



FEEDBACK FROM RESPONSES TO THE AFRICAN POSTAL REGULATION SURVEY

Le 18th June 2025

SOMMAIRE

I

OBJECTIVES OF THE AFRICAN POSTAL REGULATION SURVEY

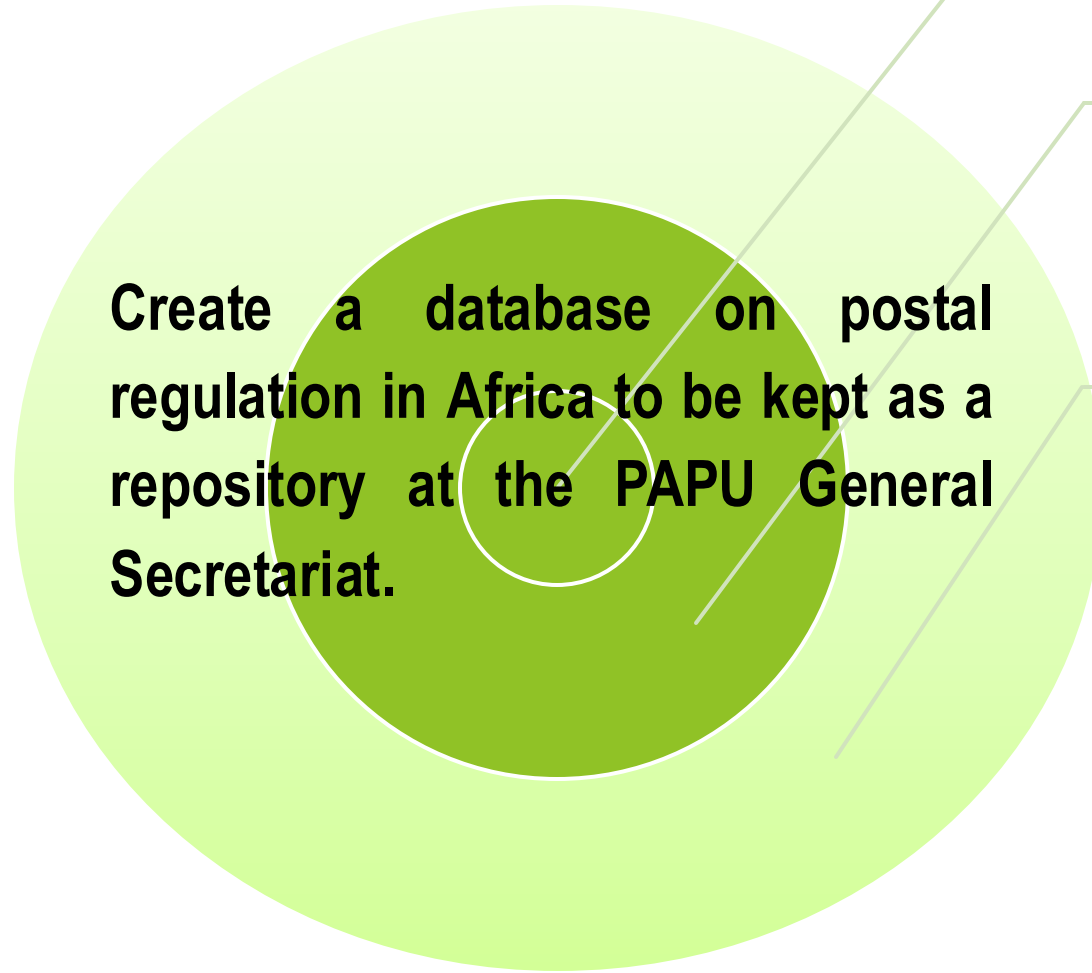
II

SURVEY METHODOLOGY

III

SURVEY FEEDBACK

OBJECTIVES OF THE AFRICAN POSTAL REGULATION SURVEY

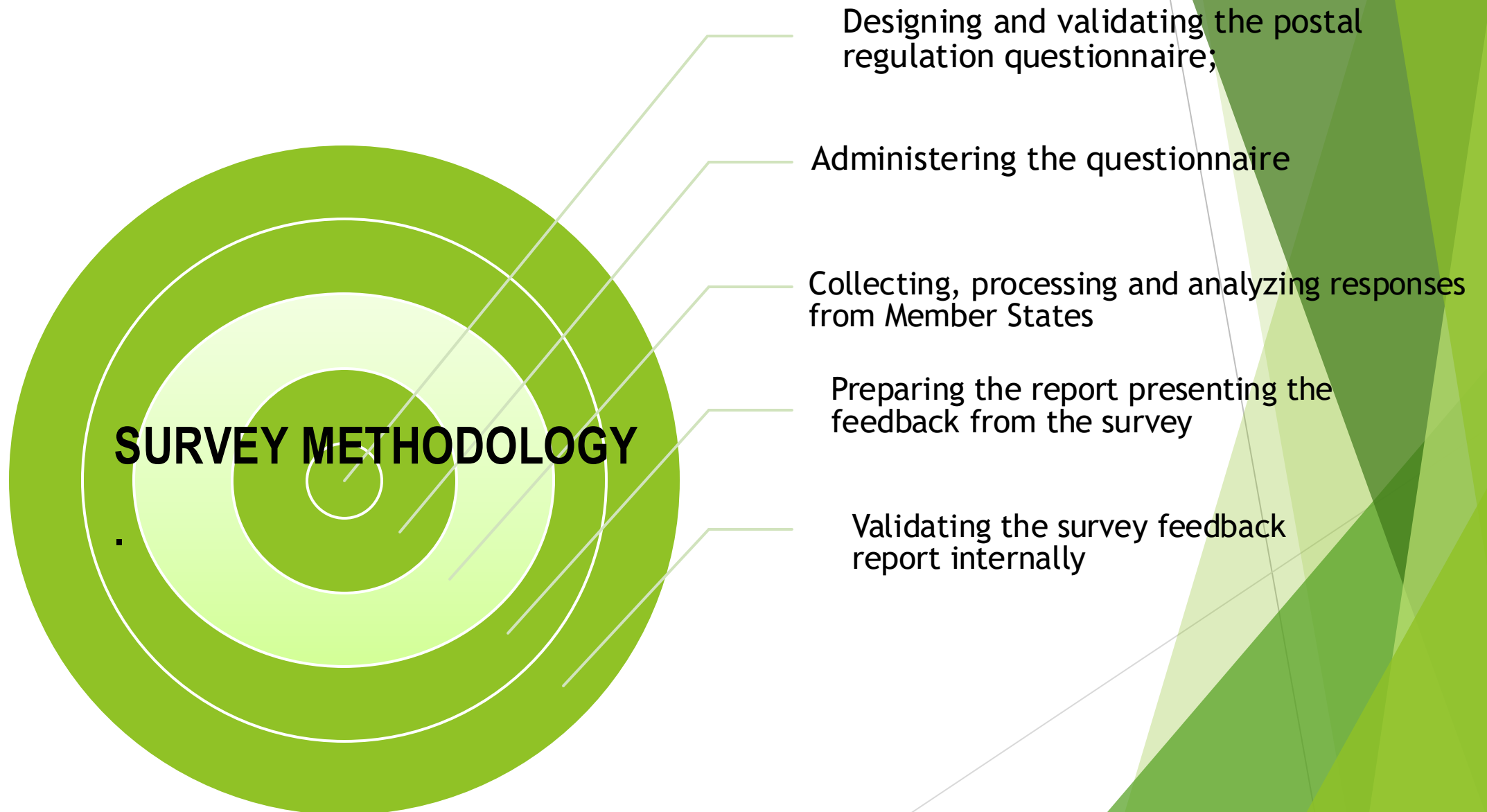


Helping the PAPU Secretariat General to take stock of postal regulation in Africa;

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

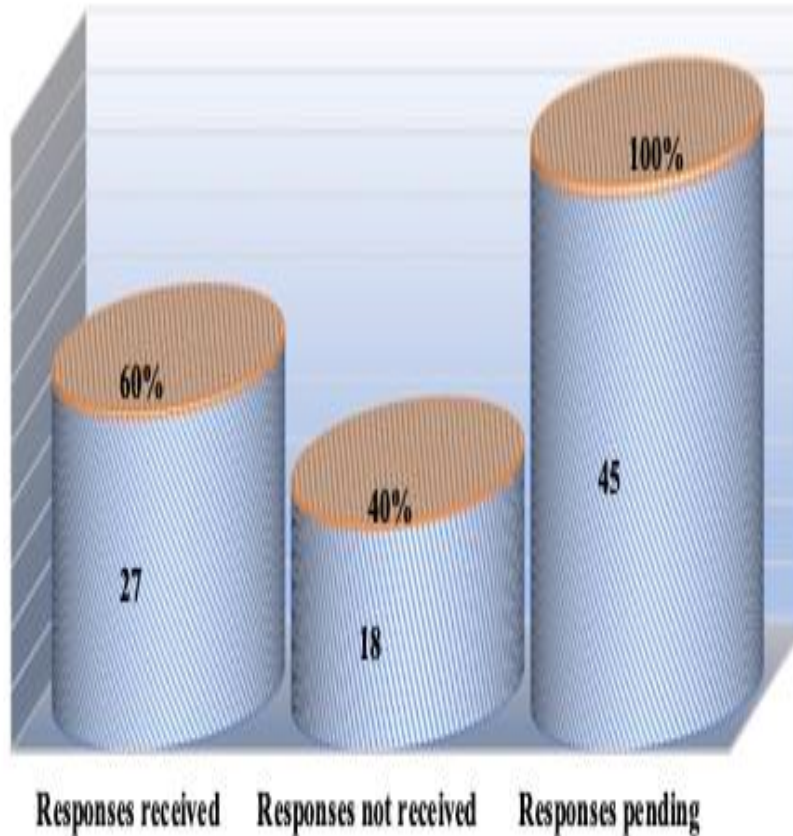
SURVEY METHODOLOGY



SURVEY FEEDBACK

RESPONSES (NUMBER/RATE)

Number Percentage



Analysis

- With more than half of PAPU Member States having responded to the questionnaire, the response rate can be considered to be fairly satisfactory

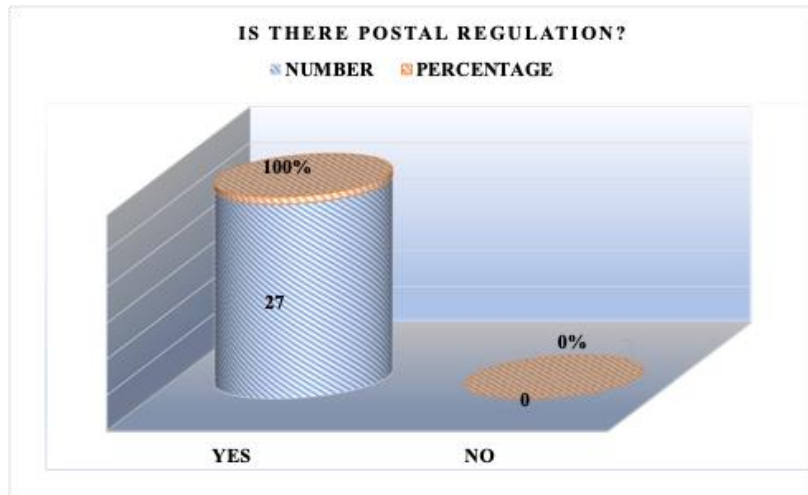
Recommendation

- 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.

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

SURVEY FEEDBACK

Do you have postal regulation?



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

- 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.

SURVEY FEEDBACK

WHAT TYPE OF POSTAL REGULATION SYSTEM DO YOU USE?

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

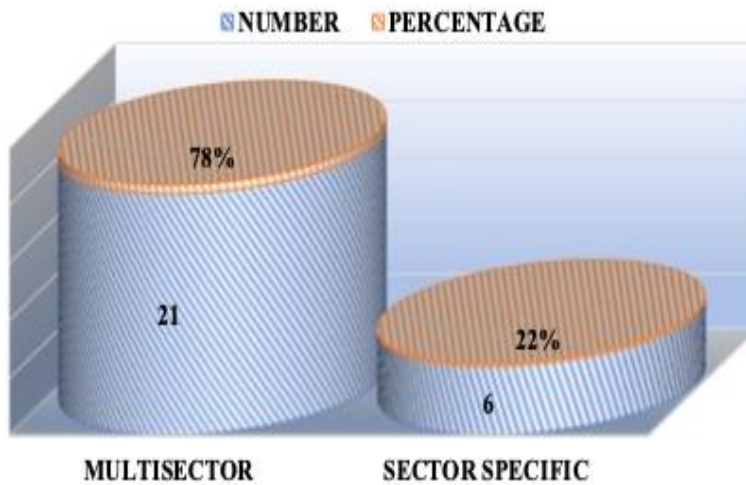
Analysis

- 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
- 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.

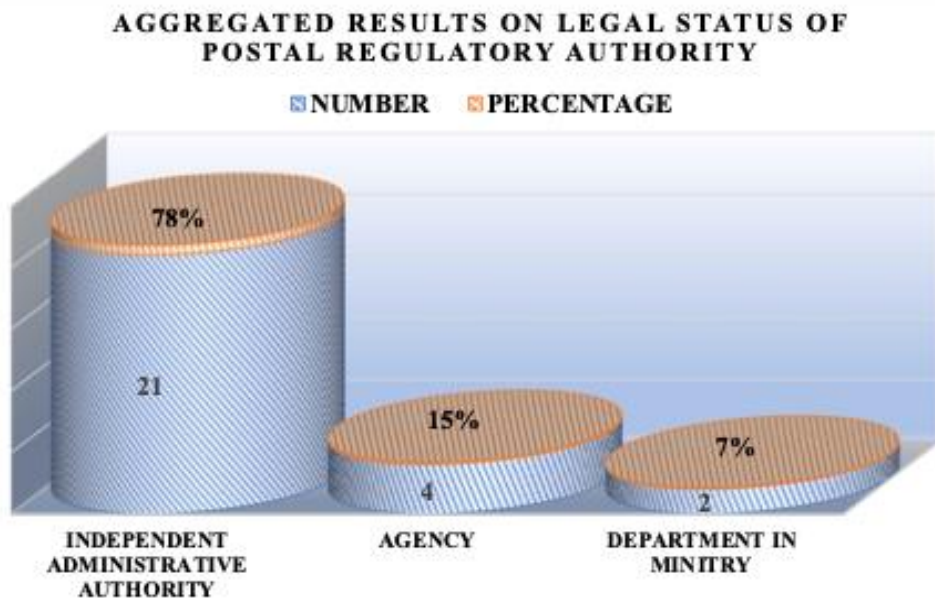
Recommendation

- *it is recommended that PAPU Member States seriously consider establishing multi-sector regulatory authorities to cover postal regulation as well*

AGGREGATED RESULTS ON TYPE OF REGULATION



WHAT IS THE STATUS OF THE ENTITY RESPONSIBLE FOR POSTAL REGULATION?



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. 22%) 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

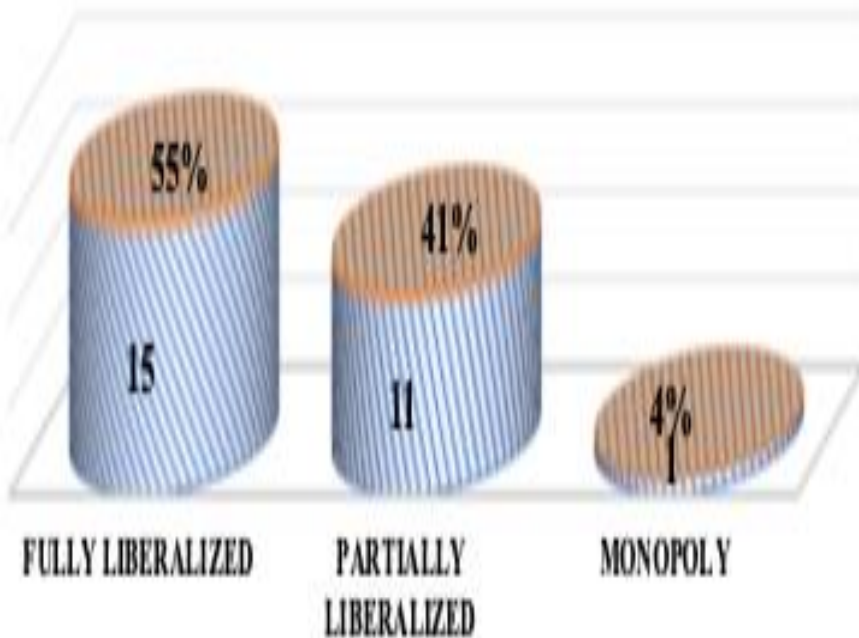
Recommendation

- *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.*

TO WHAT EXTENT IS THE POSTAL MARKET OPENED UP?

AGGREGATED RESULTS ON POSTAL MARKET LIBERALIZATION

■ NUMBER ■ PERCENTAGE



Result

- 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.

Analysis

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

Recommendation

- *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.*

AVAILABLE POLICY OR STRATEGY FRAMEWORKS

Result

- All other Member States, excluding the Central African Republic, have a legal framework for regulation, which is also the legal basis for postal regulation;
- South Africa, Burkina Faso, Democratic Republic of Congo, Zambia, Niger, and Nigeria have a national postal strategy in addition to the legal framework for regulation

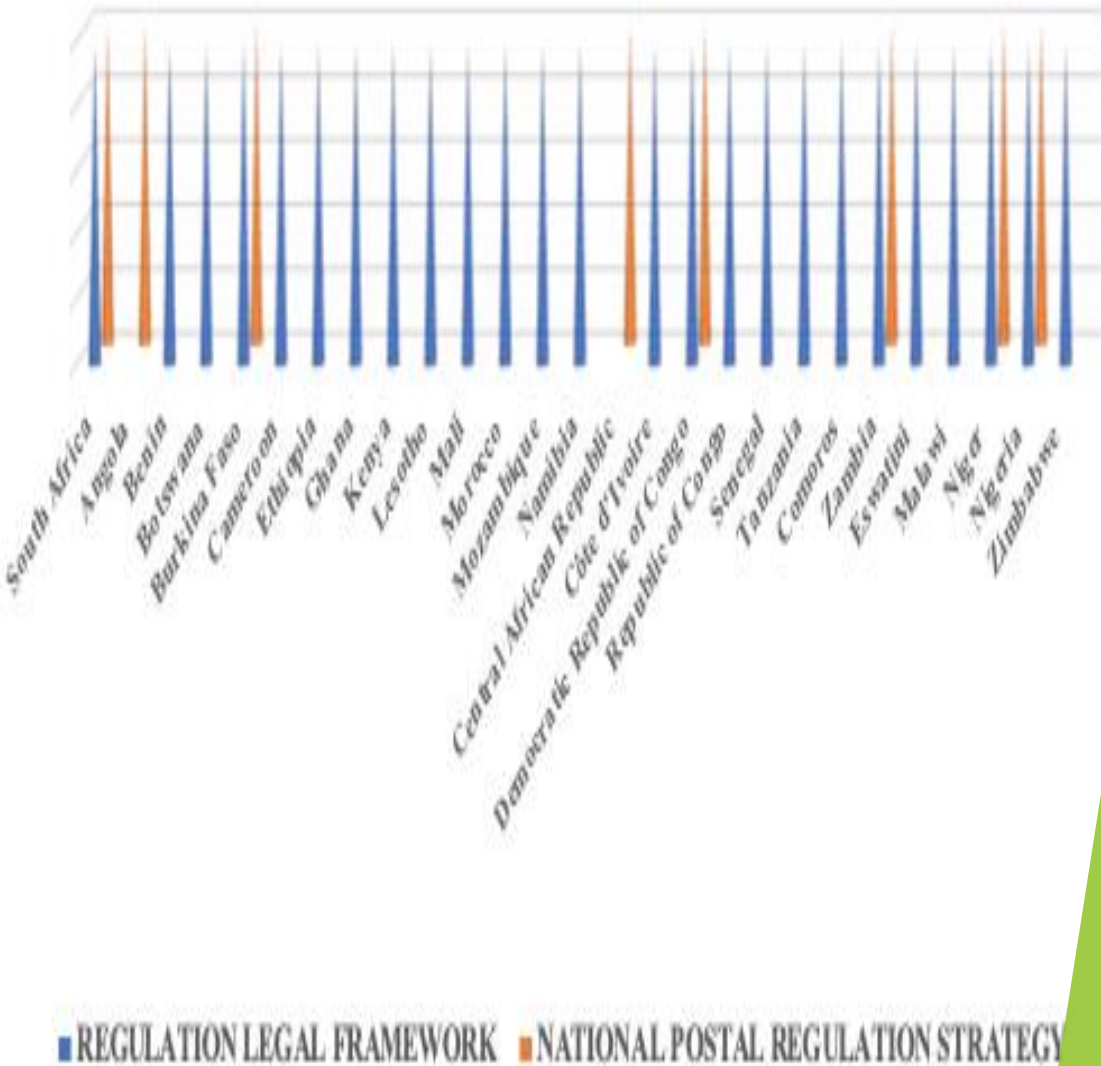
Analysis

While a legal framework is essential for effective regulation of postal activities, it is not sufficient on its own. In addition to the legal framework for regulation, member states must adopt strategic documents to, among other things, define priorities, strategic and operational objectives, potential risks and the necessary resources, anticipate challenges, promote innovation and consider future prospects.

Recommendation

Member States that do not have Strategic or Policy framework are recommended to adopt a strategic planning document for postal regulation.

AVAILABLE POLICY OR STRATEGY FRAMEWORKS



WHAT IS THE SCOPE OF POSTAL REGULATION?

Result

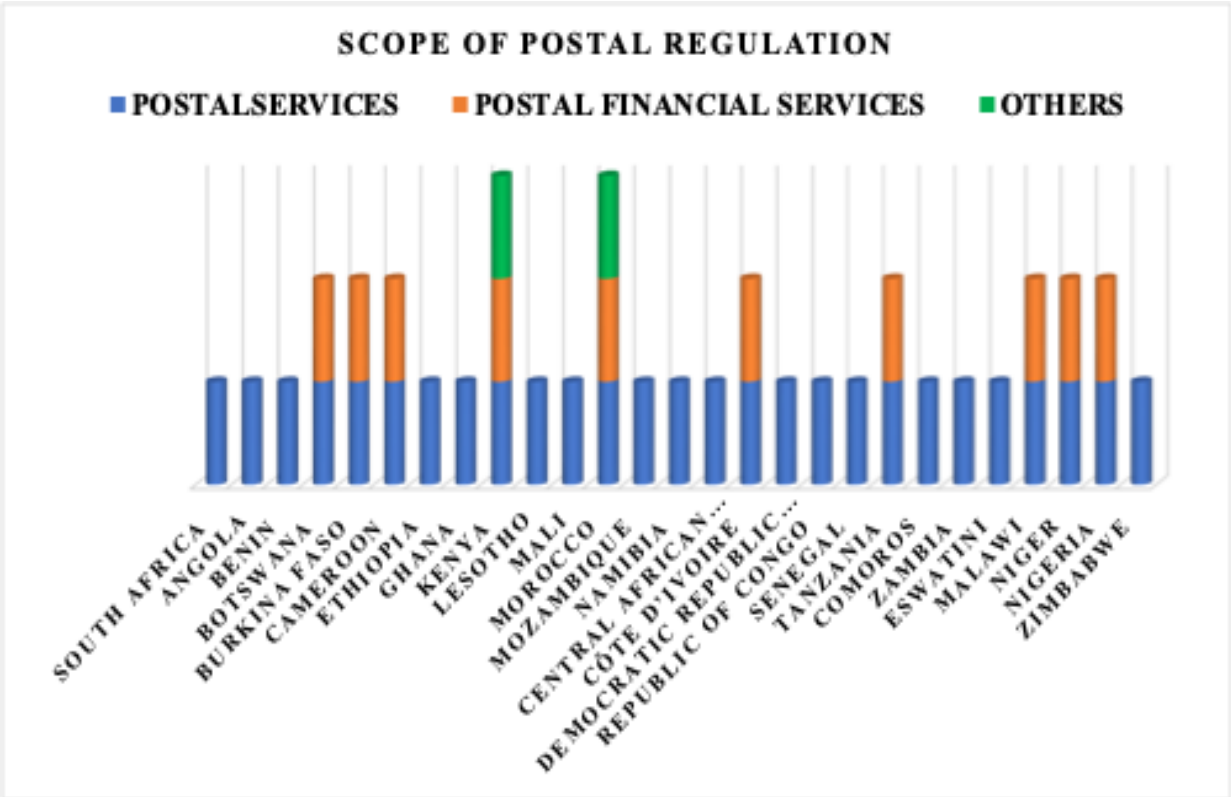
- Postal regulation covers postal services in all the Member States that replied to the questionnaire. In addition to postal services, it covers financial services in the following Member States: Botswana, Burkina Faso, Cameroon, Kenya, Morocco, Côte d'Ivoire, Malawi, Niger, Nigeria and Tanzania. However,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

- Member States, which have not yet done so, extend postal regulation to postal financial services and electronic services.



WHAT IS THE SCOPE OF UNIVERSAL POSTAL SERVICE ?

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;
- Benin and Tanzania have included electronic
- Some Member States, the scope of the postal service has not been defined or is in the process of being defined (**Namibia, Lesotho and Kenya**)

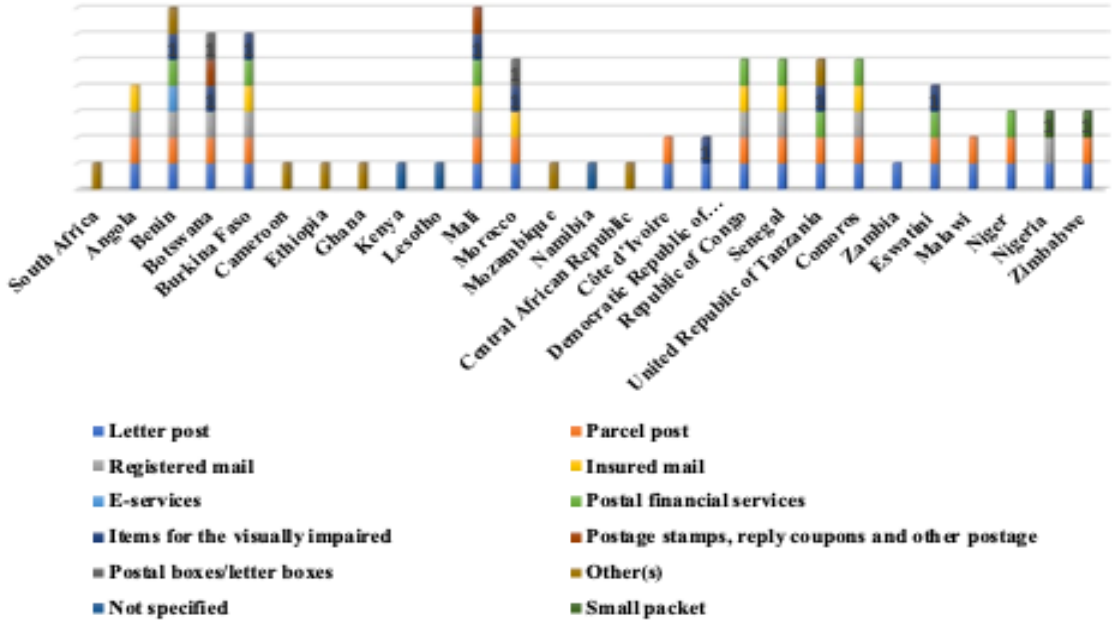
Analysis

The current context, marked by the emergence of Information and Communication Technologies (ICTs) as well as the changing needs of consumers of postal services towards digital products requires update of the portfolio of postal products and services

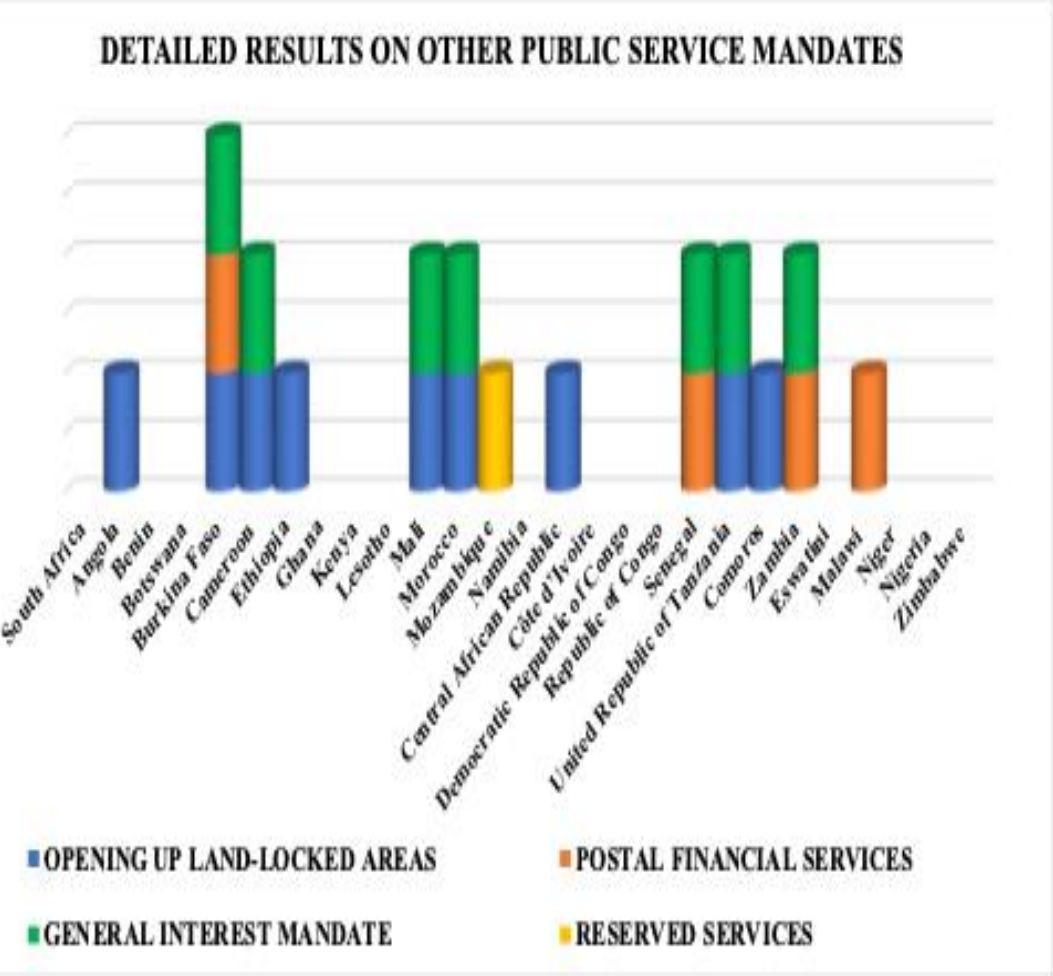
Recommendation

It is 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.).

SCOPE OF UNIVERSAL POSTAL SERVICE



WHAT OTHER PUBLIC SERVICE RESPONSIBILITIES ARE ENTRUSTED TO THE DESIGNATED OPERATOR?



Result

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.

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

Analysis

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.

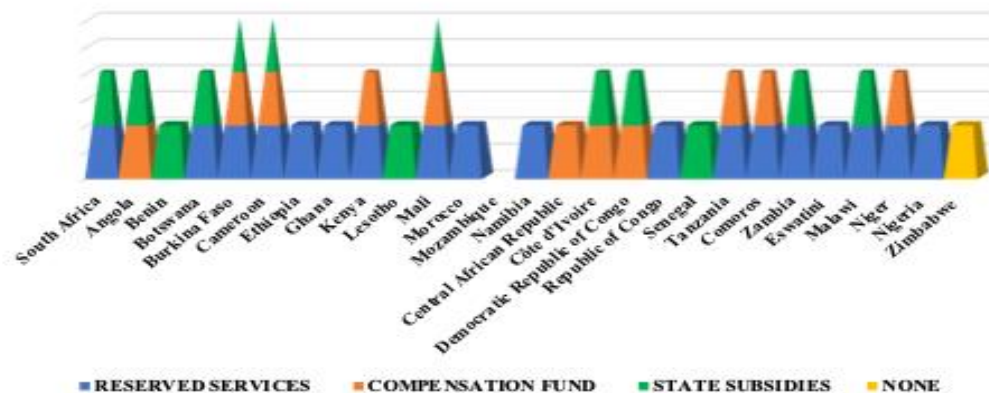
This generates additional costs distinct from those resulting from the provision of the universal postal service

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 (may involve, but are not limited to, subsidies or a dedicated fund)

WHAT COMPENSATION MECHANISM(S) ARE USED TO RECOUP UNIVERSAL POSTAL SERVICE COSTS?

UPS COST COMPENSATION MECHANISMS



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

ANALYSIS

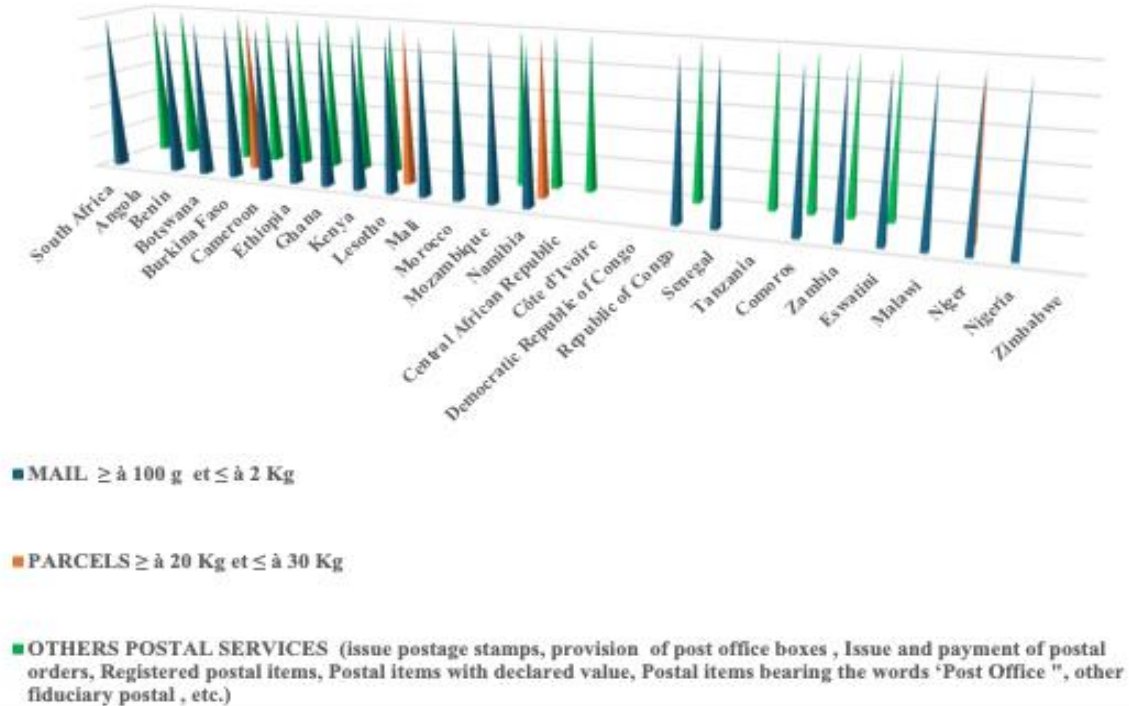
The provision of the universal postal service generates a shortfall (unfair charges) for the designated operators. It is therefore necessary to compensate for the net cost incurred in order to guarantee the continuity of the effective provision of the universal postal service

RECOMMENDATION

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

WHAT IS THE SCOPE OF RESERVED POSTAL SERVICES?

SCOPE OF RESERVED POSTAL SERVICES



Result

Out of 27 respondents, the following Member States have not defined the scope of reserved postal services: the Republic of Côte d'Ivoire, the Democratic Republic of Congo, and Zimbabwe.

the reserved postal services, for those Member States that have them, mainly include: Mail, Parcel Post and others postal services (issue of postage stamps, registered postal items, postal items with declared value, the rental of post office boxes and the issue and payment of postal money orders)

Analysis

Reserved postal services are provided for in many national regulatory frameworks and constitute one of the mechanisms for compensating the net cost of the universal postal service. However, Member States face many difficulties in ensuring that private postal operators effectively comply with the reserved services.

Recommendation

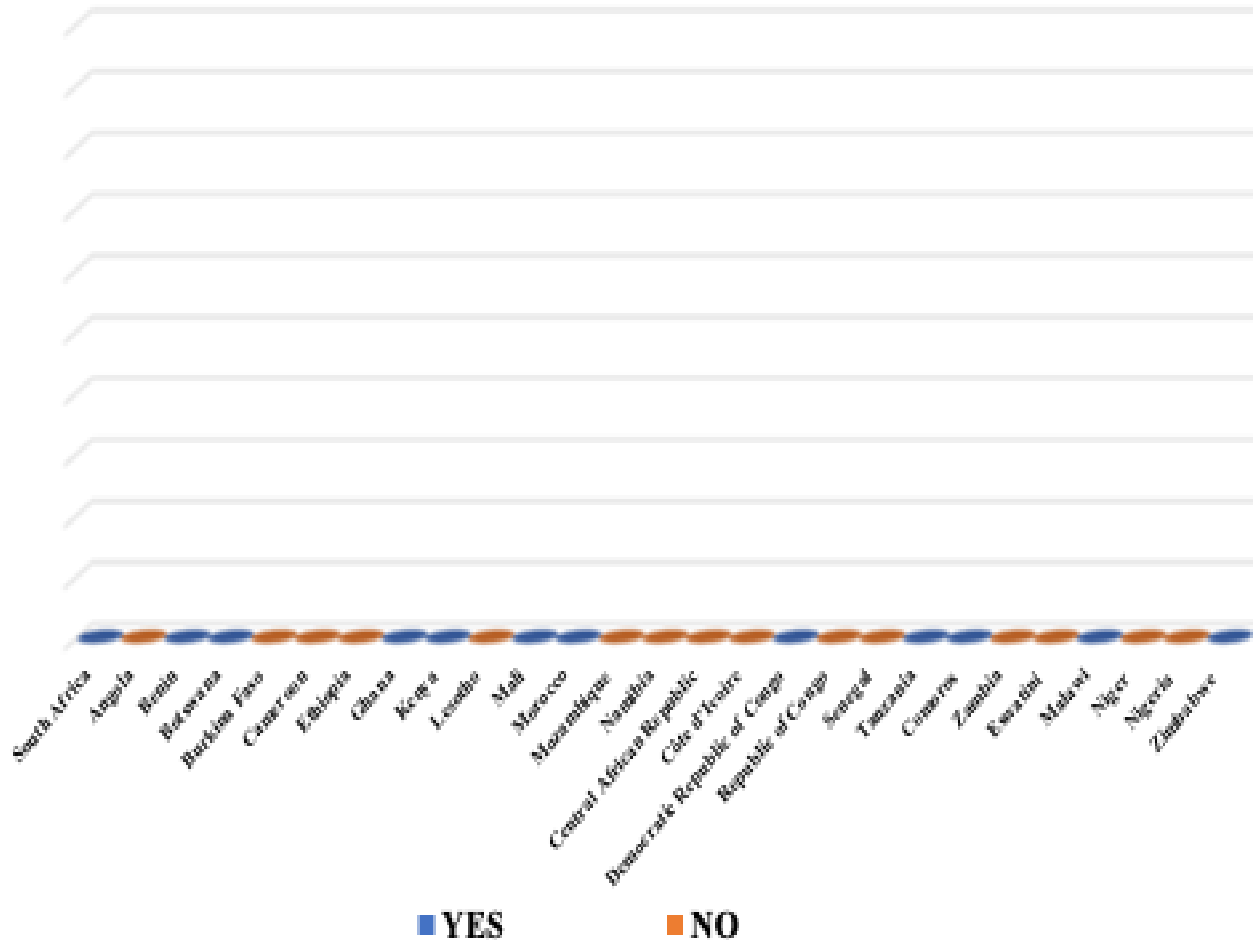
It is recommended that member states:

- Fully liberalize the postal sector and, in return, increase the contribution rate of private operators to the compensation fund or;

Gradually liberalize the postal sector by gradually reducing the weight limits for reserved postal services..

IS THERE A FRAMEWORK AGREEMENT BETWEEN THE STATE/GOVERNMENT AND THE DESIGNATED OPERATOR?

DETAILED RESULTS ON WHETHER THERE IS A FRAMEWORK AGREEMENT



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

Analysis

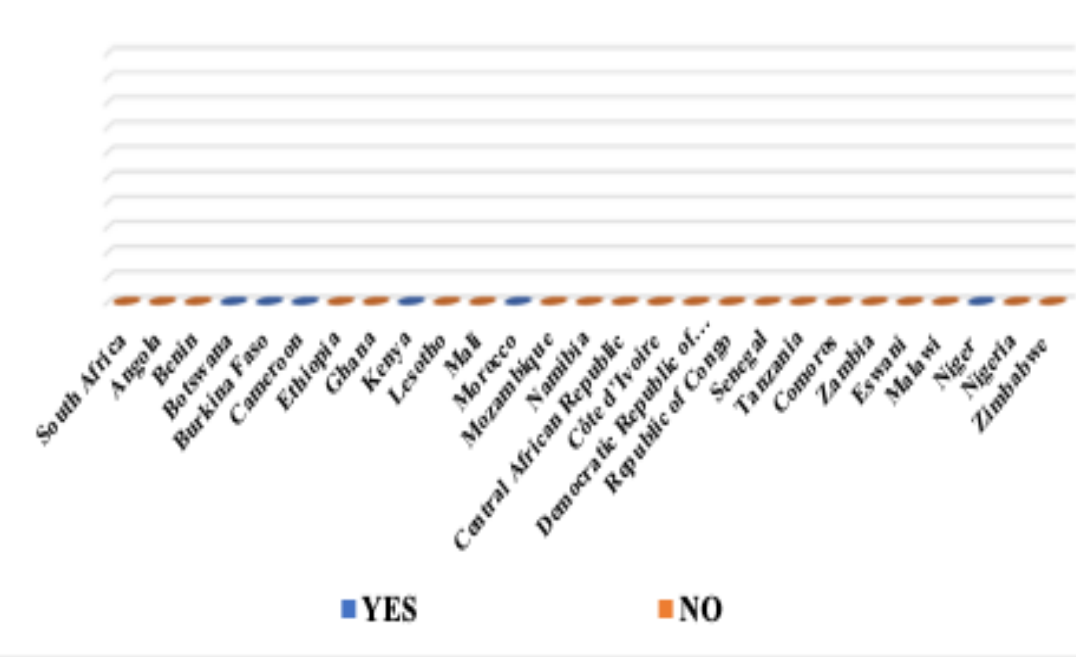
- The framework agreement is an important way of supporting designated operators in fulfilling their public service mandates. It indeed makes it possible to enshrine the commitments made and specify the State's contributions to the fulfilment of public service mandates. State contributions may be in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

Recommendation

- *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.*

IS THE COST OF PROVIDING UNIVERSAL POSTAL SERVICE USUALLY RECOVERED?

DETAILED RESULTS ON ROUTINE COMPENSATION OF UPS NET COST



Result

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.

Results

- 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

Analysis

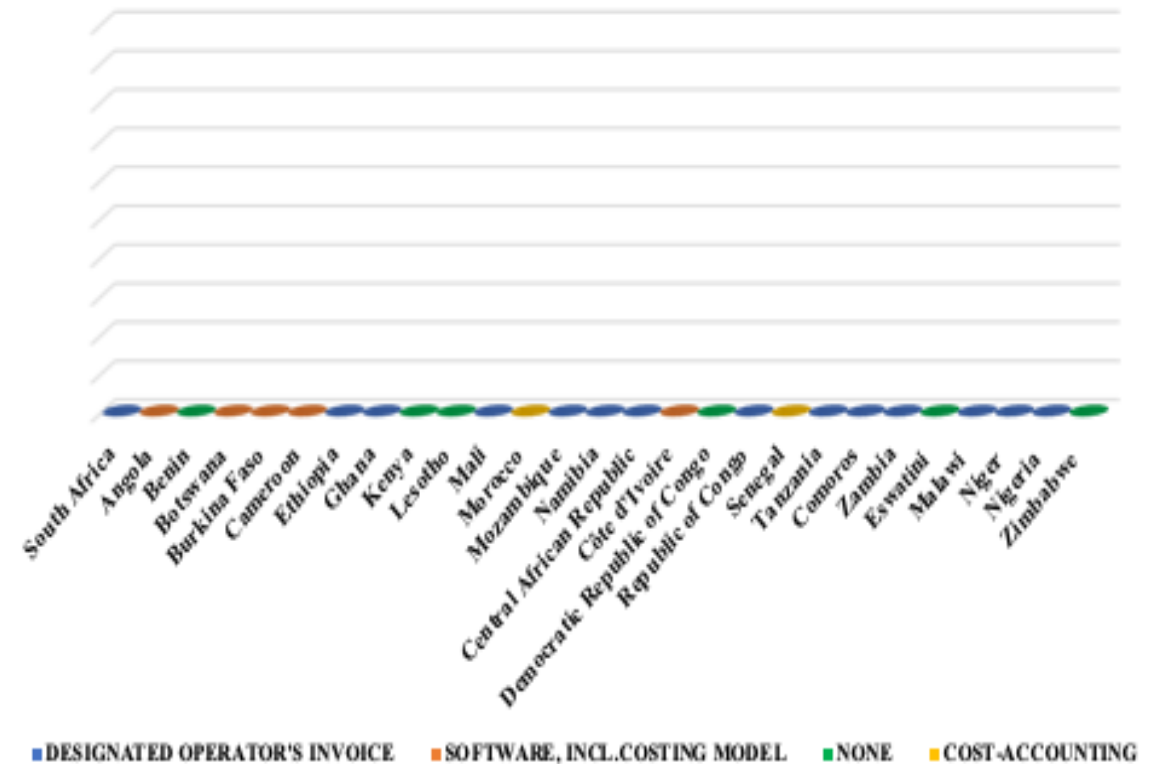
- Determining the actual net cost is a sine qua non for fair compensation of the net cost of universal postal service. In this respect, operators and postal regulators must introduce cost accounting.

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.

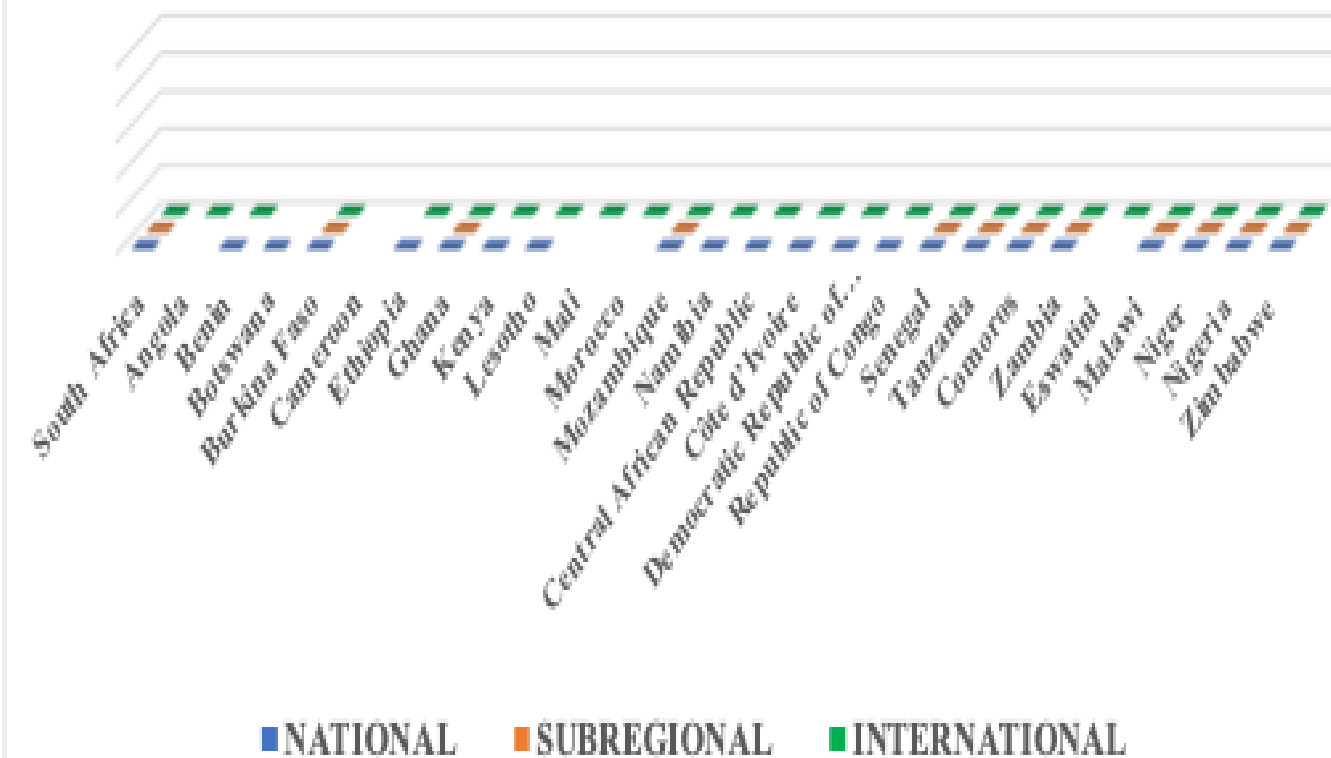
HOW DO YOU ESTABLISH YOUR UNIVERSAL POSTAL SERVICE COST?

UPS NET COST-SETTING MECHANISMS



WHAT IS THE SCOPE OF THE PERMIT OR LICENSE GRANTED TO POSTAL OPERATORS IN YOUR COUNTRY?

SCOPE OF AUTHORIZATION/LICENSES



Result

- The scope of authorizations/licenses varies from one Member State to another. With the exception of Angola, Mali, Morocco, and Zambia, which have only provided for an international licensing regime, all other Member States have provided for at least two (02) regimes: national and international, or national, subregional, and international.

Analysis

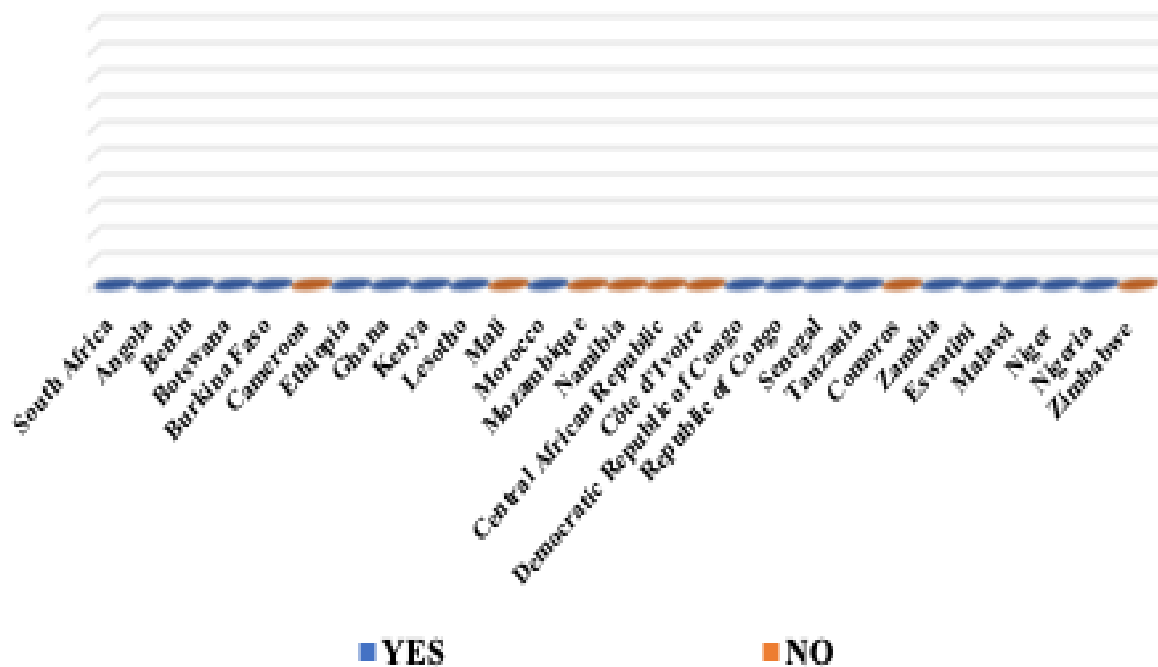
- It is therefore clear that there is a proliferation of authorization regimes in many Member States..

Recommendation

- The General Secretariat recommends to Member States to establish a licensing system, taking into consideration the needs of market, competition, coverage of postal services and postal services customer satisfaction.

DO YOU HAVE TOOLS TO ASSESS QUALITY OF SERVICES DELIVERED BY POSTAL OPERATORS?

DETAILED RESULTS ON WHETHER THERE ARE QoS ASSESSMENT
SYSTEMS



RESULT

- Only eight respondent Member States (i.e. 30%) do not have QoS assessment systems. In contrast, **19 respondent Member States (i.e. 70%)** have introduced tools for assessing the quality of service.

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.

THE MAIN CHALLENGES



Ensuring healthy and fair competition



Fair compensation for the net cost of universal postal service



Reforming and harmonizing the legal framework for postal regulation in Africa, taking into account innovative postal services;



Enhance satisfaction and protection of consumers of postal services



Build capacities of regulators, particularly in the new lines of activity brought about by technological breakthroughs;



Developing a harmonized institutional framework for postal regulation in Africa

THE MAIN CHALLENGES



Enhance collaboration among regulators



Strengthen cooperation between postal sector players at national and international level;



Encouraging greater investment in the postal sector



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;

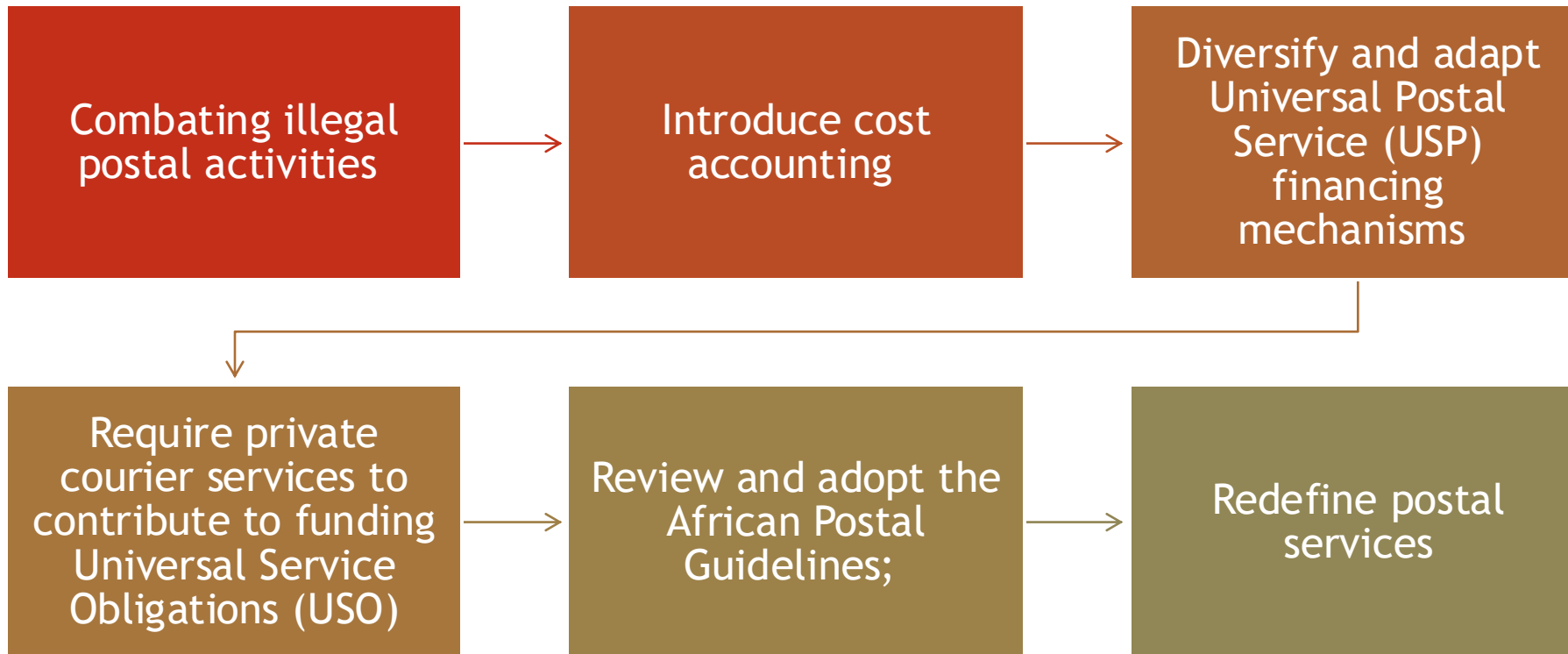


Ensure effective regulation of e-commerce and digital financial services;



Reduce the environmental footprint of postal activities

RECOMMENDATIONS



RECOMMENDATIONS



Clearly differentiate postal services from delivery services and the logistics services



Develop service quality standards



Standardize the scope of postal regulation, taking into account postal and postal financial services



Redefine the scope, content and obligations of UPS



Strengthen the regulatory powers of postal regulators



Harmonize postal regulation policies and procedures

RECOMMENDATIONS



Develop harmonized regulations and monitor their implementation



Propose postal regulation policies



Improve satisfaction and protection of consumers of postal services



Introduce systems for assessing and inspecting service quality and compliance with obligations;



Strengthen controls on postal operators' obligations



Organize capacity-building sessions for postal operators and regulators



Strengthen the independence and autonomy of postal regulators



Pool infrastructure and other resources needed for postal regulation



Appoint a focal point per country to monitor and evaluate postal regulatory activities



Develop a road map for focal points



Set up an African association of postal regulators



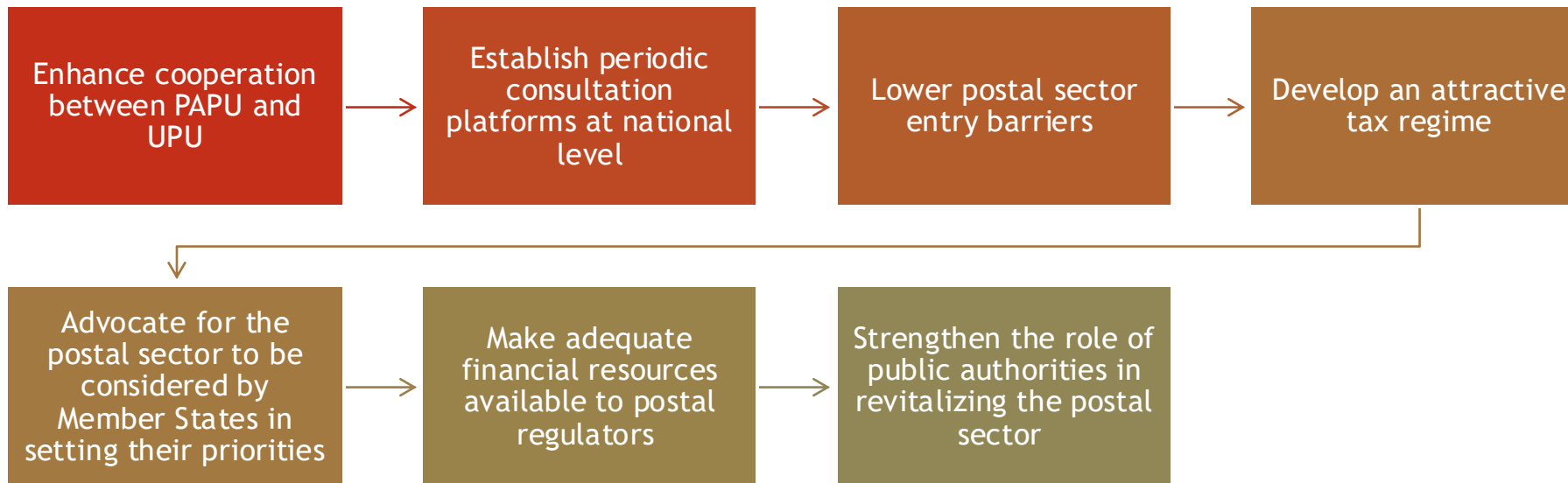
Strengthen regional cooperation



Strengthen collaboration and cooperation between regional and international organizations, including UPU, PAPU, Restricted Unions...

RECOMMENDATIONS

RECOMMENDATIONS



RECOMMENDATIONS



SIGN FRAMEWORK AGREEMENTS
BETWEEN POSTAL OPERATORS AND
MEMBER STATES



ESTABLISH CO-REGULATION
BETWEEN POSTAL REGULATORS AND
OTHER RELEVANT STAKEHOLDERS



FORM A WORKING GROUP ON
SUSTAINABLE DEVELOPMENT

DECISION EXPECTED



The Policy and Regulation Committee is called upon to:

- consider the document and make any relevant comments, observations or proposals;
- Submit the challenges and recommendations to the Administrative Council for adoption



Merci pour votre aimable attention!

