



Postal Vision 2030: Global survey results 2025

Assessment of member countries' progress
towards Postal Vision 2030



Table of contents

Overview	3
Analysis of responses	7
• Survey respondents	8
• Progress by governments	12
• Progress by regulators	20
• Progress by designated operators	32
Conclusions and next steps	43
Annex	46

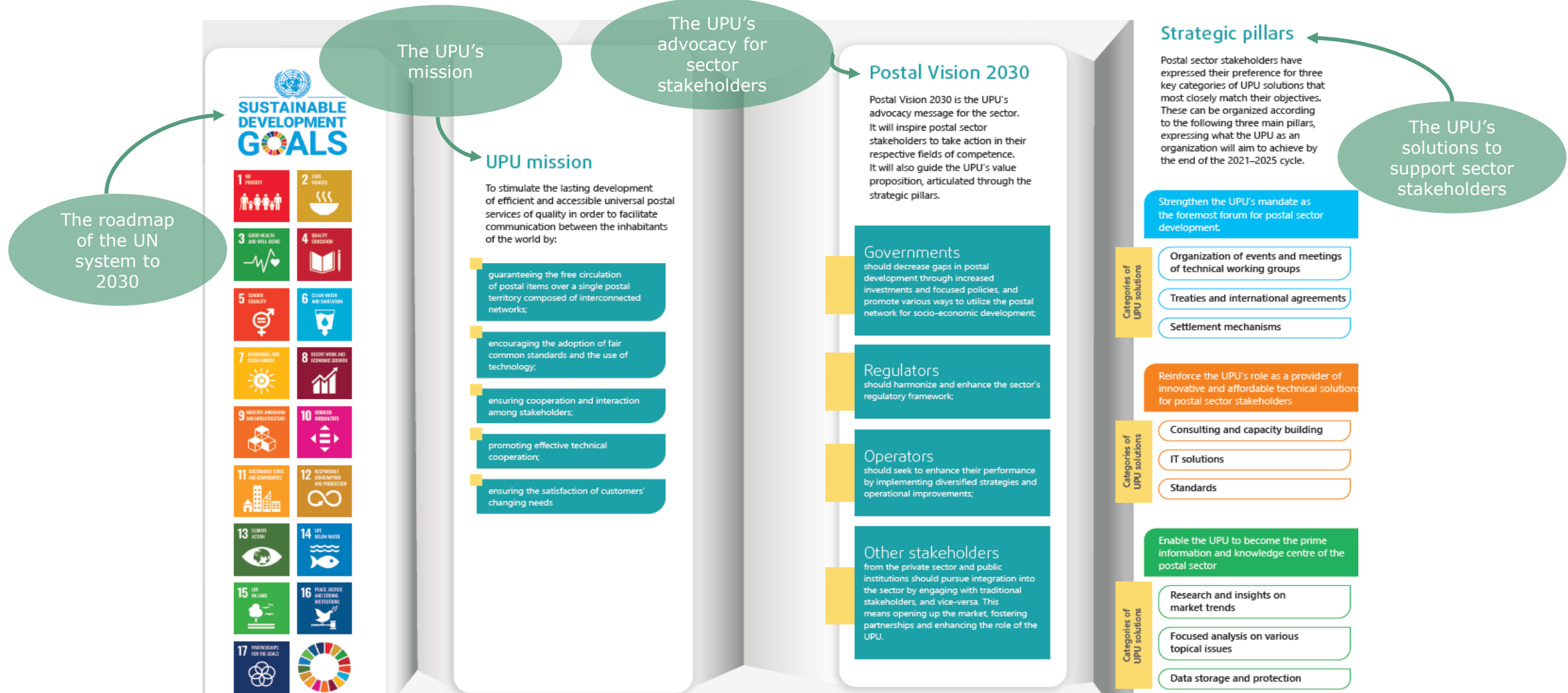


Overview

What is the purpose of this survey?



Postal Vision 2030: derived from the Abidjan Postal Strategy





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 within their domestic context** and in their respective fields of competence.

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. Annual surveys are conducted to assess progress up to 2030, with the first survey sent in 2024.

PV 2030 will guide the UPU's value proposition, articulated through the following four strategic pillars:



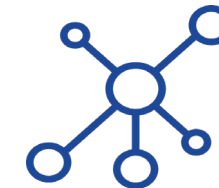
Governments should **close gaps in postal development** through increased investments and focused policies, and promote various ways to utilize the postal network for socio-economic development.



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.



Annual assessment of member countries' progress towards PV 2030

When? To whom?

The survey was sent out on 22 May 2025, by post and e-mail, in all UPU languages. It was sent to all supervisory ministries, regulators and designated operators (DOs) across the 192 UPU member countries.

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?

PV 2030 parameters determined and designed by member countries and regions themselves. The survey is critical to measure the progress made by member countries and to establish a baseline for future measurement in the lead-up to 2030. Outcomes from the survey will also serve as input towards future strategy development and inform our activities during this cycle.

How does this help members?

By evaluating their own progress towards PV 2030 statements determined by them, member countries can identify areas for domestic 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 year and results presented to the CA annually.



Analysis of responses

What is the benchmark status of stakeholders against PV 2030?



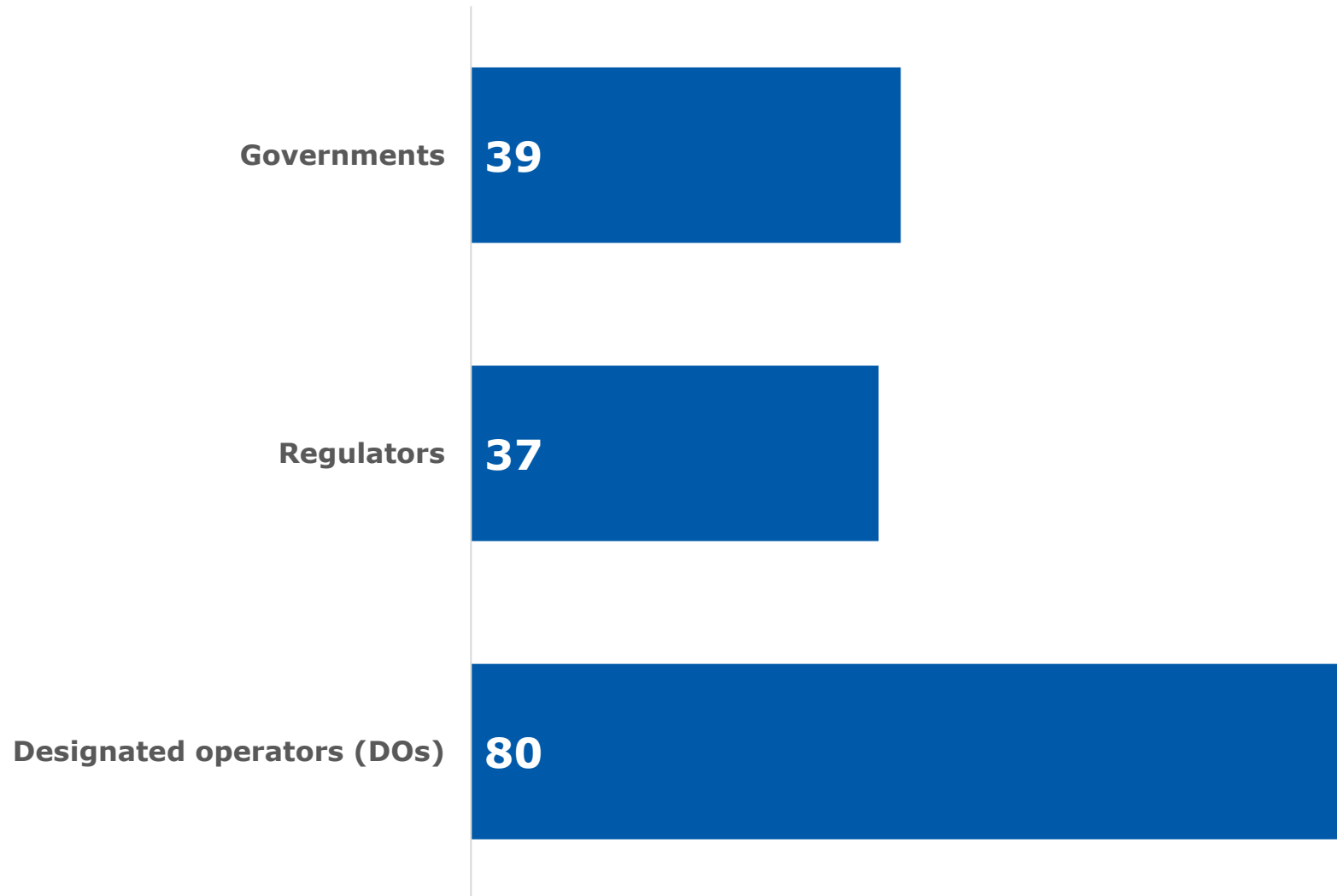
Survey respondents

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



We received 156 inputs in 2025

90 member countries responded to our survey



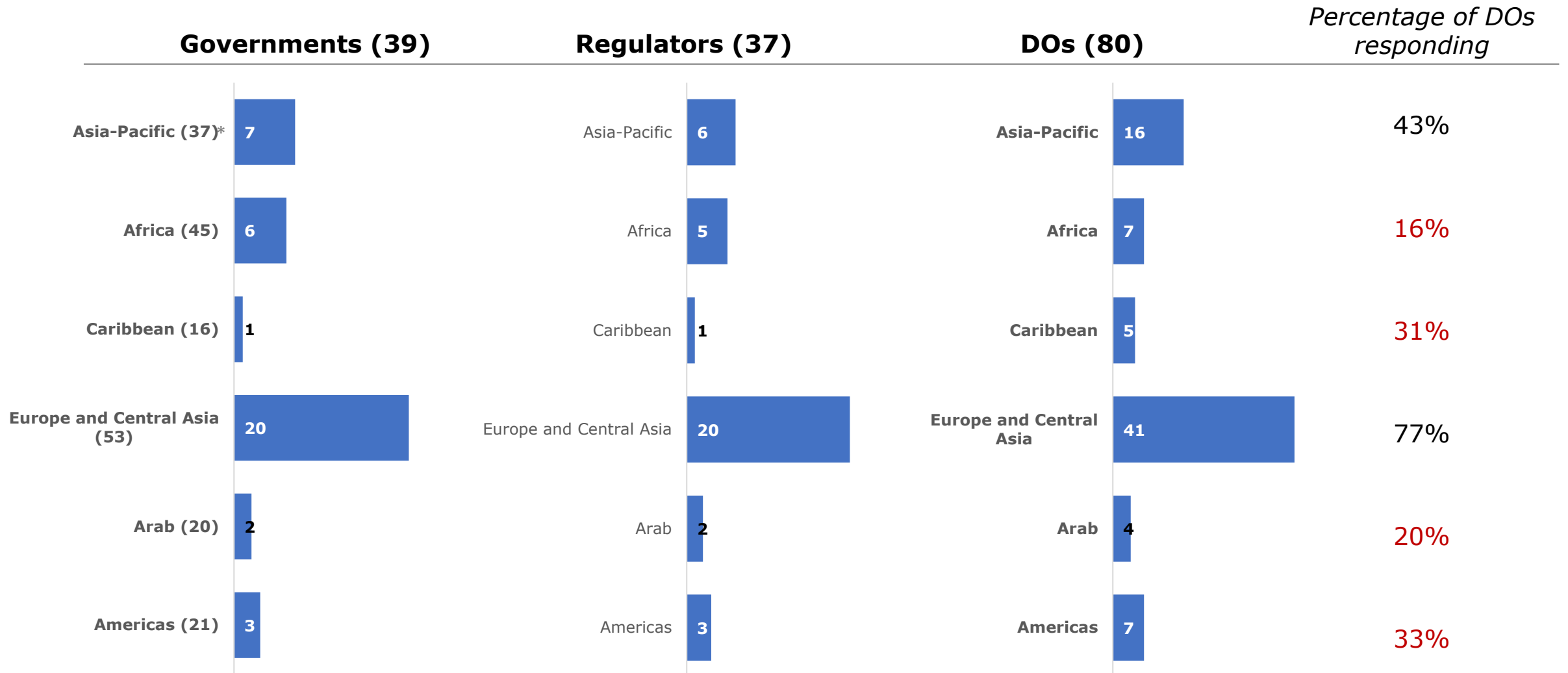
90 member countries responded in total (47% of members)

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



Stakeholders responded from every region

Most regions are underrepresented in the survey responses



Note. – Some countries have multiple DOs. In such cases, the responses are counted separately according to the number of DOs that replied.

* Indicates the total number of countries in a region.

n = 156



Assessment methodology

Detailed responses, by category and region, are included in the annex

1 Survey design

- Annual survey covering 192 UPU member countries
- Questions tailored by stakeholder: ministries, regulators, DOs
- Standardized responses: **Yes (1.0) | No, in progress (0.5) | No such plan (0.0)**

2 Progress index calculation

- Country-level scores averaged at **regional level** (non-weighted)
- **Index = average score across responding countries**
- Scale: **1.0** = full implementation | **0.5** \approx majority in progress | **0.0** = no plans

3 Data treatment

- Only **responding countries included**
- Missing data excluded
- Response rates reported separately (transparency) in the annex

4 Interpretation and use

- Measures **policy maturity and progress**
- Enables **regional comparison** and **year-on-year tracking (2024–2030)**



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."



Key observations – governments

- **Policy development shows encouraging progress** in several regions, particularly regarding national postal sector policies (PV 1.1), where Asia-Pacific, the Caribbean and Arab countries reported notable improvements between 2024 and 2025.
- **Investment monitoring for the universal service obligation (USO) remains uneven**, with mixed results across regions and limited progress in several cases (PV 1.2).
- **Integration of postal services into broader socio-economic strategies is also advancing**, with modest increases observed in several regions for the provision of government services through the postal network (PV 1.3) and inclusion of the postal sector in Sustainable Development Goal (SDG) strategies (PV 1.6).
- **Emergency preparedness through national postal contingency plans shows limited progress overall**, with some regions reporting stagnation or slight decline (PV 1.4).



Governments (1/6)

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, other market participants and governmental authorities).

<i>Region</i>	<i>2024*</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.61	0.86	+0.25
Africa	0.50	0.58	+0.08
Caribbean	0.00	0.50	+0.50
Europe and Central Asia	0.85	0.83	-0.02
Arab countries	0.88	1.00	+0.12
Americas	0.50	0.50	0.00

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

* For an explanation of the scoring, please see the methodology section and detailed responses, by region, in the annex.



Governments (2/6)

PV 1.2: By 2030, each country should be measuring the amount of annual investments from government towards activities associated with the USO in the postal sector, so as to ensure full cost recovery.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.39	0.36	-0.03
Africa	0.17	0.25	+0.08
Caribbean	0.50	0.00	-0.50
Europe and Central Asia	0.59	0.63	+0.04
Arab countries	0.50	0.25	-0.25
Americas	0.25	0.00	-0.25

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 39₁₅



Governments (3/6)

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.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.67	0.64	-0.03
Africa	0.64	0.75	+0.11
Caribbean	0.50	0.50	0.00
Europe and Central Asia	0.54	0.53	-0.01
Arab countries	0.75	1.00	+0.25
Americas	0.50	0.83	+0.33

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 39₁₆



Governments (4/6)

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.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.50	0.57	+0.07
Africa	0.36	0.33	-0.03
Caribbean	0.50	0.50	0.00
Europe and Central Asia	0.67	0.58	-0.09
Arab countries	1.00	1.00	0.00
Americas	0.25	0.33	+0.08

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 39₁₇



Governments (5/6)

PV 1.6: By 2030, in each country, the postal sector should be included in the national strategy for the achievement of the SDGs.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.61	0.57	-0.04
Africa	0.58	0.75	+0.17
Caribbean	0.00	0.50	+0.50
Europe and Central Asia	0.52	0.55	+0.03
Arab countries	0.88	0.75	-0.13
Americas	0.25	0.83	+0.58

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 39₁₈



Governments (6/6)

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.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.50	0.64	+0.14
Africa	0.54	0.58	+0.04
Caribbean	0.50	0.50	0.00
Europe and Central Asia	0.50	0.43	-0.07
Arab countries	0.75	1.00	+0.25
Americas	0.50	0.17	-0.33

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 39₁₉



Progress by regulators

Shared commitment adopted through PV 2030:

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



Key observations – regulators

- **Progress on regulatory reviews and updates remains uneven**, with some regions reporting declines or stagnation (PV 2.1 and PV 2.5).
- **Modest progress is observed in harmonizing regulatory frameworks**, particularly in the development of comprehensive regulatory systems covering all postal market participants (PV 2.2 and PV 2.3).
- **Several regions reported improvements in regulatory modernization**, including policy alignment with international standards and regulatory mapping of all postal market players (PV 2.2 and PV 2.4).
- **Progress towards updating USO and licensing to meet socio-economic targets remains low**, with most regions reporting it either as planned or in progress (PV 2.7).
- **Establishing sustainable models for funding the USO** continues to be a challenge across several regions (PV 2.8).



Regulators (1/10)

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).

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.40	0.58	+0.18
Africa	0.58	0.40	-0.18
Caribbean	0.25	0.50	+0.25
Europe and Central Asia	0.71	0.70	-0.01
Arab countries	0.67	0.75	+0.08
Americas	0.00	1.00	+1.00

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 37₂₂



Regulators (2/10)

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.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.70	0.75	+0.05
Africa	0.54	0.40	-0.14
Caribbean	0.50	0.50	0.00
Europe and Central Asia	0.61	0.75	+0.14
Arab countries	0.83	1.00	+0.17
Americas	0.00	0.83	+0.83

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 37₂₃



Regulators (3/10)

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.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.80	0.92	+0.12
Africa	0.67	0.50	-0.17
Caribbean	0.75	0.50	-0.25
Europe and Central Asia	0.85	0.85	0.00
Arab countries	0.83	1.00	+0.17
Americas	0.00	0.83	+0.83

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 37₂₄



Regulators (4/10)

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.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.70	0.75	+0.05
Africa	0.38	0.40	+0.02
Caribbean	0.25	0.50	+0.25
Europe and Central Asia	0.77	0.78	+0.01
Arab countries	0.67	1.00	+0.33
Americas	0.00	0.67	+0.67

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.



Regulators (5/10)

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 two- to three-year basis.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.50	0.58	+0.08
Africa	0.73	0.50	-0.23
Caribbean	0.50	0.50	0.00
Europe and Central Asia	0.67	0.68	+0.01
Arab countries	0.83	1.00	+0.17
Americas	0.00	1.00	+1.00

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.



Regulators (6/10)

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).

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.70	0.75	+0.05
Africa	0.45	0.50	+0.05
Caribbean	0.50	0.50	0.00
Europe and Central Asia	0.76	0.83	+0.07
Arab countries	0.67	1.00	+0.33
Americas	0.00	1.00	+1.00

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 37₂₇



Regulators (7/10)

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.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.40	0.50	+0.10
Africa	0.58	0.38	-0.20
Caribbean	0.25	0.50	+0.25
Europe and Central Asia	0.65	0.68	+0.03
Arab countries	0.83	1.00	+0.17
Americas	0.00	0.83	+0.83

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.



Regulators (8/10)

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.).

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.60	0.58	-0.02
Africa	0.46	0.38	-0.08
Caribbean	0.25	0.50	+0.25
Europe and Central Asia	0.63	0.70	+0.07
Arab countries	0.50	0.50	0.00
Americas	0.00	0.83	+0.83

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 37₂₉



Regulators (9/10)

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).

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.80	0.83	+0.03
Africa	0.88	0.50	-0.38
Caribbean	0.50	0.50	0.00
Europe and Central Asia	0.85	0.90	+0.05
Arab countries	0.83	1.00	+0.17
Americas	0.00	1.00	+1.00

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 37₃₀



Regulators (10/10)

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.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.50	0.58	+0.08
Africa	0.38	0.38	0.00
Caribbean	0.50	0.50	0.00
Europe and Central Asia	0.28	0.31	+0.03
Arab countries	0.83	0.75	-0.08
Americas	0.00	0.83	+0.83

Note. – Grey cells indicate regions that have not 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."



Key observations – DOs

- **Access to postal services remains relatively strong globally**, with high scores reported in most regions for universal access to postal services (PV 3.2).
- **Compliance with national USO definition and contribution to socio-economic development objectives show gradual improvement** in several regions (PV 3.3).
- **Progress has been observed in operational performance and strategic planning**, including performance reviews based on postal development indicators (PV 3.6).
- **Limited progress in the ability to provide international remittance services**, with some regions faring better than others (PV 3.7).
- **Digital transformation and sustainability efforts are advancing**, though implementation remains uneven across regions (PV 3.12 and PV 3.13).



DOs (1/9)

PV 3.2: By 2030, 100% of the population should have access to postal services.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.91	0.87	-0.04
Africa	0.59	0.79	+0.20
Caribbean	0.50	0.90	+0.40
Europe and Central Asia	0.94	0.99	+0.05
Arab countries	0.67	0.38	-0.29
Americas	0.83	0.79	-0.04

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 80₃₄



DOs (2/9)

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.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.73	0.78	+0.05
Africa	0.56	0.71	+0.15
Caribbean	0.38	0.70	+0.32
Europe and Central Asia	0.86	0.93	+0.07
Arab countries	0.67	0.50	-0.17
Americas	0.83	0.79	-0.04

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.



DOs (3/9)

PV 3.4: By 2030, all operators should have developed means to accurately calculate the cost of providing the USO.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.68	0.66	-0.02
Africa	0.56	0.64	+0.08
Caribbean	0.50	0.40	-0.10
Europe and Central Asia	0.77	0.88	+0.11
Arab countries	0.67	0.38	-0.29
Americas	0.67	0.43	-0.24

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 80₃₆



DOs (4/9)

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.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.39	0.41	+0.02
Africa	0.50	0.57	+0.07
Caribbean	0.25	0.30	+0.05
Europe and Central Asia	0.65	0.71	+0.06
Arab countries	0.58	0.63	+0.05
Americas	0.42	0.57	+0.15

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 80₃₇



DOs (5/9)

PV 3.6: By 2030, all countries should have reviewed their performance in postal development (as per measures such as the 2IPD), in order to develop precise targets for improvement.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.64	0.66	+0.02
Africa	0.53	0.57	+0.04
Caribbean	0.50	0.50	0.00
Europe and Central Asia	0.64	0.67	+0.03
Arab countries	0.75	0.88	+0.13
Americas	0.42	0.57	+0.15

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 80₃₈



DOs (6/9)

PV 3.7: By 2030, all operators should be equipped to provide international remittance services.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.59	0.53	-0.06
Africa	0.65	0.64	-0.01
Caribbean	0.25	0.40	+0.15
Europe and Central Asia	0.64	0.72	+0.08
Arab countries	0.75	0.88	+0.13
Americas	0.60	0.43	-0.17

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 80₃₉



DOs (7/9)

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.).

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.68	0.69	+0.01
Africa	0.56	0.57	+0.01
Caribbean	0.25	0.13	-0.12
Europe and Central Asia	0.64	0.81	+0.17
Arab countries	0.83	0.88	+0.05
Americas	0.92	0.71	-0.21

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 80₄₀



DOs (8/9)

PV 3.12: By 2030, all concerned postal staff should have received training on skills pertinent to digital transformation.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.82	0.75	-0.07
Africa	0.47	0.57	+0.10
Caribbean	0.63	0.63	0.00
Europe and Central Asia	0.72	0.78	+0.06
Arab countries	0.67	0.83	+0.16
Americas	0.67	0.43	-0.24

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 80₄₁



DOs (9/9)

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.

<i>Region</i>	<i>2024</i>	<i>2025</i>	<i>Change (2024 to 2025)</i>
Asia-Pacific	0.55	0.59	+0.04
Africa	0.33	0.29	-0.04
Caribbean	0.25	0.38	+0.13
Europe and Central Asia	0.62	0.71	+0.09
Arab countries	0.42	0.25	-0.17
Americas	0.50	0.57	+0.07

Note. – Grey cells indicate regions that have not prioritized the indicator as applicable to them.

n = 80₄₂



Conclusions and next steps

What has been achieved and what will follow?



So, what's next?

- The results of the survey serve as **critical input** in the assessment of progress on PV 2030. They also allow member countries to **take stock of the current situation** and assess national mechanisms to achieve the targets set.
- From the 2024 results, a trend analysis has formed part of the PV 2030 stocktaking exercise. Leading up to 2030, **annual surveys** will be sent every year and trends will be measured in the results.
- A **larger number of responses** will lead to more reliable results and trends.
- The final results of this survey, as well as future survey results, will be published on the **UPU website**.



Thank you

strategy@upu.int

Copyright © 2026 Universal Postal Union. All rights reserved.

Except as otherwise indicated, the copyright in this publication is owned by the Universal Postal Union (UPU). Reproduction is authorized for non-commercial purposes, subject to proper acknowledgement of the source. This authorization does not extend to any material identified in this publication as being the copyright of a third party. Authorization to reproduce such third-party materials must be obtained from the copyright holders concerned.

This publication by the UPU constitutes research in progress of an informational character for which no guarantees or assurances are provided; in this regard, it shall not be deemed to represent the official position or opinions of the UPU or its staff members, or of UPU member countries.

Moreover, any depiction and use of boundaries, geographic names and related data shown on maps and included in lists, tables, documents and databases are not warranted to be error-free, nor do they necessarily imply official endorsement or acceptance by the UPU.



Annex

Methodology and number of respondents
by category and region in 2025



Assessment methodology

1 Survey design

- Annual survey covering 192 UPU member countries
- 6 questions for ministries, 10 questions for regulators and 9 questions for DOs
- Three response options:
 - **Yes**
 - **No, in progress**
 - **No such plan**

2 Scoring framework

- Each response category is assigned a numerical value to reflect the responses:
 - **Yes = 1.0**
 - **No, in progress = 0.5**
 - **No such plan = 0.0**
- This approach captures policy maturity on an ordinal scale



Assessment methodology

3 Calculation of the progress index

- The index is calculated at the regional level
- Based on a country-count (non-weighted) average
- Formula:
$$\text{Progress Index} = \frac{\sum (\text{Score per responding country})}{\text{Number of responding countries}}$$
- Values range from 0 to 1
 - 1 = all responding countries have approved policies
 - 0.5 \approx majority are at the “in progress” stage
 - 0 = no responding country has a plan

4 Treatment of missing responses

- Only responding countries are included in the calculation
- Missing responses are excluded
- Response rates are reported separately for transparency in the annex – this ensures methodological clarity without imputing assumptions



Assessment methodology

5 Interpretation principles

- The index reflects reported policy progress
- Designed to measure:
 - Level of policy development
 - Regional comparison
 - Year-on-year progress
- Enables consistent tracking from 2024 to 2030

6 Key strengths of the approach

- Captures intermediate progress (“in progress”)
- Allows cross-regional comparison
- Supports trend analysis over time
- Simple, transparent and replicable

7 Limitations

- Number of respondents may vary each year
- Changes in participation may influence the index values
- Results should therefore be interpreted considering variations in response rates



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)

Number of respondents by category and by region in 2025

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
--------------------------	--	--	---------------------	---------------	------------------	--------------------------------	-----------------------	-----------------

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, other market participants and governmental authorities).	Yes	5/37	1/45	0/16	13/53	2/20	1/21
		No, in progress	2/37	5/45	1/16	7/53	0/20	1/21
		No such plan	0/37	0/45	0/16	0/53	0/20	1/21

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

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 SMEs, agriculture, cultural heritage, technology, etc.	Yes	3/37	3/45	0/16	7/53	2/20	2/21
		No, in progress	3/37	3/45	1/16	6/53	0/20	1/21
		No such plan	1/37	0/45	0/16	6/53	0/20	0/21

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



Governments (2/2)

Number of respondents by category and by region in 2025

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
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	3/37	1/45	0/16	7/53	2/20	0/21
		No, in progress	2/37	2/45	1/16	8/53	0/20	2/21
		No such plan	2/37	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>					
PV 1.6	By 2030, in each country, the postal sector should be included in the national strategy for the achievement of the SDGs.	Yes	1/37	3/45	0/16	6/53	1/20	2/21
		No, in progress	6/37	3/45	1/16	10/53	1/20	1/21
		No such plan	0/37	0/45	0/16	4/53	0/20	0/21

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

* This indicator is measured by the International Bureau.



Progress by regulators

Shared commitment adopted through PV 2030:

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



Regulators (1/3)

Number of respondents by category and by region in 2025

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
--------------------------	--	--	---------------------	---------------	------------------	--------------------------------	-----------------------	-----------------

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	2/37	1/45	0/16	10/53	1/20	3/21
		No, in progress	3/37	2/45	1/16	8/53	1/20	0/21
		No such plan	1/37	2/45	0/16	2/53	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	3/37	1/45	0/16	11/53	2/20	2/21
		No, in progress	3/37	2/45	1/16	8/53	0/20	1/21
		No such plan	0/37	2/45	0/16	1/53	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	5/37	2/45	0/16	16/53	2/20	2/21
		No, in progress	1/37	1/45	1/16	2/53	0/20	1/21
		No such plan	0/37	2/45	0/16	2/53	0/20	0/21

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



Regulators (2/3)

Number of respondents by category and by region in 2025

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and 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	4/37	1/45	0/16	13/53	2/20	1/21
		No, in progress	1/37	2/45	1/16	5/53	0/20	2/21
		No such plan	1/37	2/45	0/16	2/53	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 two- to three-year basis.	Yes	2/37	2/45	0/16	10/53	2/20	3/21
		No, in progress	3/37	1/45	1/16	7/53	0/20	0/21
		No such plan	1/37	2/45	0/16	3/53	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	4/37	2/45	0/16	15/53	2/20	3/21
		No, in progress	1/37	1/45	1/16	3/53	0/20	0/21
		No such plan	1/37	2/45	0/16	2/53	0/20	0/21

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



Regulators (3/3)

Number of respondents by category and by region in 2025

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
--------------------------	--	--	---------------------	---------------	------------------	--------------------------------	-----------------------	-----------------

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	1/37	0/45	0/16	8/53	2/20	2/21
		No, in progress	4/37	3/45	1/16	11/53	0/20	1/21
		No such plan	1/37	1/45	0/16	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 ETOEs, etc.).	Yes	2/37	0/45	0/16	10/53	0/20	2/21
		No, in progress	3/37	3/45	1/16	8/53	2/20	1/21
		No such plan	1/37	1/45	0/16	2/53	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	5/37	1/45	0/16	17/53	2/20	3/21
		No, in progress	0/37	2/45	1/16	2/53	0/20	0/21
		No such plan	1/37	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.



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)

Number of respondents by category and by region in 2025

<i>PV 2030 statement</i>	<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
--------------------------	---------------------	---------------	------------------	--------------------------------	-----------------------	-----------------

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 2IPD as a proxy measure for this indicator.</i>			
--------	--	--	--	--	--	--

PV 3.2	By 2030, 100% of the population should have access to postal services.	Yes	11/37	4/45	4/16	40/53	0/20	4/21
		No, in progress	4/37	3/45	1/16	1/53	3/20	3/21
		No such plan	0/37	0/45	0/16	0/53	1/20	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	11/37	3/45	2/16	36/53	1/20	4/21
		No, in progress	3/37	4/45	3/16	4/53	2/20	3/21
		No such plan	2/37	0/45	0/16	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 International Bureau.



DOs (2/5)

Number of respondents by category and by region in 2025

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
PV 3.4	By 2030, all operators should have developed means to accurately calculate the cost of providing the USO.	Yes	7/37	2/45	1/16	32/53	0/20	1/21
		No, in progress	7/37	5/45	2/16	8/53	3/20	4/21
		No such plan	2/37	0/45	2/16	1/53	1/20	2/21
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	1/16	19/53	2/20	2/21
		No, in progress	9/37	6/45	1/16	20/53	1/20	4/21
		No such plan	5/37	0/45	3/16	2/53	1/20	1/21
PV 3.6	By 2030, all countries should have reviewed their performance in postal development (as per measures such as the 2IPD), in order to develop precise targets for improvement.	Yes	6/37	1/45	1/16	17/53	3/20	2/21
		No, in progress	9/37	6/45	3/16	17/53	1/20	4/21
		No such plan	1/37	0/45	1/16	4/53	0/20	1/21

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



DOs (3/5)

Number of respondents by category and by region in 2025

<i>PV 2030 statement</i>		<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and 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	7/37	2/45	1/16	26/53	3/20	2/21
		No, in progress	3/37	5/45	2/16	7/53	1/20	2/21
		No such plan	6/37	0/45	2/16	8/53	0/20	3/21

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	7/37	1/45	0/16	28/53	3/20	4/21
		No, in progress	8/37	6/45	1/16	9/53	1/20	2/21
		No such plan	1/37	0/45	3/16	3/53	0/20	1/21

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)

Number of respondents by category and by region in 2025

<i>PV 2030 statement</i>			<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and 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	8/37	1/45	1/16	22/53	2/20	1/21
		No, in progress	8/37	6/45	3/16	18/53	1/20	4/21
		No such plan	0/37	0/45	0/16	0/53	0/20	2/21

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



DOs (5/5)

Number of respondents by category and by region in 2025

<i>PV 2030 statement</i>	<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
--------------------------	---------------------	---------------	------------------	--------------------------------	-----------------------	-----------------

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	4/37	0/45	1/16	18/53	0/20	3/21
		No, in progress	11/37	4/45	1/16	22/53	2/20	2/21
		No such plan	1/37	3/45	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)

Number of respondents by category and by region in 2025

<i>PV 2030 statement</i>	<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
--------------------------	---------------------	---------------	------------------	--------------------------------	-----------------------	-----------------

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>			
--------	--	--	----------------------------	--	--	--

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 2IPD as a proxy measure for this indicator.</i>			
--------	--	--	--	--	--	--

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)	3/37	2/45	0/16	4/53	2/20	0/21
		(R)	3/37	0/45	0/16	1/53	1/20	2/21
		No, in progress (G)	3/37	3/45	1/16	9/53	0/20	1/21
		(R)	1/37	3/45	1/16	9/53	1/20	1/21
		No such plan (G)	1/37	1/45	0/16	7/53	0/20	2/21
		(R)	2/37	1/45	0/16	8/53	0/20	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 International Bureau.



Other stakeholders (2/2)

2024 baseline

<i>PV 2030 statement</i>	<i>Asia-Pacific</i>	<i>Africa</i>	<i>Caribbean</i>	<i>Europe and Central Asia</i>	<i>Arab countries</i>	<i>Americas</i>
--------------------------	---------------------	---------------	------------------	--------------------------------	-----------------------	-----------------

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>
--------	---	---

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 PV 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 covering partnerships with international organizations.</i>
--------	--	--

* This indicator is measured by the International Bureau.