

Postal networks: Actors in the social and economic development of the Africa region

Regional Development Plan 2017–2020
Development and Cooperation Directorate



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Postal networks: actors in social and economic development

In a rapidly changing world, the essential role that Posts play in ensuring the right to communication through the exchange of messages, the transport of parcels or the sending of money is now more relevant than ever. Postal networks are vital to e-commerce development, ensuring the delivery of millions of parcels each day. Postal networks also contribute to trade facilitation, in particular for micro, small and medium enterprises, by offering products and services tailored to the needs of those businesses. In addition, over 1.5 billion people around the world have access to financial services via the post office, making Posts the world's second biggest stakeholder in financial inclusion.

In a world in which new technologies are constantly being developed, the Posts demonstrate day after day their capacity for innovation. The use of drones or driverless vehicles to deliver parcels, the launch of hybrid mail, the development of mobile payment services or cryptocurrencies for money transfers, and the creation of mobile virtual network operators are just some of the examples of how Posts are able to adapt to, and even anticipate, changes in the environment in which they operate.

Consequently, in the majority of countries, postal networks constitute an essential infrastructure for an inclusive and effective economy. The purpose of this document is to show government authorities and development partners (international organizations, development agencies, United Nations system institutions, etc.) how postal networks can serve as catalysts for development. The document comprises three parts. The first part looks at the global postal sector and highlights its importance as an economic infrastructure. The second part highlights the contributions Posts make to the Sustainable Development Goals, in particular in the areas of socio-economic development, climate change, and financial and social inclusion.

Lastly, the third part offers insight into the postal sector in the Africa region, examining its strengths and weaknesses, and provides a brief description of some of the key projects that the UPU intends to implement in the region during the 2017–2020 cycle.

In 2015 and 2016, the UPU, a specialized agency of the United Nations, worked with regional partners to identify the intervention priorities for its development cooperation activities. Using the UPU's Vision 2020, which focuses on the three key pillars of innovation, inclusion and integration, each region selected three to five areas for which projects would be formulated. Accordingly, during the 2017–2020 cycle, projects will be developed in the areas of e-commerce, financial inclusion, trade facilitation, measuring and reducing the postal sector's carbon footprint, disaster risk management, and bridging the digital divide. All interventions will be designed to make the best use of the postal infrastructure, in particular in rural and remote areas, in order to contribute to the development of countries.

I urge all partners to work with the UPU and its 192 member countries to ensure that their activities in the area of socio-economic development have a greater impact. I know that by joining forces and using postal networks to their full potential, we can contribute to the achievement of the Sustainable Development Goals.



Bishar A. Hussein
Director General

Postal sector contribution to socio-economic development

The postal sector is currently in a period of profound change. Technological developments, challenges to the traditional economic model, liberalization, new customer expectations and significant shifts in consumption patterns are all factors that are pushing Posts to re-invent themselves. One thing, however, remains unchanged: postal networks continue to be an essential part of a country's socio-economic infrastructure.

Posts in the 21st century

One of the first things that comes to mind when one thinks of the Post is letters or postcards. However, postal operators around the world offer a whole host of other products and services: parcel delivery, bank accounts, bill payment services, applications for or renewals of official documents, delivery of fresh products, home services for the elderly, delivery of vaccines or books for school children, and so on. The postal sector is thus an essential infrastructure that facilitates the functioning of the global economy.

A study¹ conducted in 2016 by the UPU, the United Nations Global Pulse initiative and the University of Cambridge, analyzing the postal flows of 184 countries over a four-year period, reveals a very strong correlation between postal connectivity and gross domestic product per capita and the rate of poverty. Postal connectivity is defined as the capacity of the postal network to engage in exchanges with a large number of countries. Therefore, the more the Post of a country exchanges with other Posts, the greater the growth in the country's economy and the greater the decrease in its rate of poverty. Furthermore, if a high degree of postal connectivity is combined with the proper functioning of other communication networks (air transportation and social and mobile networks), the correlation between postal connectivity and development becomes even stronger. This study thus shows

that if a country's postal network is adequately developed, engages in exchanges with the postal networks of a number of other countries, and has a solid infrastructure (airlines, mobile networks, etc.), the more positive its impact will be on the country's economic growth.

A three-dimensional network: physical, electronic and financial

To better understand the importance of the postal sector, a few of its characteristics should be examined:

- Posts form the largest integrated distribution network in the world: with over 660,000 offices operating in the 192 UPU member countries, the postal network makes it possible to physically connect everyone around the world. In addition to these post offices are the 1.4 million postal carriers who visit hundreds of millions of households each day. The postal network is made up of 2 million points of contact around the world, not including letter boxes and other automatic dispensers.
- An electronic network: to ensure the physical distribution of items (letters, parcels, e-commerce deliveries), Posts use an electronic network that interconnects the various operators and enables them to exchange electronic data in real time. The complementarity between the physical and electronic dimensions makes Posts key players in e-commerce, as the final link in the supply chain that connects distributors, websites and customers.
- A key player in financial inclusion²: around the world, 1.5 billion people send money to their families, pay their bills or receive social payments via the Post. Globally, 91% of postal operators offer financial services directly or in partnership with other financial institutions, making Posts the world's second largest contributor to financial inclusion, behind banks but well ahead of mobile phone operators and microfinance institutions.

¹ Hristova D., Rutherford A., Ansón J., Luengo-Oroz M., Mascolo C. (2016) The International Postal Network and Other Global Flows as Proxies for National Wellbeing. PLoS ONE 11(6). <http://journals.plos.org/plosone/article?id=10.1371/journal.pone.0155976>.

² Clotteau N., Measho B. (2016) Global Panorama on Postal Financial Inclusion. Universal Postal Union. www.upu.int/uploads/tx_sbdownloader/globalPanoramaOnPostalFinancialInclusion2016En.pdf.

Postal operations are extremely diverse



Prepaid cards for migrants



Parcels (e-commerce)



Banking services



Delivery of emergency aid



Government services (identification)



Mobile banking



Social role



Mail



Trade facilitation (MSMEs)



Money transfers



Posts by the numbers

As facilitators of international and domestic trade, e-commerce and financial inclusion, postal networks represent a basic infrastructure that is essential to economic development.

Traditional mail is on the decline in industrialized countries, but the significant growth in e-commerce is largely counterbalancing that trend. Indeed, according to eMarketer³, online sales will reach 1.915 trillion USD in 2016, accounting for 8.7% of retail spending worldwide, a percentage expected to reach 14.6% in 2020. Posts – key partners in e-commerce – are part of this trend. For several years now, the postal sector has seen extremely strong growth, with an annual rate of +14% between 2012 and 2014.

Aside from its extremely dense network, the postal sector boasts 5.24 million employees; handles over 300 billion items a year, including 8 billion parcels; and serves one billion customers who have a bank account with a postal financial institution.

Universal service and social role

The governments of the UPU member countries are obligated to provide a universal postal service, that is, to provide all citizens in their territories with basic postal services at affordable rates. Each country designates a postal operator (known as a designated operator or DO) responsible for ensuring access to the postal service. In contrast to other institutions that focus on major cities or the most developed areas, DOs are obligated to cover the entirety of the national territory and to offer their services at a uniform rate.

In this context, Posts typically take on public service missions, which are not always remunerated. France's postal bank, for example, is legally obligated to open a bank account for anyone who applies, regardless of that person's resources. In many countries, DOs are legally obligated to collect and deliver letters and parcels at people's homes, five or six days a week.

The postal network is thus a network of proximity and trust that facilitates the implementation of public policies.

³ <https://www.emarketer.com/Article/Worldwide-Retail-Ecommerce-Sales-Will-Reach-1915-Trillion-This-Year/1014369>.

Economic impact of postal activity

An analysis of a series of programmes instituted by the Brazilian government in the late 1990s and early 2000s using the postal network perfectly captures the potential of Posts to stimulate economic growth. The government launched two programmes in particular. One involved implementing a simplified export process accessible to all via the post office. The idea was to enable micro, small and medium enterprises (MSMEs) to reach new markets in an accessible and affordable manner, without needing any particular expertise in international trade. At the same time, the government enacted new banking regulations allowing banks to recruit agents to distribute financial products, and it encouraged the Post to become involved. Correios, Brazil's designated operator, partnered with Bradesco, a large private bank, to distribute banking products via all the country's post offices.

The combined impact of these two policies was measured by means of various UPU studies⁴, which found the following:

- Between 2002 and 2008, the trade facilitation programme *Exporta Fácil* enabled over 10,000 MSMEs to access international markets. This programme enjoyed particular success in the country's poorest regions and in the less service-oriented regions.
- Similarly, an econometric analysis of each of Brazil's 5,564 municipalities showed the effect achieved by the creation of Banco Postal, the partnership between Correios and Bradesco. In the municipalities in which a Banco Postal agency was introduced, the creation of new businesses increased by 23% in comparison to the municipalities with no such agency. Furthermore, job creation increased by 14%, while the number of new banking agencies increased by 56%. A definite formalization of the economy and an increase in the average size of businesses was noted.

All of these factors demonstrated that rural areas, until then excluded from traditional economic networks, are able to develop when provided with adequate infrastructure. The postal network is able to play an important role in that process.

The UPU as a driver of sector development

Overview of the UPU

Created in 1874, the UPU is an intergovernmental organization and a United Nations specialized agency. It is the primary forum for cooperation between postal sector players (governments, regulators, operators) and works in a coordination, advisory or even regulatory capacity. In that capacity, the UPU drafts various international treaties and standards for the exchange of letters and parcels and for postal money transfers. Within the UPU, a large number of technical and operational issues relating to international postal exchanges are discussed. Furthermore, through its Postal Technology Centre, the UPU provides Posts around the world with cutting-edge technical solutions to help them secure their exchanges and improve quality of service. The UPU thus creates the conditions that enable the world's Posts to offer businesses the infrastructure needed to engage in exchanges in the safest and most secure manner.

Moreover, as a centre of expertise, the UPU produces studies and analyses, in particular to demonstrate the postal sector's impact on economic development. Lastly, since its creation, the UPU's mission has been to carry out cooperation activities aimed at strengthening the postal networks of developing countries.

The UPU works with specialized regional organizations, called restricted unions, that play an important role in ensuring a link between global, national and regional activities. By aligning their missions and agendas with UPU priorities, the restricted unions have become key players in facilitating the implementation of global strategies at the regional level.

⁴ Ansón J., Bosch Gual L., Caron J., Toledano J. (2008) Postal Economics in Developing Countries: Posts, Infrastructure of the XXIst Century?

Technical cooperation at the UPU

The postal sector is a universal network. The concept of a single postal territory is thus used, expressing the idea that the postal operators of countries worldwide are able to ensure global coverage and that people around the world can send letters, parcels or money orders to anyone, anywhere.

However, just as a chain is only as strong as its weakest link, a network is only as strong as its constituent parts. For that reason, the UPU has implemented a cooperation policy aimed at supporting the Posts of developing countries. Cooperation activities can be broken down into the following categories:

- **Public policy support:** as a centre of knowledge and expertise, the UPU regularly publishes studies on the postal sector that highlight best practices, offer impact analyses of various public policies, or ensure a better understanding of the business models adopted by different operators. In recent years, one of the key areas of focus has been on using big data to better quantify the postal sector's contribution to the United Nation's Sustainable Development Goals (SDGs).

- **Sector reform:** since 2005, the UPU has been working with the governments of nearly 70 countries on reforming their postal sector. In concrete terms, this process involves adopting a suitable legal framework, defining a consistent and sufficiently broad sector policy, and modernizing the DO. One success story is Uruguay, where the government fully supported postal reform and put in place all the necessary prerequisites to ensure optimal functioning of the market, with a strong national operator responsible for implementing a number of public policies.
- **Technical assistance for DOs:** the UPU implements regional and national projects designed to strengthen the capacity of Posts to offer services tailored to the needs of citizens. Such assistance can take various forms: procurement of equipment, roll-out of new services, advice, training, and so on.

The UPU's cooperation programmes are implemented by its Development and Cooperation Directorate and in particular by its seven regional offices, which act as the link between UPU headquarters and partners in the field.



Examples of UPU projects

The UPU, in the context of its cooperation policy, has achieved many successes in recent years:

- **E-commerce:** the UPU is involved in e-commerce on two levels. On a global level, the UPU establishes standards, develops services and defines procedures to be applied internationally. This provides a framework that allows postal operators to fully play their role as a key stakeholder in the e-commerce supply chain. The UPU also intervenes at the national and regional levels in developing countries through major strategic projects. Technical and financial assistance is provided to governments and Posts to ensure that they can enter the international e-commerce market. Between 2013 and 2016, over a hundred countries received training and technical assistance in the areas of security, customs, quality of service, or transport. Posts are also provided with tools that make it possible to connect the entire supply chain, track all items transported within the postal network, and ensure the security of the network.
- **Reduction in the cost of migrant remittances in West Africa:** in 2008, in partnership with the International Fund for Agricultural Development, the UPU began implementing a series of projects in Asia-Pacific, Central Asia and Africa to use the postal networks in rural areas to roll out secure and affordable money transfer services. For example, between 2008 and 2010, in six West African countries, the average cost of transfers – via the Post as well as via traditional money transfer agencies – decreased by 30% to 50%, which helped migrants and their families, who are the recipients of these remittances.
- **Emergency projects:** in 2010, Haiti was devastated by an earthquake that killed over 200,000 people. In 2013, in the Philippines, Typhoon Haiyan, the most intense tropical cyclone on record, killed over 5,000 people and devastated the Tacloban region. In both instances, the UPU, via its Emergency and Solidarity Fund (ESF), assisted the Posts in these two

countries in not only re-establishing service (reconstruction of a sorting centre and post offices, and procurement of vehicles), but also rebuilding infrastructure in accordance with adequate standards in order to improve the resilience of the network. Since 2013, the UPU has been helping member countries put in place risk reduction strategies to ensure that Posts are better able to face natural disasters and can play an active role in providing humanitarian assistance in the wake of such disasters.

- **Introduction of a postal addressing system in South Africa:** people without an address are unable to register with the civil registry or vote. Emergency services (fire, ambulance) cannot reach their homes and it is virtually impossible to obtain a telephone land line or connect to the electrical grid. Without addresses, governments have a difficult time collecting taxes or conducting censuses. The United Nations Development Programme estimates that four billion people worldwide are excluded from the rule of law. In many cases, this is the result of the fact that they do not have a clearly identified address, which excludes them from accessing many services. The UPU provides technical assistance to many countries to help them institute national addressing systems. As an example, a wide-scale project in South Africa resulted in the assignment of addresses to eight million homes in rural areas. As a result, rural populations were able to access public services, open bank accounts with Postbank, and receive home delivery from the Post and from many merchants.

Postal sector contribution to the implementation of the Sustainable Development Agenda

The 17 SDGs and 169 targets adopted by the United Nations in September 2015 serve as a roadmap for the international community to build a sustainable future and foster social advancement and human well-being. Their implementation calls for active and collaborative partnerships between all countries and stakeholders.

The postal sector can play a key role in the attainment of the SDGs nationally, regionally and internationally. The diverse network and presence of Posts make them a potentially strategic driver of the SDG agenda. The sections below detail how postal services can, and indeed must, be part of the solution for each of the approved goals.





SDG 1:

End poverty in all its forms everywhere

Ensure equal rights to economic resources and access to basic services and financial services (target 1.4)

Reduce vulnerability to environmental shocks and disasters (target 1.5)

Posts are the second biggest contributor to financial inclusion worldwide after the banking sector

Financial inclusion is recognized in the SDG framework as a key part of fighting poverty and fostering development for all.

Today, three quarters of Posts worldwide offer financial services, including domestic and international money transfer services. They provide accounts for roughly a billion people, making them the second biggest global player in financial inclusion, behind banks but well ahead of microfinance institutions, which account for “only” 200 million customers, and mobile money operators, which have roughly 150 million active customers.

Owing to their very dense physical networks, unique presence in rural areas and trusted status, Posts are vital players in financial inclusion – and in a variety of different contexts:

- The Brazilian Post was a pioneer of the banking agent model in the early 2000s, with 10 million accounts opened over 10 years, mostly for unbanked or under-banked people.
- The Moroccan Post now provides accounts to around 20% of the country’s population, especially in low- and medium-income segments.

Because of their extensive network and logistics capabilities, Posts are considered in many countries as valued partners in their governments’ national disaster risk management and recovery plans. Their knowledge of the communities they serve and their infrastructure allow them to operate and intervene efficiently, especially in remote areas where the post office is often the only government presence.

Following Typhoon Haiyan, PHLP (the Post of the Philippines) and partners delivered cash grants to around 18,000 beneficiaries of the United Nations World Food Programme and made total cash payments of approximately 15 million PHP to more than 6 million victims of the disaster.



SDG 2:

End hunger, achieve food security and improved nutrition and promote sustainable agriculture

Provide secure and equal access to financial services and markets (target 2.3)

The Post enables and provides infrastructure for rural development through financial inclusion

A joint study by the World Bank and the UPU showed that Posts are better placed than banks to provide accounts to people excluded from the financial system, especially those in rural areas or precarious economic situations. This is very important in a rural development context, where the need for appropriate financial products and economic opportunities is greatest. For example, in Burundi in 2013, the Post implemented a government programme aimed at facilitating the distribution of fertilizers to around 350,000 families, helping to establish Burundi as a net exporter of rice.

Development in rural areas can only occur where there is adequate infrastructure. In the vast majority of countries, the postal network is the largest network in rural and remote areas to offer financial, communication, logistics and other retail and government services. This was shown in the examples above in the areas of financial inclusion, access to information and

communications technology (ICT), and trade facilitation for SMEs in rural and underserved areas.

Posts assist local small-scale producers by building local and international marketplaces for the sale and distribution of food. As early as 1986, Korea Post created the ePOS postal ordering system for typical local products as a way of regenerating the local economy in farming and fishing communities.



SDG 5:

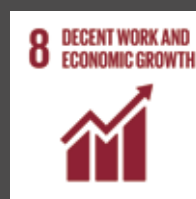
Achieve gender equality and empower all women and girls

Give women equal rights to economic resources, as well as access to financial services (target 5.a)

Posts as drivers of financial inclusion for women

A 2015 joint study by UN Women and the UPU demonstrated the non-discriminatory nature of Posts in the provision of financial services.

On average, in developing countries, postal financial institutions (postal banks or postal savings banks) have twice as many female customers as other financial institutions. This phenomenon is even more marked in rural areas.



SDG 8:

Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all

Encourage the formalization and growth of micro, small and medium-sized enterprises, including through access to financial services (target 8.3)

Strengthen the capacity of domestic financial institutions to encourage and expand access to banking, insurance and financial services for all (target 8.10)



SDG 9:

Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation

Increase the access of small-scale industrial and other enterprises, in particular in developing countries (target 9.3)

Increase access to information and communications technology and strive to provide universal access to the Internet in least developed countries (target 9.c)

Postal financial inclusion serves not only individuals excluded from the banking sector but also businesses, especially SMEs

Leveraging its network of over 40,000 branches extending to all parts of the country, the Postal Savings Bank of China (PSBC) fills the access-to-finance gap for farmers and MSMEs in rural China. According to the Consultative Group to Assist the Poor, between its launch in 2007 and 2013, the PSBC “served over 7.5 million microcredit business beneficiaries, handling over 13 million transactions amounting to over 811 billion RMB (over 130 billion USD)”⁵. The PSBC is therefore an indispensable banking institution willing to provide services to those not considered priorities by more traditional banks.

The postal sector as a tool for bridging the digital divide

The postal network is a unique asset for extending the information society to under-served populations.

In Botswana, the development of Internet access and the provision of various communication services in post offices through knowledge centres has increased the revenue of connected post offices by an average of 25% and provided local communities with a full range of e-services.

Tanzania Postal Corporation runs 36 Internet cafés and six post offices containing community information centres which offer e-learning and other Internet-based services to local communities.



SDG 10:

Reduce inequality within and among countries

Promote social and economic inclusion (target 10.2)

By 2030, reduce to less than 3% the transaction costs of migrant remittances and eliminate remittance corridors with costs higher than 5% (target 10.c)

A network for social and economic inclusion

With more than 660,000 post offices in the world, postal presence in rural areas is unmatched by any other network for the facilitation of social and economic inclusion.

Post offices: the world's cheapest providers of remittances

According to the World Bank, post offices are the world's cheapest providers of remittance services. Posts have already achieved the 5x5 objective, with an average cost of about 5%. In Sub-Saharan Africa alone, if all remittances were to be channelled through post offices at that cost, migrants and their families could save up to 3.2 billion USD a year.

⁵ Zhang M. and Liu Z. (2014) Postal Savings Bank of China: Inclusive Finance in Rural China. CGAP.



SDG 11:

Make cities and human settlements inclusive, safe, resilient and sustainable

Approximately a quarter of the world's urban population lives in slums (UN-Habitat 2013). Lack of addressing infrastructure can exacerbate inequalities and undermine economic growth. Posts are helping to establish and provide addressing systems for all populations. The UPU, through its "Addressing the World – An address for everyone" initiative, is building a multi-stakeholder approach to help Posts in developing countries and least developed countries provide addressing systems to excluded populations. Quality addressing and postcode systems are an essential part of national infrastructure and are crucial to the socio-economic development of countries. They also facilitate trade and hence contribute to countries' economic growth.



SDG 12:

Ensure sustainable consumption and production patterns

Encourage companies, especially large and transnational companies, to adopt sustainable practices and to integrate sustainability information into their reporting cycle (target 12.6)

Posts are key players in the local, national and international transport supply chain. More and more postal operators are calculating and reporting their carbon footprint. In developing and least developed countries, Posts are supported by the UPU through its specially designed carbon management tool OSCAR.



SDG 13:

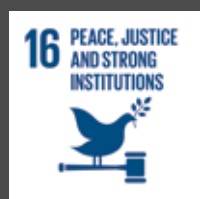
Take urgent action to combat climate change and its impacts

Strengthen resilience and adaptive capacity to natural disasters (target 13.1)

Integrate climate change measures into national policies (target 13.2)

Making Posts more resilient enables them to play a more effective role in managing disaster risks and the aftermath of catastrophes, and in improving the resilience of local communities. More and more Posts are implementing disaster risk management and resilience programmes to enable better preparation for and adaptation to natural disasters with a view to better serving all populations.

Mitigating the environmental impact of postal activities is on the agenda of a growing number of Posts in not only industrialized but also developing and least developed countries. Many Posts are developing low carbon strategies through their postal products and the use of renewable energy in their vehicles and buildings.



SDG 16:

Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels

As public institutions in many countries, Posts are delivering government services and acting as public policy enablers. For example, they help to organize electoral processes and deliver identity papers and official documents, and enable public access to information through the distribution of print media. In Lebanon, the Post, which has more than 90 branches throughout the country, has concluded partnerships with several public and private institutions to provide services on their behalf, enabling citizens to renew passports, pay taxes, have official documents certified and apply for work permits in all post offices. More than 120 different services can be facilitated by postal staff, and millions of these operations are performed every year.



SDG 17:

Strengthen the means of implementation and revitalize the global partnership for sustainable development

Significantly increase the exports of developing countries, in particular with a view to doubling the least developed countries' share of global exports by 2020 (target 17.11)

Posts as a key enabler of trade

The role of Posts in trade facilitation is growing, especially in the context of e-commerce. The implementation of trade facilitation programmes by Posts has had a significant impact on export trends, in particular for SMEs in rural areas of developing countries. This is true of Latin America in particular, where postal trade facilitation programmes developed by Posts in cooperation with the relevant national authorities have been a success. In Ecuador, where such a programme has been implemented by the Post, the value and volume of exports from SMEs through this channel have more than tripled in two years.

Regional priorities

Analysis of the Africa region at the end of 2016

Actions led in Sub-Saharan Africa during the 2013–2016 cycle

The intervention priorities for the Sub-Saharan Africa region for the 2013–2016 cycle were established in 2012 following a consultation process with regional partners (member countries, UPU restricted unions, partners). This process resulted in a regional matrix built upon the goals and programmes of the UPU's global strategy. The following two main priorities were identified:

- Quality of service and supply chain improvement;
- Financial services and e-commerce development.

To turn these priorities into concrete action, projects were formulated at the regional and national levels. Action was taken in close cooperation with the Pan African Postal Union (PAPU), a specialized agency of the African Union, in the following areas:

Quality of service and supply chain improvement

Measures were taken to develop the operational management competencies of postal operators to help them better meet customer needs. Activities included group training workshops, using an approach aimed at building the capacities of one team per country that would be responsible for implementing a national action plan. The workshops were aimed at the 45 countries in Sub-Saharan Africa. A total of fourteen training workshops were organized for 500 senior officials and national project managers.

Additional activities were implemented to achieve the target objectives and included organizing national technical assistance projects for 26 least developed countries. Through these projects, postal equipment for mail processing and transport systems was provided based on the needs of each country, and technical assistance and specialized on-site training sessions were offered to ensure greater impact.

As a result of all the activities carried out, 18 postal operators were able to achieve quality certification and were thus able to meet international standards.

Post office electrification and connectivity in Africa

In partnership with PAPU, the African Union and other regional postal sector stakeholders, the UPU commissioned a study to assess current infrastructure levels and evaluate the needs of the postal sector in Africa. The study revealed the postal network's potential in contributing to socio-economic development, and a series of technical recommendations was issued for configuring an IT architecture for Posts based on renewable energy and with a small carbon footprint. A pilot project was developed for 13 countries: Burkina Faso, Burundi, Chad, Ghana, Guinea, Kenya, Madagascar, Malawi, Nigeria, South Africa, South Sudan, Tanzania (United Rep.) and Uganda. A feasibility study was also conducted, setting out the project's various components and identifying the pre-requisites for project implementation.

Within this framework, a donor's conference, organized by the African Union in partnership with the UPU and PAPU, was held on 3 September 2015 in Addis Ababa, Ethiopia. At this ministerial conference, a resolution was adopted to develop the postal sector in order to foster socio-economic development, in particular in Africa's rural and isolated regions. At the same time, the relevance of the project was highlighted, with the governments of Madagascar, Malawi, Tanzania and Uganda committing to mobilize the national resources necessary to implement the pilot project.



Financial services development

During the 2013–2016 period, the UPU launched a wide range of financial services activities. First, many measures were taken across Sub-Saharan Africa to modernize postal money transfer services. In particular, audits were conducted of the Posts of 11 countries in an effort to ensure the security of their processes as well as the reliability and security of the services offered to customers. Training workshops and other capacity-building activities aimed at improving quality of service were also carried out. In total, approximately 300 officials from 20 countries received training.

Furthermore, several regional projects were developed and implemented in coordination with other organizations:

- In 2013, in partnership with PlaNet Finance and four African Posts, the UPU launched the postal initiative for the improvement of money transfers for African migrants. This project, funded by the European Union, enabled the Posts of Burkina Faso, Cameroon, Côte d'Ivoire (Rep.) and Mali to carry out quality audits, improve their procedures, deploy new mobile money transfer technologies, or link their money transfer services to other financial products such as insurance or savings accounts. Tens of thousands of people in those four countries benefited from the project, which enabled the Posts to significantly reduce payment times and improve quality of service. Moreover, four financial education training modules were developed and delivered in partnership with migrant associations and partner Posts, helping thousands of families to better manage their budgets, learn to save, or better understand the various financial products available to them.
- Between 2013 and 2016, in partnership with the International Fund for Agricultural Development, the World Bank, the United Nations Capital Development Fund, and the World Savings and Retail Banking Institute, the UPU led a wide-scale project on using African postal networks to give migrants and rural populations better access to a range of financial services, including affordable and secure money transfer services. As part of that project, which received over four million euros in funding from the European Union, the UPU provided technical assistance to the Posts of Benin, Ghana, Madagascar and Senegal. As a result, these Posts were able to audit, update and formalize their operational processes; improve operational security; and provide a better quality of service to their

customers. Major investments were also made in the infrastructure of the four Posts, with the construction or renovation of two model post offices (one in a rural area and one in an urban area) in each country.

- In September 2015, the UPU launched a project with the International Organization for Migration and Burundi Post aimed at using the postal network to contribute to the socio-economic development of Burundi's rural population and diaspora. The purpose of the project, which was supported by Belgium and Turkey, was to offer concrete solutions to migrants and their families. The first phase of the project was to reduce the cost of money transfers to and from Burundi. To that end, an IT infrastructure was put in place in all of Burundi's 142 post offices. By using mobile equipment and cloud-based technologies, Burundi Post is now able to offer instant money transfer services at a low cost. Through public-private partnerships to be developed as of 2017, the postal infrastructure will also be accessible to various money transfer agencies, which will increase competition in this market and help reduce costs.

Current situation of the postal sector in the Africa region

For UPU purposes, the Sub-Saharan Africa region comprises 45 countries. According to the World Bank (2014), the population in Sub-Saharan Africa was 973 million in 2014 and was increasing at an average rate of 2.7% per year. The region is among the fastest growing in the world, but it faces significant challenges owing to weaknesses in the global economy and region-specific risks such as the falling prices of key commodities like oil, gas and minerals. Economic growth slowed from 4.5% in 2014 to 3% in 2015 and continued to decelerate in 2016. However, a 2016 World Bank⁶ analysis predicted a modest rebound in commodity prices in 2017 and 2018, which bodes well for economic growth in the region.

Information and communication technologies

The role played by ICTs in postal development is critical. According to ITU statistics (2014), Africa is one of the fastest growing regions in terms of Internet penetration, with a 16.5% growth rate in Internet users between 2013 and 2014, more than twice as high as the global average of 7.85%. A number of postal operators in Africa have made efforts to introduce IT in their post offices through the automation of their counter operations and the introduction of new and innovative

⁶ <http://www.worldbank.org/en/region/afr/overview>.

products and services. Postal operators in Africa offer a wide variety of new IT-based products and services such as money transfer services, postal item track and trace, bill payments, online postage stamp sales, pension payments and hybrid mail.

Postal regulation and reform

Postal regulation is a relatively new phenomenon in Africa and various organizational models have been used in establishing the institutional framework for the regulatory body overseeing the postal sector. Many African countries have adopted the communication sector's multi-sectorial regulation model, with a separate postal department. Postal sector regulation is beneficial to both postal customers and market operators as it creates a better organized market. Consumers of postal products and services benefit from increased competition in the market, which in turn could lead to lower prices and improved service delivery. Postal customers also benefit from the various consumer protection measures introduced as part of the regulatory framework for the postal sector in most African countries. Postal regulation also facilitates the creation of a level playing field in the market, with a view to promoting fair competition among market players.

Many countries in Africa have either undergone or are currently undergoing major reforms of the postal sector. Such reform has focused largely on the creation of a conducive policy framework for the postal sector, review of the legal and regulatory framework,

modernization of the public postal operator, and diversification and modernization of products and services offered within the postal sector.

Postal infrastructure

In 2014, there were a total of 13,213 post offices in Africa. According to a UPU study⁷ on postal infrastructure in Sub-Saharan Africa, it is estimated that 82% of post offices are located outside the three largest cities of each African country and in rural and peri-urban areas where 80% of the population lives. The extensive postal network in rural and other marginalized areas provides an important infrastructure which can be used to provide people in different parts of the country with access points for a wide range of products and services, such as financial services, including savings and remittances; communication services; and logistics and government services.

The postal network provides an infrastructure that can be used to bridge the digital divide, especially in rural areas, through the provision of various ICT services. The establishment of community information centres within the postal network provides facilities which enable rural communities to access the Internet and other business services, market information, and government services (e.g. social transfers). The provision of various products and services through the extensive postal network contributes to reaching national socio-economic development goals pertaining to rural development and poverty alleviation.



⁷ Anson J., Toledano J. (2008) Postal Economics in Developing Countries: Posts, Infrastructure of the XXIst Century?

Postal financial services and financial inclusion

Financial inclusion

According to the World Bank's Global Findex (2014), 34% of adults in the Sub-Saharan Africa region had a bank account in 2014, up from 24% in 2011. The region leads the world in mobile money accounts: 12% of adults in Sub-Saharan Africa have a mobile money account, compared with only 2% of adults worldwide. The vast presence of postal networks across rural areas in most African countries gives post offices a comparative advantage over other financial institutions to tap into the unbanked market.

The extensive postal networks in African countries provides an infrastructure which can be used to enhance financial inclusion through the provision of various financial services. Access to financial services is especially important in rural areas, where a large share of the unbanked population lives. According to the 2014 Global Findex, 43% of the world's rural population is unbanked. This is where the postal network can play an important role: through its extensive presence in rural areas, it can promote the integration of individuals into the formal financial system. A 2013 UPU–World Bank study⁸ highlighted that the size of the postal network is positively associated with the number of adults having a postal account.

Many African countries have seen rapid growth in mobile money services in recent years and this has had a positive impact on efforts to enhance financial inclusion in most countries. Posts from the African continent have deployed a variety of approaches to offer digital financial services. The Postal Corporation of Kenya and Zimpost (Zimbabwe), for example, have partnered with Safaricom and Econet Wireless, respectively, to become agents for the M-Pesa and EcoCash products. In Senegal, the Post went a step further and launched PosteCash, its own mobile banking system, in partnership with a fintech company called Numherit. Both institutions are heavily involved in developing a comprehensive ecosystem allowing users of the service to transfer money, receive government payments, buy online, or pay in a growing number of shops in Senegal. More than 200,000 clients were signed up in the first four months of operation in 2015.

Post offices play a particularly important role in national financial inclusion strategies given the relative magnitude of postal networks in African countries, especially in rural areas where post offices are frequently the nearest possible access point for pick-up of remittances. The extensive postal network in most African countries means that Posts have the capacity to offer a wide range of affordable financial services and to become a “supermarket” for remittances, financial inclusion and other e-services.

International money transfers

Diaspora remittances are a major part of the economies of many African countries, and about 40 billion USD is received annually from immigrants from Africa. According to the World Bank, post offices are the world's cheapest providers of remittance services, with an average cost between 5% and 6% compared with the world average of 8.5%. Remittances from the diaspora provide much needed resources to meet the population's basic needs, such as food, school fees and health expenses. Remittances contribute to poverty reduction and economic empowerment of the population, especially in rural areas, and they play a significant role in national socio-economic development.

MSMEs, trade and e-commerce

The postal sector is well positioned to aid the market transformation through e-commerce, using its three-dimensional network of physical, financial and electronic services.

E-commerce is now business as usual in developed countries. However, this is not the case in many developing countries. The current share of consumer e-commerce for African enterprises, for example, is below 2%, but there is enormous potential. By 2018, the African e-commerce market is projected to soar to 50 billion USD, from just 8 billion USD in 2013.

Being among the largest providers of delivery services in the world, postal operators have the potential to be major players in the delivery of e-commerce merchandise by offering their customers access to simple, affordable and reliable international postal services.

⁸ Anson J., Berthaud A., Klapper L., Singer D. (2013) Financial Inclusion and the Role of the Post Office. Policy Research Working Paper 6630, World Bank, Washington DC.

Intervention strategy in the Africa region

Based on the results of the activities implemented in the 2013–2016 cycle and the situational analysis of the region presented above, and taking into account the declaration made at the 2015 regional strategy conference organized by the UPU and PAPU, which identified the priorities for the 2017–2020 cycle, the intervention strategy for the region will include the projects below.

Improvement of operational efficiency and development of e-commerce

Aim of the project

The project dovetails with the UPU's strategic objective of helping postal operators become key players in e-commerce. To meet the challenges posed by the e-commerce market, the UPU must adopt a global and integrated approach based on a market and customer focus. For the 2017–2020 cycle, the UPU's main goal is to ensure the "operational readiness" of Posts for seamless cross-border e-commerce. The ultimate objective is to ensure that online merchants have adequate distribution infrastructure to develop their business.

The aims of the project are to address obstacles that prevent consumers from making online cross-border transactions, to help participating designated operators modernize operational processes, and to use all available standardized IT tools and end-to-end systems to implement operational solutions that meet e-commerce requirements. By improving end-to-end delivery performance and reliability, providing consumers with more visibility through EDI message exchanges, and establishing more customer-oriented solutions (delivery options, data capture at source, return solutions, simple customer services, etc.), postal operators will contribute to the continued growth of the e-commerce market.

What

By rolling out a series of training activities, modernizing processes and implementing state-of-the-art IT technologies, the project will ensure that Posts are in a position to address the needs of customers and e-retailers. For example, tracking tools will allow both customers and e-merchants to follow their shipments in real time. Tracking will also improve customs transit, e.g. by enabling compliance with international security standards. Additional tools will also allow clients to choose delivery locations and in some cases delivery schedules, giving them the flexibility that is expected nowadays. Lastly, processes will be developed to facilitate seamless product returns.

A particular emphasis will be placed on integrating the various links in the supply chain (transport companies, airlines, customs authorities, security agencies, postal operators, e-merchants) into end-to-end processes and IT tools with a view to maximizing the operational efficiency of cross-border e-commerce.

How

The project will be implemented by the UPU and postal operators in coordination with airlines, handlers, customs authorities and other project stakeholders through workshops, training, on-site surveys, organizational audits and twinning activities as part of a global four-year plan.

According to the Information Economy Report 2015 by the United Nations Conference on Trade and Development, rapid improvements in e-commerce have been noted in Africa; however, barriers remain in certain areas such as transport and logistics, and difficulties persist in terms of inadequate legal frameworks and limited purchasing power. Telecommunications networks are also improving, the number of smartphone users is on the rise, and innovative solutions are being introduced, in particular in the area of e-payments.

Contributing to financial inclusion via the postal network

According to the World Bank⁹, in Sub-Saharan Africa, only 34% of adults have a bank account. However, 92% of Posts in the region offer financial services, and the postal network is larger than the banking network, in particular in rural areas. As a result, many Posts in the region already play a key role in financial inclusion. In Namibia, for example, 39% of the adult population has an account with the Post. In Benin, where the rate of financial inclusion stands at only 16.6%, nearly 10% of adults have an account with the Post.

Postal money transfers

In this context, the UPU will carry out a series of activities to strengthen the contribution of Posts to financial inclusion in the region. In the early 2000s, the UPU developed the International Financial System (IFS), a money transfer tool that it makes available to Posts. In accordance with SDG 10c, which is to reduce to less than 3% the transaction costs of migrant remittances by 2030, the UPU helps Posts offer their customers secure and affordable services. Over 80 Posts currently use IFS, which was updated in 2013 for use on mobile devices and which can be managed remotely via cloud computing for Posts that do not have sufficient technical capacity.

For the 2017–2020 period, the UPU will continue to develop this network through the following actions:

- Increasing the number of IFS users;
- Conducting on-site audits to improve quality of service and security;
- Deploying mobile solutions in countries with no such solutions in place;
- Implementing remote payment solutions in the area of e-commerce for unbanked customers.

Digitalization of financial services

In addition to its efforts in the area of money transfers, the UPU has also put in place a technical assistance fund to help Posts digitalize their financial services. At least 20 Posts will benefit from this programme in 2017–2020, with the goal of ensuring that the financial services offered by Posts (money transfers, bill payments, government payments, savings services, insurance, etc.) are available digitally. Assistance will be available in various areas:

- Defining an effective digitalization strategy;
- Implementing technological tools;
- Developing a digital ecosystem;
- Etc.



⁹ Demircuc-Kunt A., Klapper L., Singer D., and Van Oudheusden P. (2015) The Global Findex Database 2014: Measuring Financial Inclusion around the World. Policy Research Working Paper 7255, World Bank, Washington DC.

Implementation strategy for postal sector reform 2017–2020

One of the UPU's objectives, as set out in the preamble to its Constitution, is to afford all the world's citizens access to communication services. To this end, it provides technical assistance to its member countries in order to ensure the smooth running of their postal sectors. For instance, it has developed an approach to help governments restructure their postal sectors by means of a coherent methodology based on national analyses and the specific realities of each country.

The responsibility for implementing postal sector reform lies directly with the countries, and decisions in this regard are made at the national level. For the 2017–2020 cycle, the UPU's role in the context of postal sector reform will primarily be to support countries that have launched transformation processes, namely by facilitating access to methodological tools and providing specialized experts.

The UPU will strengthen dialogue with governments and stress both the postal sector's new role in the societies and national economies of developing countries and the need to establish structured reform processes.

In the 2017–2020 cycle, the UPU's work in this connection will be guided by the following principles:

- Providing beneficiary countries with methodological tools for the different areas of postal sector reform;
- Establishing an integrated approach, including a policy to mobilize UPU resources, at national and regional levels;
- Continuing to serve as a platform for the sharing of best practices in postal sector reform among UPU member countries;
- Strengthening capacity building at national and regional levels.

Contributing to the digital transformation of postal networks

Connected people: on average, eight in 10 individuals in the developing world own a mobile phone, and the number is steadily rising. Even among the bottom fifth of the population, nearly 70% own a mobile phone. However, Internet adoption lags behind considerably: only 31% of the population in developing countries had access in 2015, compared with 80% in high-income countries.

Connected businesses: Internet adoption has increased across businesses in all country income groups. Nearly nine out of 10 businesses in high-income OECD countries had a broadband Internet connection in 2014, compared with seven for middle-income and four for low-income countries. But adoption rates for technologies such as secure servers, enterprise networks, and e-commerce are much lower in most developing countries.

Connected governments: governments are increasingly going digital and, in comparison with the private sector, a greater share of government jobs in developing countries are ICT-intensive. However, according to the 2016 United Nations E-Government Survey,¹⁰ only 60 countries have online services to register a business and 20 have multipurpose digital identification platforms.

ICTs are the backbone of sustainable economic growth. According to the World Economic Forum Digital Transformation of Industries 2016 report,¹¹ the future of countries, businesses, and individuals will depend more than ever on whether they embrace digital technologies.

In 2012, the UPU launched the .POST project to define the role of the Post in the digital economy and to provide a platform for developing countries to access secure cloud-based services. At the end of 2016, 25 countries were already using .POST to offer secure Internet services. Through the provision of digital

¹⁰ <https://publicadministration.un.org/fr/Research/UN-e-Government-Surveys>

¹¹ <http://reports.weforum.org/digital-transformation-of-industries/wp-content/blogs.dir/94/mp/files/pages/files/wef-digital-transformation-of-industries-2016-exec-summary.pdf>

services, Posts play a major role in connecting people, businesses and governments. In addition, Posts are key contributors to target 16.9 of the SDGs, which aims to provide a legal identity for all.

Digital postal services

In this context, during the 2017–2020 cycle, the UPU will carry out a series of activities to strengthen the contribution of Posts to digital inclusion.

Digital postal networks

- Helping countries define an effective national Internet strategy that integrates the Post;
- Increasing the number of countries using .POST;
- Developing a digital ecosystem for postal services to consumers and businesses.

E-commerce platforms

- Defining effective national e-commerce strategies leveraging postal capabilities;
- Setting up e-commerce platforms in countries with no such solutions in place.

E-government services

- Defining effective national e-government strategies leveraging postal capabilities;
- Defining effective digitalization strategies;
- Implementing technological tools.

Creating resilient postal networks

According to the Third United Nations World Conference on Disaster Risk Reduction, held in March 2015, between 2005 and 2014, more than 1.5 billion people were affected by disasters in various ways and the total economic loss was more than 1.3 trillion USD.

The postal sector has also been severely affected by disasters, which have caused destruction and interrupted services. However, some examples emerging from these events have shown that the Post can be a key player in disaster response, such as by serving as a logistics infrastructure and a distribution point for emergency supplies and money transfers in affected areas, and by providing a basic means of communication when no other system is available.

Given the achievements of disaster risk management (DRM) activities during the Doha cycle, the importance of building postal networks' resilience to natural disasters, and the benefits for member countries of enhancing the role postal operators can play in pre- and post-disaster situations, the UPU will conduct specific capacity-building and technical assistance activities, and in particular will:

- provide support, particularly to designated operators of developing and least developed countries, through dedicated training modules and technical assistance projects. These will be based on a specific methodology in order to provide the best level of assistance to postal operators and relevant authorities in the implementation or improvement of DRM policies and business continuity planning;
- implement a specific certification process which will allow postal operators to improve their DRM approaches and benchmark their level of implementation in the framework of the UPU DRM guide;
- disseminate, at the country level, the UPU DRM guide, which is a practical tool that sets out all the necessary steps for postal operators to implement a DRM approach at all levels of the postal organization;
- share best practices among Posts through communication platforms and regional workshops and seminars.



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A large graphic on a light blue background showing a network of white lines connecting various circular icons. The icons include a group of people, a padlock, a mail envelope, a smartphone, a music note, a speech bubble, a globe, a cloud, a server rack, and an '@' symbol. A dark blue rectangular box is overlaid on the right side of the network.

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Link with Africa regional development agenda

The UPU development cooperation priorities for the 2017–2020 cycle were identified by the African countries during the African Strategy Conference held in June 2015 in Khartoum, Sudan, which was co-organized by PAPU and the UPU. The following key postal stakeholders participated in the event: African Union Commission (AUC), Conference of Posts and Telecommunications of Central Africa (COPTAC), Southern Africa Postal Operators Association (SAPOA), West African Postal Conference (WAPCO), Common Market for Eastern and Southern Africa (COMESA), East African Communications Organization (EACO), Economic Community of West African States (ECOWAS), and Southern African Development Community (SADC).

Africa's priorities and projects need to mirror its concerns and be aligned with the priorities of the main regional players, in particular the African Union's Agenda 2063: The Africa We Want. Based on the fundamental pillars of innovation, integration and inclusion, the following UPU priorities are in line with such regional priorities.

Improvement of operational efficiency and e-commerce development

This key UPU project for the 2017–2020 period is aligned with Aspiration 2.26 of Agenda 2063, which states that Africa's "world-class infrastructure, accompanied by trade facilitation, will see intra-African trade growing from less than 12% in 2013 to approaching 50% by 2045" and according to which "Africa's share of global trade shall rise from 2% to 12%". The proposed UPU e-commerce programme will see the postal sector contributing towards Agenda 2063 aspirations, thereby facilitating intra-African and international trade. Addressing, which is an important infrastructure for e-commerce, is both a challenge and an opportunity for Africa. It is supported by the ICT ministers, who urged member states to incorporate addressing and postcode systems into national development plans (2015 ministerial resolution, Addis Ababa, Ethiopia).

Postal financial services development

This programme is aligned with Aspiration 1.10 of Agenda 2063, which calls for "a prosperous continent, with the means and resources to drive its own development" where "people have access to affordable and decent housing including housing finance together with all the basic necessities of life such as water, sanitation, energy, public transport and ICT". Call to action point 72(o) of Agenda 2063 stresses the need to "strengthen domestic resource mobilization, build continental capital markets and financial institutions, and reverse the illicit flows of capital from the continent" in order to, among other actions, reduce aid dependency, eliminate all forms of illicit flows, and double the contribution of African capital markets in development financing. Postal financial services are supported by African Union ministers of finance (2014 resolution, Abuja, Nigeria). They reiterated that increasing financial inclusion contributes to poverty reduction in line with Agenda 2063, and emphasized the role of the postal networks in increasing financial inclusion in particular for underserved poor rural communities. In the same vein, among their resolutions, ICT ministers supported the action plan for the development of the postal sector in Africa, including in the area of financial inclusion, with particular focus on the low income population (2015 resolution, Addis Ababa, Ethiopia). As mentioned earlier, financial inclusion will continue to be an area of focus for the UPU.

Postal sector development

Postal sector development can contribute to the socio-economic development of nations. Call-to-action point 72(g) stresses the need to “connect Africa through world-class infrastructure... with a concerted push to finance and implement the major infrastructure projects” in energy and ICT by harnessing energy resources to ensure modern, efficient, reliable cost-effective renewable and environmentally friendly energy, as well as by ensuring that Africa is on equal footing with the world as an information society. To address the problem of lack of funding, resource mobilization will play a significant role during the 2017–2020 cycle as part of the UPU development cooperation strategy to reform the postal sector. The funds raised will be used for projects such as postal infrastructure improvement and capacity building.

E-services and diversification

Aspiration 2.25 of Agenda 2063 points to ICT as one of the basic necessities for citizens. Call-to-action point 72(g) of the Agenda also stresses the need for an “integrated e-economy where every government, business and citizen has access to reliable and affordable ICT services”. African Posts have also embraced the use of new technologies to improve existing services; develop new ones; and improve the delivery of mail, parcels, and express and financial services in order to meet customers’ evolving needs. In this regard, during the 2017–2020 cycle, there will be concerted efforts to digitalize postal networks, create e-commerce platforms and e-government services, and so on.

Conclusion

The broad directions of African regional political entities encourage the various stakeholders to work towards achieving sustainable development goals and to combine efforts in order to facilitate the achievement of those goals by 2030. This can only be accomplished by means of partnerships between governments, regional and international organizations, and other donors in order to create the synergies needed to achieve the set objectives.

The UPU will thus need to strengthen regional partnerships with the African Union, PAPU and other organizations working in the region (United Nations agencies, international financial institutions, and other donors) in an effort to reinforce and promote the value of the postal sector in improving countries’ socio-economic development.

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