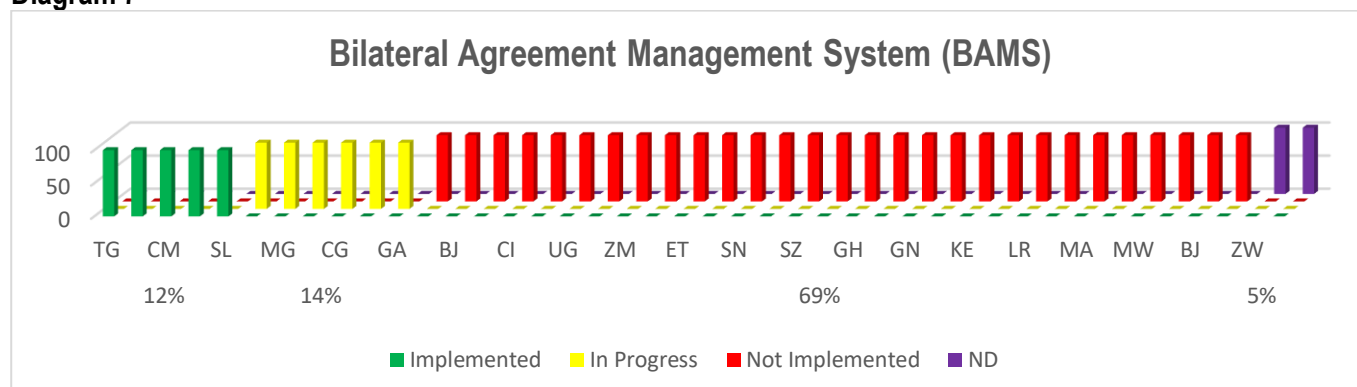
- STEFI is implemented in only 5% of the Member States that responded to the questionnaire.
- API technologies, i.e., UPU-IP, have superseded STEFI.

4.2.5 Bilateral Agreement Management System (BAMS)

- The Bilateral Agreements Management System (BAMS) is a web application hosted by the UPU for Designated Operators (DOs) to centrally manage bilateral agreements.
- It reflects the Business Agreement parameters agreed on between participants in the PosTransfer network.

The Diagram below shows the status of implementation of the BAMS by Member States.

Diagram 7



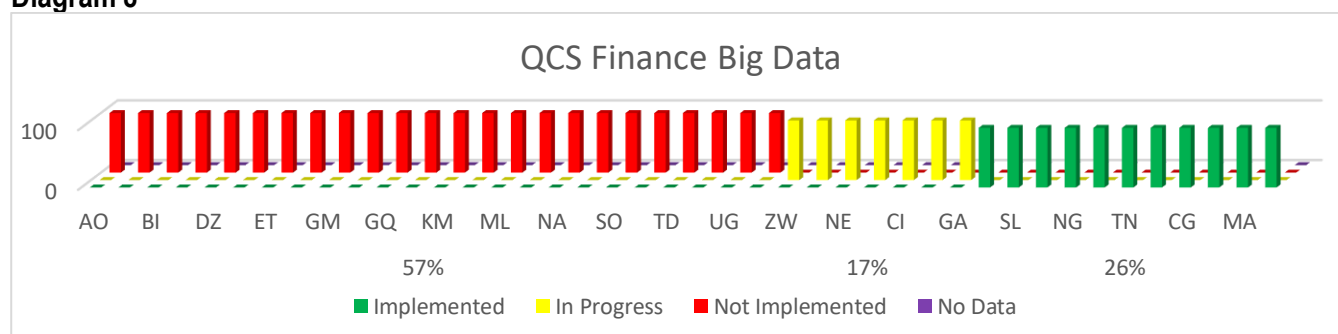
- The implementation of the Bilateral Agreement Management System (BAMS) is still low in Africa.
- 12% of the Member States have implemented BAMS
- 14% of respondents are in the process of implementing BAMS.
- The remaining 69% of respondents have not implemented the system.

4.2.6 QCS Finance Big Data

- The Quality Control System (QCS) Finance is a web-based application hosted by the UPU that monitors the performance of the PosTransfer network.

The diagram below shows the status of the QCS Finance Big Data implementation by Member States.

Diagram 8



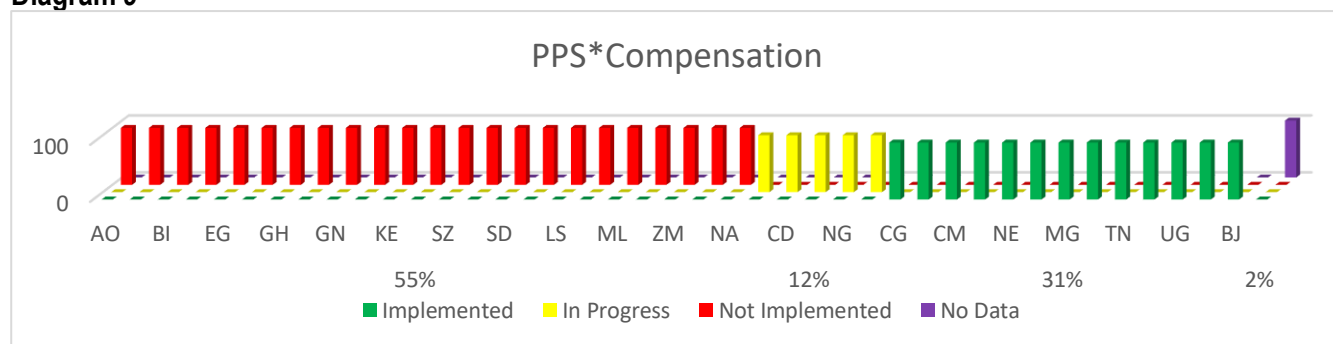
- Eleven (11) Member States representing 26% of the respondents to the questionnaire have already implemented the QCS Finance Big Data
- 17% are in the process of implementation.
- 57% have not implemented

4.2.7 PPS*Compensation

- i) PPS*Clearing or Compensation is a system that secures and facilitates settlement between Designated Operators exchanging postal payment services electronically in the same network.
- ii) PPS*Clearing is a centralized clearing and settlement system that prevents a multiplication of settlement agreements and periodic payments.

The Diagram below shows the status of implementation of the PPS*Compensation by Member States.

Diagram 9



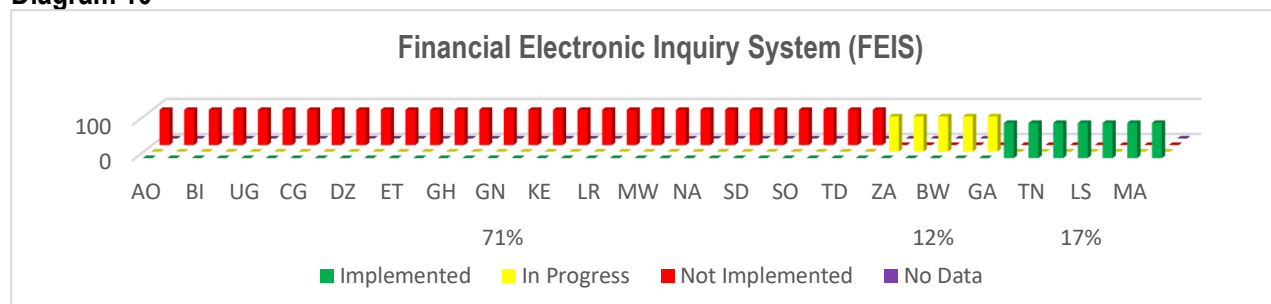
- 31% of the responding DOs are using PPS*Compensation.
- 12% of the respondents indicated that the implementation is in progress.
- 55% of the DOs have not implemented the PPS* Compensation, implying they do not use the Postal Payment Services.

4.2.8 Financial Electronic Inquiry System (FEIS)

- i) The Financial Electronic Inquiry System (FEIS) is a web application hosted by the UPU for Designated Operators (DOs) to centralize, secure, and facilitate the creation, management, and resolution of inquiries relating to international postal payments.

The Diagram below shows the status of implementation of the Financial Electronic Inquiry System (FEIS) by Member States.

Diagram 10



- The Electronic Financial Inquiry System (EFIS) is utilized in only 17% of the Member States that responded to the questionnaire.
- It is in the process of being implemented in 12% of the responses received.

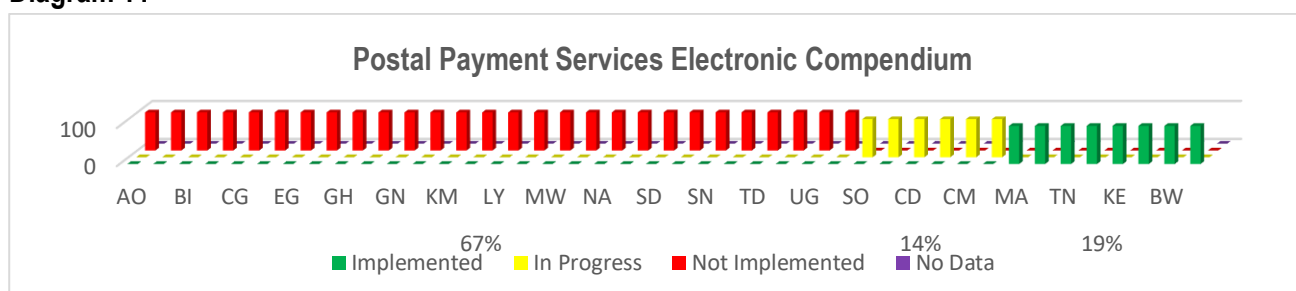
- 71% of the DOs do not use the Electronic Financial Inquiry System (EFIS), indicating they have not implemented the Postal Payment Services.

4.2.9 Postal Payment Services Electronic Compendium

- The Postal Payment Services Electronic Compendium is a web application hosted by the UPU for Designated Operators (DOs) to centrally publish information related to their postal payment services portfolio and setup.

Diagram 11 below shows the implementation status of the Postal Payment Services Electronic Compendium.

Diagram 11



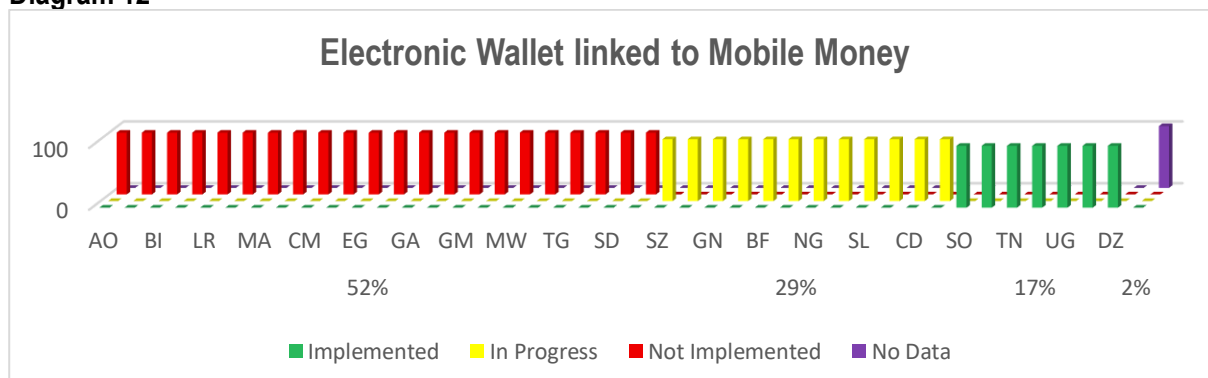
- The responses received show that the Postal Payment Services Electronic Compendium is at a very low implementation level.
- Only 19% of the countries have implemented it while 14% are in progress.

4.2.10 Electronic Wallet linked to Mobile Money

- Electronic Wallet linked to Mobile Money is a complete platform that allows MNOs¹, MVNOs², Banks and Financial institutions to launch an electronic wallet tightly linked to their core systems.

Diagram 12 below shows the status of implementation of the Electronic Wallet linked to mobile money by Member States.

Diagram 12



¹ Mobile Network Operator

² Mobile Virtual Network Operator

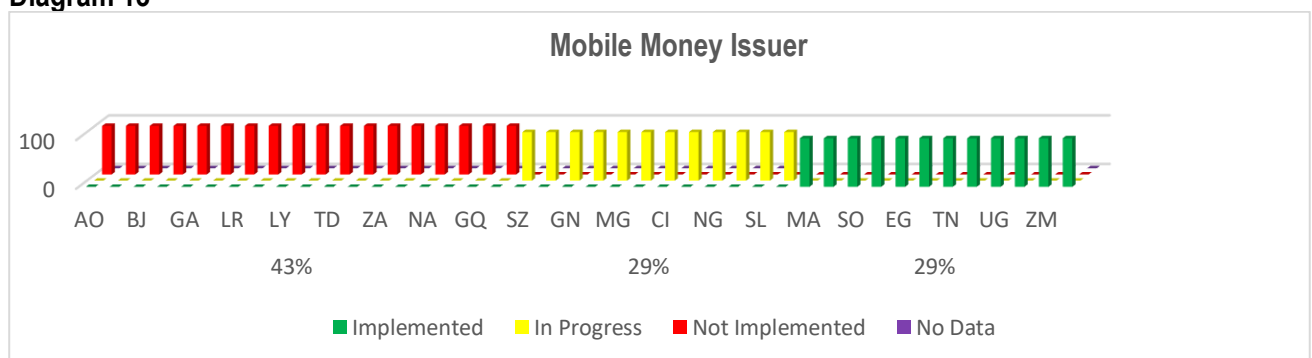
- The mobile money e-wallet is used in only 17% of the Member States that responded to the questionnaire.
- It is work in progress in 29% of Member States while 52% have not yet implemented it.

4.2.11 Mobile Money Issuer

- A Mobile Money Issuer is a financial institution authorized to issue electronic money and provide payment services such as domestic and international wire transfers and may offer bank accounts and electronic wallets.

The Diagram below shows the status of implementation of the Mobile Money Issuer by Member States.

Diagram 13



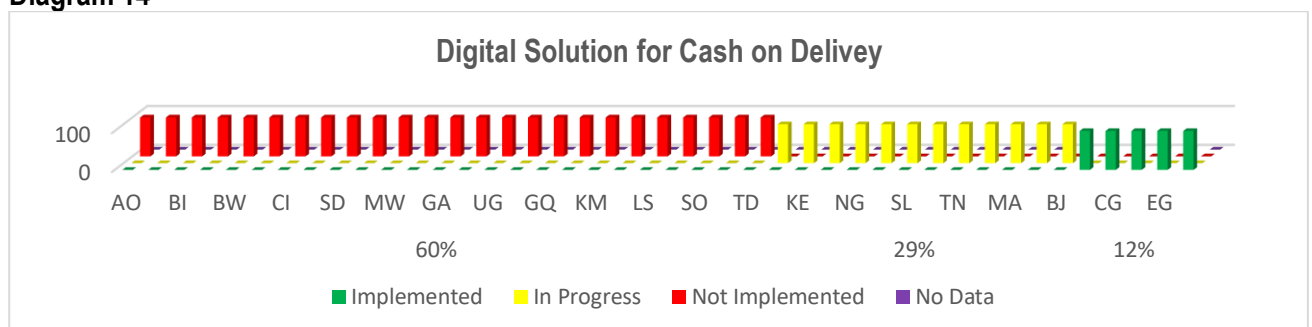
- 29% of the DOs have implemented the project and 29% are in progress. 43% have not implemented Mobile Money Issuer.
- Depending on the country, the authorization of issuing electronic money often requires complex conditions and regulations which are not easily achievable by posts.

4.2.12 Digital Solution for Cash on Delivery.

- Digital solutions for Cash on Delivery involve sending money in a timely, secure, properly controlled and reported manner.

The Diagram below shows the status of implementation of the Solution for Cash on Delivery by Member States.

Diagram 14



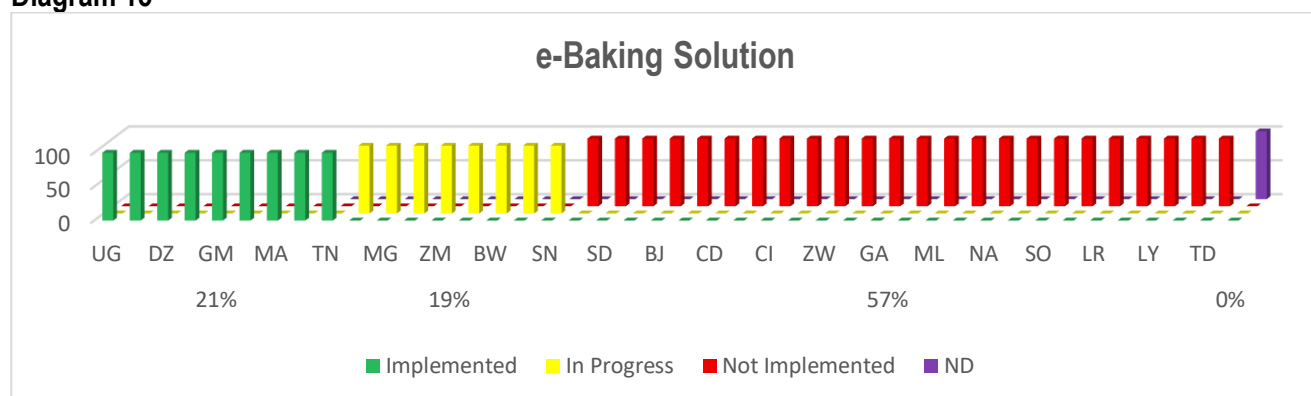
- 12% of the DOs who responded to the questionnaire are implementing the Digital Cash-on-Delivery Solution,
- 29% are in progress while
- 60% have not implemented.

4.2.13 e-Banking Solution

- i) E-banking or online banking allows customers to carry out banking transactions online via a website anywhere and at any time.

The Diagram below shows the status of implementation of the e-Banking Solution by Member States.

Diagram 15



- 21% of the Designated Operators that responded to the questionnaire have implemented the solution.
- 19% of the DOs have the project in the process of being implemented.
- 57%, the solution has not been implemented.

4.2.14 Recommendations

The Financial Postal Payment Services Pillar is one of the least implemented in terms of the digitalization of postal services. The following are the recommendations emanating from the questionnaire responses:

1. The Designated Operators have to strengthen their efforts in the implementation of the digital solutions under the Financial Postal Payment Services Pillar;
2. Postal and financial regulators are encouraged to develop appropriate policies and regulatory frameworks to allow for seamless transition into the postal financial services by Designated Operators;
3. Designated Operators are encouraged to deploy tools and solutions already available in the UPU menu or in partnership with third parties to boost postal financial services;
4. Designated Operators have to increase investments in information technology systems and tools on postal financial and payment services in line with global digital trends.

4.3 MAIL SERVICES

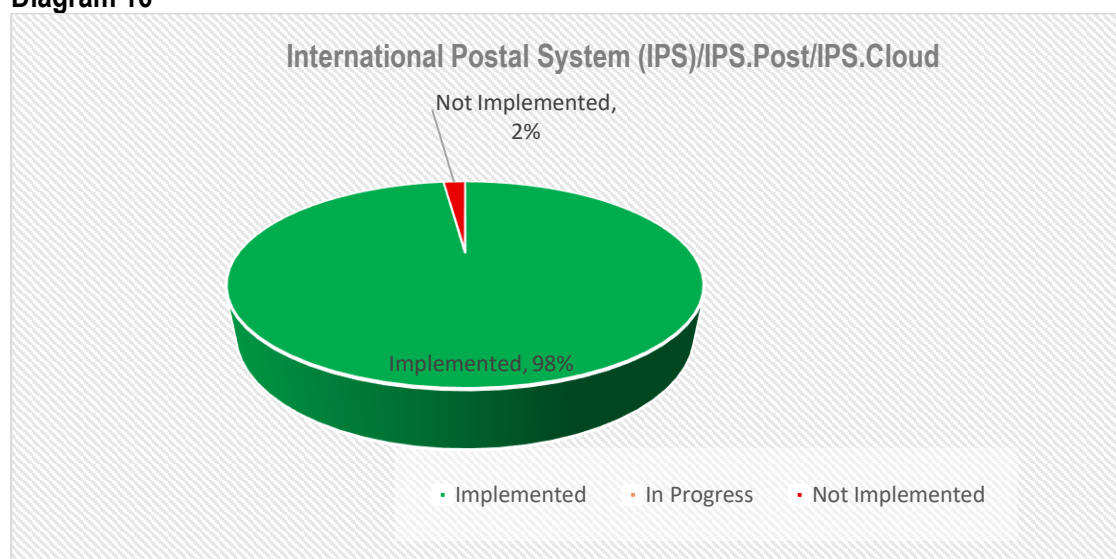
- i) Several IT Systems and Tools are deployed to facilitate the efficient mail exchange services among designated operators. This guarantees the exchange of secure electronic data on mail services.
- ii) The services offered include but are not limited to the following: International Postal System (IPS)/IPS.Post/IPS.Cloud, S10 barcodes, EMEVT V3 messages, Track and Trace, Internet Based Inquiry Systems (IBIS), Quality Control System (QCS), Global Monitoring System (GMS), EMS SMART.

The detailed analysis of the activities under the Mail Services Pillar are illustrated below.

4.3.1 International Postal System (IPS)/IPS.Post/IPS.Cloud

The Diagram below shows the status of implementation of the International Postal System (IPS)/IPS.Post/IPS.Cloud by Designated Operators.

Diagram 16



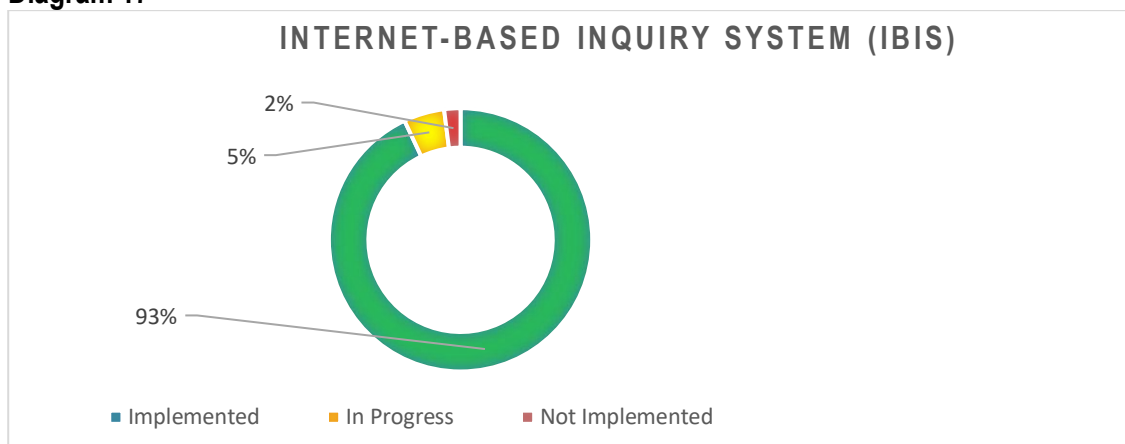
- 98% of the DOs have implemented the International Postal System (IPS)/IPS. Post/IPS. Cloud) for the exchange of international mail.
- Of the 42 Member States that responded, only Sudan has not yet implemented the solution.
- The high implementation rate is commendable, and DOS are encouraged to keep up the digitalization drive.

4.3.2 Internet-Based Inquiry System (IBIS)

- i) The Internet-Based Inquiry System (IBIS) is used to process international inquiries for mail services. For the inquiries to be processed using this system, the mail should possess S10 bar codes and be trackable using the EMSEVT V3 messages.

The Diagram below shows the status of implementing the Internet-based Inquiry System (IBIS) by Designated Operators for processing international inquiries.

Diagram 17



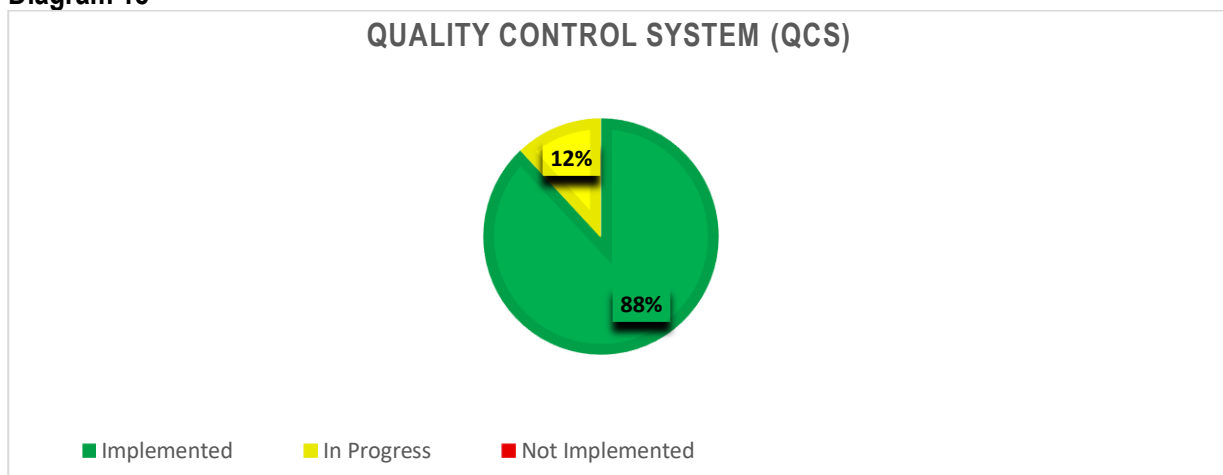
- 93% of the Member States that responded to the questionnaire are using IBIS to process international mail service inquiries.
- Only Burundi, Chad, Comoros, Gambia, and Libya have not yet implemented the solution.
- The same percentage of respondents, 93%, are using the S10 bar codes and exchanging data using the EMSEVT V3 messages and Track & Trace.

4.3.3 Quality Control System (QCS)

- Quality Control System (QCS) is a web-based application hosted by the UPU that monitors the performance of mail services, measures quality standards, and generates customized reports for Designated Operators.

The diagram below shows the status of the implementation of the Quality Control System (QCS) by Member States.

Diagram 18



- 88% of the DOs have implemented the Quality Control System (QCS)

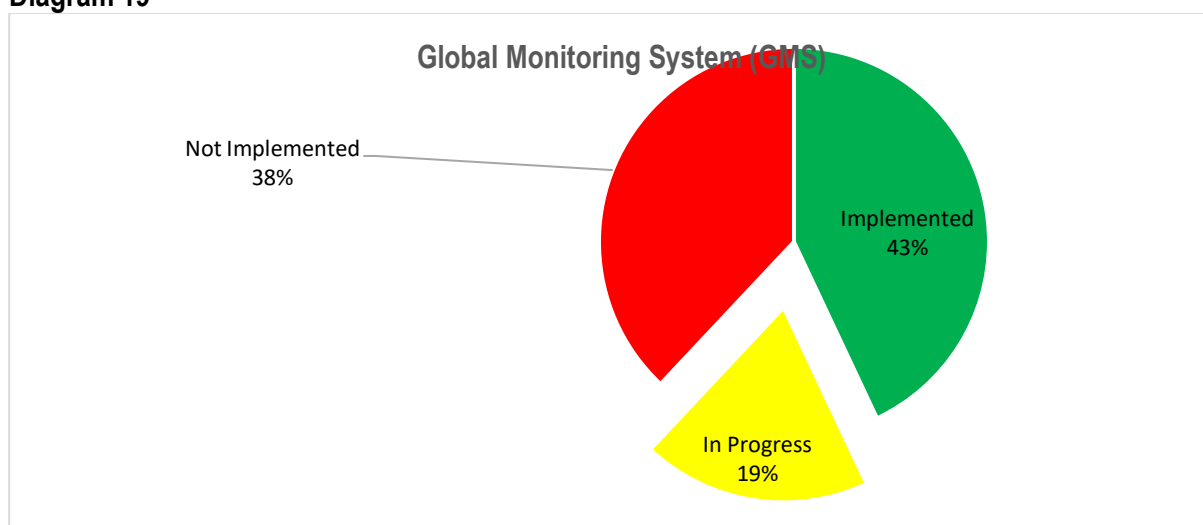
- 12% are in the process of implementation.

4.3.4 Global Monitoring System (GMS)

- The Global Monitoring System (GMS) is a measurement system managed by the UPU International Bureau, which uses Radio Frequency Identification (RFID) technology to monitor the quality of service for non-tracked ordinary letters. Its primary objective is to provide Designated Operators (DOs) with accurate, high-quality operational results.

The diagram below shows the implementation status of the Global Monitoring System (GMS) by Member States.

Diagram 19



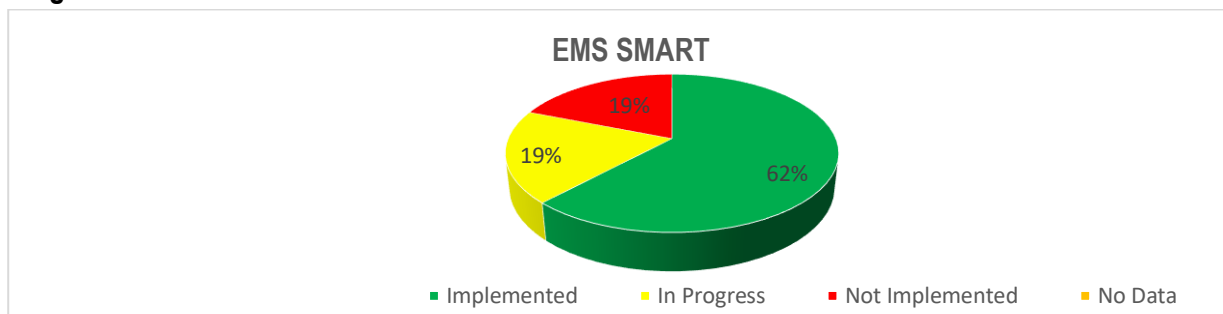
- 43% of the responding Designated Operators have implemented the GMS
- 19% of the respondents are in the process of implementing GMS
- 38% have not implemented the GMS system

4.3.5 EMS SMART

- EMS SMART is an online reporting system linked to the EDI messages collected in the EMS Bubble data pool hosted by the UPU's PTC and external reference data. The system has been further developed to contain highly complex elements, such as the elapsed time calculator.
- EMS SMART can be used on various devices, including desktop computers, tablets, and smartphones.

The Diagram below shows the implementation status of the EMS SMART by Designated Operators.

Diagram 20



- EMS SMART is available in 62% of the DOs that responded to the questionnaire.
- 19% of the DOs are in the process of implementing the system, remaining
- 19% have not implemented EMS Smart

4.3.6 Recommendations

Following the analysis of responses to the Questionnaire on the Status of Digitalization of Postal Services, the following recommendations are being made:

- 1. Designated Operators are encouraged to utilize the tools recommended by the UPU, which are essential elements of the Mail Services Pillar for best practices, quality monitoring, and improvement, particularly the Quality Control System (QCS) or the Integrated Quality Reporting System (IQRS), and EMS Smart.**
- 2. The General Secretariat should strengthen capacity building and technical assistance on using these UPU tools to efficiently and effectively provide mail services.**

4.4 SUPPLY CHAIN INTEGRATION

- Supply chain integration denotes incorporating all parties and activities involved in delivering the final product to the customer into one system.
- The various stakeholders in the postal supply chain work together and exchange electronic data to ensure a seamless experience for the postal industry and their customers. The main stakeholders are mail carriers, customs authorities, government agencies, and other partners.
- The services offered include but not limited to the following: E-government Services, Customs Declaration System (CDS), Exchange of ITMATT, Exchange of CUSITM/CUSRSP with Customs, Exchange of ITMREF/REFRSP, CDS Kiosk, EAD Customs declaration Application, Exchange of CARDIT/RESBIT with airlines, .Post to level domain, OSCAR - for carbon analysis and reporting, Use of IPS-CDS Telematics tool, WADP Numbering System (WNS), Electronic counter solution (POS & e-POS) Relay Points and Smart Lockers.

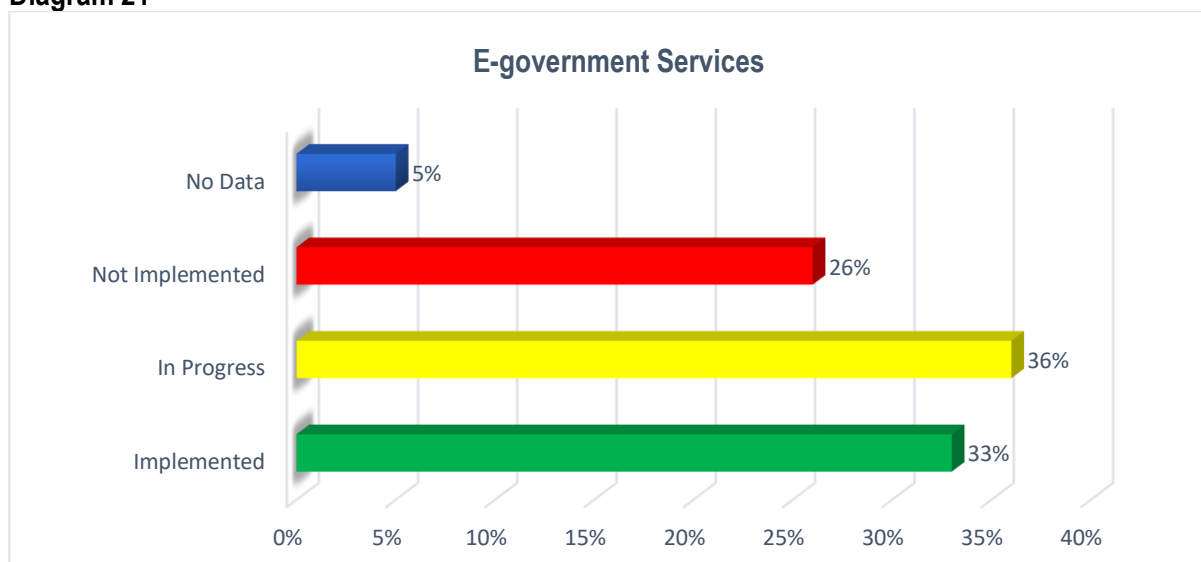
The detailed analysis of the activities under the Supply Chain Integration Pillar are illustrated below.

4.4.1 E-government Services

- i) E-government also known as electronic government services, involves utilizing technology devices, such as computers and the Internet, for faster means of delivering public services to citizens and other persons in a country or region.

The Diagram below shows the status of implementation of the E-government Services by Member States.

Diagram 21



- 33% of the DOs offer e-government services,
- 36% are in progress
- 26% have not yet implemented this service.
- The level of implementation is too low for an institution that should be driving Government programs and projects since it has the largest footprint in any country including in remote rural areas.
- The low score on implementation may be due to low IT infrastructure deployment at Post Offices, lack of electricity and internet connectivity

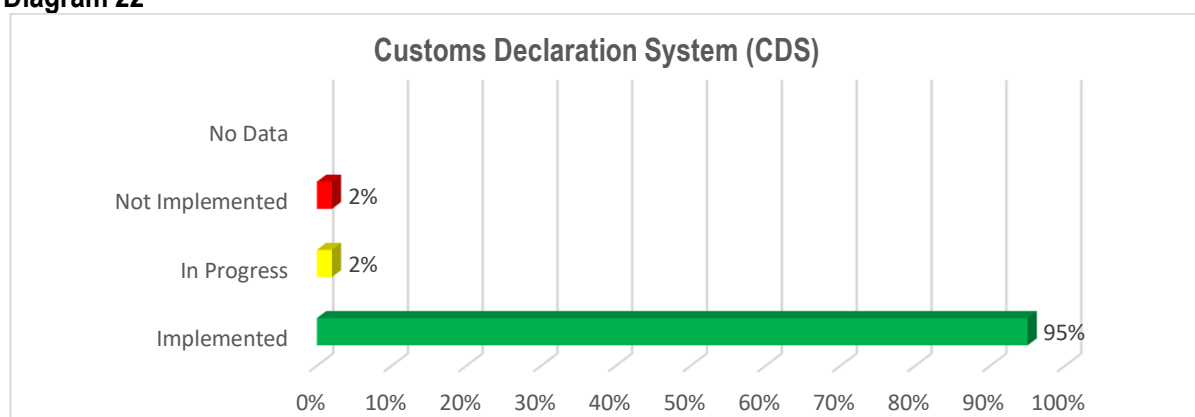
4.4.2 Customs Declaration System (CDS)

- i) The Customs Declaration System (CDS) was developed by the Postal Technology Centre (PTC) to facilitate the exchange of electronic data between Posts and Customs. This speeds up the customs clearance process by sending or distributing information in advance about postal items to Customs and partner Posts.
- ii) The CDS also allows Customs to automate their decisions regarding selectivity, risk management, and any taxes payable on items before they can be sent.

The Diagram below shows the status of implementation of the Customs Declaration System (CDS) by Designated Operator

4.4.3 Customs Declaration System (CDS)

Diagram 22



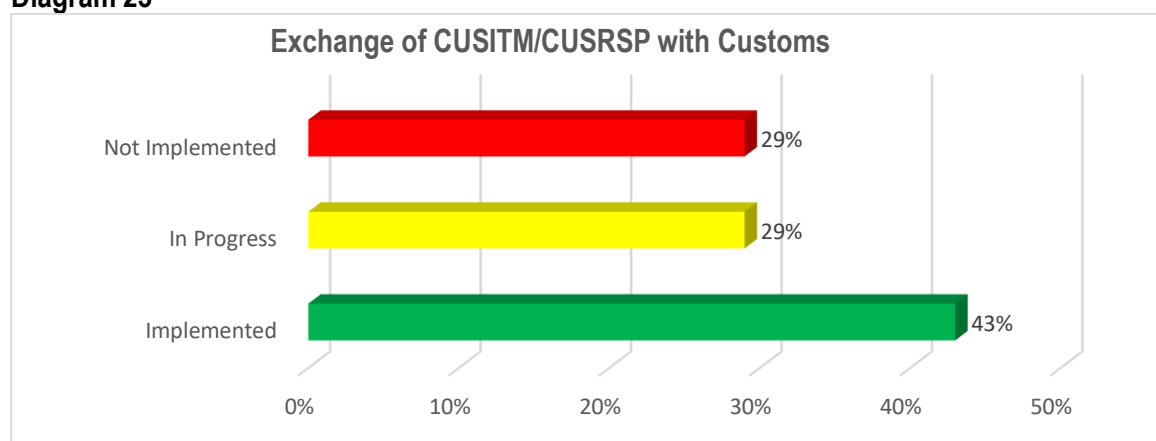
- 95% of the DOs that responded use the Customs Declaration System (CDS).
- This is good considering that exchanging Electronic Advance Data (EAD) for items containing goods became mandatory in January 2021.
- The high score may be due to the fear of consequences for non-compliance imposed under EAD
- Of the 42 Member States that responded, only Sudan has implemented the solution.

4.4.4 Exchange of CUSITM/CUSRSP with Customs

- i) The CUSITM/CUSRSP are electronic data interchange messages exchanged between Posts and Customs Authorities for customs clearance of international items containing goods.

The Diagram below shows the implementation status of the Exchange of CUSITM/CUSRSP with Customs by Member States.

Diagram 23



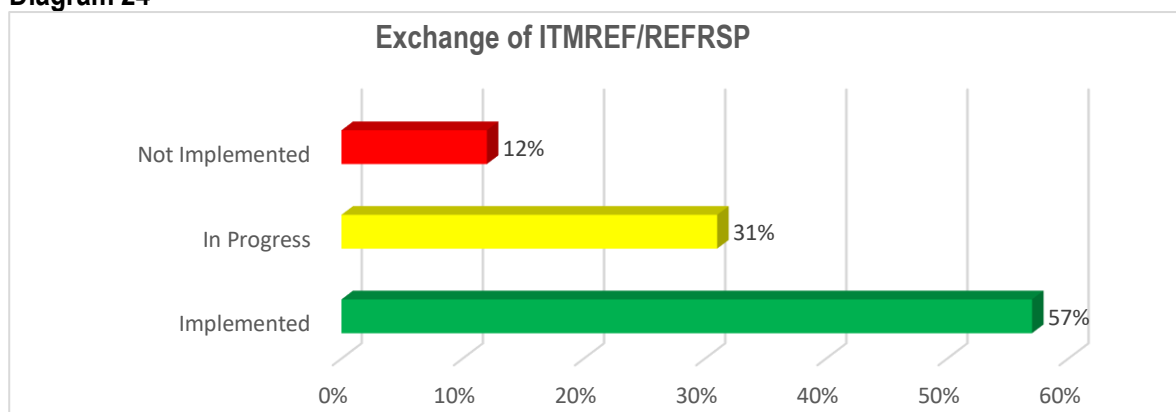
- 43% of DOs exchange CUSITM/CUSRSP messages with Customs Authorities
- 29% are working on exchanging the messages, while another 29% have not.
- The low score on this element means that the transmission of postal items may take longer due to manual exchanges between the Post and Customs.

4.4.5 Exchange of ITMREF/REFRSP

The Diagram below shows the implementation status of the Exchange of ITMREF/REFRSP by Designated Operators.

The exchange of ITMREF/REFRSP became mandatory in 2023.

Diagram 24



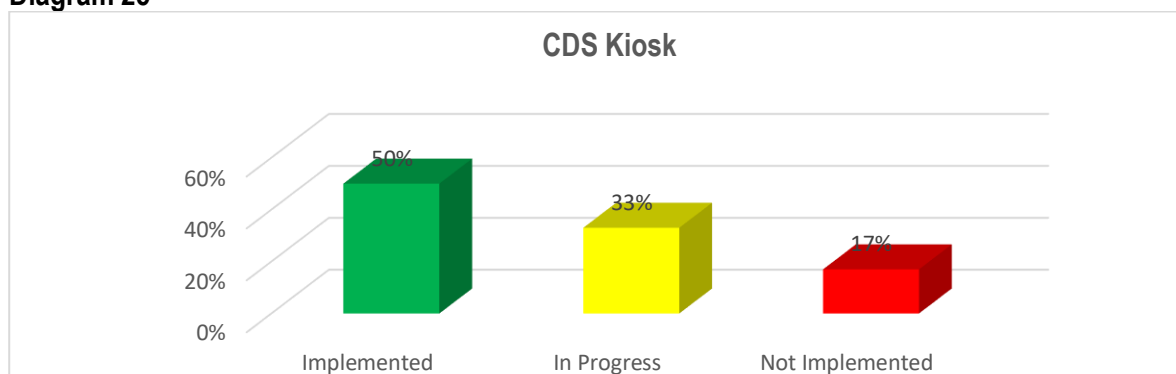
57% of the DOs exchange ITMREF/REFRSP messages, 31% are in progress, and 12 % have not yet been implemented.

4.4.6 CDS Kiosk

- i) Customers use the CDS Kiosk to complete customs declaration forms for international items before acceptance at the counter.
- ii) This quickens the acceptance process as the customers complete the CN23/CN22 on their own before presenting the items.

The Diagram below shows the status of implementation of the CDS Kiosk by Member States.

Diagram 25



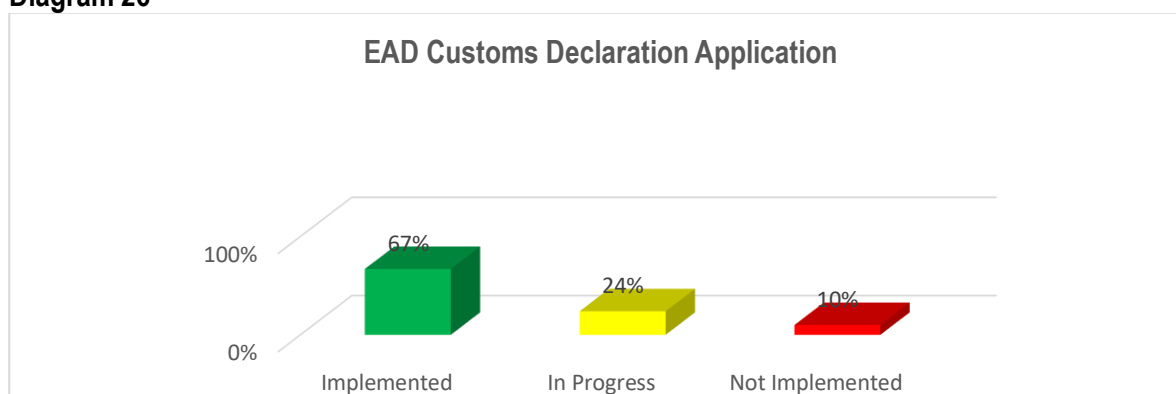
- CDS kiosks are available in 50% of DOs that responded to the questionnaire.
- 33% are in progress while
- 17% have not implemented CDS Kiosks.

4.4.7 EAD Customs Declaration Application

- i) The Customs Declaration App is used to prepare customs declarations. It replaces the CN 22 and CN 23 paper forms, enabling the transmission of EAD for mail items directly to postal Operators and Customs.
- ii) Customs authorities then use the EAD to expedite clearance in compliance with national legislation.

The Diagram below shows the status of implementation of the EAD Customs Declaration Application by Member States.

Diagram 26



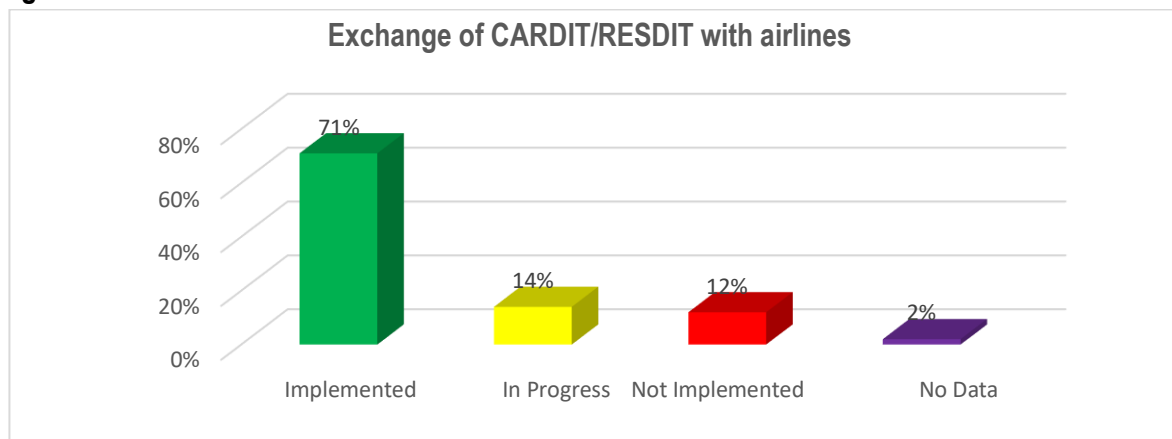
- The EAD Customs Declaration Application is fully operational in 67% of the DOs.
- 24% are in the process of implementing the application according to the responses received from the questionnaire.
- 10% have not yet implemented the EAD Customs Declaration Application

4.4.8 Exchange of CARDIT/RESBIT with airlines

- i) CARDIT/RESBIT messages are the digital form of the CN38 exchanged between DOs and carriers to convey international mail.
- ii) The exchange of CARDIT/RESBIT messages with airlines is crucial for the visibility of mail within the supply chain pipeline.

The Diagram below shows the implementation status of the Exchange of CARDIT/RESBIT with airlines by DOs.

Diagram 27



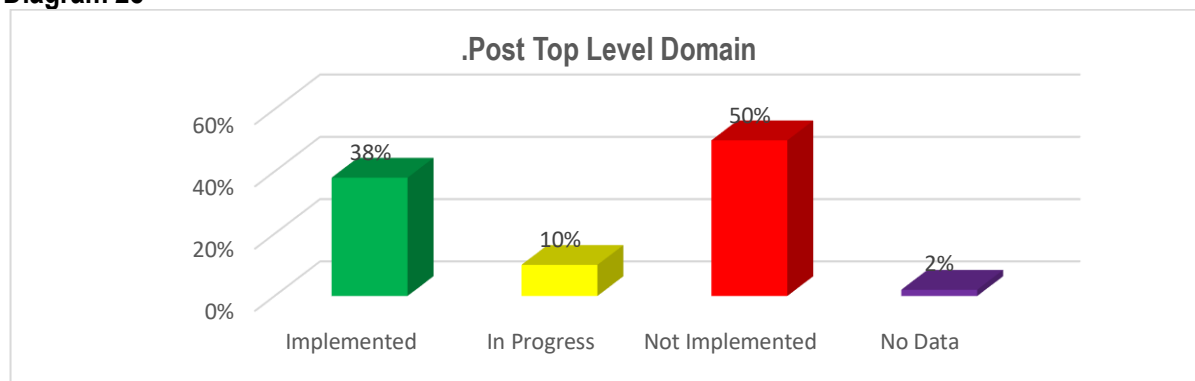
- 71% of the DOs exchange CARDIT/RESBIT messages with airlines conveying their mail.
- 14% are in the process of facilitating the exchange,
- 12% of the DOs are not yet exchanging electronic messages with airlines.

4.4.9 .Post Top Level Domain

- .POST is a top-level domain developed by the Postal Technology Centre (PTC) exclusively for the postal sector. It is a secure and trusted Internet space to serve the needs of the global postal community in the digital economy.

The diagram below shows the status of implementation of .Post Top Level Domain by Member States.

Diagram 28



- 38% of the DOs that responded to the questionnaire have implemented .Post Domain.
- 10% are in the process of implementing .Post Domain,
- 50% of the DOs have not yet implemented it.
- The Dot Post domain must be considered as a suitable infrastructure for the postal sector, especially when there is a need to host e-commerce platforms that require enhanced security of

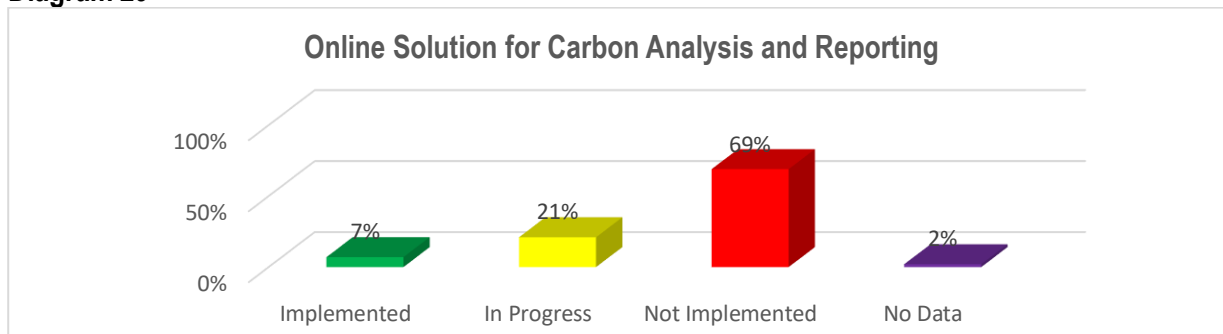
4.4.10 Online Solution for Carbon Analysis and Reporting (OSCAR)

- OSCAR is the Online Solution for Carbon Analysis and Reporting.

- ii) It is a tool provided by the UPU to measure and analyze the postal sector's carbon footprint.

The Diagram below shows the status of implementation of the OSCAR for Carbon Analysis and Reporting by Member States.

Diagram 29



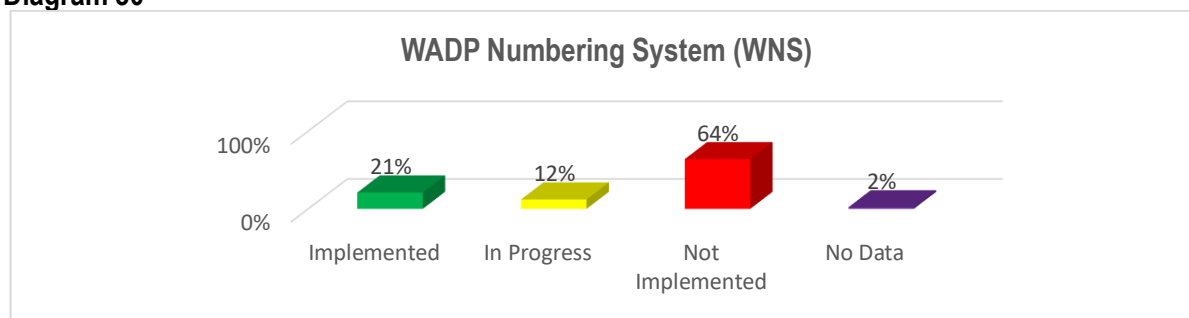
- 10% of the DOs that responded to the questionnaire have implemented the Online Solution for Carbon Analysis and Reporting (OSCAR).
- 21% are in the process of implementing,
- 69% of the DOs have not implemented OSCAR.
- With the global concerted efforts and thrust towards environmental sustainability in the face of global warming, the Post in Africa needs to take more decisive measures to ensure that they are part of the initiatives.

4.4.11 WADP Numbering System (WNS)

- i) The World Association for the Development of Philately (WADP) Numbering System (WNS) is the central register of official postage stamps issued by the UPU Designated Operators.

The diagram below shows the status of the WADP Numbering System (WNS) implementation by Member States.

Diagram 30



- 21% of the DOs use the WADP Numbering System (WNS).
- 12% are in progress while
- 64% have not implemented it.
- The Posts in Africa should consider utilizing the WADP platform, as it serves to
 - Safeguard postage stamps legally issued from being fraudulently traded

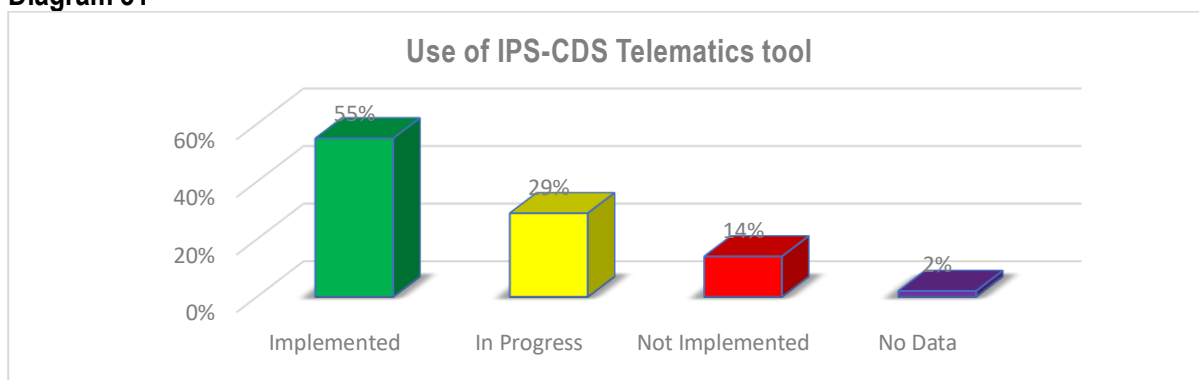
- Provides visibility of postage stamps, which can boost philatelic sales
- Lead to quick identification of illegal stamp issues

4.4.12 Use of the IPS-CDS Telematics Tool

- A set of interoperable technological tools implemented by UPU to benefit DOs.
- It provides the link between IPS and CDS to enable the exchange of international items.

The Diagram below shows the implementation status of the Use of IPS-CDS Telematics tool by Member States.

Diagram 31



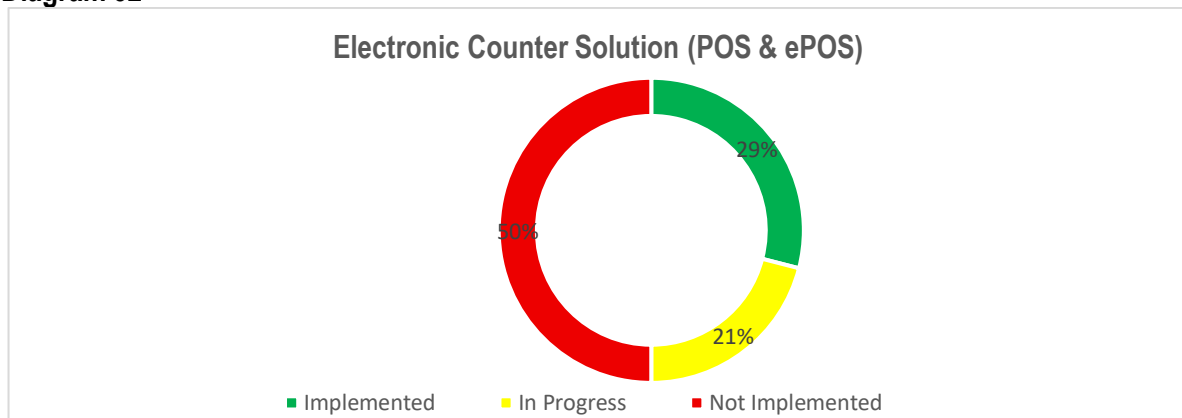
- 55% of the 42 DOs responding have implemented IPS-CDS
- 29% are in the process of implementing
- 14% have not implemented.
- The use of the IPS-CDS Telematics Tool is at a very acceptable level according to the results of the survey

4.4.13 Electronic Counter Solution (POS & ePOS)

- Point of Sale (POS) is where customers make payments when purchasing products or services. In simple terms, every time a customer completes a purchase, they make a point of the sale transaction.
- An ePOS system will accept payment types such as cash, online payments, contactless payments, credit cards, and debit cards.

The Diagram below shows the status of implementing the use of Electronic Counter Solutions (POS & ePOS) by Member States.

Diagram 32



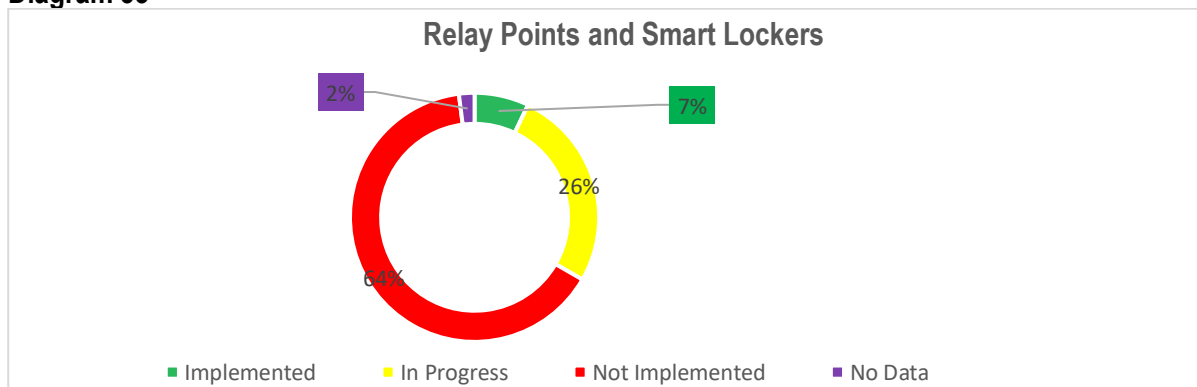
- 29% of the 42 responses received from DOs use the electronic counter solution (POS & ePOS).
- 21% are in the process of implementing,
- 50% have not yet implemented these tools.

4.4.14 Relay Points and Smart Lockers

- i) Smart Lockers are storage containers that use Internet of Things (IoT) technology to connect to the internet and provide people with a convenient way to store their belongings or to protect assets in factory and warehouse environments.

The Diagram below shows the status of implementation of the Relay Points and Smart Lockers by Member States.

Diagram 33



- 7% have implemented this solution.
- 26% are in progress, while
- 54% have not yet implemented.
- Relay points and smart lockers are not sufficiently implemented in the African postal network

4.4.15 Recommendations

The recommendations emanating from the Supply Chain Integration Pillar are as follows:

1. **Designated Operators should exchange electronic data (CUSITM/CUSRSP) with Customs Authorities to speed up the customs clearance process;**
2. **Updating the Transport EAD Compendium ensures Stakeholders' access to up-to-date transport information on each Designated Operator and smoothens the supply chain pipeline;**
3. **Designated Operators are encouraged to promote the use of the WADP Numbering System (WNS) to register their stamps and curb counterfeit and illegal issuance of stamps;**
4. **Designated Operators should endeavour to implement Electronic Counter Solutions (POS & ePOS), relay Points, and Smart Locks to offer innovative postal services that meet customer needs.**

4.5 INFRASTRUCTURE AND MOBILE APPLICATION

- i) IT Infrastructure and Mobile Applications are an essential aspect of digitalizing postal services, enabling DOs to increase efficiency, improve customer experience, generate savings, automate business processes within regulatory frameworks, and improve operational capabilities.
- ii) The African Postal Sector has recognized the critical importance of embracing digital transformation to remain competitive, meet changing customer expectations, and adapt to technological advances.
- iii) The services offered include, but are not limited to, the following: Warehousing, Business Management System, SMS/email customer notification platform, Mobile Application for the Post, Cyber Security Policy, Post Office Power and Connectivity back-up, Interactive Website, E-Philately Shop, and E-Commerce Platform.

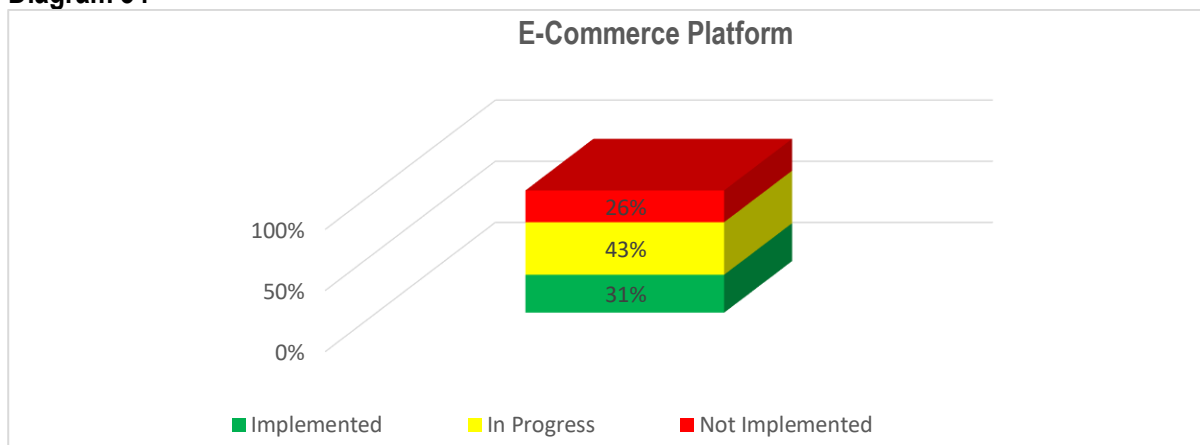
The detailed analysis of the activities under the Infrastructure and Mobile Applications Pillar are illustrated below.

4.5.1 E-Commerce Platform

- i) An e-commerce platform is a web platform that enables merchants to sell their products or services on the internet. The platform offers a catalogue of products and is equipped with a secure payment system. Customers can therefore buy at any time and from anywhere.
- ii) E-commerce platforms are transforming retail businesses as sellers and buyers meet at these sites to do business.

The Diagram below shows the E-Commerce Platform's implementation status by DOs.

Diagram 34



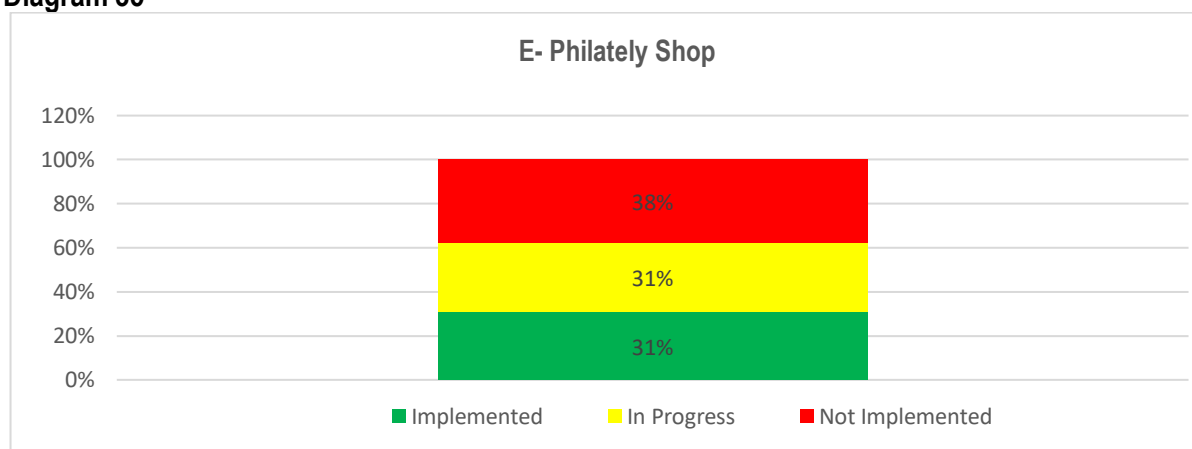
- 31% of the 42 responses received from DOs have implemented an e-commerce platform
- 43% are in the process of implementing,
- 26% have not yet implemented the solution.
- The operation of an e-commerce platform enhances the chances of attracting ECOM products into the Post Office distribution channel
 - The Post can interface its platform with suppliers and manufacturers, shortening the delivery cycle and reducing the service cost.
- Tools like Track and Trace are a 'must-have' in an e-commerce business

4.5.2 E- Philately Shop

- DOs sell their philatelic products online via E-Philately shops.
- Online sale of philatelic products increases the market reach as global collectors can see the products from across the world

The Diagram below shows the implementation status of the E-Philately Shop by DOs.

Diagram 35



- 31% of the DOs that responded to the questionnaire implement the E-Philately Shop
- 31% are in the process

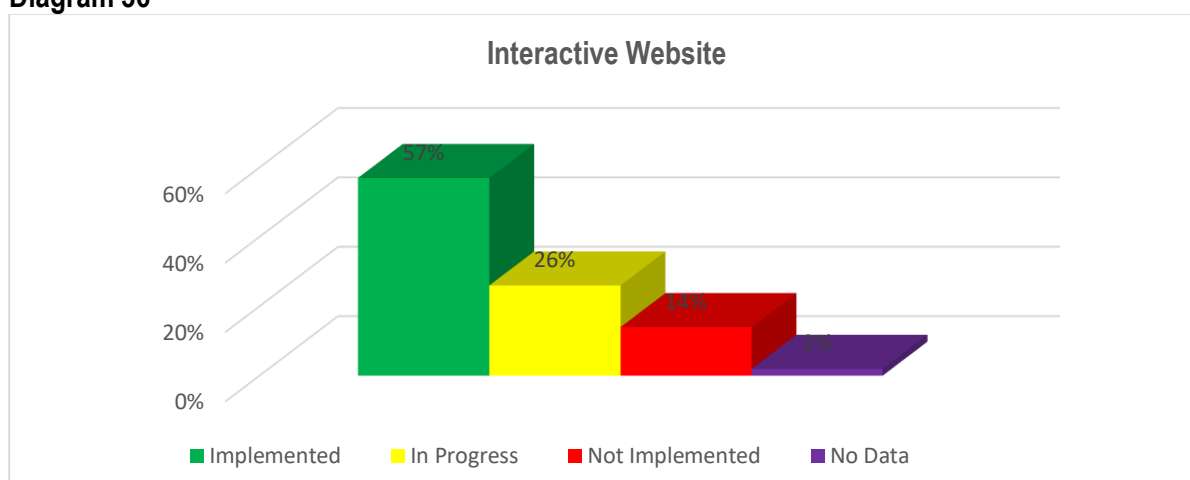
- 38% have not yet implemented.
- The low utilization of e-philately shops excludes the youth from the service and may be the ultimate route to the demise of the service.

4.5.3 Interactive Website

- Interactive Website uses various technologies and design techniques to engage users and create a dynamic experience.

The Diagram below shows the implementation status of the Interactive Website by Member States.

Diagram 36

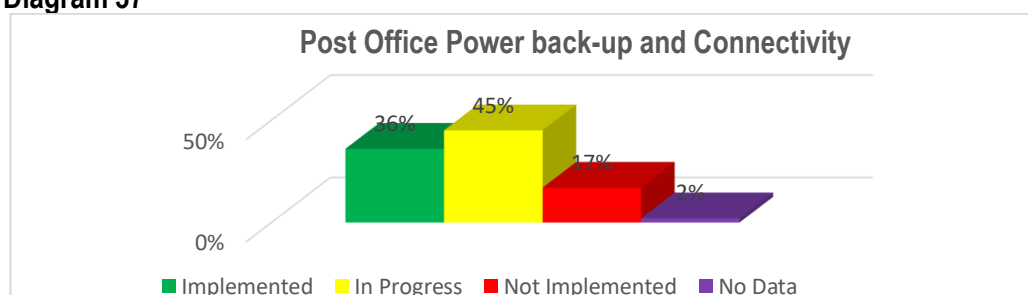


- 57% of the 42 DOs have interactive operational websites.
- 26% are in progress, while 14% have not yet been implemented.
- Interactive websites are prominent in client management, tracking feedback, and analysis.

4.5.4 Post Office Power Back-up and Connectivity

The Diagram below shows the implementation status of the Post Office Power back-up and Connectivity by DOs.

Diagram 37



- 36% of the DOs that responded to the questionnaire have Power back-up and Connectivity at their Post Offices.

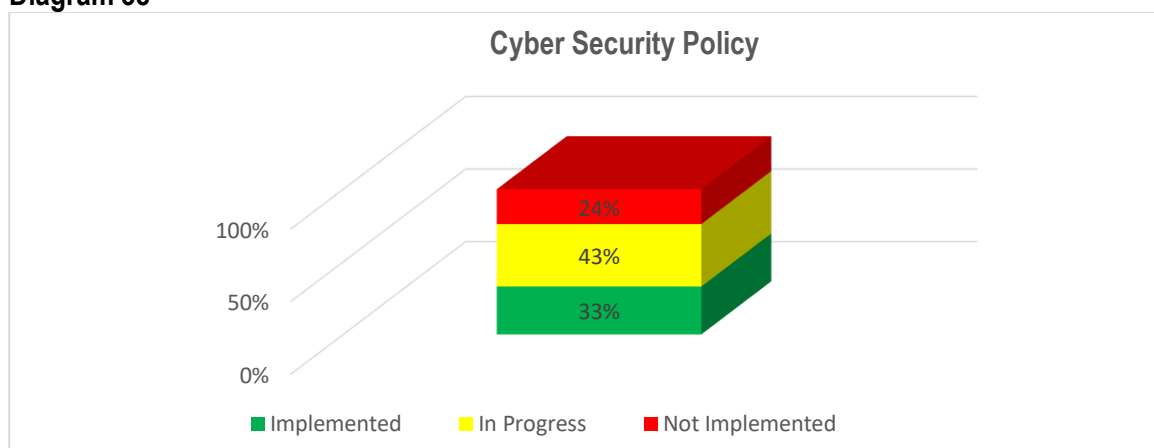
- 45% are in progress,
- 17% have not yet implemented it.
- This is the foundation upon which a digitalized postal operation must be built
- The Electrification and Connectivity Project that stalled must be revived to ensure that the Post offices can be transformed into digital sites.

4.5.5 Cyber Security Policy

- The UPU has approved cybersecurity policy recommendations for Member Countries and their Designated Operators to reduce the incidence of domain hijacking, phishing, and spoofing in the postal sector, which are the leading causes of breaches, identity theft, and fraud.

The Diagram below shows the status of implementation of the Cyber Security Policy by Member States.

Diagram 38

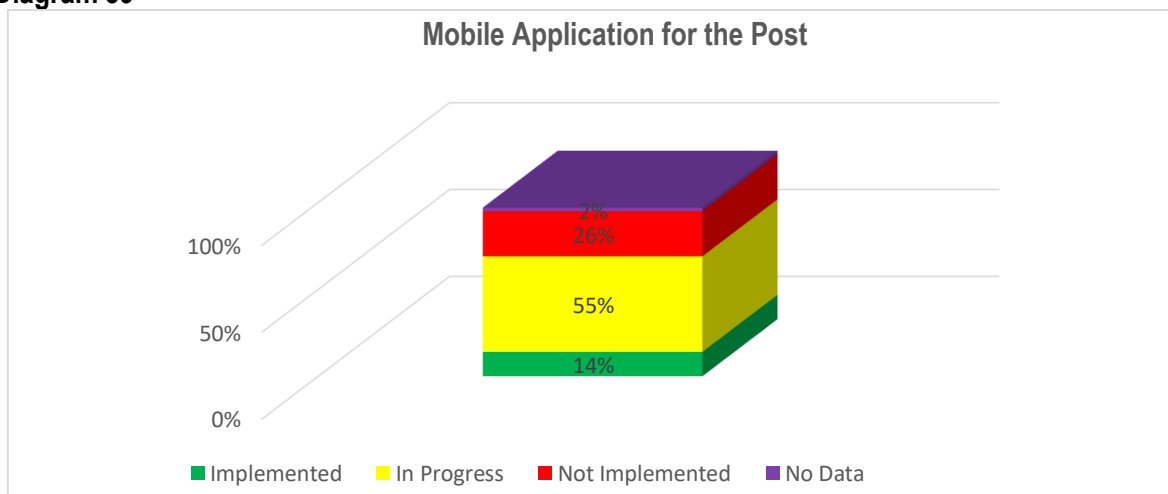


- 33% have implemented a cybersecurity policy.
- 43% are in the process of implementing it,
- 24% have not yet implemented.
- Cyber-attacks represent a significant risk that has the potential to disrupt operations.
- Customer and business information must be protected following Data Protection protocols.

4.5.6 Mobile Application for the Post

The Diagram below shows the implementation status of the Mobile Application for the Post by DOs.

Diagram 39

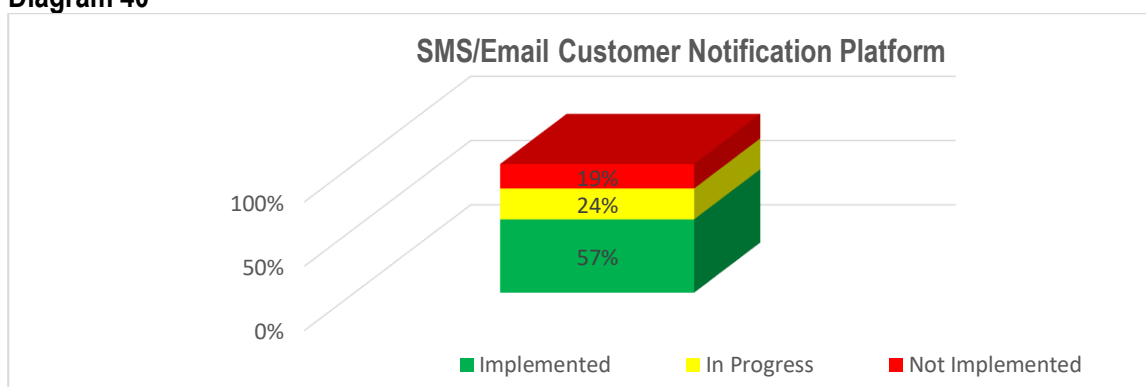


- The Mobile Application for the post office is implemented in 14% of the DOs that responded to the questionnaire.
- 55% are in the process of implementing, while 26% have not yet implemented.
- The Post in Africa needs to intensify its operations in Mobile Wallet services, which are bringing great convenience in the areas of remittances, payments, fund transfers, collections, agency services, etc.
- Africa has tried and tested mobile money services that started in Kenya as M-Pesa and have been adopted by most Mobile Network Operators.

4.5.7 SMS/email Customer Notification Platform

The Diagram below shows the status of implementation of the SMS/email customer notification platform by Member States.

Diagram 40



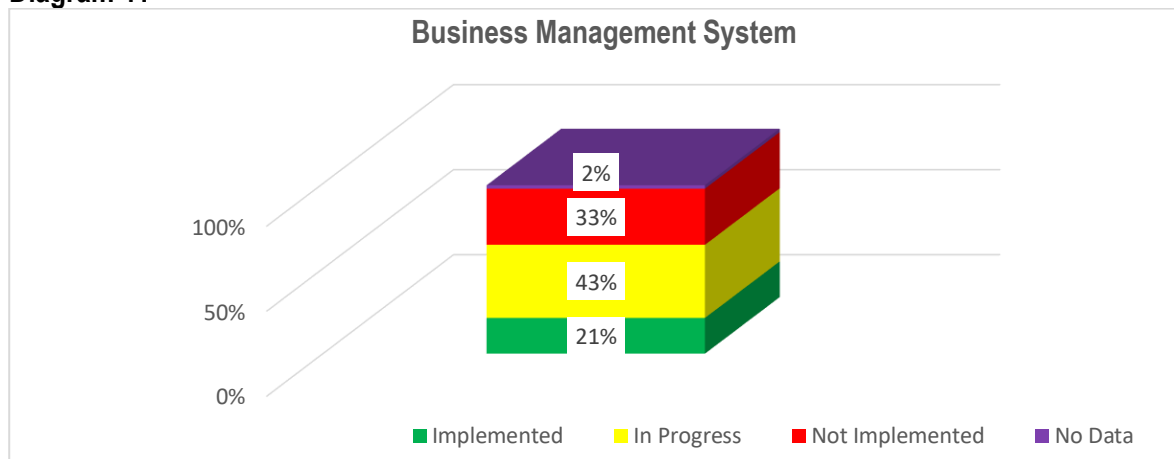
- SMS/Email Notification Platforms have been implemented in most DOs at 57%.
- 24% are in progress, while 19% have not yet implemented this system.

4.5.8 Business Management System

- i) A Business Management System is a set of tools for planning and implementing policies, practices, guidelines, processes, and procedures that are used in the development, deployment, and execution of business plans and strategies, including all associated management activities.

The Diagram below shows the status of implementation of the Business Management System by Member States.

Diagram 41

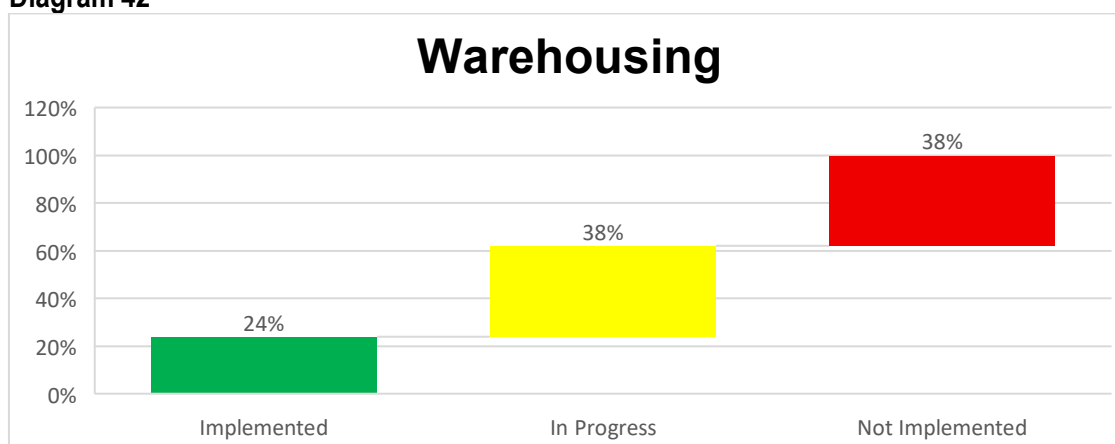


- 21% of DOs have implemented a Business Management System.
- 43% are in progress,
- 3% have not yet implemented.

4.5.9 Warehousing

- i) A warehouse is a material and organizational system that provides storage space. The diagram below shows the status of warehousing implementation by member states.

Diagram 42



- 24% of DOs have implemented warehousing facilities.
- 38% are in progress,
- 38% have not yet implemented.
- Warehousing is essential for specific e-commerce models and can be operated to ensure a quicker turnaround for e-commerce transactions, from online purchases to the last-mile delivery.
- Warehousing operations provide a useful window in utilizing the massive postal real estate infrastructure that has been underutilized due to the low mail business volumes over the past decades.

4.5.10 Recommendations

The following are the recommendations emanating from the infrastructure and mobile applications pillar:

- 1. Designated Operators should accelerate innovations in e-commerce platforms to capture a significant market share in this trade area.**
- 2. Designated Operators are encouraged to focus more on the digitalization of stamps by creating e-philatelic shops for consumers and collectors;**
- 3. Designated Operators are strongly encouraged to develop mobile application solutions for postal services (internally or in partnership between DOs or with Fintechs);**
- 4. The DOs in Africa need to partner with MNOs to provide Mobile Wallets that offer remittances, payments, fund transfers, collections, agency services, etc. The pioneer MPESA service has proven its reliability and stability to the extent that it has been replicated across many networks.**
- 5. Designated Operators are encouraged to develop business management systems.**

4.6 SUPPORT FUNCTIONS

- A company's support functions, or back office, are concerned with all management activities that do not constitute its core business. They ensure the continuity and proper functioning of the company to remain competitive and to manage and support its operational teams in their daily missions.
- These cross-functional roles contribute to operational efficiency, legal compliance, risk management, and achieving corporate objectives.

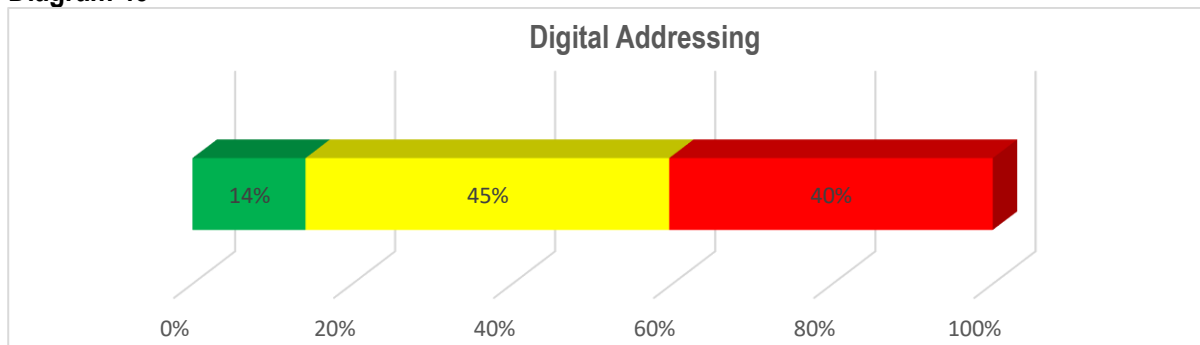
The detailed analysis of the activities under the Support Functions Pillar is illustrated below.

4.6.1 Digital Addressing

- Digital Addressing involves assigning unique, alphanumeric addresses based on GPS data to physical locations, often using digital address codes.

The diagram below shows the status of member states implementing digital addressing.

Diagram 43



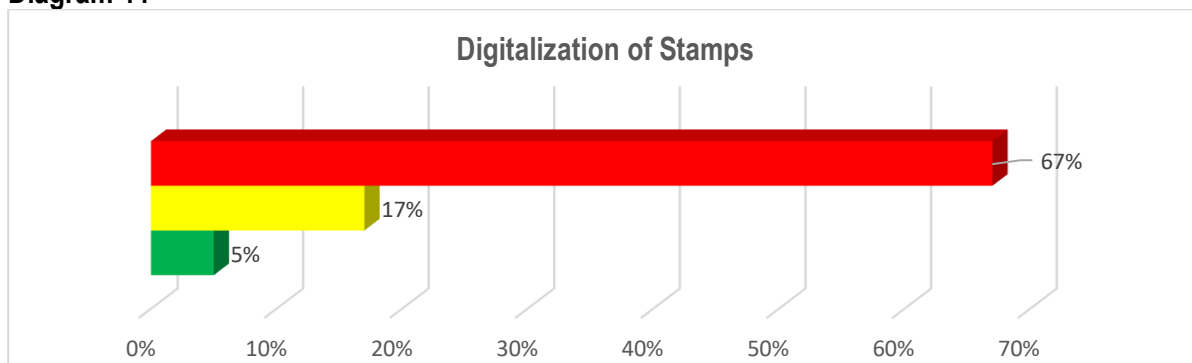
- 14% of the DOs have implemented Digital Addressing.
- 45% are in the process of implementation.
- 40% have not yet been implemented.
- The addressing infrastructure is the backbone for postal delivery services. Its modernization and digitalization can bring more efficiency to postal operations:
 - Improved delivery service;
 - Customer satisfaction boosting;
 - Better delivery routing that is cost-efficient.

4.6.2 Digitalization of Stamps

- i) Posts are using technologies to improve performance and offer new innovative services and products.
- ii) Posts worldwide have been implementing distributed ledger technologies (DLTs) to issue stamps with various digital characteristics.

The Diagram below shows the status of implementation of the Digitalization of Stamps by Member States.

Diagram 44



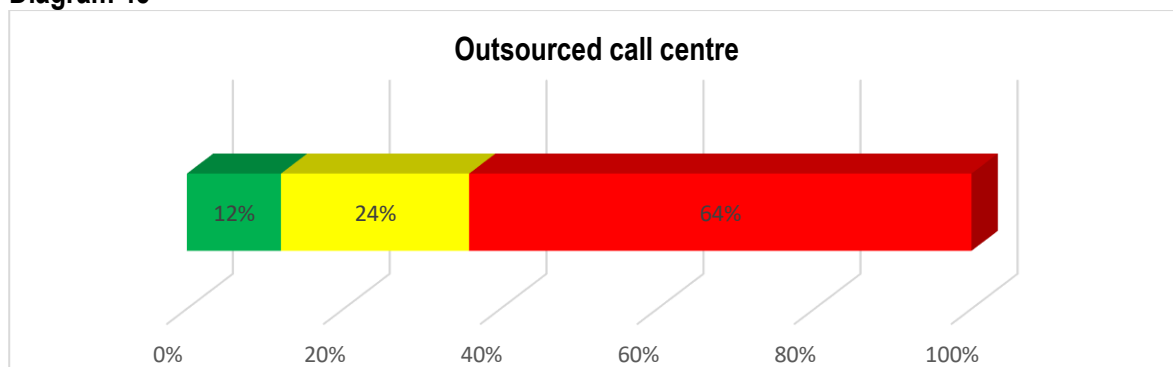
- 5% of the DOs have implemented.
- 17% are in progress.
- 67% have not yet been implemented.
- The process of digitizing stamps is still modest according to the responses received from the DOs.

4.6.3 Outsourced Call Centre

- i) Call Centre outsource companies are considered as one of the most cost-effective ways to ensure an organization's customer service operations are delivered to high standards.

The Diagram below shows the status of implementation of the Outsourced call centre by Member States.

Diagram 45

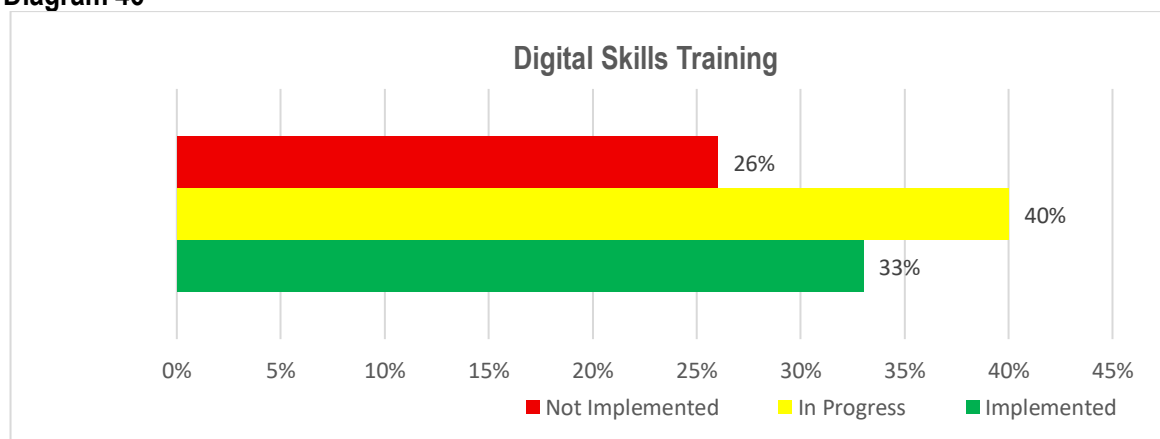


- 12% of DOs that responded to the questionnaire have implemented the Outsourcing call centres,
- 24% are in progress,
- 64% have not implemented.

4.6.4 Digital Skills Training

The diagram below shows the status of implementing Digital Skills Training by Member States.

Diagram 46



- 33% of the DOs that responded to the questionnaire have conducted Digital Skills Training to the Staff,
- 40% are in progress,
- 26% have not implemented
- DOs need to upskill their employees and equip them with digital skills to drive the digitalization agenda.

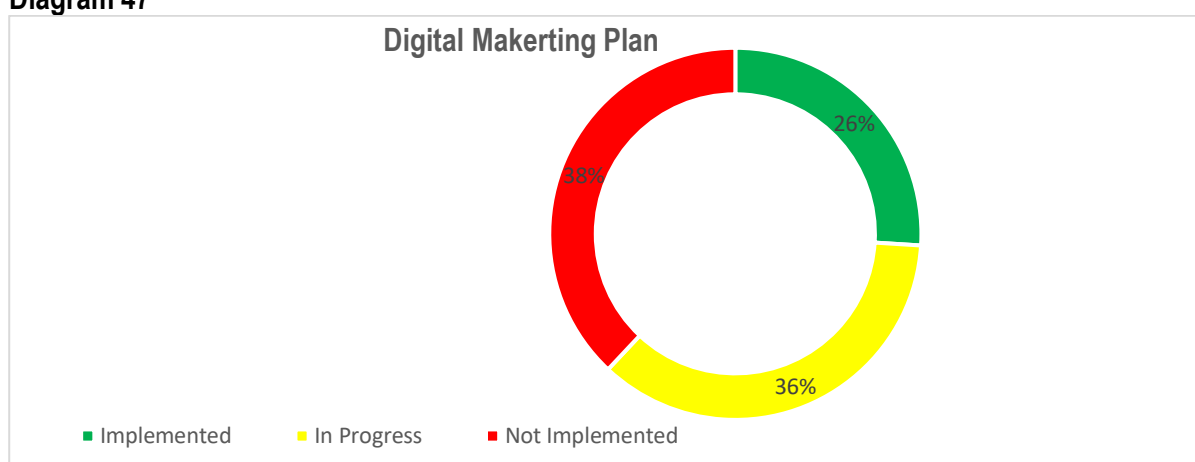
- Employees lacking digital skills are a handicap to the business, as they cannot
 - Identify market opportunities
 - Deliver quality digital services desired by customers
 - Interact with Partners whose businesses are hinging on technology platforms

4.6.5 Digital Marketing Plan

- A digital marketing plan is a strategy outlining how the Post will use Digital Channels to promote its products and services, among others.

The diagram below shows the status of the implementation of the Digital Marketing Plan by Member States.

Diagram 47

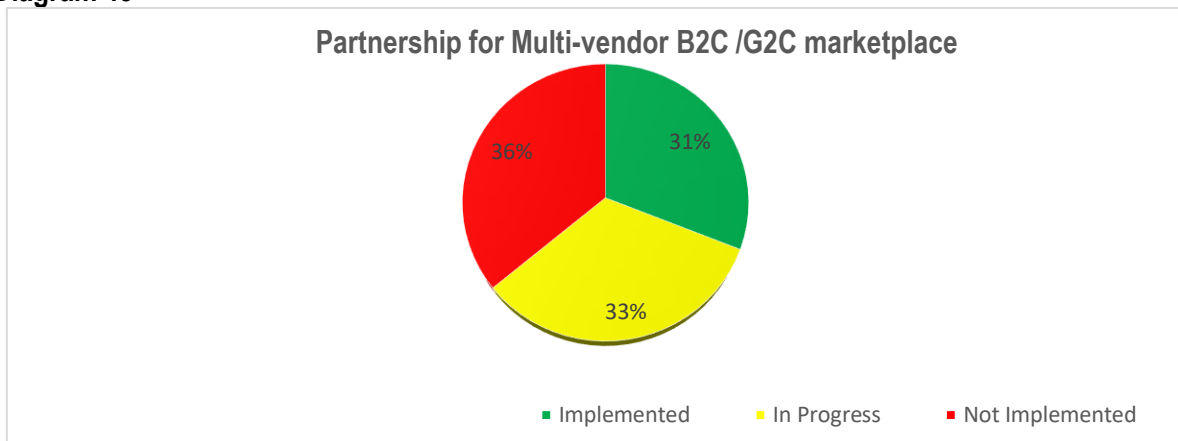


- 26% of the responding DOs have developed Digital Marketing Plans to promote their products and services.
- 36% are in the process of developing Digital Marketing Plans.
- 38% have not implemented.
- A digital marketing Plan is a vital go-to-market tool that ensures that the business fully exploits the technology-based opportunities in the market.

4.6.6 Partnership for multi-vendor B2C /G2C Marketplace

The Diagram below shows the implementation status of the Partnership for Multi-vendor B2C /G2C marketplace by Member States.

Diagram 48

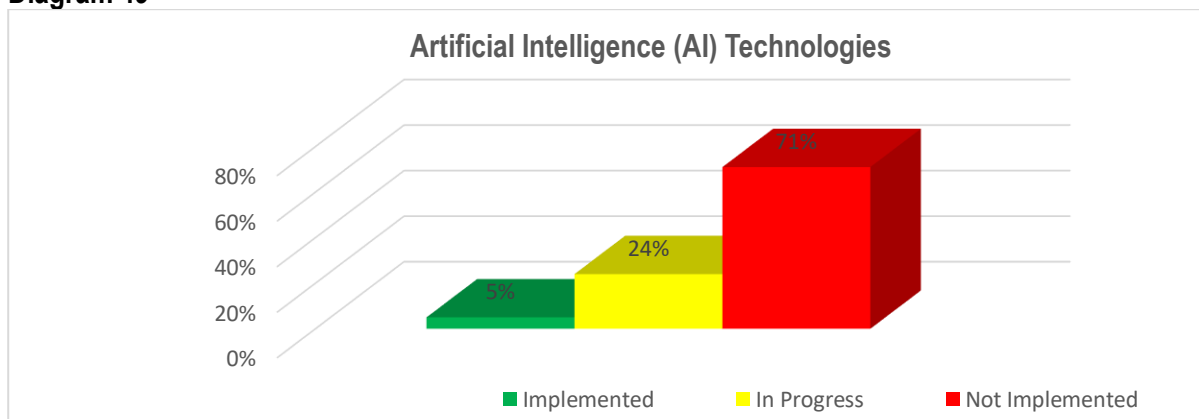


- 31% of DOs have implemented,
- 33% are in the process of becoming partners with a multi-vendor B2C/G2C marketplace.
- 36% have not yet implemented.
- The partnership (B2C/G2C) is in the take-off phase

4.6.7 Artificial Intelligence (AI) Technologies

The diagram below shows the status of member states' implementation of artificial intelligence (AI) technologies.

Diagram 49



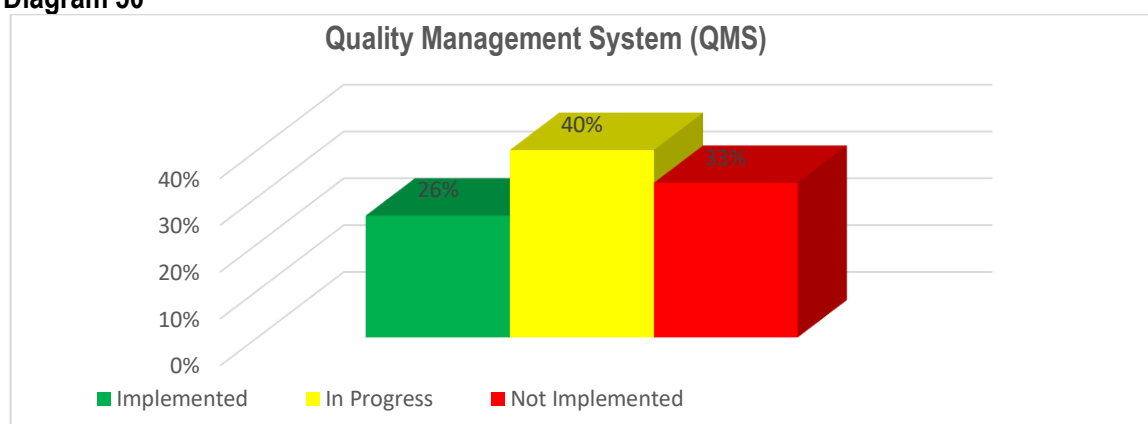
- According to the responses, 5% of the DOs that responded to the questionnaire use AI.
- 24% are in the process of implementing
- 71% have not yet implemented
- The integration of Artificial Intelligence (AI) remains very low, yet the world is moving at a galloping speed in the application of AI.

4.6.8 Quality Management System (QMS)

- i) A Quality Management System is a structured framework that defines and documents an organization's processes, procedures, and responsibilities for achieving policies and objectives.

The diagram below shows the status of the implementation of the Quality Management System (QMS) by Member States.

Diagram 50

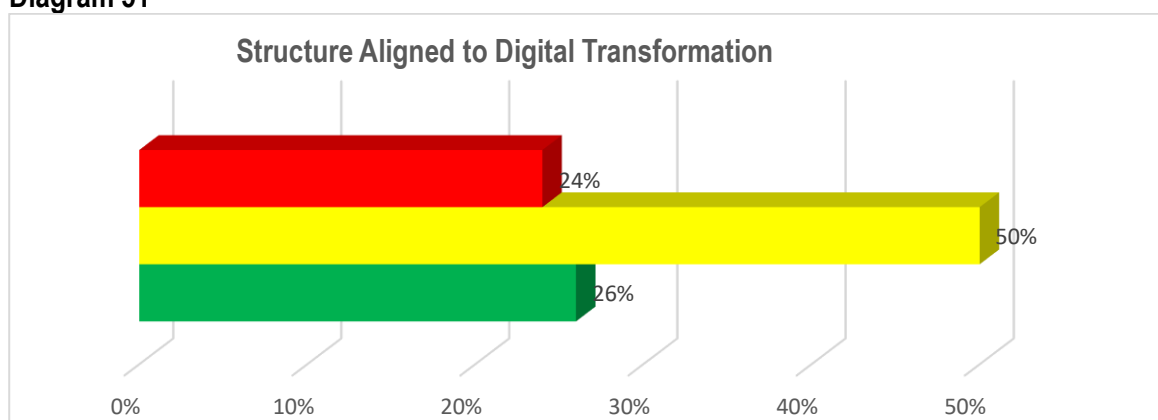


- 26% of the DOs that responded to the questionnaire have already implemented the QMS.
- 40% are still in progress.
- 33% have not implemented QMS.
- QMS is necessary for streamlining processes to achieve efficiencies in service delivery, improve service provision, and manage the cost of service provision.

4.6.9 Structure Aligned to Digital Transformation

The Diagram below shows the status of implementation of the Structure Aligned to Digital Transformation by Member States.

Diagram 51



- 26% of the DOs have implemented the Structure aligned to Digital Transformation.
- 50% are in the process of implementation.

- 24% have not yet implemented.
- Structure follows Strategy; the low (26%) alignment of the structure to digital transformation is indicative of a lack of a comprehensive digital strategy
- DOs are strongly urged to craft digital strategies to ensure the business is ready to play in the digital space.

4.6.10 Recommendations

The following are the recommendations under the Support Functions pillar:

- 1. Designated Operators are encouraged to digitalize stamps in line with global trends, targeting the youth, to ensure continued market development.**
- 2. DOs should strengthen investment in support functions, particularly staff training in cutting-edge technologies such as artificial intelligence, modern management, business monitoring, and decision-making tools;**
- 3. Designated Operators are encouraged to develop digital marketing strategies, which are highly accessible to the new generation, to increase visibility and grow market share.**
- 4. Designated Operators should consider outsourcing some of their functions, such as the call center, for greater efficiency and profitability.**
- 5. Designated Operators should craft a comprehensive digital strategy that covers all business aspects, e.g., operations, marketing, Client Relationship Management (CRM), Information Technology, Human Resources Management, Fleet Management, Mail Logistics, and Real Estate.**

5. CONCLUSION

While African DOs are taking good steps to digitalize postal services, efforts must be stepped up to digitalize financial services and support functions, which account for low scores of 22% and 21%, respectively. The level of digitalization of IT infrastructure and mobile applications remains low at 34%. It is worth noting, however, that the overall implementation rate of projects in the 42 Member States stands at 40%.

The next African Postal Strategy must seek to address the issues that have been identified, especially in the areas of

- Digitalization of services
- E-Commerce growth
- Capacity building targeting Digital skills
- Electricity power backup and internet connectivity
- IT infrastructure deployment
- Market development

6. DECISIONS EXPECTED

The Committee is requested to:

- Adopt the Report on analyzing the Status of Digitalization of Postal Services in Africa Questionnaire.
- Take Note of the Recommendations

FINDINGS ON AFRICA'S IMPLEMENTATION OF THE DIGITALIZATION OF POSTAL SERVICES.

N°	PRODUCT/PILLAR	STATUS OF IMPLEMENTATION			
		Done	WIP	Not Done	NR
		%	%	%	
1-	FINANCIAL AND POSTAL PAYMENTS SERVICES – INDICATE THE EXTENT OF USE OR IMPLEMENTATION OF THE FOLLOWING SYSTEMS/TOOLS BY THE DESIGNATED OPERATOR.				
	i) UPU-IP- UPU Interconnection Platform	21	7	69	2
	ii) International Financial System (IFS)	57	5	36	2
	iii) IFS Domestic System	19	10	67	5
	iv) STEFI	5	2	86	7
	v) BAMS-Bilateral Agreement Management System	12	14	69	5
	vi) QCS Finance Big Data	26	17	75	
	vii) PPS*Clearing	31	12	55	
	viii) FEIS- Financial Electronic Inquiry System	17	12	71	
	ix) PPS e-Compendium - Postal Payment Services Electronic Compendium	19	14	67	
	x) Electronic wallet linked to mobile money	17	29	52	2
	xi) Mobile Money Issuer	29	29	43	
	xii) Digital solution for cash on delivery	12	29	60	
	xiii) "E-banking" solution	21	19	57	2
2-	MAIL SERVICES - INDICATE THE EXTENT OF USE OR IMPLEMENTATION OF THE FOLLOWING SYSTEMS/ TOOLS BY THE DESIGNATED OPERATOR				
	i) International Postal System (IPS)/ IPS.Post/ IPS.Cloud	98	0	2	
	ii) S10 Bar Codes use	93	2	5	
	iii) Exchange of EMSEVT V3 messages	93	5	2	
	iv) Track and Trace	93	5	2	
	v) Internet-Based Inquiry System (IBIS)	83	2	12	2
	vi) Quality Control System (QCS)	88	12		
	vii) Global Monitoring System (GMS)	43	19	38	
	viii) EMS SMART	62	19	19	
3-	SUPPLY CHAIN INTEGRATION – INDICATE THE EXTENT OF USE OR IMPLEMENTATION OF THE FOLLOWING SYSTEMS/ TOOLS BY DESIGNATED OPERATOR				
	i) E-government Services	33	36	26	5
	ii) Customs Declaration System (CDS)	95	2	2	
	iii) Exchange of ITMATT	95	2	2	
	iv) Exchange of CUSITM/CUSRSP with Customs Authorities	43	29	29	
	v) Exchange of ITMREF/REFRSP	57	31	12	
	vi) CDS Kiosk	50	33	17	
	vii) EAD Customs Declarations Application	67	24	10	
	viii) Exchange of CARDIT/RESBIT with Airlines	71	14	12	2
	ix) .POST top-level domain	38	10	50	2
	x) OSCAR – the Online Solution for Carbon Analysis and Reporting	7	21	69	2
	xi) WADP Numbering System (WNS)	21	12	64	2
	xii) Use of the IPS-CDS Telematics tool	55	29	14	2

	xiii) Electronic counter solution (POS & ePOS)	29	21	50	
	xiv) Relay Points and Smart Lockers	7	29	69	2
4-	INFRASTRUCTURE AND MOBILE APPLICATIONS - INDICATE THE EXTENT OF DEVELOPMENT AND IMPLEMENTATION OF THE FOLLOWING SYSTEMS BY THE DESIGNATED OPERATOR				
	i) E-commerce Platform	31	43	26	
	ii) E-philately Shop	31	31	38	
	iii) Interactive Website	57	26	14	2
	iv) Post Office power & connectivity back-up	36	45	17	
	v) Cyber Security Policy	33	43	24	
	vi) Mobile Application for the Post.	14	57	26	2
	vii) SMS/email customer notification platform	57	24	19	
	viii) Business Management System	21	43	33	2
	ix) Warehousing	24	38	38	
5-	INDICATE THE EXTENT OF USE OR IMPLEMENTATION OF THE FOLLOWING SUPPORT FUNCTIONS BY THE DESIGNATED OPERATOR.				
	i) Digital Addressing	14	17	67	2
	ii) Digitalization of Stamps	12	24	64	
	iii) Outsourced Call Centre.	33	40	26	
	iv) Digital Skills Training	26	36	38	
	v) Digital Marketing Plan	31	33	36	
	vi) Partnership for multi-vendor B2C and/or G2C marketplace	31	33	36	
	vii) Artificial Intelligence (AI) Technologies	5	24	71	
	viii) Quality Management System (QMS)	26	40	33	
	ix) Organizational Structure aligned to digital transformation	26	50	24	