



Stakeholder consultation on UPU's institutional strategy 2026–2029

Global survey results

June – December 2023



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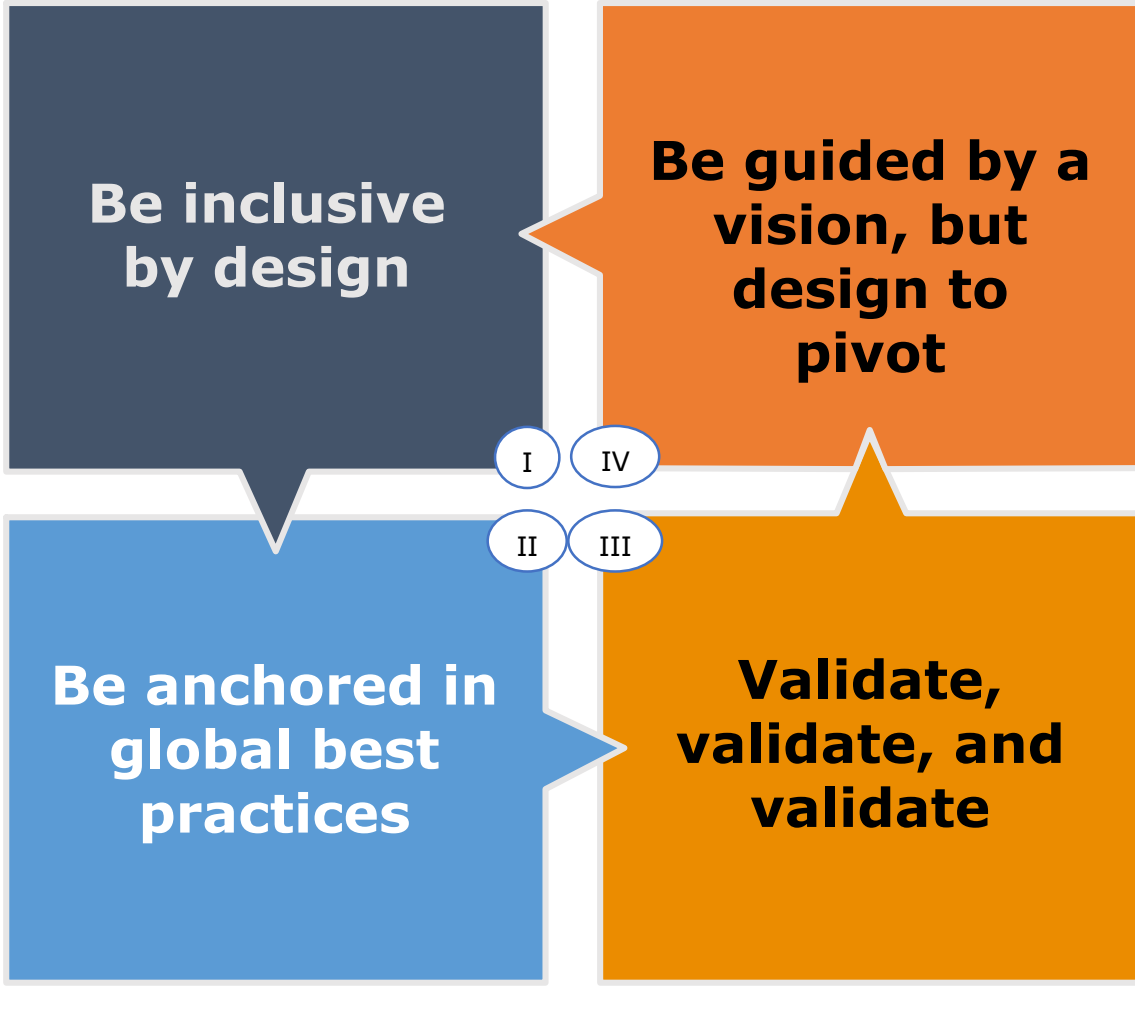


Overview

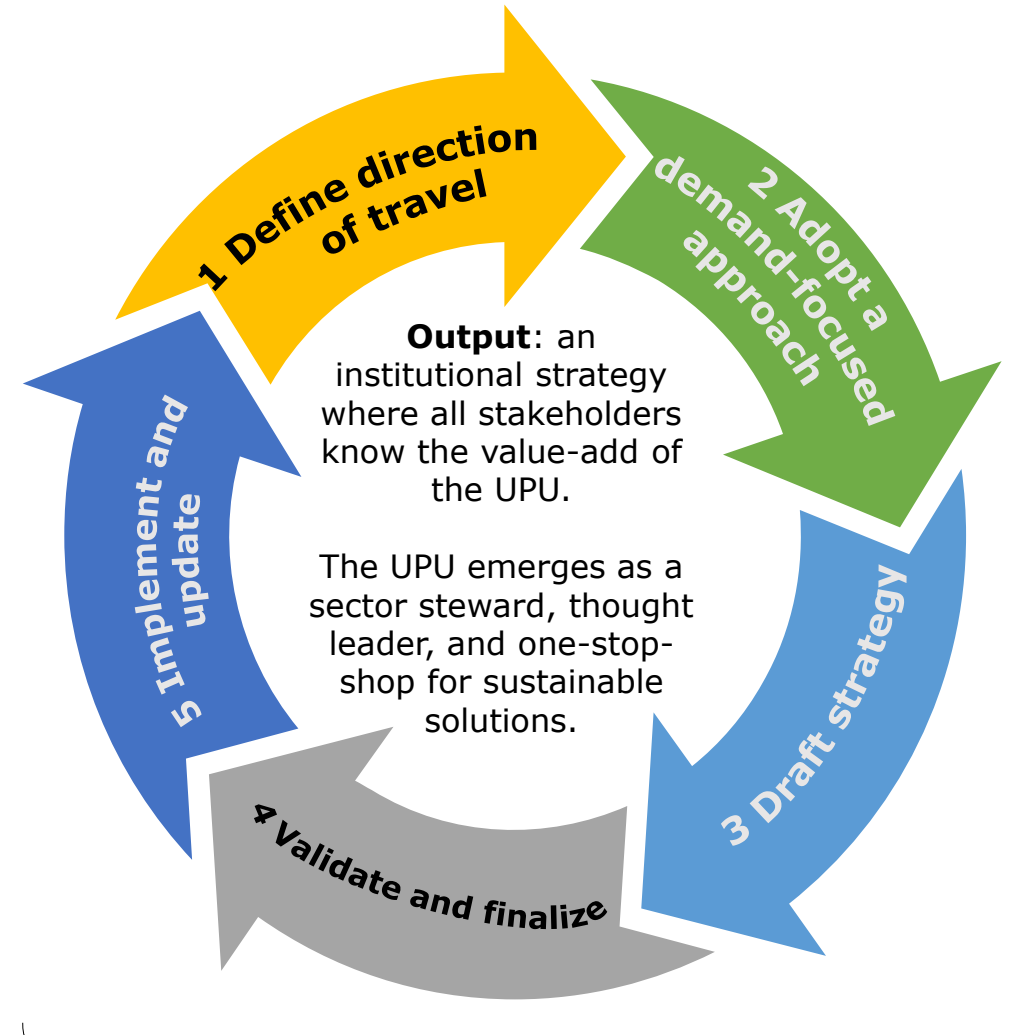
What is the role of this consultation in future strategy development?



We are taking an inclusive approach to strategy design



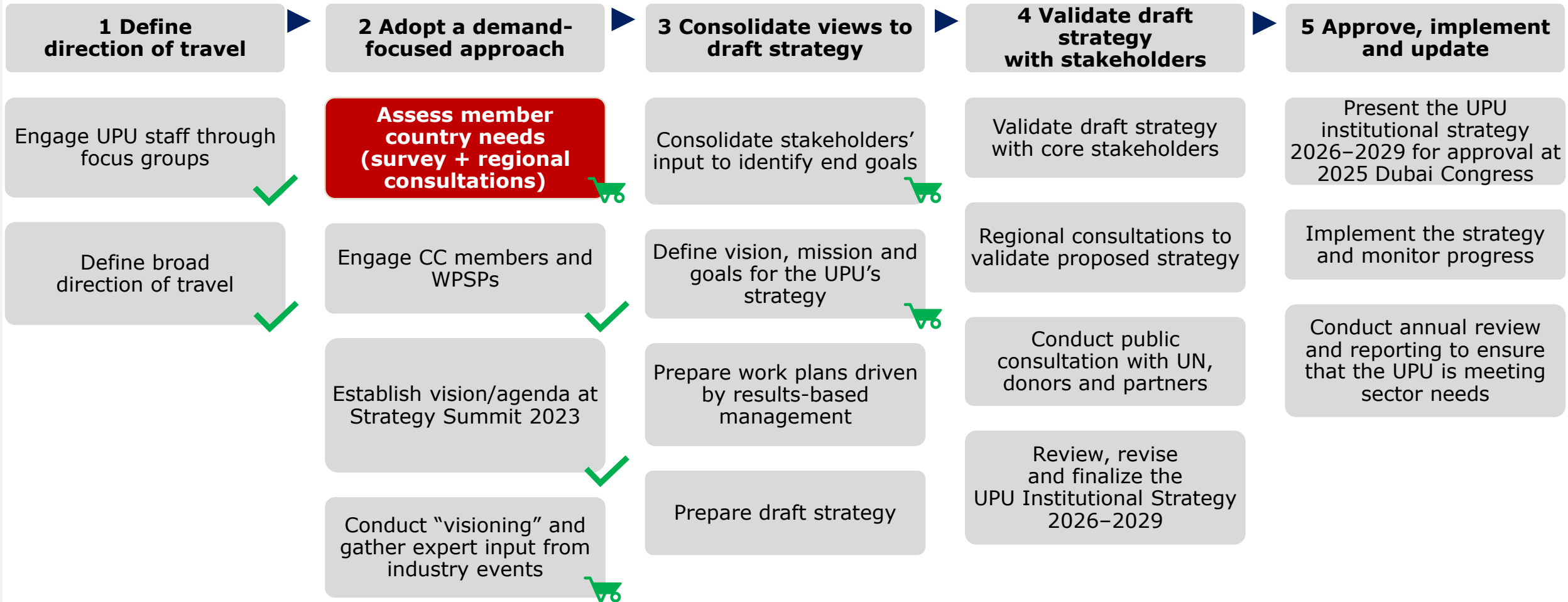
strategy design principles



strategy design process



The CA approved a clear, inclusive process to define the 2026–2029 strategy





This survey will guide the strategy design – this is the voice of our stakeholders

When? To whom?

This survey was sent out on 12 June 2023, by post and e-mail, in all UPU languages. It was sent to all supervisory ministries, regulators and designated operators (DOs) across 192 UPU member countries.

What was in the survey?

The survey contained five sections: I. General questions, with contact details; II. Perspectives on the UPU, asking whether UPU is/will continue to be relevant; III. Potential risks and opportunities for the global postal sector by 2029; IV. Potential risks and opportunities for the UPU as an institution; and V. Potential solutions that the UPU can offer to its stakeholders.

Why was this survey done?

The survey is critical for informing the strategy development in four key ways:

- 1 It provides us with a holistic view of our stakeholders' perspectives:** the survey captures viewpoints from diverse stakeholders, providing a comprehensive understanding of member countries' expectations across various regions, regulatory environments, and postal development levels.
- 2 It allows us to assess risk and evaluate opportunities:** the survey allows for a thorough examination of potential risks and opportunities, both for the global postal sector and for the UPU as an institution. This information is essential for strategic planning and risk mitigation.
- 3 It allows us to assess the UPU's strategic relevance:** By exploring perspectives on the UPU's current and future relevance, the survey aids in aligning the organization's strategies with the evolving needs of its stakeholders, ensuring continued effectiveness.
- 4 It allows us to adopt a solution-oriented approach:** we do this by focusing on potential solutions that the UPU can offer to its stakeholders. This aspect is critical for developing forward-looking strategies that propose sustainable solutions to address challenges and capitalize on emerging opportunities.



Analysis of responses

What are UPU stakeholders thinking?

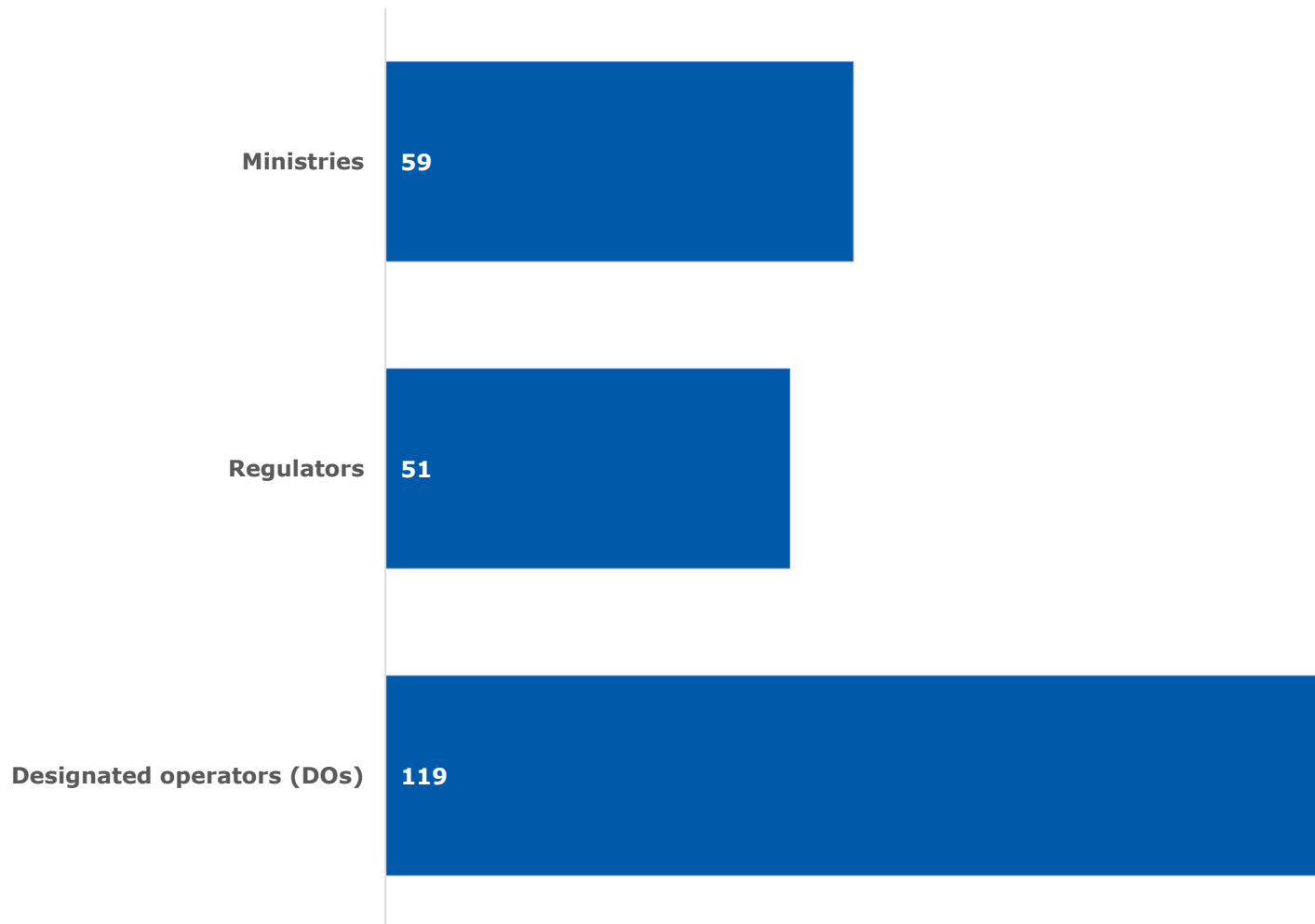


Survey respondents

Key outcomes: Who responded? Which type/region of stakeholders?



We received 229 inputs, from 70%+ of UPU member countries



137 member countries responded in total (71% of members)

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

We also received the view of 13 Consultative Committee (CC) members and 9 wider postal sector players (WPSPs) – as a broader, non-guidance perspective.

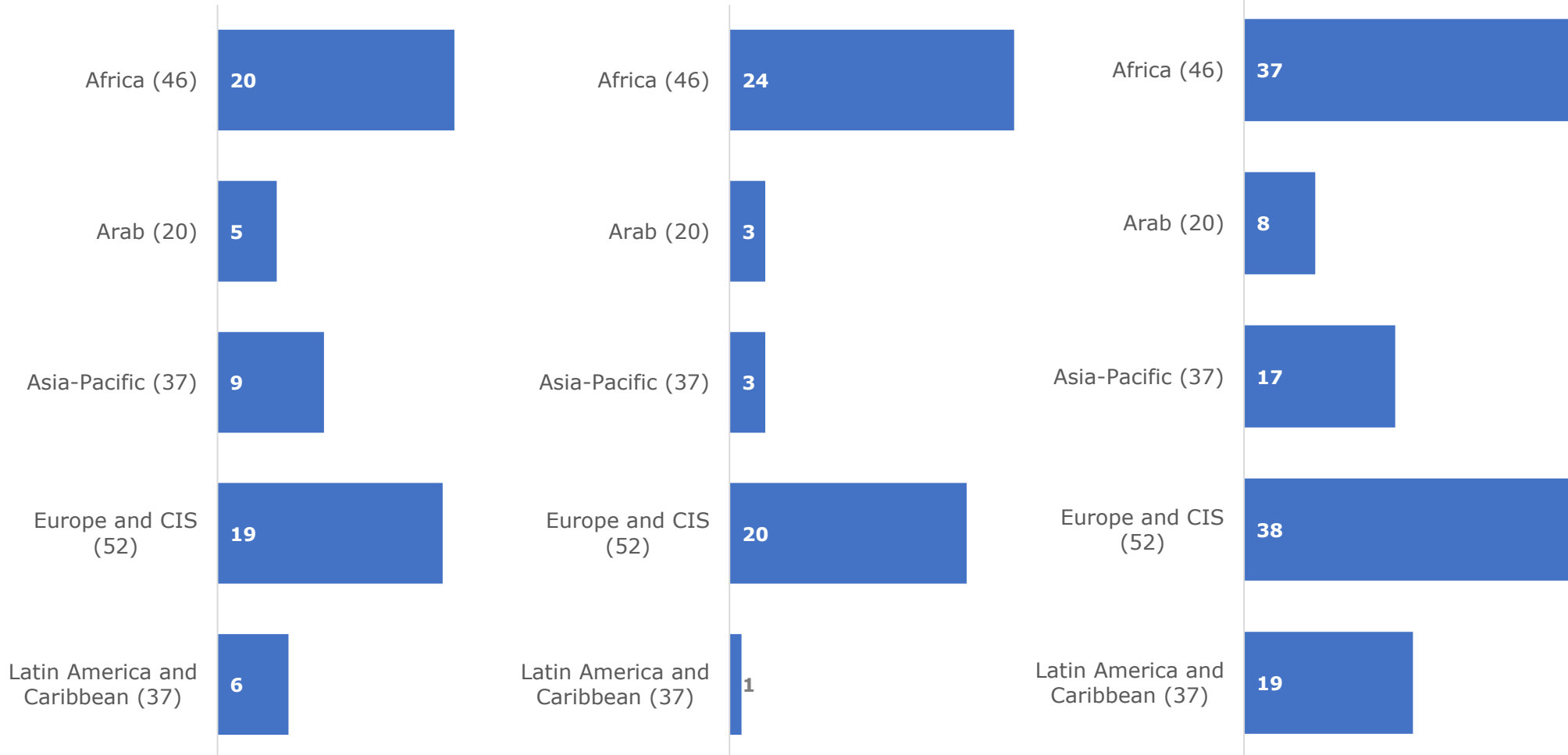


We heard the voices of stakeholders from every single region

Ministries

Regulators

Designated Operators (DOs)



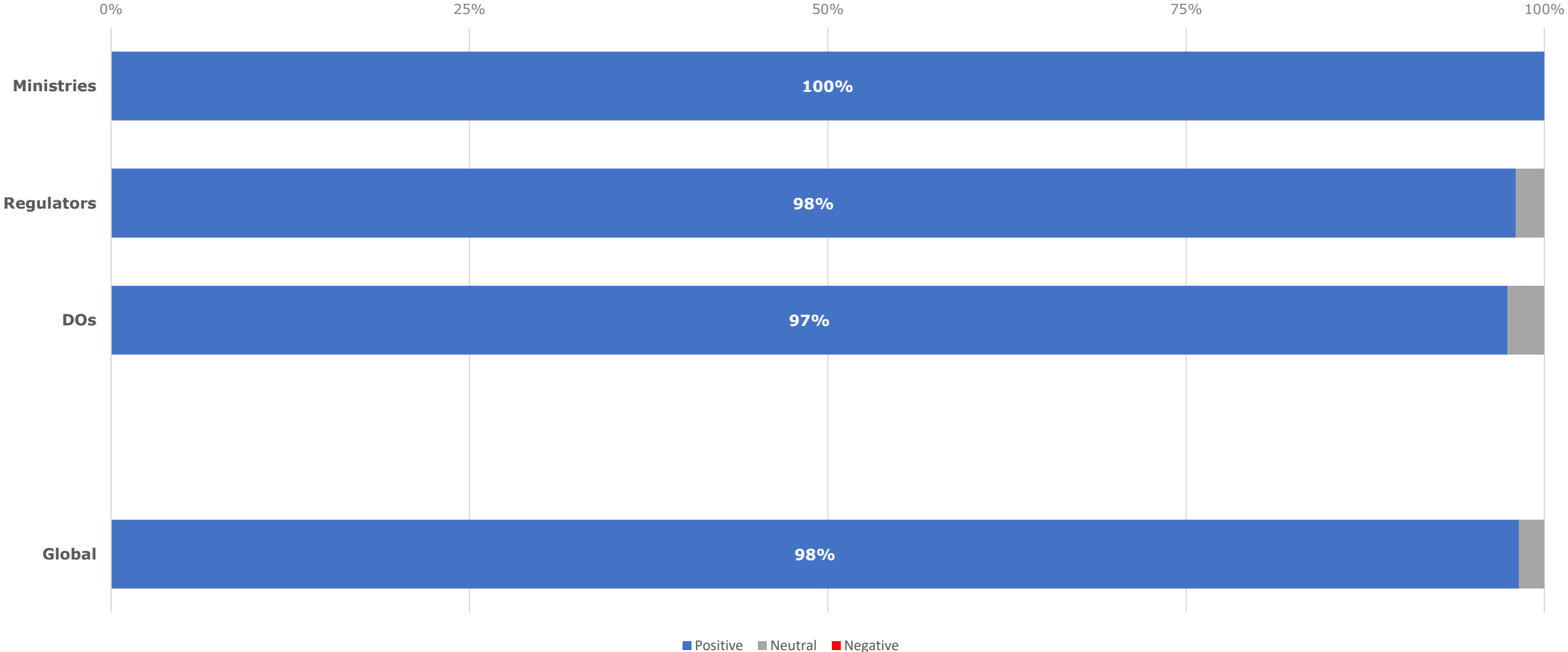


Stakeholder sentiment analysis

Key outcomes: What do the UPU's key stakeholders feel about its role and relevance?



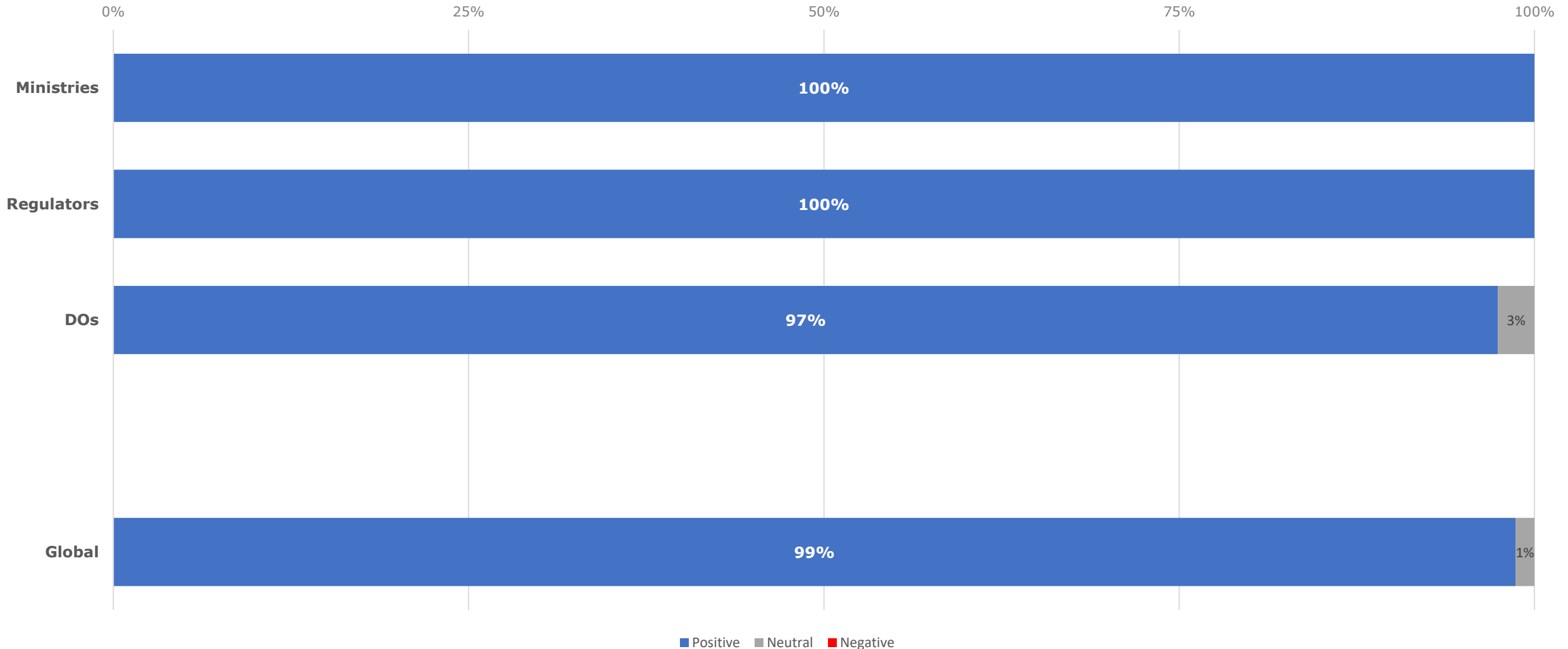
Nearly everyone sees the UPU as relevant for their organization



Q: The UPU is relevant for my organization.
Note: For this analysis "strongly agree" and "agree" are combined as "positive". The same applies for "strongly disagree" and "disagree" as "negative".
n = 224
January 2024



There is consensus: the UPU's current relevance for the sector is undisputed



Q: The UPU is relevant for the postal sector.

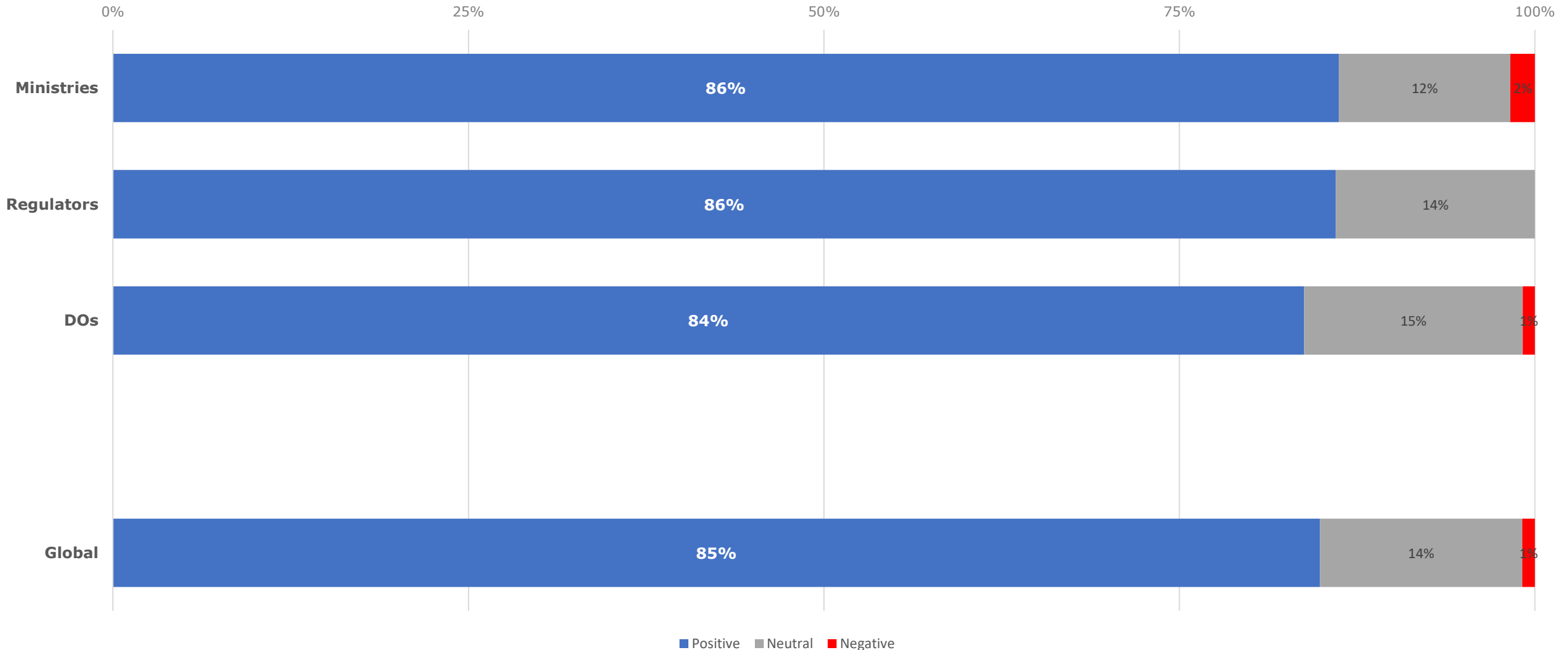
Note: For this analysis "strongly agree" and "agree" are combined as "positive". The same applies for "strongly disagree" and "disagree" as "negative".

n = 225

January 2024



80%+ of 225 organizations think the UPU can help them succeed in the future



Q: The UPU will be relevant to meet the needs of my organization by 2029.

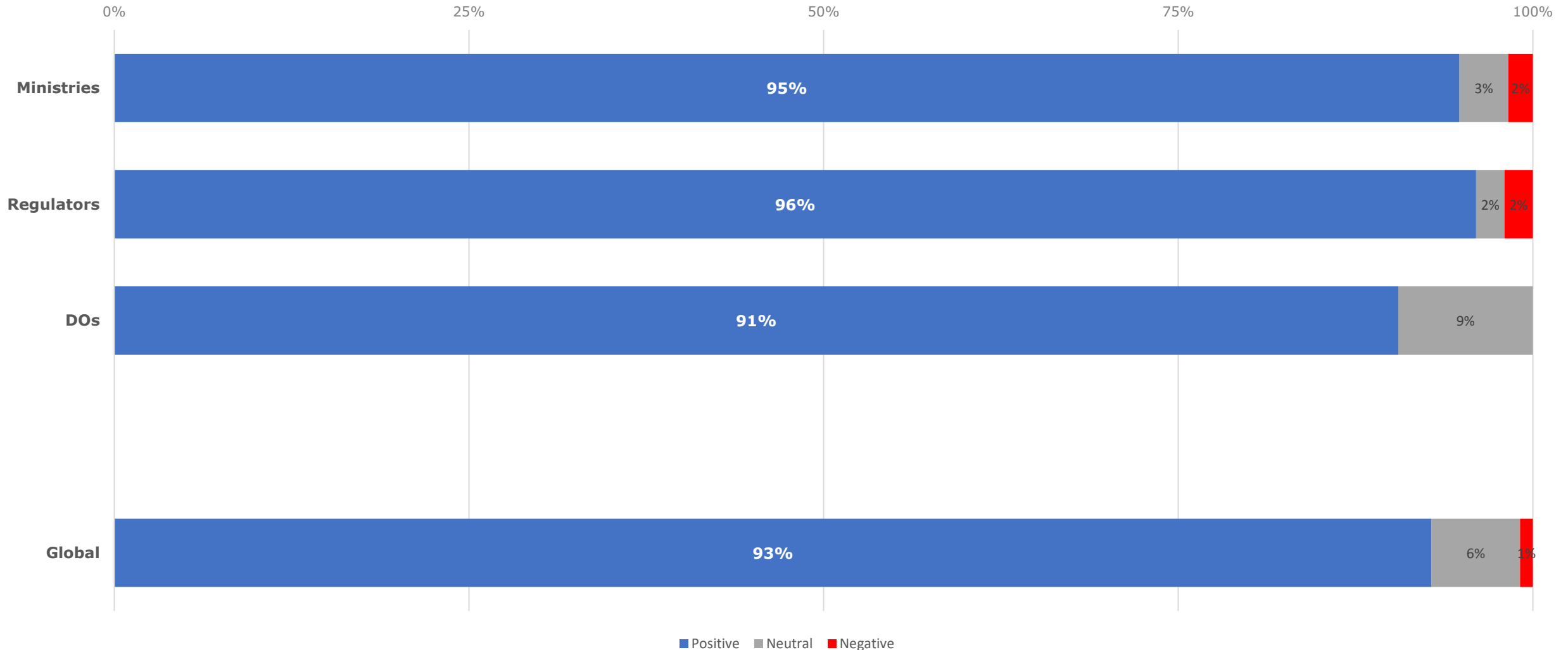
Note: For this analysis "strongly agree" and "agree" are combined as "positive". The same applies for "strongly disagree" and "disagree" as "negative".

n = 225

January 2024



9 out of 10 stakeholders think the UPU is relevant for the future of the sector



Q: The UPU will be relevant to meet the needs of the global postal sector by 2029.

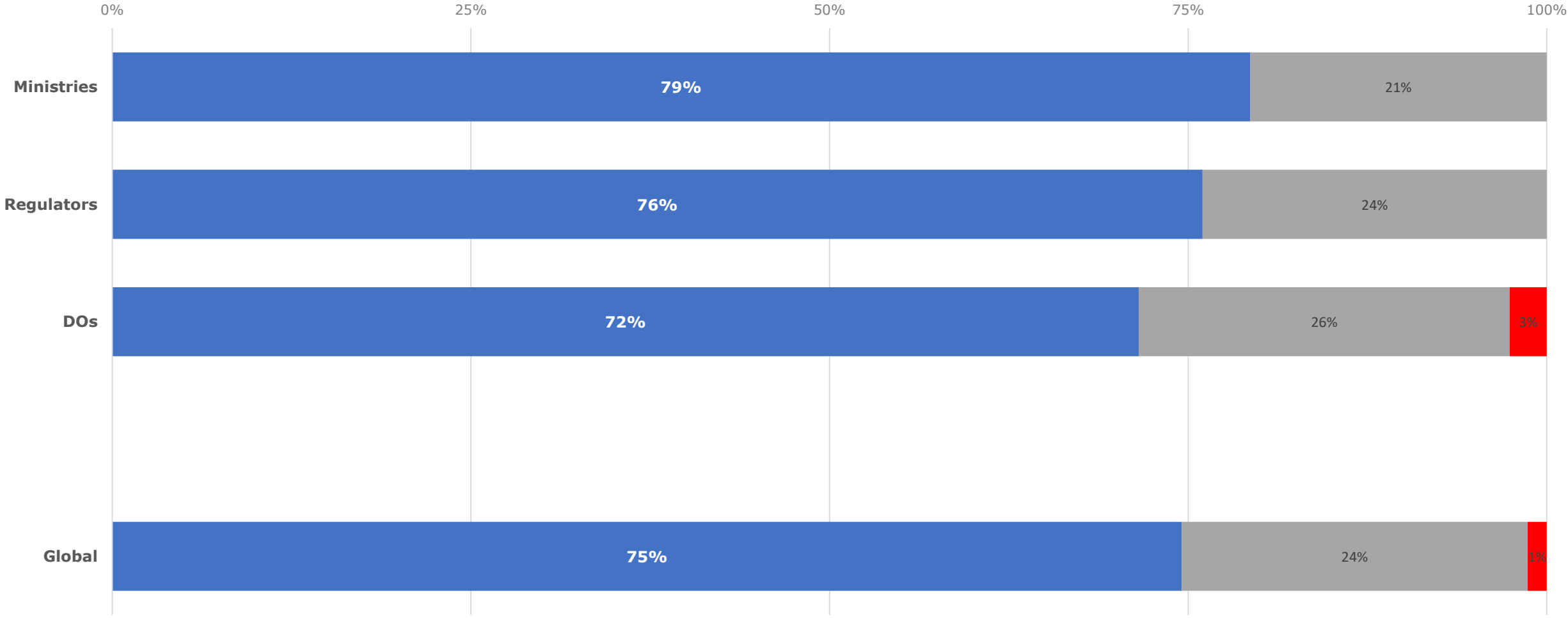
Note: For this analysis "strongly agree" and "agree" are combined as "positive". The same applies for "strongly disagree" and "disagree" as "negative".

n = 224

January 2024



Three-quarters feel heard in shaping the future strategy; some seem unaware



■ Positive ■ Neutral ■ Negative

Q: The views of my organization are being heard and considered in shaping the Dubai Postal Strategy 2026-2029.
Note: For this analysis "strongly agree" and "agree" are combined as "positive". The same applies for "strongly disagree" and "disagree" as "negative".
n = 224
January 2024

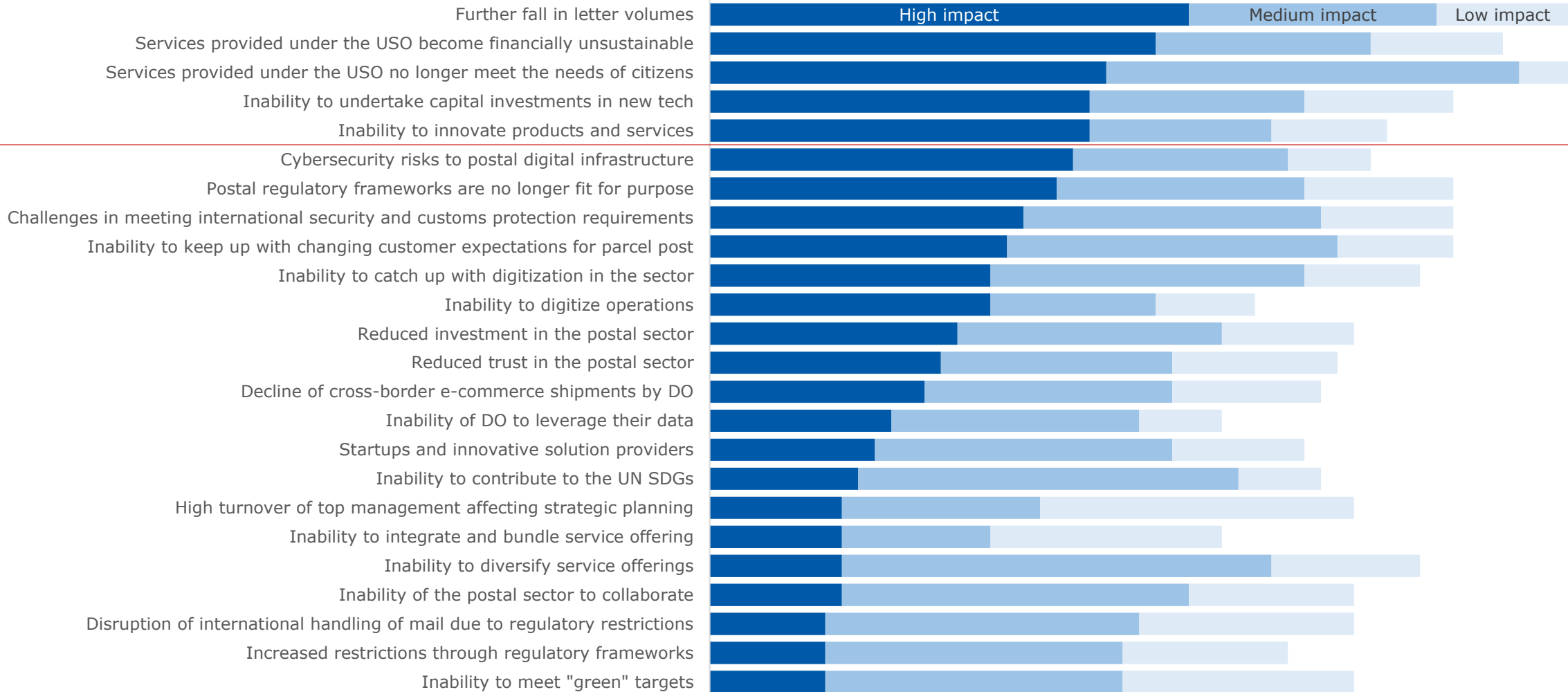


Risks & opportunities for the global postal sector

Key outcomes: How do the UPU's key stakeholders view the global postal sector by 2029?

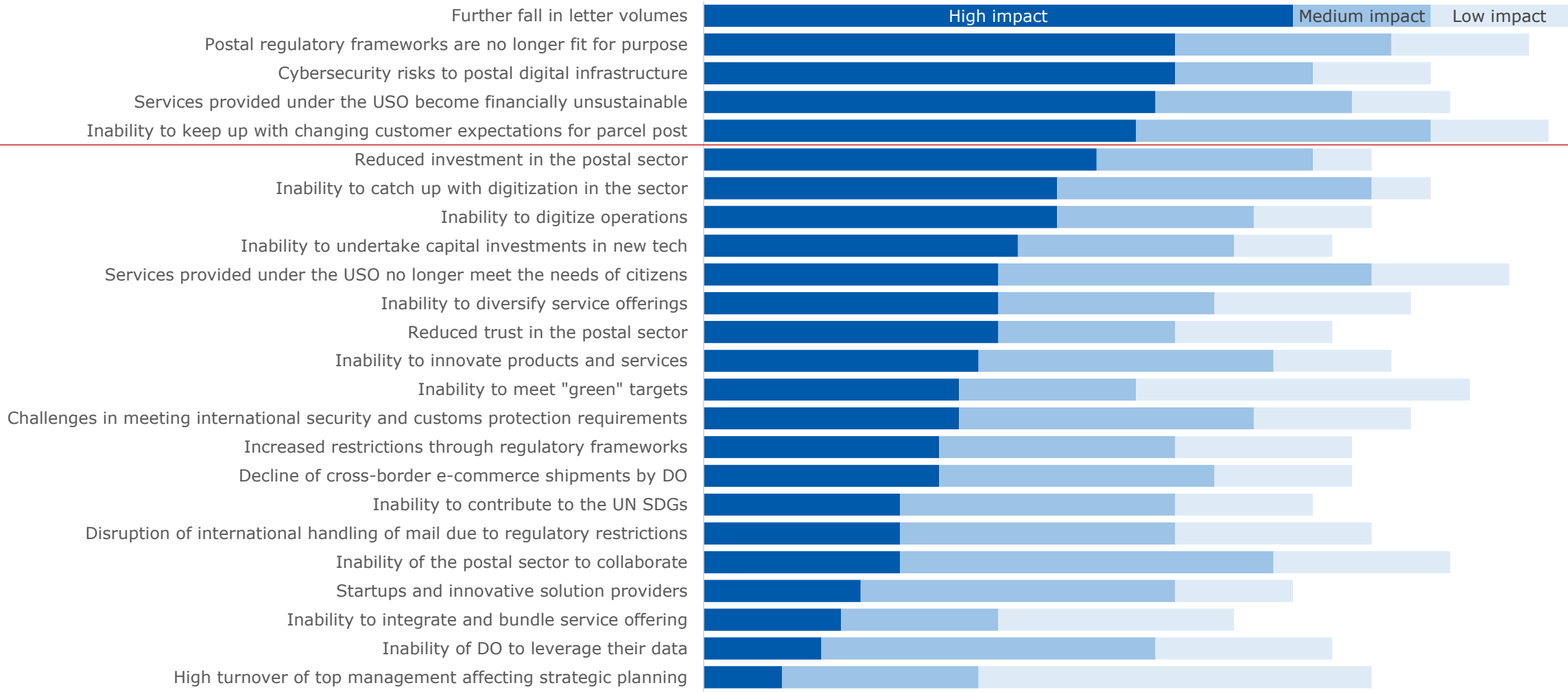


Ministries sound alarm that a fall in letter volumes is the top sector risk



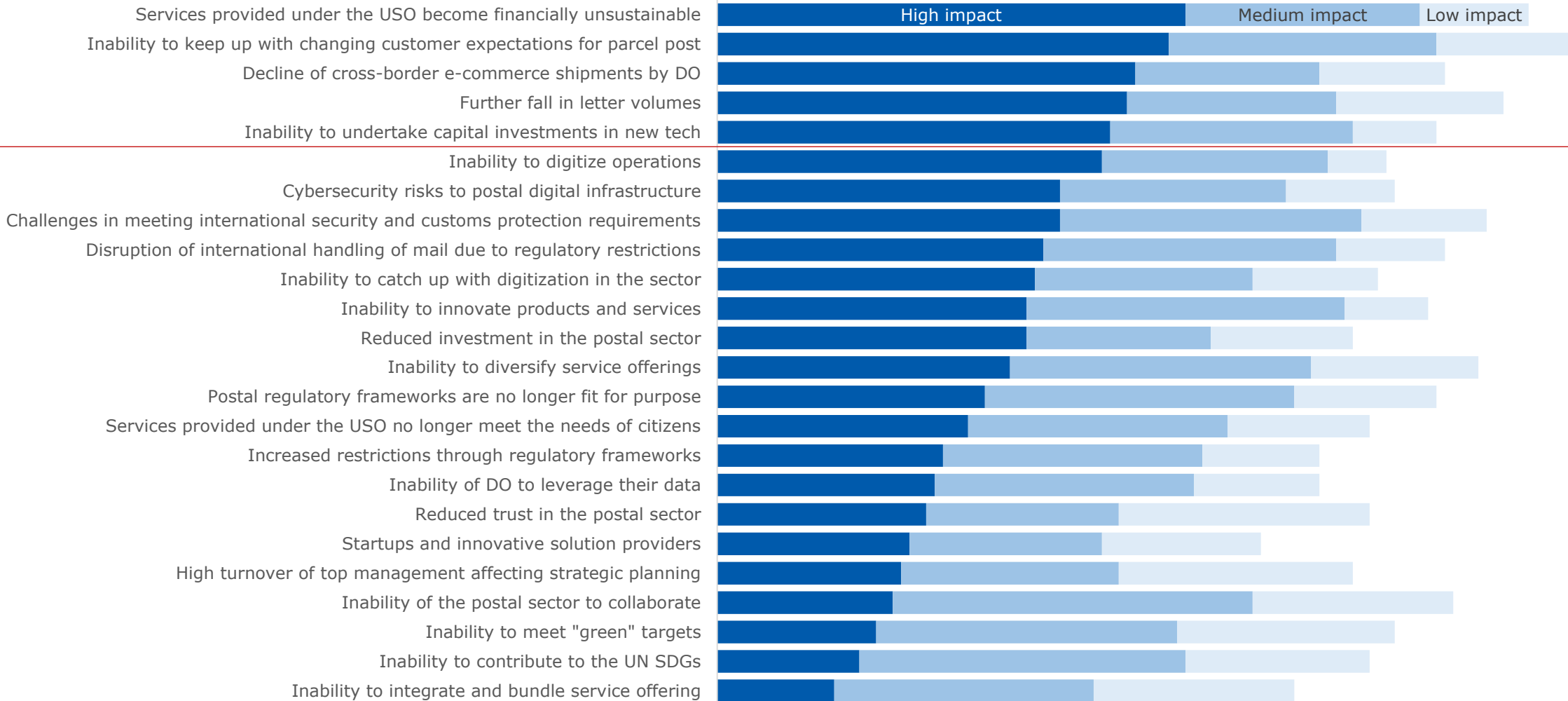


Regulators agree that a fall in letter volumes is the top risk





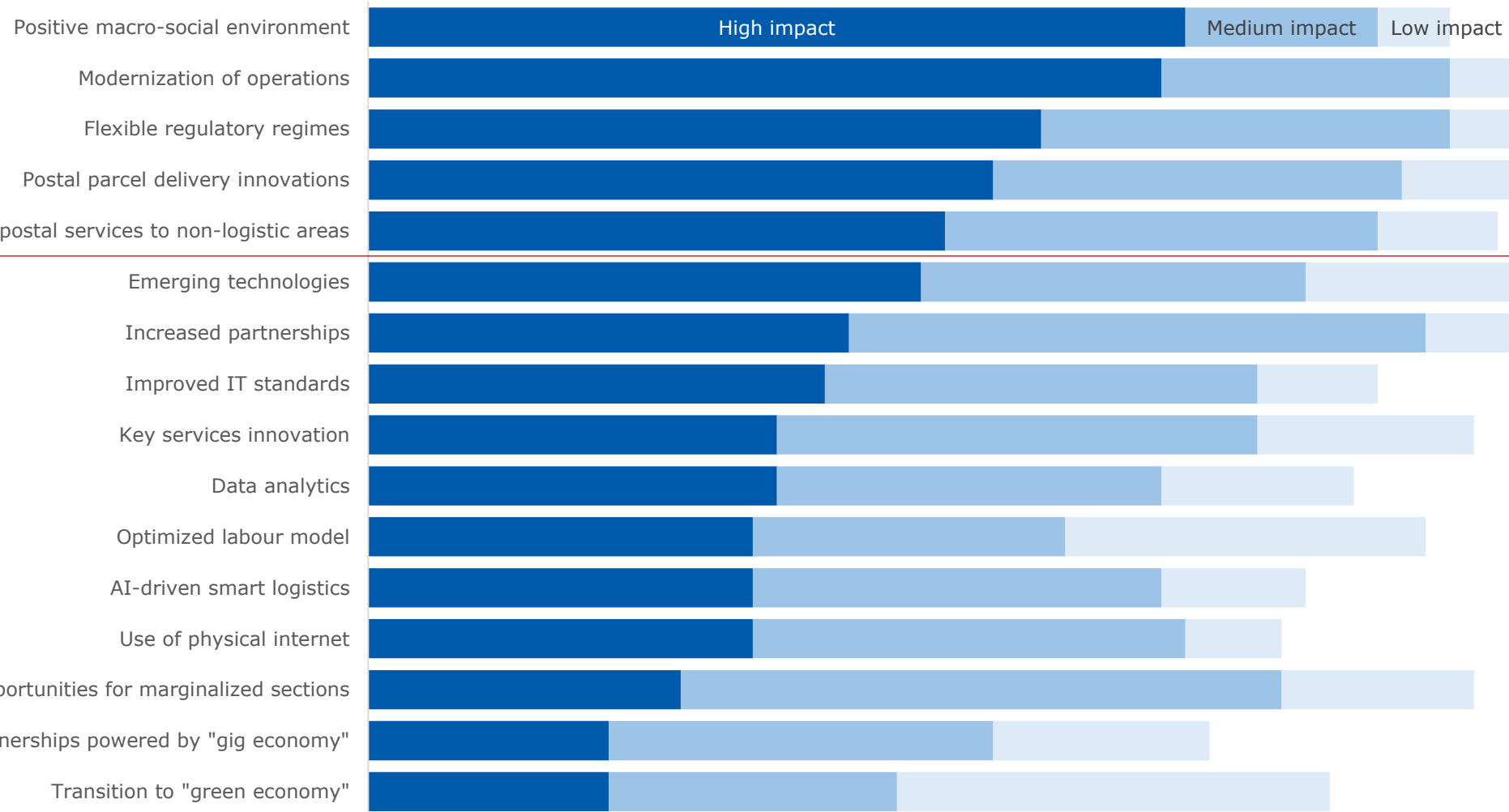
However, DOs think the top risk is the USO* becoming financially unsustainable



* USO: universal service obligation
n = 119

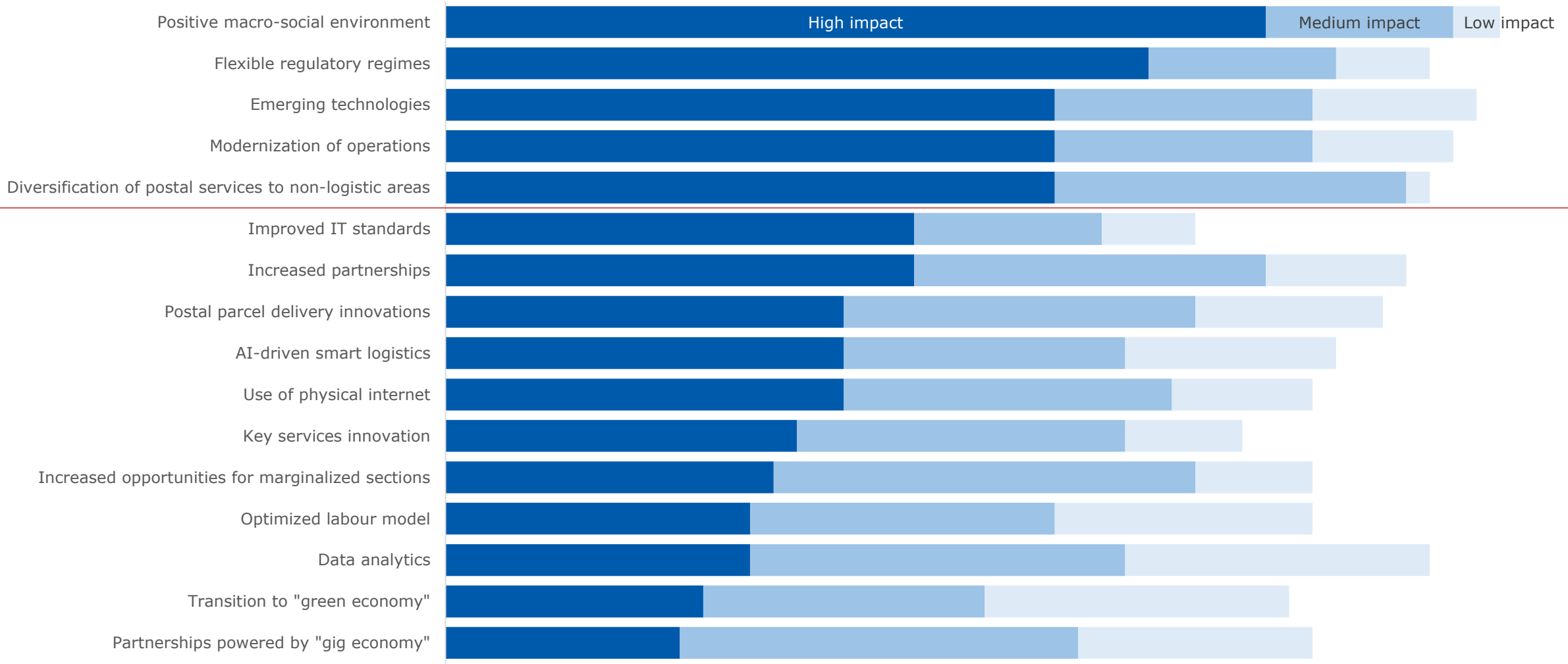


Ministries think a positive macro-social environment is the top sector opportunity



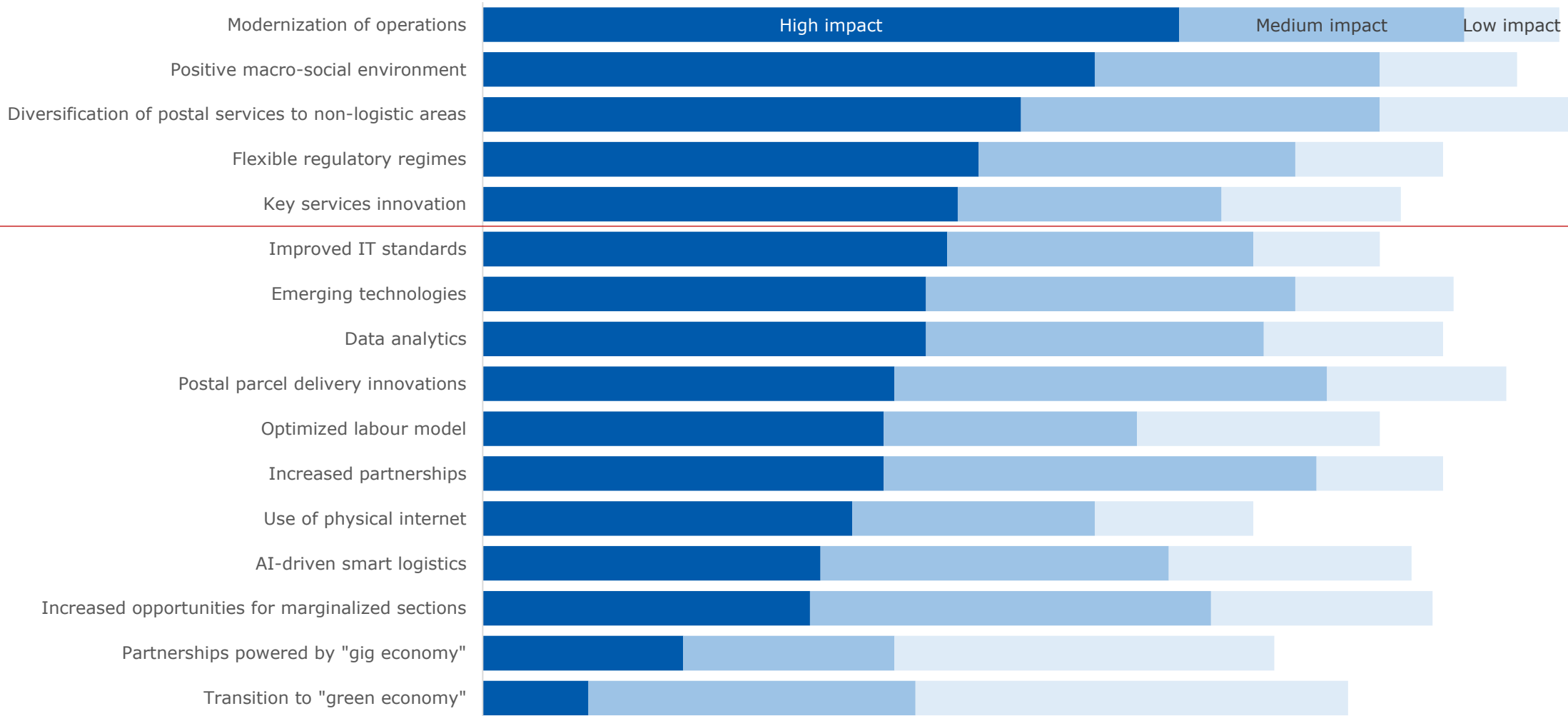


Regulators agree that a positive macro-social environment is the top opportunity





However, DOs think modernization of operations might be a game-changer





Core UPU stakeholders' views

What are the top five risks and opportunities identified by UPU members?

Ministries

Risks:

1. Further fall in letter volume
2. Services provided under the USO become financially unsustainable
3. Services provided under the USO no longer meet the needs of citizens
4. Inability to undertake capital investments in new tech
5. Inability to innovate products and services

Opportunities:

1. Positive macro-social environment
2. Modernization of operations
3. Flexible regulatory regimes
4. Postal parcel delivery innovations
5. Diversification of postal services to non-logistic areas

Regulators

Risks:

1. Further fall in letter volume
2. Postal regulatory frameworks are no longer fit for purpose
3. Cybersecurity risks to postal digital infrastructure
4. Services provided under the USO become financially unsustainable
5. Inability to keep up with changing customer expectations for parcel post

Opportunities:

1. Positive macro-social environment
2. Flexible regulatory regimes
3. Emerging technologies
4. Modernization of operations
5. Diversification of postal services to non-logistic areas

Designated Operators

Risks:

1. Services provided under the USO become financially unsustainable
2. Inability to keep up with changing customer expectations for parcel post
3. Decline of cross-border e-commerce shipments by DO
4. Further fall in letter volumes
5. Inability to undertake capital investments in new tech

Opportunities:

1. Modernization of operations
2. Positive macro-social environment
3. Diversification of postal services to non-logistic areas
4. Flexible regulatory regimes
5. Key services innovation

Key Takeaways

Across ministries, regulators, and designated operators, common threads emerge as they collectively navigate risks in the postal sector. The spectre of further declines in letter volumes looms large, posing a shared challenge that demands innovative solutions. Financial sustainability of services under the USO is a recurring concern. Additionally, the shifting landscape of customer expectations, especially in parcel post, underscores the industry-wide imperative for agility and adaptation.

Amidst these challenges, common opportunities include the ability of the sector to leverage a positive macro-social environment to propel collective growth, against a background of flexible regulatory regimes and diversified solutions. In addition, the opportunity of modernizing operations stands out as a transformative turning point for enhancing operational efficiencies to meet evolving customer expectations. These commonalities among core stakeholders highlight the interconnectivity of challenges and opportunities faced by the postal sector and the necessity of hyper-collaborative, industry-wide responses.

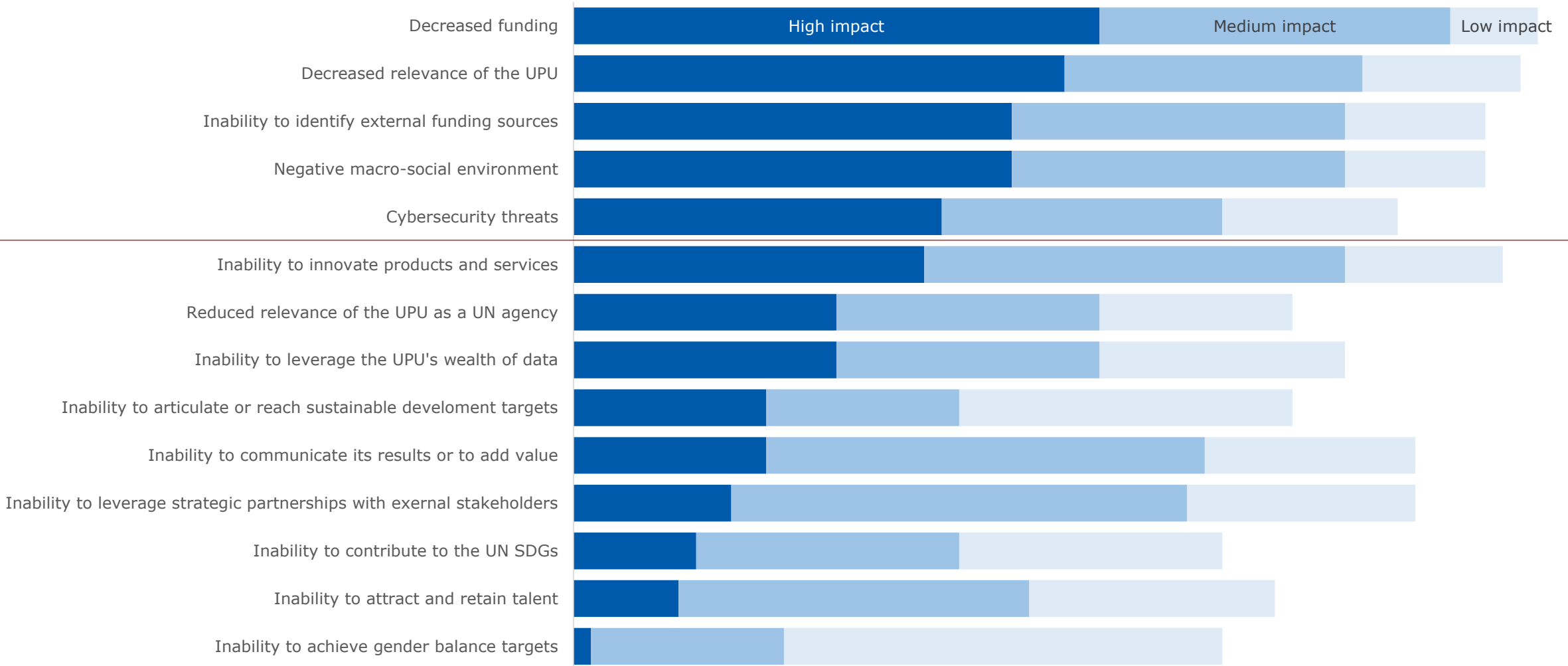


Institutional risks and opportunities for the UPU

Key outcomes: How do the UPU's key stakeholders view the UPU as an institution by 2029?

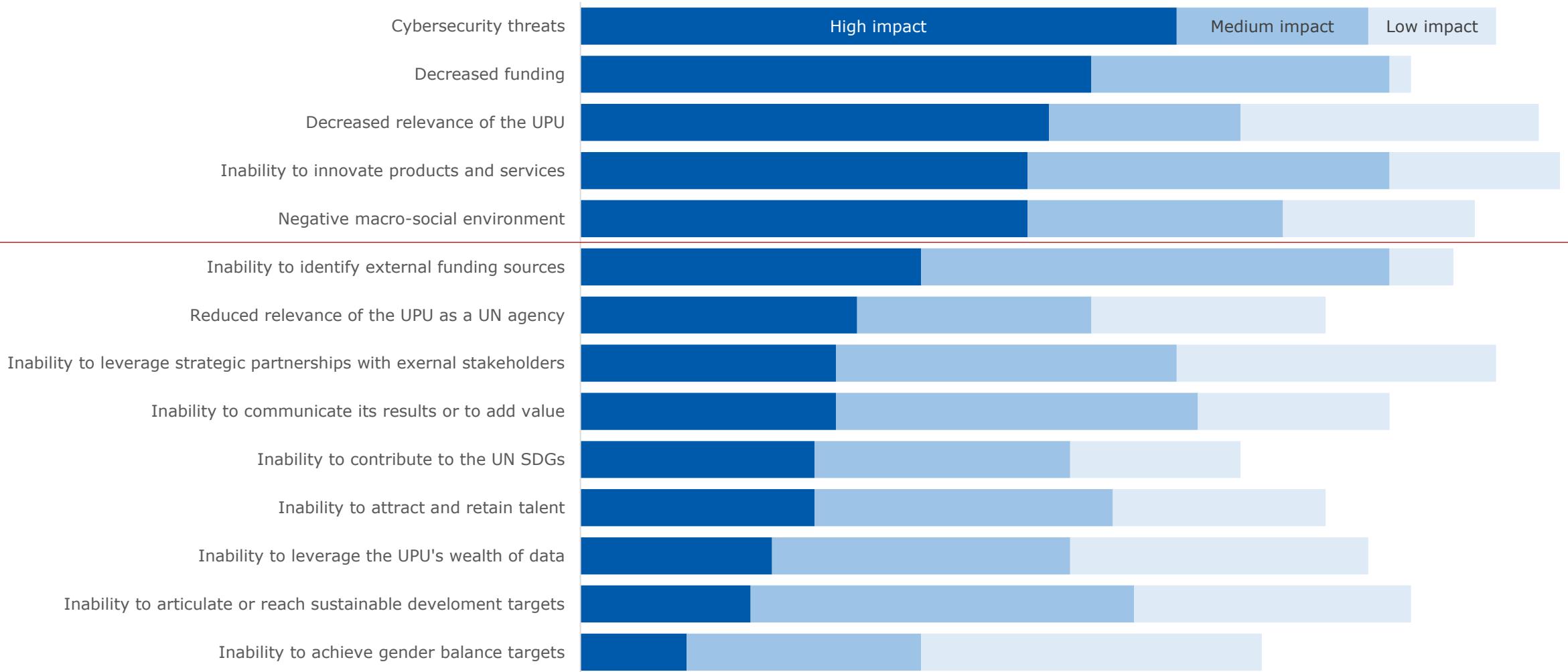


Ministries flag that the top institutional risk is the likelihood of decreased funding



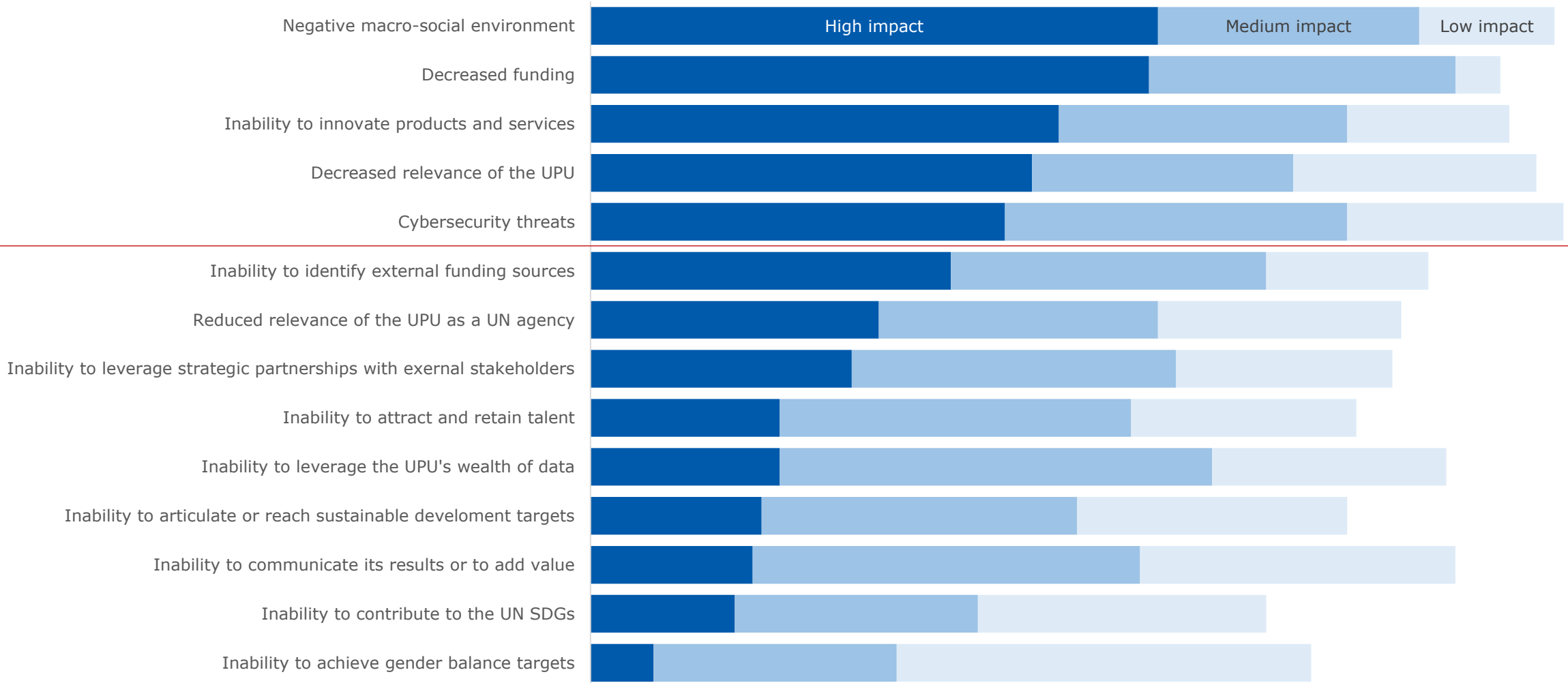


Regulators caution that cybersecurity threats are the top institutional risk ...



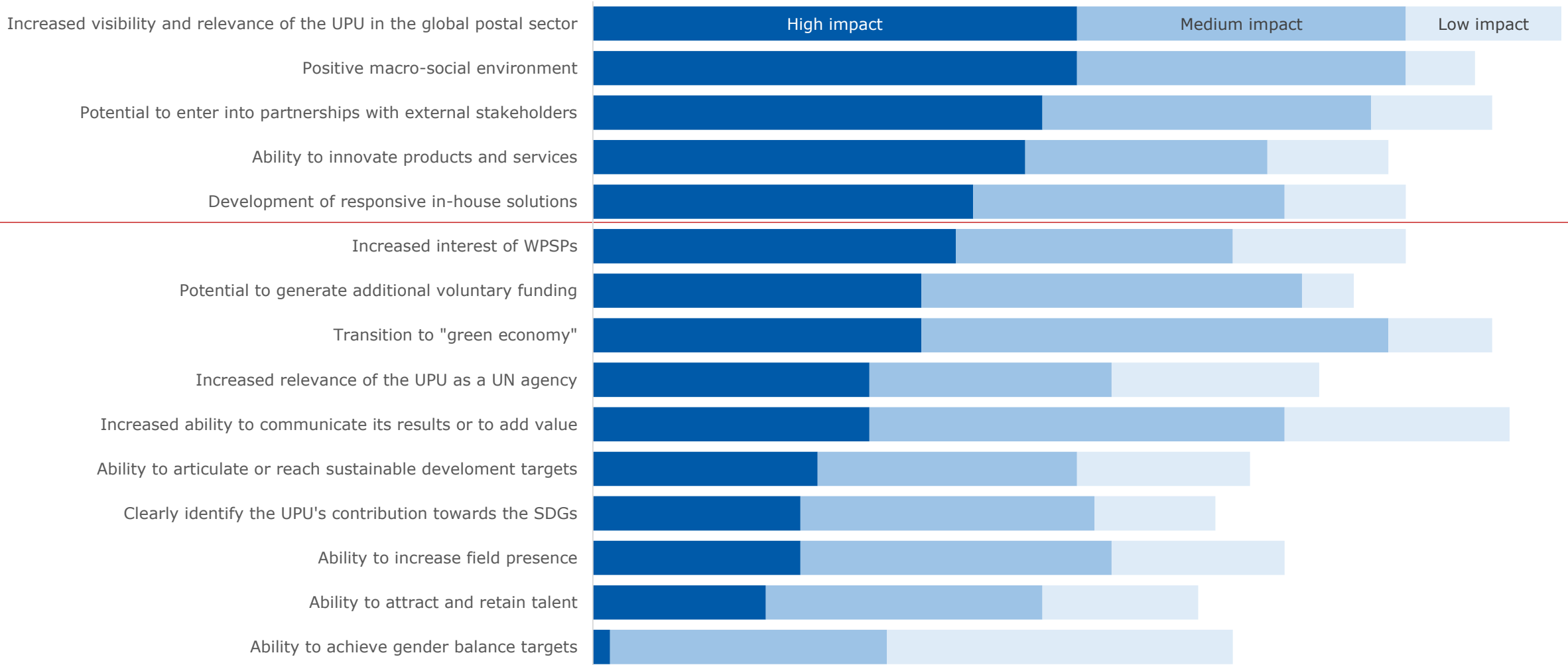


... whereas DOs view a negative macro-social environment as the top risk



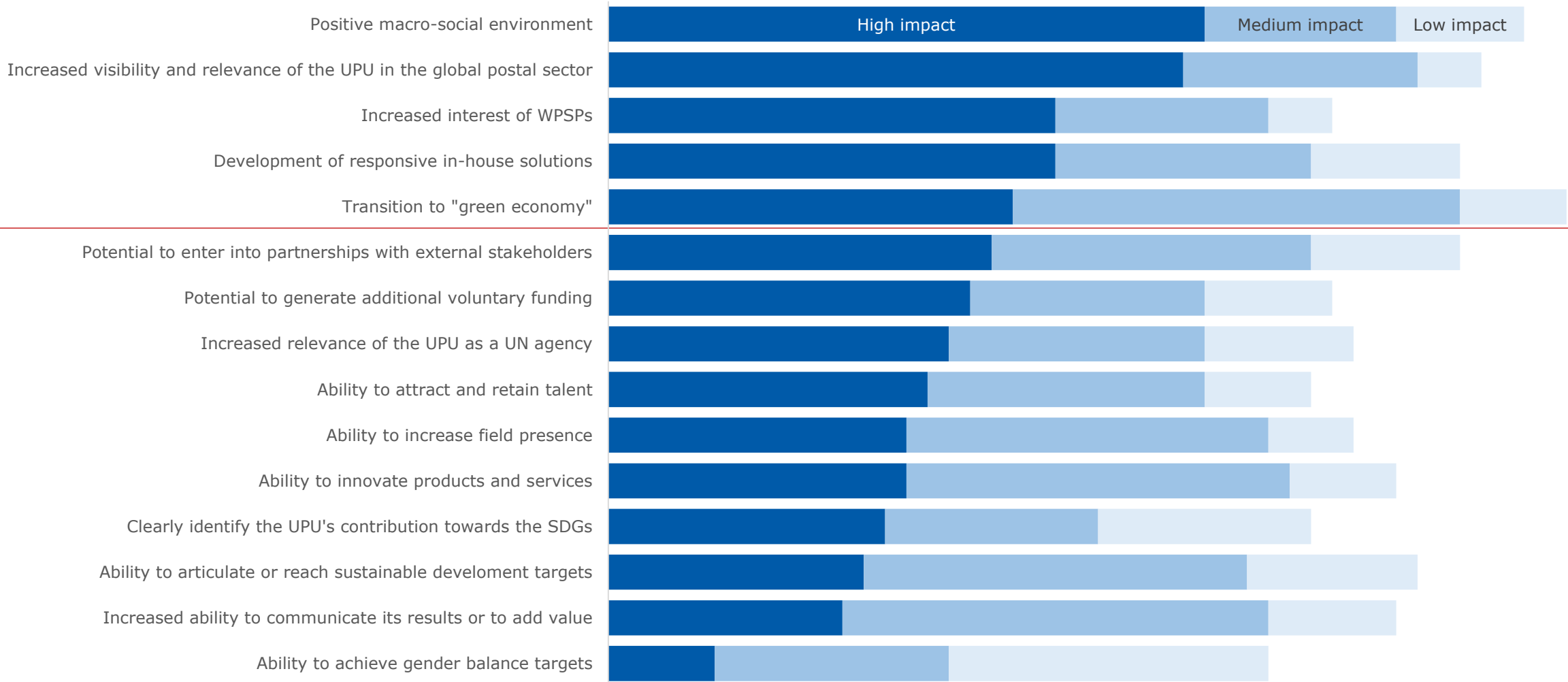


Ministries see elevating the UPU's visibility and relevance as the top opportunity



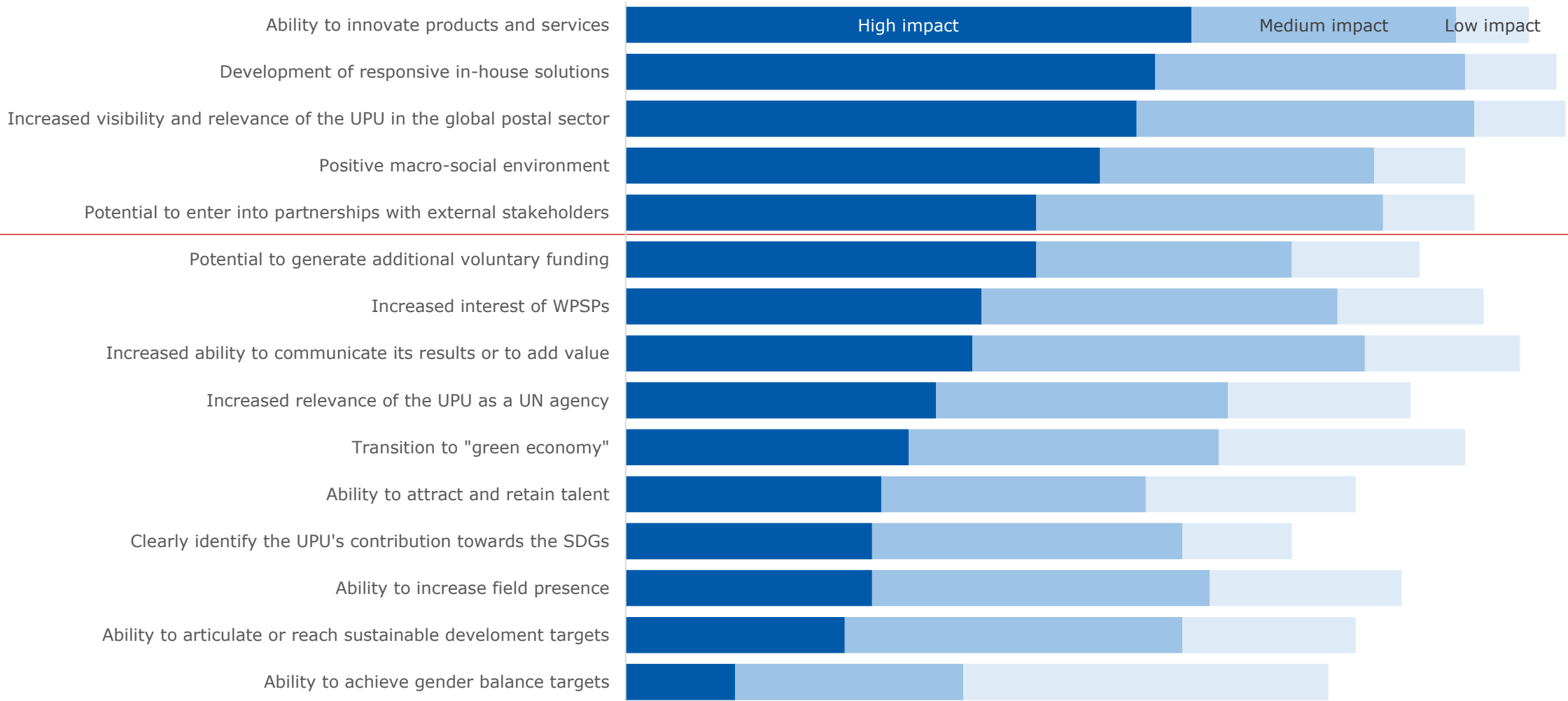


Regulators turn outward: a positive macro-social environment is the top opportunity





DOs view innovating products and services as the top institutional opportunity





Core stakeholders share UPU insights

What does each group think of the UPU's institutional landscape?

Ministries

Risks:

1. Decreased funding
2. Decreased relevance of the UPU
3. Inability to identify external funding sources
4. Negative macro-social environment
5. Cybersecurity threats

Opportunities:

1. Increased visibility and relevance of the UPU in the global postal sector
2. Positive macro-social environment
3. Potential to enter into partnerships with external stakeholders
4. Ability to innovate products and services
3. Development of responsive in-house solutions

Regulators

Risks:

1. Cybersecurity threats
2. Decreased funding
3. Decreased relevance of the UPU
4. Inability to innovate products and services
5. Negative macro-social environment

Opportunities:

1. Positive macro-social environment
2. Increased visibility and relevance of the UPU in the global postal sector
3. Increased interest of WPSPs
4. Development of responsive in-house solutions
5. Transition to "green economy"

Designated Operators

Risks:

1. Negative macro-social environment
2. Decreased funding
3. Inability to innovate products and services
4. Decreased relevance of the UPU
5. Cybersecurity threats

Opportunities:

1. Ability to innovate products and services
2. Development of responsive in-house solutions
3. Increased visibility and relevance of the UPU in the global postal sector
4. Positive macro-social environment
5. Potential to enter into partnerships with external stakeholders

Key Takeaways

Taking a comparative lens across ministries, regulators, and designated operators, the most common risks and opportunities underscore a shared narrative. Risks of decreased funding, cybersecurity threats, and potential UPU relevance decline are universally recognized. Conversely, opportunities in a potentially positive macro-social environment, increased UPU visibility and relevance in the sector, and the development of innovative in-house solutions resonate collectively.

Notably, ministries place greater emphasis on strategic partnerships, while regulators focus on transitioning to a "green economy", and designated operators prioritize innovation and potential external collaborations.

This comparative analysis highlights both shared challenges and nuanced strategic priorities, paving the way for a cohesive and collaborative response within the UPU framework.



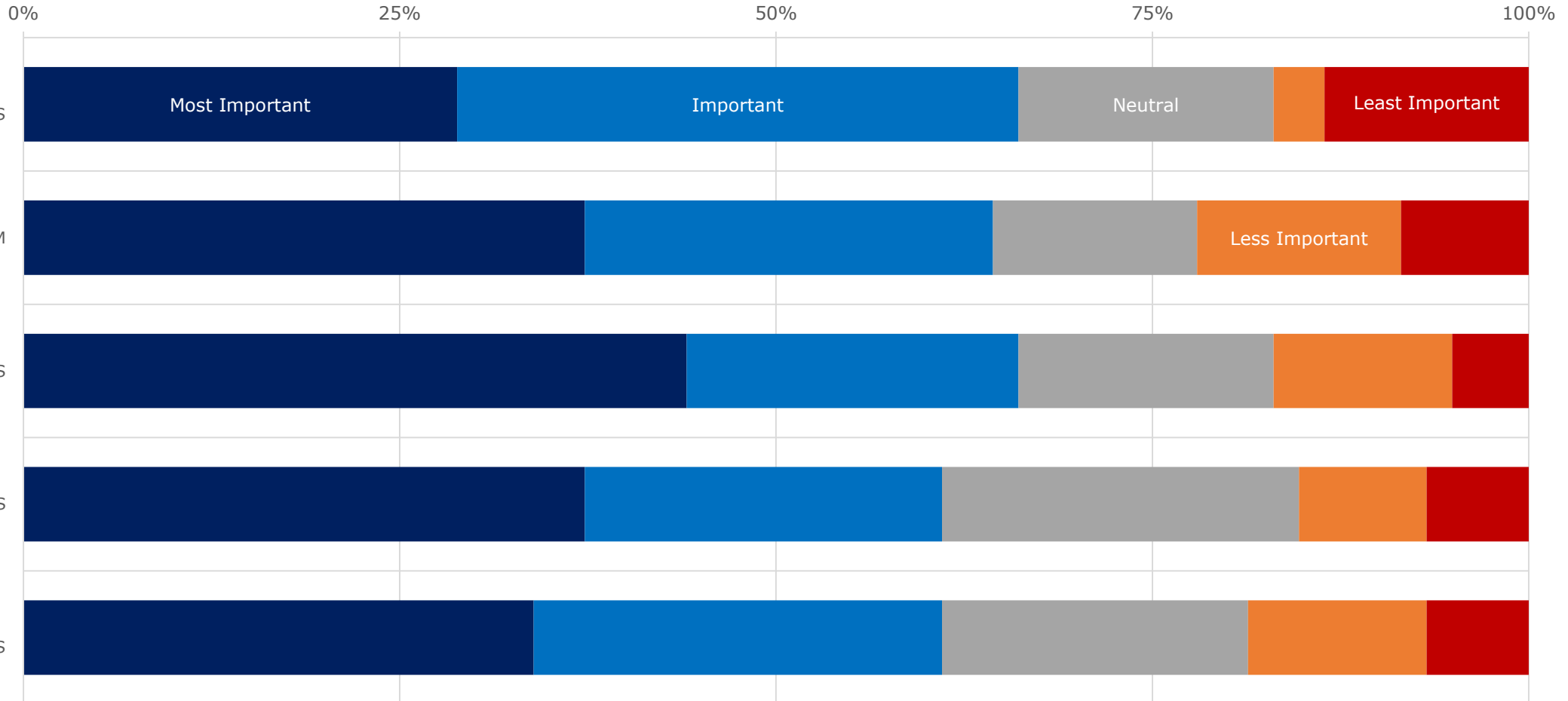
Potential UPU solutions

Key outcomes: What are the most impactful solutions that the UPU could offer to its stakeholders?



Ministries want stronger treaty, forum, and increased advocacy for the sector

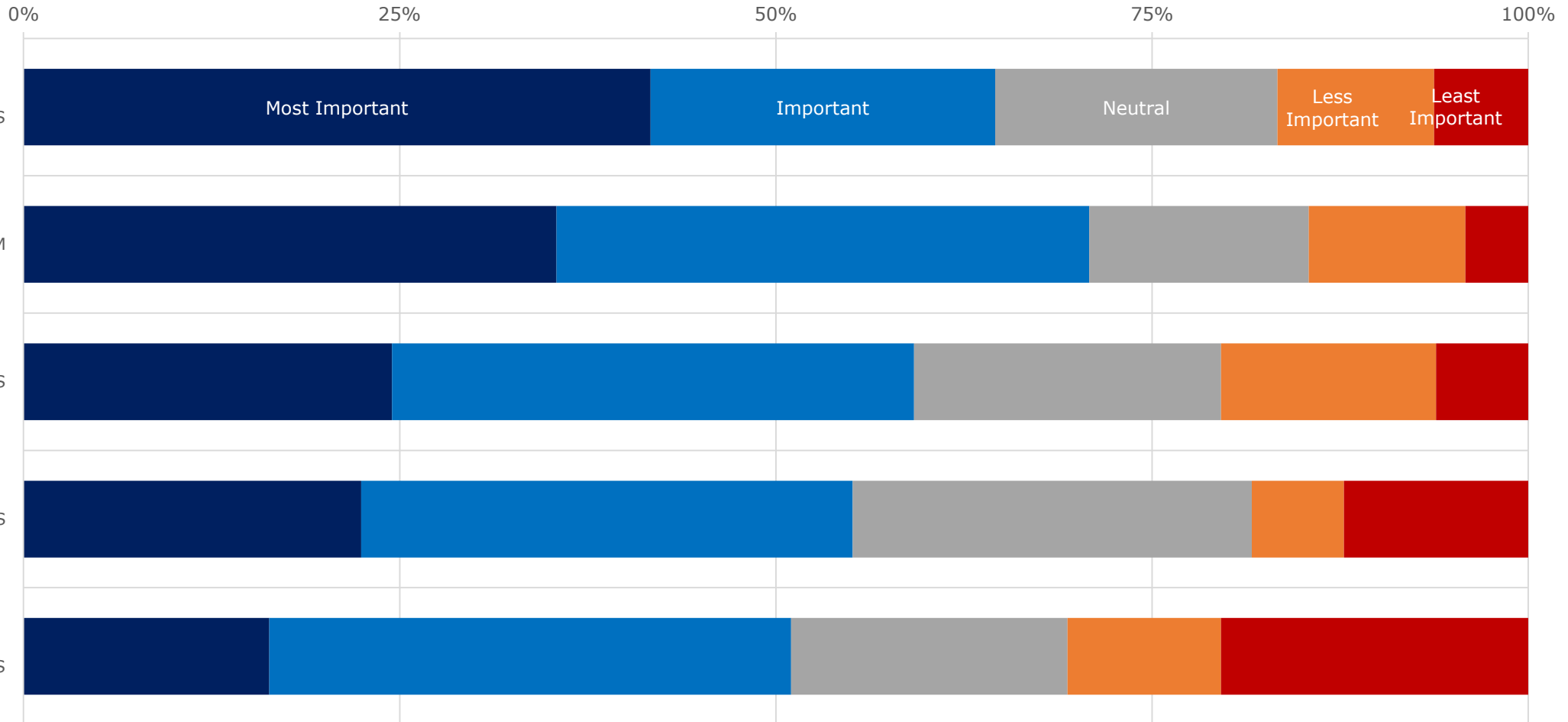
MINISTRIES





Regulators agree on advocacy, also wish to see greater knowledge sharing

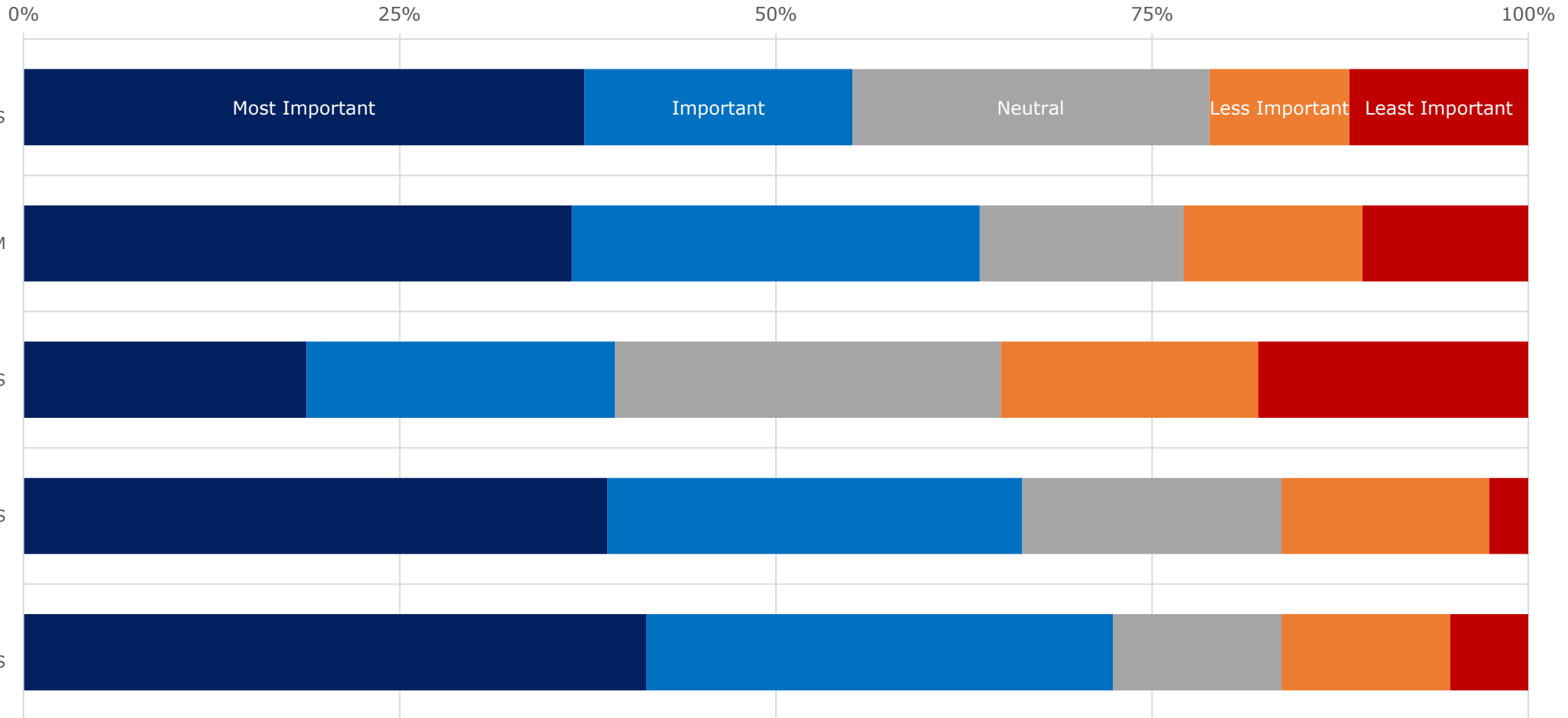
REGULATORS





DOs want more operational support via technical assistance and IT solutions

DESIGNATED OPERATORS





Conclusion and next steps

What are the key takeaways from this exercise?



Here are the four key takeaways from the consultation...

1

The UPU is relevant, and will remain relevant

All key UPU stakeholders (ministries, regulators, and DOs) unanimously affirmed that the UPU is relevant for their organization and sector, and that it will continue to remain relevant to their needs and those of the sector needs in the medium term.

Stakeholders largely agree that the UPU is and will continue to be important for them in the future, and that they are being heard in shaping the UPU's future strategy.

2

We are facing critical risks for the sector and institution

UPU stakeholders identified critical risks both for the sector and for the institution, from falling in letter volumes to funding uncertainties and cybersecurity threats, underlining the imperative for strategic resilience and collective, hyper-collaborative actions.

3

But we must seize the many opportunities in front of us

Despite the challenges, stakeholders clearly identified abundant opportunities - leveraging a positive macro-social environment, modernizing operations, bolstering UPU visibility, and innovating solutions.

4

And we must take action NOW

Stakeholders underlined the urgency of immediate action.

There is a clear need for proactive measures to secure the sector's future and maximize the potential for positive change.



So what's next?

- As stakeholders, **you have expressed your views** on the role and relevance of the UPU, and identified the top risks and opportunities facing both the postal sector and the UPU as an institution by 2029. You have advocated for solutions that are critical in ensuring a future-ready UPU.
- Your **insights will form the core of the future UPU institutional strategy**. The outcomes will be shared with the CA.
- We **urge you all to participate in regional consultations** in early 2024. Each UPU region will unpack the regional results of the consultation, validate findings, and provide a dynamic space for stakeholders to shape the future narrative.
- We will share for comments a **first draft of the strategy at the CA S5** in May 2024.
- The trajectory is set - **every input, every insight** is helping to carve the path for the UPU's impactful evolution.



Thank you

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