



Postal Vision 2030: Global survey results 2024

Assessment of member countries' progress
towards Postal Vision 2030



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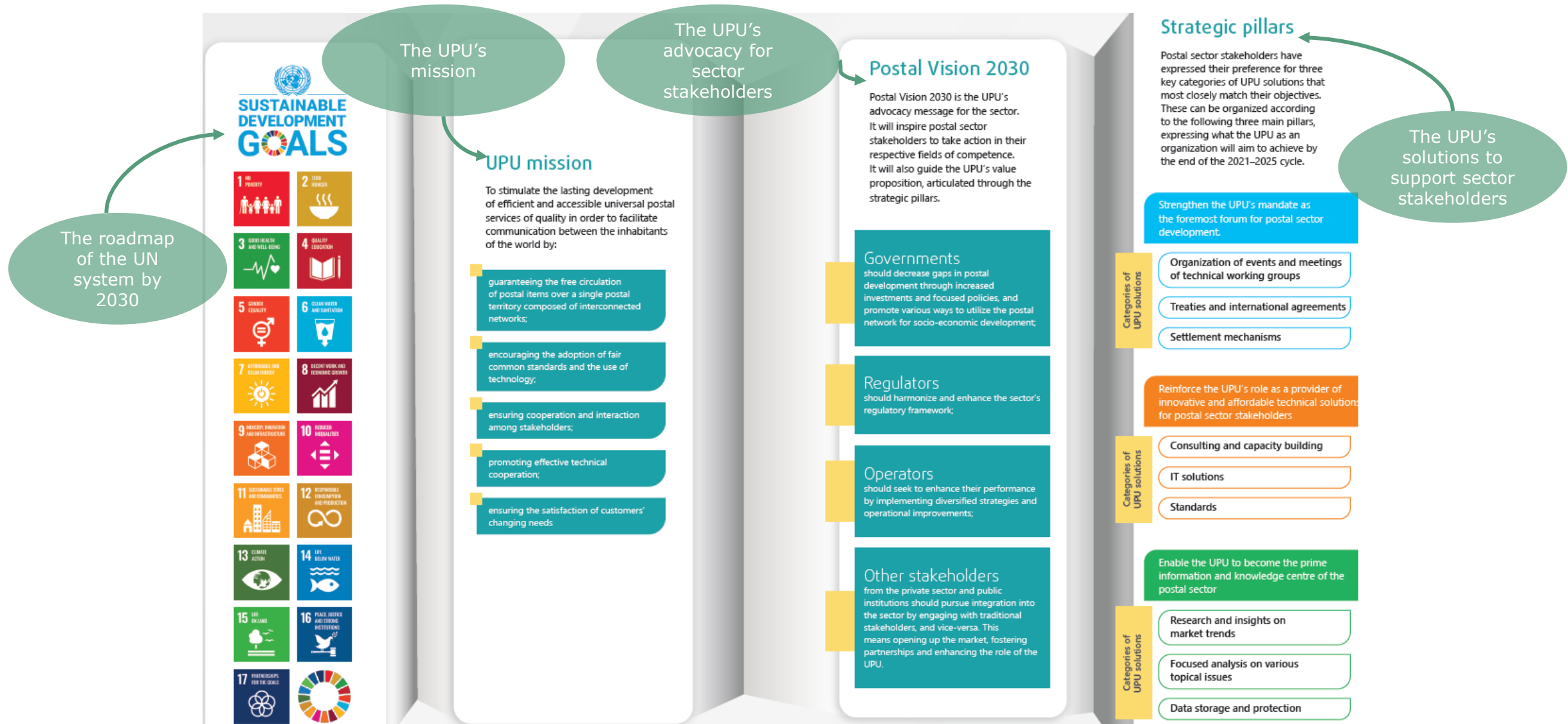


Overview

What is the purpose of this survey?



The Abidjan Postal Strategy in a nutshell





What is Postal Vision 2030?

Approved at the 27th UPU Congress in 2021 as part of the Abidjan Postal Strategy, Postal Vision (PV) 2030 is the **UPU's advocacy message for the sector**. Its aim is to inspire postal sector stakeholders to take action in their respective fields of competence. It will also guide the UPU's value proposition, articulated through the strategic pillars.

PV 2030 was developed through an **inclusive and comprehensive process**, with statements reinforced through regional strategy forums conducted in 2019 in all parts of the world, as well as Congress and CA sessions.



Governments should **close gaps in postal development** through increased investments and focused policies, and promote various ways to utilize the postal network for socio-economic development.



Regulators should **harmonize** and enhance the **sector's regulatory framework**.



Operators should seek to **enhance their performance** by implementing diversified strategies and operational improvements.



Other stakeholders from the private sector and public institutions should **pursue integration into the sector** by engaging with traditional stakeholders, and vice-versa. This means opening up the market, fostering partnerships and enhancing the role of the UPU.



Assessment of member countries' progress towards PV 2030

- When?** The survey was sent out on 30 January 2024, by post and e-mail, in all UPU languages. It was sent to all supervisory ministries, regulators and designated operators (DOs) across 192 UPU member countries.
- To whom?**
- What was in the survey?** The survey contained two sections: I. General questions, with contact details; and II. Assessment of progress based on stakeholder type (achievement against the PV statements marked as either yes/in progress/no such plan).
- Why was this survey conducted?** The survey is critical to measure the progress made by member countries and to establish a baseline for future measurement. Outcomes from the survey will also serve as input towards future strategy development.
- How does this help members?** By evaluating their own progress towards PV 2030 statements, member countries can identify areas for improvement and plan accordingly in order to reach the targets by 2030.
- What's next?** Member countries will be invited to assess their progress on an annual basis, with the questionnaire sent every January and results presented to the CA at its spring session.



Assessment methodology

- The PV 2030 assessment is consolidated to regional level.
- PV 2030 is based on six UPU regions.
- Responses are anonymized and individual member country data is kept confidential.
- The International Bureau (IB) tracks the achievements of each region, **using the total number of countries in each region as a denominator.**
- This allows us to track progress over the coming years, even when the number of respondents varies.
- The ultimate goal of this exercise is to monitor the progress made by each region in achieving their expected PV 2030 outcomes.

Example of a progress monitoring table

	Asia-Pacific		Baseline 2024	2025	2026	2027	2028	2029	2030
PV 1.1	By 2030, each country should have drafted and approved a national policy for the postal sector, with clear roles and expectations for each of the sector's stakeholders (ministry, regulator, operators, and other market participants and governmental authorities)	Yes	X/37	X/37	Y/37	X/37	Y/37	X/37	Y/37
		No, in progress	X/37	X/37	Y/37	X/37	Y/37	X/37	Y/37
		No such plan	X/37	X/37	Y/37	X/37	Y/37	X/37	Y/37



Analysis of responses

What is the benchmark status of stakeholders against PV 2030?

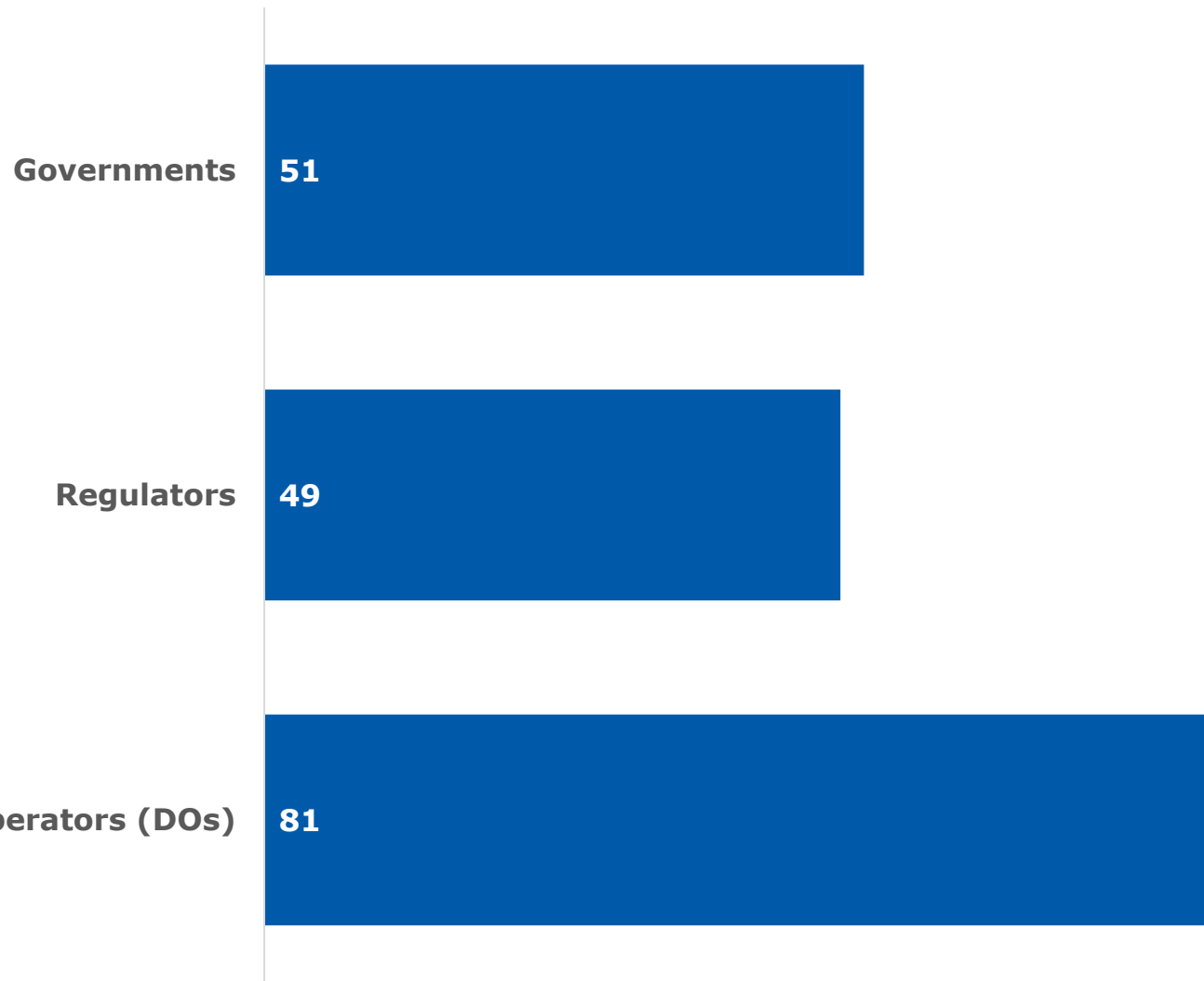


Survey respondents

Key outcomes: Who responded? Which types of stakeholder and from which regions?



We received 181 inputs from 100 member countries in 2024



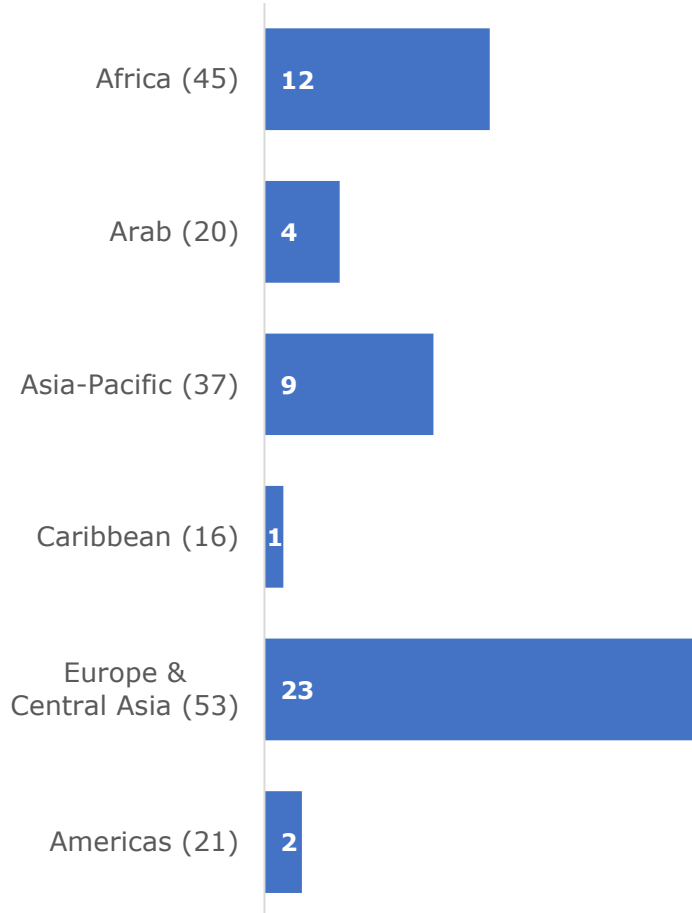
100 member countries responded in total (52% of members)

25 countries provided responses from **all three stakeholder groups**

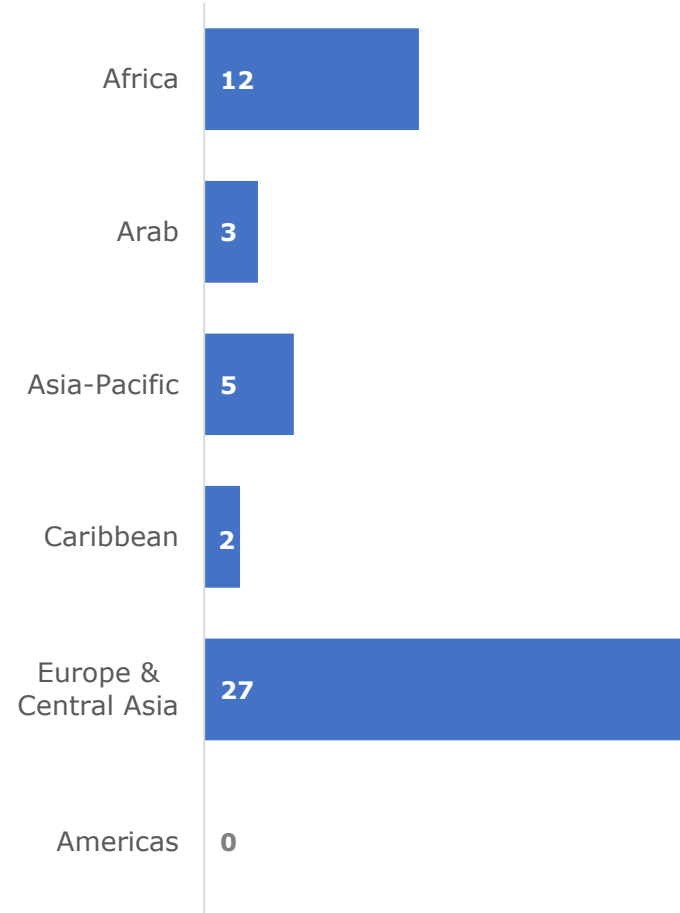


We heard from stakeholders in every region

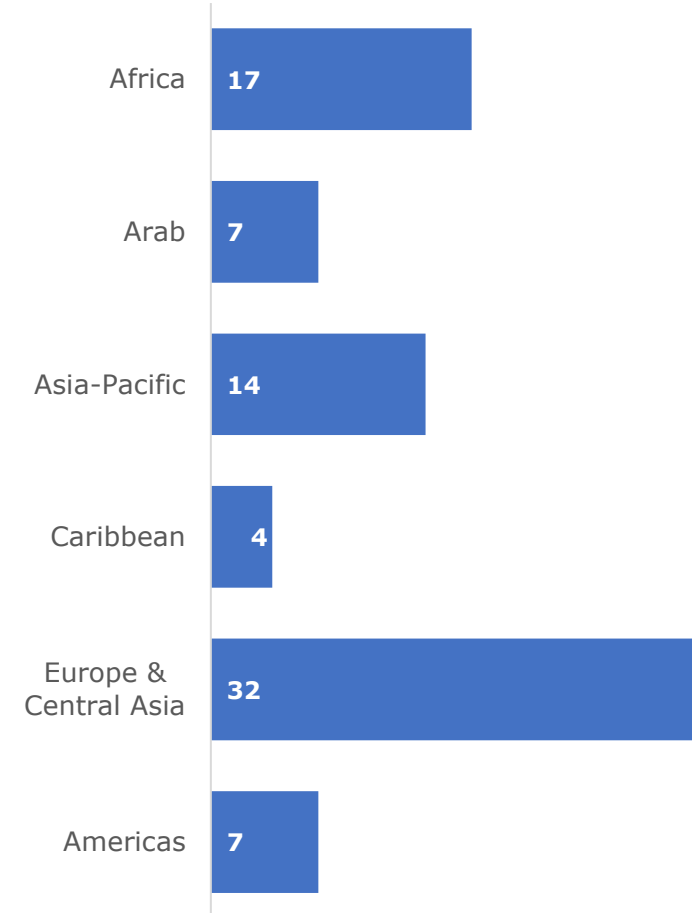
Governments



Regulators



DOs





Progress by governments

Shared commitment adopted through PV 2030:

"Governments should close gaps in postal development through increased investments and focused policies, and promote various ways to utilize the postal network for socio-economic development."



Governments (1/2)

2024 baseline

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
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PV 1.1	By 2030, each country should have drafted and approved a national policy for the postal sector, with clear roles and expectations for each of the sector's stakeholders (ministry, regulator, operators, and other market participants and governmental authorities)	Yes	3/37	1/45	0/16	18/53	3/20	0/21
		No, in progress	5/37	10/45	0/16	3/53	1/20	2/21
		No such plan	1/37	1/45	1/16	2/53	0/20	0/21

PV 1.2	By 2030, each country should be measuring the amount of annual investments from government towards activities associated with the universal service obligation (USO) in the postal sector, so as to ensure full cost recovery	Yes	2/37	2/45	0/16	9/53	2/20	0/21
		No, in progress	3/37	0/45	1/16	8/53	0/20	1/21
		No such plan	4/37	10/45	0/16	5/53	2/20	1/21

PV 1.3	By 2030, each country should provide at least 10 government/citizen services through the postal sector. These can include services related to financial inclusion, disaster risk management, services for seniors/watch-over services, pension payments, support to small and medium-sized enterprises (SMEs), agriculture, cultural heritage, technology, etc.	Yes	4/37	3/45	0/16	8/53	2/20	1/21
		No, in progress	4/37	8/45	1/16	9/53	2/20	0/21
		No such plan	1/37	0/45	0/16	6/53	0/20	1/21

Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them.



Governments (2/2)

2024 baseline

<i>PV 2030 statement</i>		<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
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PV 1.4	By 2030, each country should have a national emergency postal plan as part of their national and local disaster risk reduction strategies	Yes	1/37	0/45	0/16	11/53	4/20	0/21
		No, in progress	7/37	8/45	1/16	6/53	0/20	1/21
		No such plan	1/37	3/45	0/16	4/53	0/20	1/21

PV 1.5	By 2030, the gaps in postal development within regions should have decreased by 10% (as measured through UPU-calculated indices)*		<i>Please refer to the UPU's Integrated Index for Postal Development (2IPD) as a proxy measure for this indicator.</i>					
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PV 1.6	By 2030, in each country, the postal sector should be included in the national strategy for the achievement of the Sustainable Development Goals (SDGs)	Yes	4/37	4/45	0/16	6/53	3/20	0/21
		No, in progress	3/37	6/45	0/16	12/53	1/20	1/21
		No such plan	2/37	2/45	1/16	5/53	0/20	1/21

Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them.

* This indicator is measured by the IB.



Progress by regulators

Shared commitment adopted through PV 2030:

"Regulators should harmonize and enhance the sector's regulatory framework."



Regulators (1/3)

2024 baseline

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
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PV 2.1	By 2030, each country should have analyzed the current status of its national regulatory environment in the light of technological and market changes, and in comparison with models used in other industries (e.g. telecommunications)	Yes	0/37	3/45	0/16	12/53	1/20	0/21
		No, in progress	4/37	8/45	1/16	13/53	2/20	0/21
		No such plan	1/37	1/45	1/16	1/53	0/20	0/21

PV 2.2	By 2030, each country should have developed a policy to revitalize and harmonize its regulatory environments for the postal sector, aligning them to international standards developed by the UPU	Yes	2/37	2/45	1/16	10/53	2/20	0/21
		No, in progress	3/37	9/45	0/16	13/53	1/20	0/21
		No such plan	0/37	1/45	1/16	4/53	0/20	0/21

PV 2.3	By 2030, each country should have clearly drafted and approved a comprehensive regulatory framework for all market participants operating in the postal sector, not only the traditional operator	Yes	3/37	4/45	1/16	19/53	2/20	0/21
		No, in progress	2/37	8/45	1/16	6/53	1/20	0/21
		No such plan	0/37	0/45	0/16	1/53	0/20	0/21

Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them.



Regulators (2/3)

2024 baseline

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
PV 2.4	By 2030, each country should have regulatory maps and dashboards, detailing all the players in the market, their exact share and the applicable regulatory framework for each one of them	Yes	2/37	0/45	0/16	17/53	1/20	0/21
		No, in progress	3/37	9/45	1/16	6/53	2/20	0/21
		No such plan	0/37	3/45	1/16	3/53	0/20	0/21
PV 2.5	By 2030, each country should have developed and implemented a formal process for monitoring, evaluating and updating regulations for the postal sector on a 2–3 year basis	Yes	1/37	5/45	0/16	13/53	2/20	0/21
		No, in progress	3/37	6/45	2/16	9/53	1/20	0/21
		No such plan	1/37	0/45	0/16	4/53	0/20	0/21
PV 2.6	By 2030, each country should have analyzed all the activities covered by postal operators and defined the applicable regulation and regulatory authority (e.g. regulation for postal payment services under the responsibility of a clearly defined agency or set of agencies)	Yes	2/37	2/45	0/16	17/53	1/20	0/21
		No, in progress	3/37	6/45	2/16	7/53	2/20	0/21
		No such plan	0/37	3/45	0/16	3/53	0/20	0/21

Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them.



Regulators (3/3)

2024 baseline

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
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PV 2.7	By 2030, each country should have updated and redefined its USO and licensing systems to meet socio-economic development targets, changing technologies, and market and citizen needs	Yes	0/37	3/45	0/16	9/53	2/20	0/21
		No, in progress	4/37	8/45	1/16	17/53	1/20	0/21
		No such plan	1/37	1/45	1/16	1/53	0/20	0/21

PV 2.8	By 2030, each country should have analyzed the current provisions, costs and licensing systems of the USO, and have an up-to-date model to fund it (e.g. universal service fund, levy on all operators, levy on extraterritorial offices of exchange (ETOE), etc.)	Yes	2/37	2/45	0/16	10/53	0/20	0/21
		No, in progress	2/37	7/45	1/16	14/53	3/20	0/21
		No such plan	1/37	3/45	1/16	3/53	0/20	0/21

PV 2.9	By 2030, each country should have built formal communication channels between the regulatory authority and the different enterprises operating in the postal sector (such as regular meetings in which authorities meet representatives of all market participants to discuss pending issues)	Yes	3/37	9/45	1/16	19/53	2/20	0/21
		No, in progress	2/37	3/45	0/16	8/53	1/20	0/21
		No such plan	0/37	0/45	1/16	0/53	0/20	0/21

Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them.



Progress by DOs

Shared commitment adopted through PV 2030:

"Operators should seek to enhance their performance by implementing diversified strategies and operational improvements."



DOs (1/5)

2024 baseline

<i>PV 2030 statement</i>	<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
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PV 3.1	By 2030, 90% of all households in developing and least developed countries should receive mail at home*		<i>Please refer to the UPU's Integrated Index for Postal Development (2IPD) as a proxy measure for this indicator.</i>			
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PV 3.2	By 2030, 100% of the population should have access to postal services	Yes	9/37	6/45	1/16	33/53	2/20	4/21
		No, in progress	2/37	8/45	2/16	2/53	4/20	2/21
		No such plan	0/37	3/45	1/16	1/53	0/20	0/21

PV 3.3	By 2030, all operators in the postal sector should comply with national USO definitions and policies as well as with governmental targets for socio-economic development	Yes	6/37	4/45	1/16	28/53	3/20	4/21
		No, in progress	4/37	11/45	1/16	8/53	2/20	2/21
		No such plan	1/37	2/45	2/16	1/53	1/20	0/21

Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them.

* This indicator is measured by the IB.



DOs (2/5)

2024 baseline

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
PV 3.4	By 2030, all operators should have developed means to calculate accurately the cost of providing the USO	Yes	5/37	3/45	1/16	25/53	2/20	2/21
		No, in progress	5/37	13/45	2/16	7/53	4/20	4/21
		No such plan	1/37	1/45	1/16	5/53	0/20	0/21
PV 3.5	By 2030, all operators delivering government services and/or USO services should have developed a national campaign to promote their contribution to the SDGs and their socio-economic role	Yes	2/37	1/45	0/16	12/53	1/20	1/21
		No, in progress	3/37	15/45	2/16	24/53	5/20	3/21
		No such plan	4/37	1/45	2/16	1/53	0/20	2/21
PV 3.6	By 2030, all countries should have reviewed their performance in postal development (as per measures such as the ZIPD), in order to develop precise targets for improvement	Yes	4/37	2/45	0/16	16/53	3/20	0/21
		No, in progress	6/37	14/45	3/16	15/53	3/20	5/21
		No such plan	1/37	1/45	0/16	6/53	0/20	1/21

Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them.



DOs (3/5)

2024 baseline

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
PV 3.7	By 2030, all operators should be equipped to provide international remittance services	Yes	4/37	9/45	1/16	19/53	3/20	3/21
		No, in progress	5/37	4/45	0/16	9/53	3/20	0/21
		No such plan	2/37	4/45	3/16	9/53	0/20	2/21
PV 3.8	By 2030, all operators should create a specific channel/activity for delivering services to SMEs (e.g. exports, training for e-trading, etc.)	Yes	5/37	3/45	0/16	16/53	4/20	5/21
		No, in progress	5/37	12/45	2/16	15/53	2/20	1/21
		No such plan	1/37	0/45	2/16	6/53	0/20	0/21
PV 3.9	By 2030, all operators should have reduced delivery time to at least the equivalent of the regional average for all mail classes (letters, parcels and express) in 2020	Yes	6/37	7/45	0/16	12/53	4/20	2/21
		No, in progress	4/37	8/45	4/16	17/53	2/20	3/21
		No such plan	0/37	0/45	0/16	4/53	0/20	1/21

Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them.



DOs (4/5)

2024 baseline

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
PV 3.10	By 2030, all operators should have increased the number of international network partners to reach at least the regional average (as measured by the big data platform) in 2020	Yes	5/37	4/45	0/16	15/53	2/20	2/21
		No, in progress	5/37	10/45	2/16	13/53	4/20	3/21
		No such plan	0/37	1/45	2/16	5/53	0/20	0/21
PV 3.11	By 2030, all operators should have increased the number of exchanged mail items with international partners to reach at least the regional average (as measured by the tonnage of exported mail) in 2020	Yes	4/37	3/45	0/16	14/53	2/20	1/21
		No, in progress	5/37	12/45	4/16	15/53	4/20	3/21
		No such plan	1/37	0/45	0/16	4/53	0/20	1/21
PV 3.12	By 2030, all concerned postal staff should have received training on skills pertinent to digital transformation	Yes	7/37	0/45	1/16	17/53	2/20	2/21
		No, in progress	4/37	14/45	3/16	18/53	4/20	4/21
		No such plan	0/37	1/45	0/16	1/53	0/20	0/21

Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them.



DOs (5/5)

2024 baseline

<i>PV 2030 statement</i>	<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
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PV 3.13	By 2030, all operators should recognize and support the Paris Agreement goals of limiting the increase in the global average temperature to well below 2°C above pre-industrial levels and pursuing efforts to limit it to 1.5°C above pre-industrial levels, including through reducing their greenhouse gas emissions	Yes	3/37	0/45	0/16	10/53	1/20	2/21
		No, in progress	6/37	10/45	2/16	26/53	3/20	2/21
		No such plan	2/37	5/45	2/16	1/53	2/20	2/21

Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them.



Progress by other stakeholders

Shared commitment adopted through PV 2030:

"Other stakeholders from the private sector and public institutions should pursue integration into the sector by engaging with traditional stakeholders, and vice-versa."



Other stakeholders (1/2)

2024 baseline

<i>PV 2030 statement</i>	<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
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PV 4.1	By 2030, each UPU region should have established hubs to facilitate exchanges of postal items between countries, by integrating all stakeholders of the supply chain, both private and public		<i>Data not available.</i>			
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PV 4.2	By 2030, each country should have managed to reduce delivery time (speed and predictability) in the international exchanges of postal items between the different stakeholders of the supply chain, including operators, Customs, airlines and roadways/railways*		<i>Please refer to the UPU's Integrated Index for Postal Development (2IPD) as a proxy measure for this indicator.</i>			
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PV 4.3	By 2030, each country should have developed and implemented a formal framework for establishing public-private partnerships between stakeholders of the postal supply chain, including operators, Customs, airlines, start-ups and other companies	Yes (G) (R)	1/37 1/37	4/45 1/45	0/16 0/16	10/53 2/53	2/20 2/20	1/21 0/21
		No, in progress (G) (R)	7/37 3/37	5/45 7/45	1/16 2/16	3/53 10/53	2/20 1/20	0/21 0/21
		No such plan (G) (R)	1/37 1/37	3/45 4/45	0/16 0/16	10/53 13/53	0/20 0/20	1/21 0/21

Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them. (G) stands for governments and (R) stands for regulators.

* This indicator is measured by the IB.



Other stakeholders (2/2)

2024 baseline

<i>PV 2030 statement</i>	<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe & Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
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PV 4.4	By 2030, the UPU should have undertaken significant efforts to organize itself (in a way yet to be decided) for the participation of relevant categories of market participants which includes accessibility to UPU operational solutions (where UPU member countries consider it appropriate)*	<i>Ongoing efforts are being undertaken at the UPU. Please refer to various UPU reports, such as those of the Consultative Committee.</i>				
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PV 4.5	By 2030, the UPU should have established formal relations (or further enhanced existing ones) with all organizations that contribute to elements of Postal Vision 2030 (e.g. UN agencies and restricted unions)*	<i>Ongoing efforts are being undertaken at the UPU. Please refer to various UPU reports, such as those reporting partnerships with international organizations.</i>				
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Note. – The blue cells indicate regions that have prioritized the indicator as applicable to them.
 * This indicator is measured by the IB.



Conclusions and next steps

What has been achieved and what will follow?



So, what's next?

- As stakeholders, **you have reaffirmed your commitment towards PV 2030.**
- Through this survey, you have provided a **baseline assessment** of your progress towards the achievement of PV 2030.
- The results of the survey serve as **critical input** in the assessment process for progress on the strategy in the Abidjan cycle. They also allow you, as member countries, to **take stock of the current situation** and assess mechanisms to achieve the targets set therein.
- From 2024 results, a trend analysis will form part of the PV 2030 stocktaking exercise. Leading up to 2030, **annual surveys** will be sent every year.
- The final results of this survey, as well as future survey results, will be published on the **UPU website.**



Thank you

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