

# UPU STRATEGY 2026–2029

Dubai cycle



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# EXECUTIVE SUMMARY

As it celebrates its 150th anniversary, the UPU is faced with an urgent need to transform in the context of digitalization, e-commerce, and technological advancements. This strategy outlines steps to ensure that postal services remain relevant, innovative, and capable of supporting global trade, communication and social inclusion in the digital age.

The global postal system, historically the backbone of communications, logistics and trade, is now at a crossroads. The sector faces numerous pressing challenges that jeopardize its long-term sustainability.

While global domestic parcel volumes have surged by over 500% between 2000 and 2024 owing to e-commerce, global domestic letter-post volumes have plummeted by 55% over the same period. Despite the growth in parcel services, postal revenues have not kept pace with global economic growth, in a phenomenon known as “postal decoupling”.

This disconnect has resulted in declining profitability for postal services, particularly as digital alternatives for communication and alternative logistics models outpace traditional postal systems.

International postal services are facing an even steeper decline than domestic services. UPU analysis projects a possible near-extinction of international letter-post and parcel services within the next five decades, unless there is a focus on getting the “basics” of service features, price and service quality right, significant innovation, regulatory modernization and ecosystemic cooperation between stakeholders.

Postal services are being outpaced by private logistics providers, digital platforms, and alternative communication and delivery solutions. Global express companies and new entrants in the international delivery market, combined with a shift towards digital communication and e-commerce solutions, have eroded traditional postal markets. These market players are equipped with more agile, customer-centric models that are constantly being reinvented to meet the expectations of a new generation of customers.

The postal sector’s inability to effectively adapt to changing regulatory environments presents a major challenge. Complex cross-border regulations, inconsistent customs procedures, and a lack of integration with international logistics networks have hindered the sector’s capacity to efficiently facilitate global e-commerce. The rise of digital technologies and alternative delivery models further compounds these challenges, leading to a fragmented and inefficient postal network.

The growing importance of sustainable practices in global trade poses both a challenge and an opportunity for the postal sector. As environmental regulations tighten and customer expectations shift towards greener delivery solutions, the sector must address its substantial carbon footprint. Postal operators face increasing pressure to adopt eco-friendly technologies, modernize transport networks, and integrate sustainability into their long-term strategies.

The period from 2019 to 2024 was a revealing time for the postal sector, exposing significant and systemic vulnerabilities. The COVID-19 pandemic triggered unprecedented disruptions in international postal services, with global postal volumes plummeting nearly 60% during the pandemic. Geopolitical tensions, supply chain disruptions, and changes in taxation regimes further exacerbated these challenges, exposing the sector’s fragility.

The sustained impact of these crises demonstrated that the problems facing the international postal sector are structural and require immediate, radical transformation.

Through extensive consultations, stakeholders have identified several shared challenges that threaten the sector’s future: the anticipated further decline in letter volumes; the sustainability of universal obligations; declining revenues from traditional mail services; rising operational costs; outdated postal regulatory frameworks; and cybersecurity risks. In addition, postal operators are concerned with the decline in cross-border e-commerce shipments.

However, even in this context there are several areas of opportunities and growth. A positive macrosocial environment, characterized by the rise of cross-border e-commerce, presents a significant opportunity for the postal sector. E-commerce growth has driven increased demand for logistics and delivery services, and postal operators can capture this demand by expanding their service offerings. Improved integration with e-commerce platforms, optimized logistics, and better last-mile delivery solutions are essential to capitalizing on this trend.

Emerging technologies like artificial intelligence (AI), blockchain, and data analytics offer the potential to revolutionize postal operations. Postal operators can harness these technologies to optimize delivery processes, improve tracking systems, offer more personalized services, and anticipate market trends. The development of innovative services and solutions, such as digital

financial services, parcel lockers, and improved tracking systems, can meet the evolving needs of customers.

The transition to a green economy also presents an opportunity for postal operators to adopt sustainable practices, reduce their environmental footprint, and tap into new revenue streams. Green logistics solutions, energy-efficient processes, and eco-friendly transport options can position postal services as key players in environmentally sustainable trade and delivery systems.

Importantly, collaboration with wider postal sector players (WPSPs), including private logistics firms, fintech companies and e-commerce platforms, has the potential to drive innovation and create new service opportunities. By forging partnerships with external stakeholders, postal operators can expand their reach, improve service offerings, and enhance their customer centricity.

Stakeholders have emphasized the pivotal role of the UPU in guiding the sector through this period of transformation. The UPU must foster stronger regulatory frameworks that align with modern market needs, encouraging innovation while ensuring a level playing field for all stakeholders. It must promote greater collaboration among postal operators, regulators and private sector players to build an interconnected global postal ecosystem that can thrive in the digital economy.

And lastly, the UPU can drive capacity building and provide technical assistance to ensure that all member countries, especially those in emerging and transitioning economies, have the infrastructure and resources needed to participate in the global postal system.

To meet stakeholder needs and to guide the postal sector through the 2026–2029 period, the UPU has designed a strategic framework structured around three key pillars:



## GOAL 1: LEVERAGING THE SINGLE POSTAL TERRITORY

The UPU seeks to improve the global postal network by enhancing cross-border postal supply chains, modernizing regulatory frameworks, and fostering stronger international collaboration. This involves creating a more flexible and market-relevant rule-based system that guarantees universal postal services.

The UPU will work with stakeholders to streamline customs processes, enhance last-mile delivery infrastructure, and support the development of regional postal hubs.



## GOAL 2: STRENGTHENING THE GLOBAL POSTAL ECOSYSTEM THROUGH INNOVATION FOR FACILITATING COMMUNICATION AND TRADE

To remain relevant, the postal sector must adopt cutting-edge technologies and innovate its operational processes as well as its products and services. The UPU will support stakeholders to develop innovative, customer-centric services, especially in e-commerce, logistics, and social, financial and trade inclusion.

The key results to be achieved through this goal include service diversification, improved e-commerce logistics, and enhanced postal infrastructure. This goal also focuses on achieving broader global development goals.



## GOAL 3: ENABLING POSTAL DEVELOPMENT THROUGH ENHANCED COOPERATION AND REGIONALIZATION

This goal embodies the UPU's commitment to promote and improve postal development worldwide by further enhancing its cooperation, technical assistance and regionalization activities. It underscores the importance of collective action, partnership building, knowledge sharing, technical assistance and contextualizing development cooperation in addressing common challenges and realizing mutual benefits.

In addition, goal 3 counts on, and intends to integrate, the work, expertise and resources of the restricted unions, all of which play a pivotal role in postal development. Furthermore, it speaks to the role of the UPU in ensuring that no member country is left behind in the postal development journey.

Each goal is supported by a set of interconnected strategic objectives that outline the response that the UPU will make based on demands from member countries and other stakeholders in the postal ecosystem. The UPU's 2026–2029 strategy represents a bold vision for transforming the global postal sector. By embracing innovation, modernizing regulatory frameworks and fostering deeper collaboration, the UPU aims to reposition postal services as an integral part of the digital economy.

This strategy calls for decisive action to ensure that postal operators remain relevant, while contributing to global development goals such as economic inclusion, environmental sustainability and social progress.

With a focus on agile, market-responsive regulatory frameworks, customer-centric products and solutions, service diversification, and robust cross-border operations, the UPU is poised to lead the global postal network through a period of unprecedented change, ensuring its continued role as an enabler of global communication and trade.



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# BACKGROUND

## URGENT NEED FOR TRANSFORMATION IN THE GLOBAL POSTAL SECTOR

As the UPU celebrates its 150th anniversary, the global postal sector finds itself at a pivotal crossroads.

Over the past century and a half, the UPU has played a significant role in shaping the world's communication, logistics and trade infrastructure. However, the dramatic shifts of the 21st century, particularly the rise of digital communication and e-commerce, and the emergence of advanced technologies have all combined to expose the vulnerabilities of this essential global system.

Historically, postal services have formed the backbone of global communications. Letter-post volumes rose exponentially through much of the 20th century. However, over the last three decades, the surge in Internet usage and e-commerce has dramatically

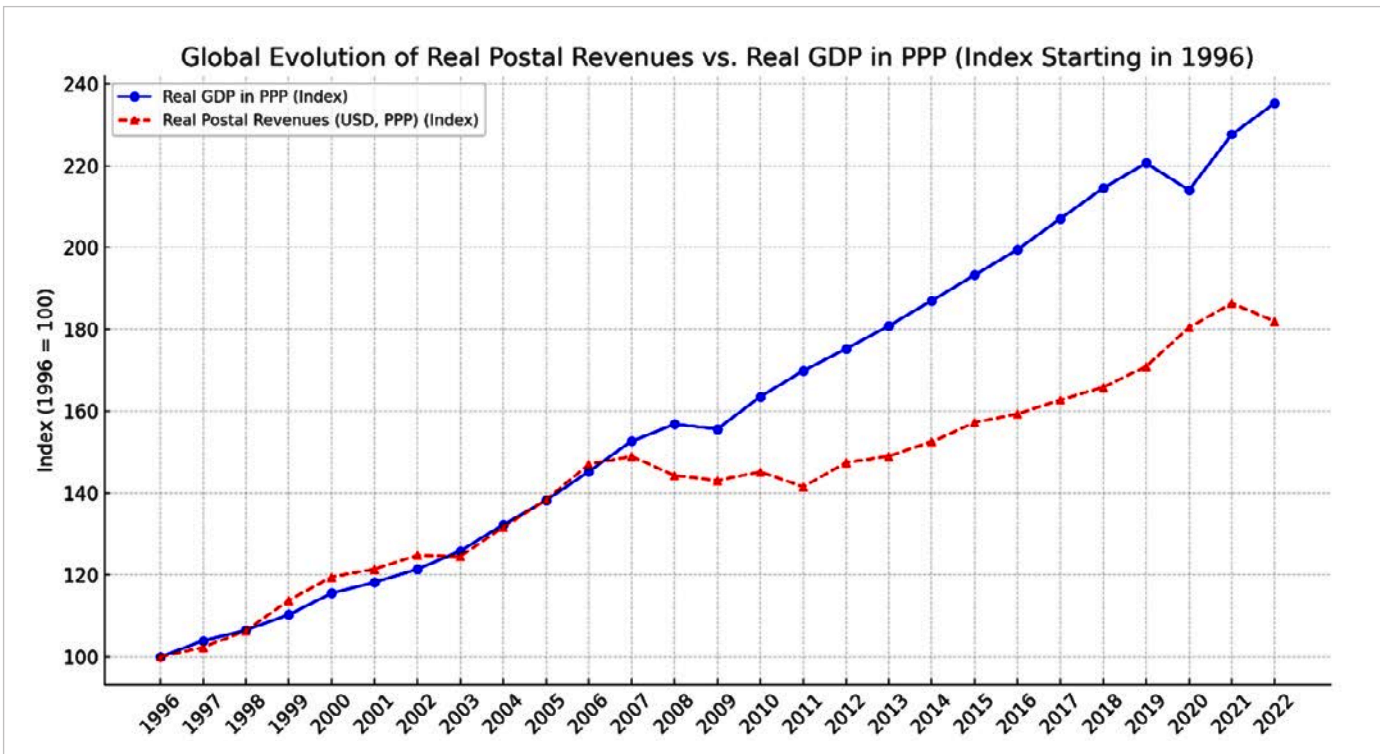
shifted this landscape, propelling parcel and logistics services to the forefront of postal development.

According to UPU analysis, this seismic shift is starkly illustrated by two contrasting trends between 2000 and 2024: while global domestic letter-post volumes plummeted by 55%, domestic parcel volumes skyrocketed by over 500%, fundamentally transforming the postal sector's operational focus.

This transformation of the postal sector, while significant, has not been sufficient to prevent a worrying trend: the "postal decoupling" phenomenon, with the postal sector's growth failing to keep pace with global economic growth.

This divergence is clearly illustrated in Figure 1. Since 1996, while global real gross domestic product (GDP, measured in purchasing power parity, PPP) has shown consistent growth, reaching an index value of nearly 240 by 2022, real postal revenues have struggled to keep abreast. The chart reveals that postal revenues initially tracked GDP growth closely until around 2007, but then began to lag significantly. By 2022, the index for real postal revenues had only reached about 180, creating a widening gap with GDP growth.

Figure 1: Postal decoupling



Source: UPU and World Bank data.

This decoupling, driven by digital transformation, shifting consumer behaviours, and the emergence of rapid urban delivery models for goods *underscores the urgent need for the postal sector to evolve and realign with the digital economy's growth drivers*. Despite the boom in e-commerce and parcel deliveries, the *postal sector has not fully capitalized on new opportunities* at a rate commensurate with global economic expansion.

Bridging this gap requires a multifaceted approach that includes embracing innovation, diversifying services to be market responsive, and fostering deeper cross-border integration within the global postal ecosystem.

The challenge for the postal sector is not just to adapt to change, but to *reinvent itself as a critical enabler of an inclusive and sustainable digital economy*, serving as a bridge between the physical and digital realms in an increasingly interconnected world.

While the *overall postal sector grapples with this decoupling from global economic growth, the evolution of international postal services presents an even more urgent and existential challenge*. The internationalization of postal services – a key indicator of the sector's global integration and a historical strength of the UPU's network – has experienced a decline far more precipitous than the broader postal–GDP decoupling.

A comprehensive analysis of 150 years of UPU postal statistics reveals a stark reality: without bold

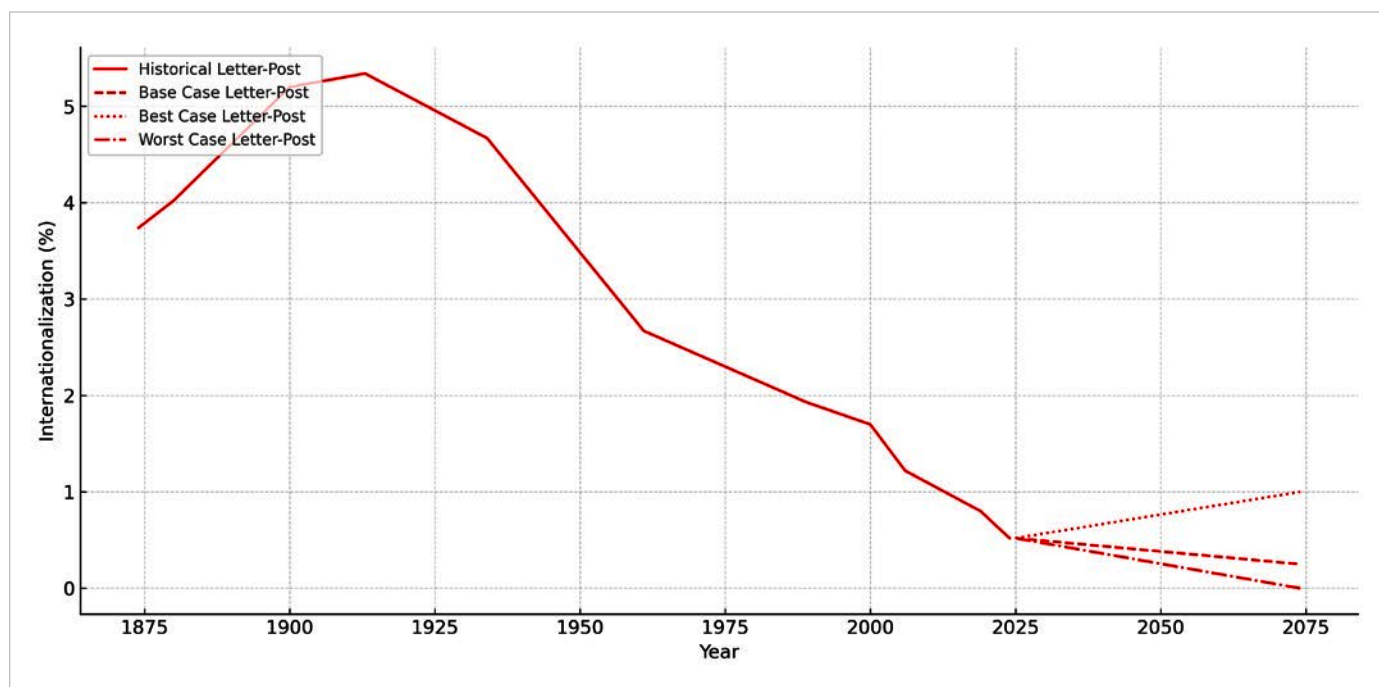
reinvention, international postal services – including those supporting cross-border e-commerce logistics – *risk disappearing entirely within the next three to five decades, or potentially even sooner*.

This alarming trend is evident in the drastic decline of postal internationalization rates, defined as the percentage of international volumes in total postal volumes, which *have plummeted from their peak levels in the early 20th century to historic lows in 2024*. This decline not only reflects the broader challenges faced by the postal sector but also highlights the unique hurdles in cross-border logistics, regulatory harmonization, and the global growth of alternative delivery channels that international postal services must overcome to remain relevant in the digital age.

Figure 2 shows that the internationalization of letter post (excluding small packets) has experienced a particularly precipitous decline. From a peak of 5.3% in 1913, coinciding with the height of the first wave of globalization, the share of international letters in total world mail deliveries has fallen to a mere 0.5% in 2024. This decline reflects not only the impact of digital communication technologies but also the postal services' failure to adapt to changing global communication patterns.

Looking ahead, UPU analysis projects three potential scenarios for the future of letter post internationalization (Figure 2), each based on different assumptions about

Figure 2: **Letter post internationalization (excluding small packets)**



Source: State of the Postal Sector 2024 (UPU, 2024).

the sector’s response to current challenges. In the worst-case scenario, which assumes that the UPU and its member countries maintain their 2024 status quo in terms of regulations, products and services without significant adaptations to the changing market, the downward trend continues unabated. Under these conditions, *the internationalization rate of letter post is projected to approach zero by 2074*. This bleak outlook represents a future where international letter services become virtually non-existent, reflecting a failure to innovate or respond to digital disruption.

The base-case scenario assumes some improvements and innovation in letter-post products and services. In this projection, the decline in letter post internationalization slows, with the *rate stabilizing around 0.25% by 2074*. While this represents a marginal improvement over the worst-case scenario, it still indicates a significant contraction of international letter services.

The best-case scenario, in contrast, envisions a proactive, transformative approach by the UPU and designated operators (DOs). This scenario assumes substantial investment in digital integration, and the development of innovative international mail products that blend physical and digital communication. Under these conditions, the model projects a reversal of the declining trend, with the *internationalization rate gradually increasing to about 1% by 2074*. While still below historical peaks, this scenario suggests a potential renaissance for international letter services through innovative adaptations to the digital age.

These divergent scenarios underscore the critical juncture at which the postal sector finds itself, highlighting the urgent need for strategic decision making and transformative action to shape the future of international postal services.

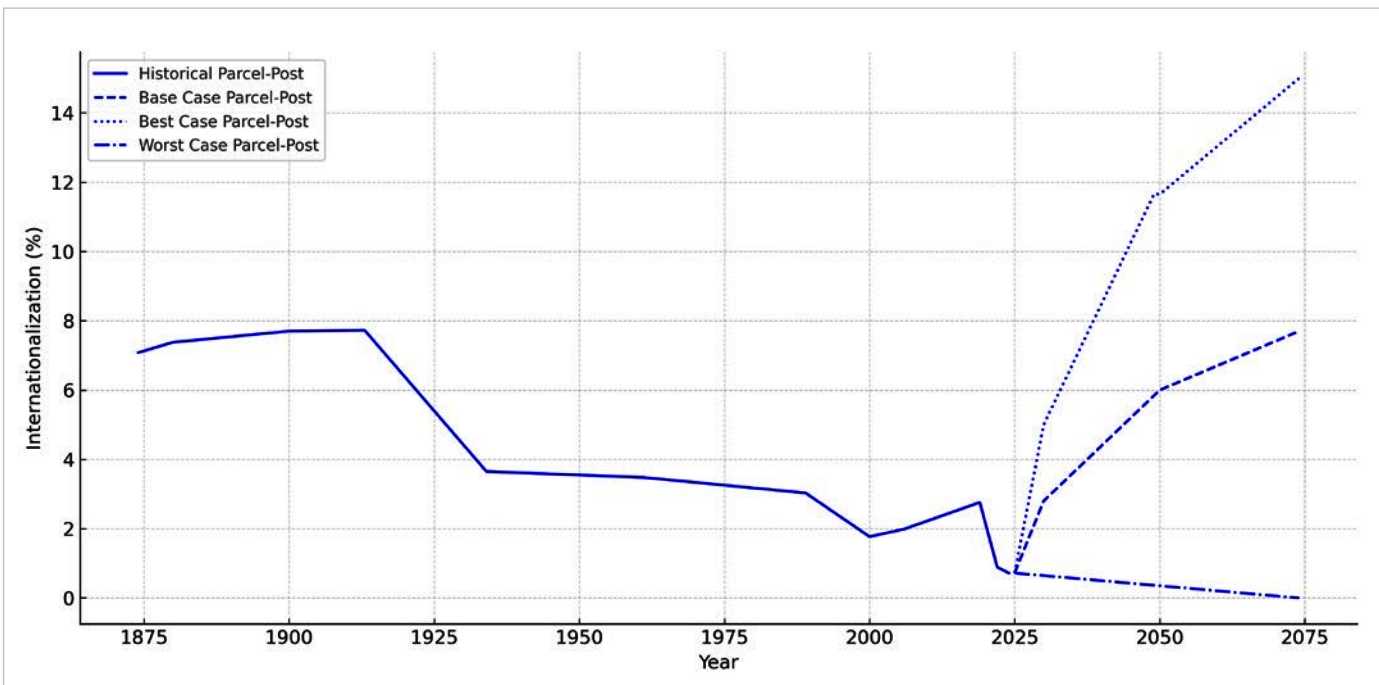
Looking beyond letter post to parcel post, Figure 3 shows that the internationalization of parcels and small packets has followed a volatile trajectory, with a more complex growth pattern than letter post.

From its peak of 7.7% in 1913, coinciding with the first wave of globalization, the share of international parcels and small packets in total world postal deliveries experienced a sharp decline until the mid-20th century. This was followed by a period of relative stability, before dropping to 1.8% in 2000. A brief resurgence to 2.7% in 2019 was quickly reversed, with the rate plummeting to a mere 0.7% in 2024.

This dramatic decline starkly illustrates *postal services’ failure to fully capitalize on the global e-commerce boom and their vulnerability to a polycrisis of disruptions* – ranging from the COVID-19 pandemic, changes in the UPU’s remuneration systems, new border control measures, evolving customs and taxation regimes, and the development of alternative delivery models, as well as other economic shocks (all of which have been explored in detail in UPU research in recent years).

Looking ahead, our analysis projects three potential scenarios for the future of parcel post internationalization, each with vastly different trajectories.

Figure 3: Parcel post internationalization (including small packets)



Source: State of the Postal Sector 2024 (UPU, 2024).

In the worst-case scenario, which assumes that the UPU and its member countries maintain their 2024 status quo without adapting to evolving market needs, the downward trend continues unabated. This scenario envisions no significant improvements in cross-border customs processes, no innovation in last-mile delivery, and a failure to integrate with e-commerce platforms. Under these conditions, *the internationalization rate of parcel-post is projected to approach zero by 2074*. This bleak outlook represents a future where international parcel services through the global postal network become virtually non-existent, completely overtaken by private logistics companies or alternative delivery models.

The base-case scenario, however, offers a more optimistic projection. It suggests a significant reversal of the current decline, with *the internationalization rate steadily increasing to reach about 7.5% by 2074*. This scenario envisions postal operators *successfully adapting to the e-commerce landscape and reclaiming a substantial portion of the international parcel market*.

The best-case scenario presents the most transformative future, assuming radical changes in the UPU's approach and DOs' strategies. This scenario envisions comprehensive regulatory reforms, full integration with global e-commerce platforms, revolutionary improvements in customs clearance through blockchain and AI technologies, and innovative last-mile delivery solutions. It also assumes the development of new value-added services that leverage the postal network's global reach. Under these conditions, the model projects *a dramatic increase in parcel post internationalization, reaching approximately 15% by 2074*, potentially surpassing historical peaks and setting new records for international parcel handling and *positioning postal services among the leading players in global e-commerce*.

These divergent scenarios underscore the critical juncture at which the postal sector finds itself, particularly in the realm of international parcel and small packet services.

The stark contrast between the worst-case and best-case scenarios highlights the immense potential for growth, as well as the existential risks faced by the sector. This analysis emphasizes the *urgent need for strategic decision making, innovation, and transformative action* to shape the future of international postal services in the rapidly evolving landscape of global e-commerce and digital trade.

## OVERCOMING THE INTERNATIONAL POSTAL CRISIS FOR A BETTER FUTURE

The crisis faced by international postal services is multifaceted, encompassing technological, regulatory and competitive factors. The rise of digital alternatives for communication and the arrival of new international delivery players for cross-border e-commerce has eroded traditional postal markets.

Additionally, complex cross-border regulations, inconsistent customs procedures, and the lack of seamless integration with international logistics and transportation networks have hindered the postal sector's ability to be an effective service provider for the global e-commerce market.

To reverse this trend and ensure the continued relevance of international postal services, a radical transformation is needed. This transformation must encompass not only technological innovation but also *a reimagining of international cooperation, regulatory frameworks, and service offerings to meet the evolving needs of a digitally driven global economy*.

The long-run decline of international postal services is exacerbated by a widening gap between the globalization of the economy and the internationalization of postal services.

While global trade has surged, the postal sector's capacity to adapt and capitalize on this growth has diminished. Despite the explosion of e-commerce, which should have offered new opportunities, *postal operators have been slow to innovate and have struggled to overcome logistical, regulatory and competitive barriers*, particularly in cross-border services.

As global trade has grown to account for over 20% of global GDP, the share of international postal items in total postal deliveries, as previously illustrated, has plummeted to historic lows, creating an unprecedented divergence. This stark contrast underscores a fundamental misalignment between the postal sector and the global economy it serves.

The magnitude of this gap *not only represents an untapped opportunity for postal services but also poses risks to the inclusivity and accessibility of global trade*, particularly for SMEs and developing economies that have traditionally relied on the international postal network.

The period from 2019 to 2024 was revelatory for the international postal sector, exposing its vulnerabilities

and the urgent need for transformation. The COVID-19 pandemic, in particular, laid bare the fragility of the operational, regulatory and business models of the international postal network. *International volumes plummeted by nearly 60% during this period, a decline unprecedented in its speed and magnitude.*

This collapse was driven by a perfect storm of challenges: operational disruptions due to international transportation interruptions that severed key postal routes; new border security control requirements and customs rules; and important changes in taxation regimes and international postal remuneration systems. Combined with rapidly emerging cross-border e-commerce logistics models (from business to consumer (B2C) to B2B2C), these elements have ultimately accelerated the shift to alternative international delivery solutions.

Moreover, the pandemic was not an isolated shock. It was followed by geopolitical tensions and supply chain disruptions that further strained the international postal system.

These cascading crises revealed the international postal sector's *lack of resilience and adaptability in the face of global upheavals*. The sustained nature of these challenges demonstrated that the issues facing international postal services go beyond temporary setbacks, pointing to *fundamental structural weaknesses*.

This period of intense stress has served as a stark wake-up call for the entire international postal community. It has underscored that *the current call for action is not for incremental improvements, but a radical reimagining of the sector's role and operations*.

If international postal services are to survive and thrive in the digital age, they must evolve beyond their traditional role and *embrace a more dynamic, resilient and technologically advanced model for operations and business development*.

This transformation must encompass not only technological upgrades but also a *fundamental rethinking of cross-border collaborations, regulatory frameworks and service offerings* to meet the evolving needs of a volatile and increasingly digital global economy.

## FUTURE SCENARIOS FOR INTERNATIONAL POSTAL SERVICES

The UPU's analysis has laid out three potential scenarios for the future of the international Post: regression, resilience and renaissance. Each of these scenarios chart the potential paths that international postal services might take over the next 50 years, each with dramatically different outcomes.

### Regression (R<sup>-1</sup>)

In this bleak scenario, the entire international postal ecosystem fails to adapt to technological advancements and evolving market demands, leading to the potential collapse of international postal services.

*DOs struggle to innovate and modernize, failing to invest in crucial technologies like AI, blockchain and automation. DOs, unable to offer services that are reliable, sustainable and affordable enough to remain relevant to customers, see their role in global commerce diminish rapidly. This leaves them unable to offer customer-centric services, unlike more agile private sector players.*

*Simultaneously, governments and regulators maintain outdated international postal policies and rigid regulatory frameworks that stifle innovation, failing to recognize the strategic importance of international postal services in a global digital economy. The lack of a supportive, enabling regulatory environment, coupled with poor international coordination on issues like customs processes and data sharing, further impedes cross-border postal services.*

*WPSPs, including private logistics companies and tech giants, grow below market potential and fail to provide universal coverage owing to fragmented services and*

*lack of collaboration with DOs.* Consequently, cross-border e-commerce logistics become inaccessible to large portions of the global population, with micro, small, and medium-sized enterprises (MSMEs) facing significant barriers to international trade. This future envisions entire regions becoming disconnected from global logistics networks.

The digital divide widens as postal services fail to bridge the gap between physical and digital communication, potentially exacerbating economic inequalities and hindering global trade.

This scenario underscores the critical need for coordinated action among all stakeholders in the postal ecosystem to prevent a regression that could disrupt global trade patterns and limit economic and business development opportunities worldwide.

## Resilience (R<sup>0</sup>)

This scenario *envisions a transformative evolution of international postal services to meet the complex challenges* of global commerce in the 21st century. DOs worldwide embrace cutting-edge technologies such as AI, blockchain, and advanced data analytics, revolutionizing cross-border mail and parcel processing, customs clearance, and international tracking systems.

Governments and regulators play a crucial role by *implementing supportive policies that encourage innovation while ensuring a level playing field* for all stakeholders and fulfilling *universal service obligations*. They work towards harmonizing regulations across different regions, though challenges remain in fully aligning diverse national interests. The UPU spearheads efforts to *standardize technological implementations* across borders, fostering a more cohesive global postal network. WPSPs, including

international e-commerce platforms and multinational tech companies, *form strategic partnerships with DOs*, enhancing the *sector's capability to offer seamless, end-to-end cross-border logistics solutions*.

These *collaborative advancements* significantly strengthen the value proposition of postal services in the international logistics landscape, bringing *substantial benefits to businesses, consumers and communities worldwide*. Postal services become increasingly *vital in facilitating global e-commerce*, particularly in emerging corridors between developing and developed nations, promoting more *inclusive participation in the digital economy*. While major international hubs and cross-border digital services see transformative upgrades, last-mile delivery in diverse global contexts experiences more gradual improvements.

This balanced approach significantly *boosts the relevance of postal services in international trade and the digital economy*. However, *the sector still grapples with fully matching the agility of born-global digital-native logistics players*.

The Resilience scenario positions the international postal network as a *key facilitator of global e-commerce and communication*, supporting *inclusive economic growth and bridging digital divides between nations*, while ensuring that the benefits of improved postal services are accessible to all citizens of the world without prejudice.

## Renaissance (R<sup>+1</sup>)

This scenario envisions the *most transformative future* for the postal sector, where *international postal services evolve into the central nervous system of global digital trade and communication*. At its core is the concept of hypercollaboration, spearheaded by the UPU, fostering *unprecedented integration among all stakeholders*. DOs undergo a radical transformation, fully embracing cutting-

edge technologies and innovative business models. They become highly agile, data-driven organizations, seamlessly blending physical and digital services.

Governments and regulators play a *pivotal role by implementing forward-thinking policies that not only support innovation but actively promote the postal sector as critical national infrastructure for the digital age*. They harmonize regulations globally, creating a *unified framework that enables seamless cross-border operations* while ensuring data privacy and security. The UPU evolves into a dynamic platform for innovation, setting global standards for digital trade and fostering technological advancements that benefit the entire world.

WPSPs, including tech giants, e-commerce platforms and financial institutions, form *deep, symbiotic partnerships with DOs and the UPU*. This collaboration results in a *comprehensive ecosystem that seamlessly integrates diverse value propositions*, combining AI-driven logistics, autonomous delivery, and real-time customs processing with advanced digital financial services, secure identity verification, and data intelligence.

This transformation positions *the postal sector not just as an adapter to the digital economy, but as its very foundation*. The international postal network becomes the *linchpin of 21st-century digital commerce*, offering a *unified platform for global communication and trade* that is accessible, efficient and transformative for governments, businesses, communities and individuals alike. By bridging physical and digital realms and connecting the unconnected, it plays a *crucial role in reducing inequalities, fostering innovation, and driving sustainable economic development on a global scale*.

In this Renaissance scenario, *the postal sector reclaims its historical role as the backbone of global communications, reimagined for the digital age*. It becomes the indispensable facilitator of global e-commerce and digital interactions, driving inclusive growth and setting new standards for international cooperation and technological innovation.

The time for action is now.

This moment, this Congress and this strategic cycle must be seized for bold reinvention.

**Only through decisive intervention, underpinned by rapid, community-focused decision making that goes beyond national interests to empower the global postal network, can international postal services avoid the risk of becoming obsolete in a world that is rapidly shifting towards digital communication and e-commerce-focused global trade.**

With the right strategy – centred on innovation, hypercollaboration, and sustainability – the postal sector can not only survive but thrive in the 21st century. *The UPU must lead this charge*, guiding its membership through this period of transformation and ensuring that postal services remain a cornerstone of global trade, communication and social inclusion for generations to come.

In the face of unprecedented challenges, the future of the postal sector and the international Post *is still full of potential*.

By embracing a vision of radical reform, the UPU can chart a path toward a renaissance, ensuring that the global postal network continues to serve as a critical infrastructure for the 21st century and beyond.

# MACROSECTORAL ASSESSMENT BY UPU STAKEHOLDERS

Based on this broad concept of what the future of the postal sector might look like, the UPU engaged in a series of consultations to hear the voice of all postal sector stakeholders. The key objective was to better understand our core stakeholders' vision for the future: What new opportunities might emerge? What challenges would need to be overcome to utilize these opportunities? And how can the UPU help its stakeholders get there?

The key principle of this consultation process was to gather the broadest possible views and demands from UPU stakeholders, without prejudice or limitation. This allowed the International Bureau (IB) to identify areas of shared interest for the UPU's core stakeholder groups (ministries, regulators and DOs), leading to the articulation of challenges, opportunities and needs for the postal sector.

## STAKEHOLDER-CENTRIC ASSESSMENT OF THE FUTURE OF THE GLOBAL POSTAL SECTOR

In drafting the UPU strategy for 2026–2029, we broadly aligned ourselves with the UN's strategic methodology on foresight,<sup>1</sup> which allows UN agencies to cultivate structured methods that help to navigate uncertainty, imagine better futures, and chart new paths forward. At the UPU, our focus was on gathering the opinions of internal and external stakeholders to form a common view of a potential future state of the postal sector, as well as how the UPU can enable its stakeholders to reach this future state and capitalize on potential opportunities.

It should be noted that we did not necessarily adopt an approach involving the creation of multiple future scenarios with various pathways (strategies).

The roadmap for the strategy development process, which was discussed and endorsed by member countries in Committee 3 of the Council of Administration (CA), was published as CA C 3 2023.1–Doc 8 (UPU strategy 2026–2029 roadmap).

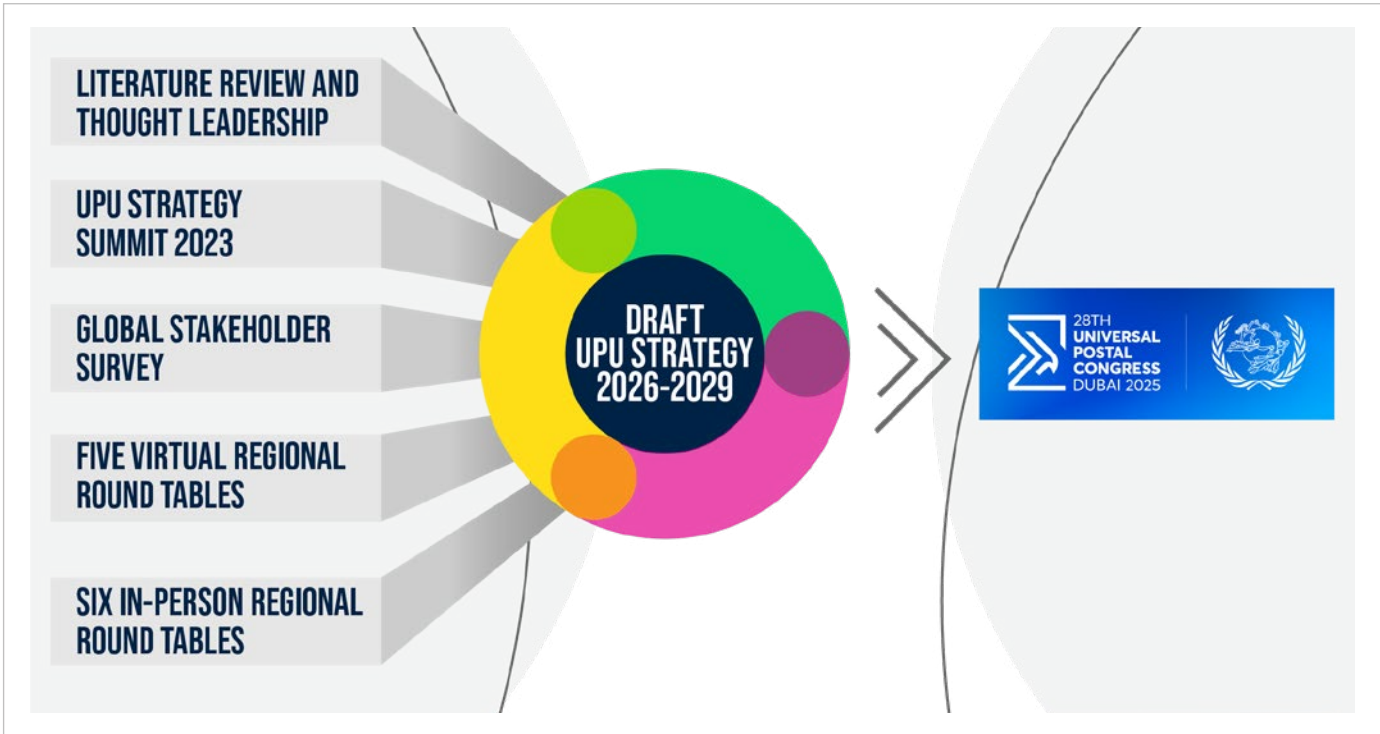
As outlined in Figure 4, drafting the UPU strategy for 2026–2029 began with an exhaustive review and assessment of current thought leadership on the future of the postal sector. This was followed by an extensive stakeholder consultation, which consisted of concurrently hosting the UPU Strategy Summit 2023 (during the fourth Extraordinary Congress in Riyadh), and sending out a global survey to all core stakeholders (ministries, regulators and DOs). A total of 229 stakeholders from 137 member countries responded to the global survey, representing 71% of the Union's membership. The views of WPSPs and the general public were also sought to enrich the feedback and to include the voices of the broader postal ecosystem in shaping and nuancing the next cycle strategy.<sup>2</sup> The opinions from the survey were further augmented by those of a group of cross-thematic IB experts.

The survey focused on defining a common view of the potential global postal sector by 2029, as well as the opportunities that might materialize for our stakeholders in this context. This future state, as defined by potential opportunities for the postal sector, was augmented by a risk assessment of the environment from which it might evolve.

<sup>1</sup> United Nations. Our Common Agenda, Policy Brief 11. UN 2.0 Forward-thinking culture and cutting-edge skills for better United Nations system impact. September 2023.

<sup>2</sup> The full outcome of the global stakeholder survey was published as CA C 3 2024.1–Pres 7a (Outcomes of consultations for future strategy development – Global survey results).

Figure 4: Inputs to the draft UPU Strategy 2026–2029



With a broad perspective of the future of the postal sector, as well as the risk environment, stakeholders articulated their expectations for the potential role of the UPU in helping them succeed in reaching this future state, as well as the potential risks of the UPU as an institution.

The overarching questions that the survey sought to answer were: *What might the future state of the postal sector look like? If this future does materialize with the identified risks and opportunities therein, what would the role of the UPU be?*

To validate the findings from this survey, and to ensure that the voices of all regions and stakeholders were accurately reflected in the strategy design process, virtual regional round tables were held during the last two weeks of January 2024, chaired by the CA Committee 3 Co-Chairs.

Around 500 participants attended these sessions from across all the regions, which underlined the strong engagement of member countries in the future strategy development process. Participants had the opportunity to ask any questions on the survey results. They were then invited to reflect on key questions aimed at identifying any additional risks and opportunities, as well as to validate the cross-stakeholder top risks and opportunities for their regions. Lastly, participants expressed their views on which UPU solutions were needed to address those risks and exploit opportunities.

To socialize the draft strategy with member countries and engage in a meaningful discussion on the future of the UPU, six regional strategy forums were held in person around the world between June and September 2024. Each forum featured three high-level panel discussions, focusing on each of the goals of the proposed strategic framework. The forums provided an opportunity for all member countries to give their views on the draft strategy document, identify regional priority areas, and discuss relevant UPU solutions.<sup>3</sup>

A summary of the outcomes of the Strategy Summit 2023, five virtual regional consultations and six regional strategy forums is presented in Annex 2.

## THE GLOBAL POSTAL SECTOR BY 2029

Across ministries, regulators and DOs, 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. The financial sustainability of services under the universal service obligation (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.

<sup>3</sup> The full outcome of the six regional strategy forums was published as CA C 3 2024.2–Doc 6 □ Outcomes of UPU regional strategy forums 2024.

The top risks are somewhat different from the points of view of the different stakeholder groups; this can be explained by the strategic focus and mandate of each of the groups. However, generally, the three distinct groups see the following top five risks for the global postal sector:

Table 1: Top five risks for the postal sector by 2029

	MINISTRIES	REGULATORS	DOs
1	Further fall in letter volumes	Further fall in letter volumes	Services provided under the USO become financially unsustainable
2	Services provided under the USO become financially unsustainable	Postal regulatory frameworks are no longer fit for purpose	Inability to keep up with changing customer expectations for parcel post
3	Services provided under the USO no longer meet the needs of citizens	Cybersecurity risks to postal digital infrastructure	Decline of cross-border e-commerce shipments by DOs
4	Inability to undertake capital investments in new technology	Services provided under the USO become financially unsustainable	Further fall in letter volumes
5	Inability to innovate products and services	Inability to keep up with changing customer expectations for parcel post	Inability to undertake capital investments in new technology

Source: UPU survey.

Despite the challenges, stakeholders clearly identify abundant opportunities – including the ability of the sector to leverage a positive macrosocial environment that can drive a growth in e-commerce, which in turn propels 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 hypercollaborative, industry-wide responses.

The top opportunities for the global postal sector that emerged from the survey and subsequent discussions include (not in order of priority):

### Positive macrosocial environment that fosters e-commerce growth:

This opportunity focuses on the rise in cross-border e-commerce, based on the exponential growth of e-commerce and changing customer purchasing habits over recent years, which can increase demand for a range of postal logistics and value-added services.

### Use of emerging, innovative technologies and data analytics:

This opportunity involves utilizing innovative technologies and infrastructure to optimize the physical movement of mail and parcels, improving efficiency and delivery times. There is also great potential to leverage AI and automation to optimize logistics operations, improving tracking, sorting and delivery processes. Harnessing the power of data analytics to gain insights and make informed policy and operational decisions, to improve operational efficiency and increase customer satisfaction, is also a key area of opportunity for the sector.

### Key services innovation:

This opportunity focuses on developing innovative services and solutions that meet the evolving needs and expectations of customers, such as new delivery options or value-added services.

**Improved IT standards:** This opportunity involves upgrading and standardizing IT systems and infrastructure to enhance connectivity, data security and interoperability within the postal sector.

**Increased opportunities to serve marginalized populations:** This opportunity focuses on creating more inclusive and accessible postal services for marginalized communities, ensuring that everyone can benefit from postal services.

**Optimized labour model:** This opportunity involves adopting new labour models and workforce management strategies to enhance productivity and efficiency in the postal sector, with due regard to legitimate concerns and by listening to the voices of the postal workforce.

**Increased partnerships:** This opportunity relates to fostering collaboration and partnerships with external stakeholders – WPSPs – to drive innovation and collaboration and create new opportunities for the postal sector.

**Transition to a “green economy”:** This opportunity involves adopting sustainable practices and technologies to reduce the environmental impact of the postal sector.

These opportunities highlight the potential for growth, innovation and positive impact within the global postal sector. By capitalizing on these opportunities, stakeholders can work together to shape the future of the postal industry and ensure its continued relevance and success.

## FUTURE STATE: THE UPU AS AN INSTITUTION BY 2029

The key takeaway from the survey is that all UPU stakeholders unanimously affirmed that the UPU is currently relevant for their organization as well as for the sector, and that it will continue to remain relevant to their needs and those of the sector in the medium term. This indicates that stakeholders recognize the value and importance of the UPU in their respective areas of influence.

Stakeholders also largely confirmed that they are being heard in shaping the UPU’s future strategy, which speaks to the inclusiveness and collective effort in defining the strategy for the next cycle.

From an institutional perspective, the key risks for the UPU, as identified by the stakeholders, are as follows:

**Decreased funding:** Ministries and DOs both highlighted this as a top risk. It is a concern that the UPU may face a decrease in funding, which could impact its ability to carry out its activities effectively.

**Decreased relevance of the UPU:** Ministries and regulators identified this as a risk. There is a concern that the UPU may become less relevant in the future, potentially through changing industry dynamics or the emergence of alternative solutions.

**Inability to identify external funding sources:** Ministries and regulators both highlighted this as a risk. It is important for the UPU to be able to secure external funding to support its operations and initiatives. If it is unable to do so, it may face financial challenges.

**Negative macrosocial environment:** DOs identified this as a risk. A negative macrosocial environment, such as economic downturns, new trends and

technologies, new entrants to the postal sector, or political instability, could have a detrimental impact on the UPU and its ability to operate effectively.

**Cybersecurity threats:** Regulators identified this as a risk. With the increasing reliance on digital technologies in the postal sector, cybersecurity threats pose a significant risk to the UPU's operations and the security of an increasingly interconnected postal ecosystem.

It is important for the UPU to address these risks and implement strategies to mitigate their impact in order to ensure the organization's continued success and relevance in the future.

In the same vein, stakeholders identified a range of opportunities for the UPU to remain relevant and important for the sector. The opportunities identified for the UPU are:

### **Positive macrosocial environment that boosts cross-border e-commerce:**

Stakeholders recognize the potential for the UPU to leverage a positive macrosocial environment, including an ability to recognize and leverage new trends and technologies and embrace new entrants to the postal sector, to propel collective growth and enhance its relevance in the global postal sector.

**Ability to innovate products and services:** Stakeholders emphasize the importance and the need for the UPU to remain vigilant and aware of the rapidly changing dynamics in the postal sector. They stressed the value of enhancing the ability of the institution to innovate its products and services, enabling it to meet the evolving needs of its stakeholders and stay ahead in a changing postal landscape.

**Development of responsive in-house solutions:** Stakeholders recognize the value of the UPU developing need-responsive in-house solutions, which can enhance the operational efficiencies and effectiveness of the global postal network in addressing challenges and capitalizing on opportunities.

### **Increased visibility and relevance of the UPU in the global postal sector:**

Stakeholders see an opportunity for the UPU to enhance its visibility and relevance in the sector, which can contribute to its effectiveness and influence. Stakeholders also stressed the intergovernmental nature of the UPU, which allows it to advocate to policymakers and development partners on the use and effectiveness of the global postal network to offer citizen-centric services – postal logistics alongside social and financial services.

### **Potential to enter into partnerships with external stakeholders:**

Stakeholders highlight the potential to form partnerships with external stakeholders, which can lead to collaborative efforts and innovative solutions.

It is important to note that these opportunities are based on the perspectives and insights of the stakeholders that chose to participate in the survey; they may not encompass all potential opportunities for the UPU.

# WHAT KEY ISSUES DOES THE 2026–2029 STRATEGY NEED TO ADDRESS?

Having engaged extensively with our stakeholders to understand their views, we can summarize four key issues that the postal sector must address during the 2026–2029 strategic cycle. These issues are outlined below, along with an overview of how the UPU will proactively work to address them:

## 1 **Postal operators need to get their “basics” right to ensure financial viability by regaining postal volumes and to capitalize on the exponential growth of e-commerce.**

The need to bring volumes into the postal network, including those related to e-commerce, is critical to the growth of the global postal network and indeed to the very survival of most postal operators.

From the perspective of policymakers and regulators, there is a need to provide for regulatory frameworks that are agile and market-responsive, enable new business models, and accommodate expanded service offerings to customers as appropriate. Cognizant of these facts, the Dubai cycle strategy places an increased focus on ensuring that postal services meet the current and emerging needs of e-commerce customers, including by getting the “basics” right.

This must begin with a segregated, deeper understanding of current and future customer needs that can lead to product portfolio changes coupled with market-relevant prices and strengthened quality of service. This is further augmented by the need to develop new and agile business models that address the end-to-end needs for e-commerce, postal logistics, and C2C, B2C, B2B and B2B2C business models.

To address these demands, the UPU is designing a comprehensive programme of work that aims to improve the reach, relevance, reliability and resilience of the global postal network.

The UPU will help develop interoperability with supply chain partners, including customs and transport providers, modernize transport networks, enhance last-mile delivery infrastructure, and strengthen the global supply chain systems. By investing in regional postal hubs, streamlining customs procedures, and implementing paperless transport documentation, postal services will become more efficient and cost-effective.

In addition, the UPU will help operators integrate e-commerce platforms and develop new commercial strategies that enable them to build sustainable businesses and provide tailored, customer-centric solutions for growing e-commerce demands.

Linked to the core challenge outlined above, the UPU will help implement cost-saving innovations, such as digitalization of transport systems and the use of paperless processes, to reduce operational costs while improving efficiency.

Postal operators can diversify their services by offering new products and services through digital channels, including new cross-border e-commerce solutions and citizen-centric services. The UPU will support the development of new business models that underpin these service offerings and help promote the financial sustainability of operators.

## 2 **The postal sector must play a more significant role in fostering national socio-economic growth by leveraging its infrastructure to provide services beyond traditional mail, including supporting e-commerce, financial services, and other key enablers of development.**

The UPU will support member countries in expanding their postal services to include e-commerce platforms, digital financial services, and logistical support for SMEs. By providing technical assistance, optimizing postal infrastructure, and focusing on capacity-building programmes, postal operators will be empowered to contribute to economic and social development, particularly in rural and underserved areas.

The UPU will also promote and support the expansion of e-government services, which will enhance the socio-economic role of postal operators.

## 3 **The postal sector must contribute to global development goals.**

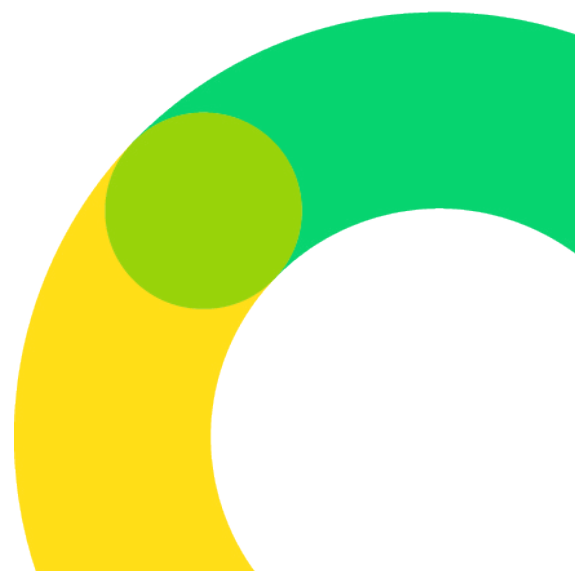
The UPU will focus on promoting sustainable practices, including green logistics solutions that reduce the environmental impact of postal services. In line with national climate change policies, operators will be encouraged to adopt eco-friendly technologies in transport and packaging.

The UPU will also work towards gender equality by offering capacity-building programmes that support the advancement of women in the postal sector. Moreover, the UPU will help SMEs and MSMEs by providing affordable e-commerce services and logistics solutions, allowing small businesses to grow and compete in domestic and international markets.

## 4 **Postal operators need to integrate seamlessly with postal ecosystem partners, such as e-commerce platforms and fintech companies, to meet modern consumer demands and provide comprehensive services.**

To ensure a seamless, customer-centric postal sector that ensures a level playing field for all actors, the UPU will develop interoperability frameworks, model contracts, matchmaking platforms, and standards that allow postal operators to integrate smoothly with non-postal sector partners, including e-commerce platforms, fintech companies, supply chain service providers, and other WPSPs.

The UPU will help create digital platforms that enhance cooperation and service delivery, ensuring integration, reporting and accountability across the value chain. Additionally, the UPU will promote public-private partnerships to expand service offerings, to plug gaps in expertise and financing and improve the postal sector's ability to meet evolving consumer expectations.



# UPU STRATEGIC FRAMEWORK FOR RESULTS 2026–2029

## VISION AND MISSION OF THE UPU

The proposed vision statement for the UPU is: A society that is interconnected, inclusive and sustainable, empowered by a seamless, innovative postal network.

This vision statement reflects the change the UPU and all of its stakeholders wish to see in society. It instils a sense of purpose and identity, fostering cohesion and alignment among members.

It also communicates to stakeholders – both internal and external – the organization’s commitment to creating a positive impact and driving meaningful change. In essence, the vision statement serves as a beacon of hope, rallying individuals and stakeholders around a shared vision of a better future.

The reasoning behind the proposed new vision statement lies in its articulation of a future where the postal network transcends its traditional role to become a catalyst for global connectivity and empowerment.

By emphasizing interconnectedness, inclusivity and sustainability, the statement envisions a society where borders dissolve, barriers to communication are dismantled, and opportunities are accessible to all. The notion of seamlessness underscores the importance of efficiency and effectiveness in postal services, facilitating the seamless exchange of information, goods and services across geographies.

Furthermore, the emphasis on innovation reflects the imperative for the postal sector to adapt and evolve in the face of technological advancements and changing customer expectations. Ultimately, this vision statement encapsulates a bold ambition to harness the transformative power of the postal network to create a more equitable, connected and sustainable world for present and future generations.

The mission of the UPU, as stated in the Constitution, is:

**To stimulate the lasting development of efficient and accessible universal postal services of quality in order to facilitate communication between the inhabitants of the world by:**

guaranteeing the free circulation of postal items over a single postal territory composed of interconnected networks;

encouraging the adoption of fair common standards and the use of technology;

ensuring cooperation and interaction among stakeholders;

promoting effective technical cooperation;

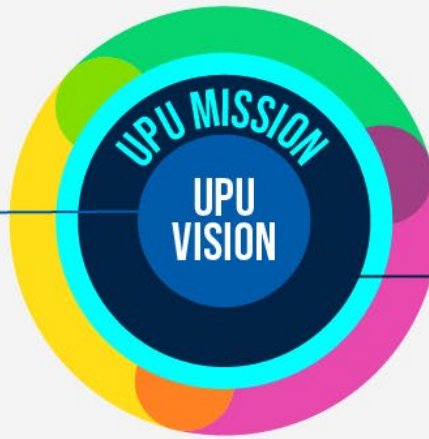
ensuring the satisfaction of customers’ changing needs.

The mission of any organization typically serves as a guiding principle that defines its purpose. It outlines the core objectives and activities that the organization undertakes to fulfil its broader vision. Overall, the mission statement serves as a compass that steers the organization towards its intended impact and ensures coherence in its actions and initiatives.

At the UPU, the mission was adopted by member countries in 2004. As we prepare the Dubai cycle strategy, the mission statement appears to adequately capture the essence of the UPU, align itself with all elements of the proposed strategy, and continue to be relevant for its stakeholders.

## UPU VISION

A society that is interconnected, inclusive and sustainable, empowered by a seamless, innovative postal network.



## UPU MISSION

To stimulate the lasting development of efficient and accessible universal postal services of quality in order to facilitate communication between the inhabitants of the world by:

- guaranteeing the free circulation of postal items over a single postal territory composed of interconnected networks;
- encouraging the adoption of fair common standards and the use of technology;
- ensuring cooperation and interaction among stakeholders;
- promoting effective technical cooperation;
- ensuring the satisfaction of customers' changing needs.



### TO LEVERAGE THE SINGLE POSTAL TERRITORY

through an effective rules-based system.

#### Strategic outcomes:

- Improved, market-relevant, multilateral systems that guarantee the provision of quality, accessible, affordable, viable postal services.
- Strengthened cross-border postal supply chains.
- Enhanced platforms for dialogue, knowledge sharing and advocacy.

### TO STRENGTHEN THE GLOBAL POSTAL ECOSYSTEM

through innovations for facilitating communication and trade.

#### Strategic outcomes:

- Improved, customer-centric, reliable, innovative postal products, services and supply chain solutions.
- Improved ability to diversify services, including in response to e-commerce market developments.
- Improved ability of the postal network to contribute towards socio-economic goals and the UN SDGs.
- Enhanced stakeholder collaboration for ecosystemic growth.

### GOAL 3

### TO ENABLE POSTAL DEVELOPMENT

through enhanced cooperation and regionalization.

#### Strategic outcomes:

- Enhanced postal infrastructure through cooperation and technical assistance.
- Strengthened postal capacity of member countries through regionalization.

Domain work proposals forming  
**THE DUBAI BUSINESS PLAN 2026-2029**

# GOALS, OUTCOMES AND STRATEGIC INDICATORS

The strategic framework serves as a tool designed to guide the UPU in achieving its objectives effectively and transparently. It is structured to align with best practices in results-based management, which prioritize outcomes and impacts over activities and outputs.

The UPU's strategic framework clearly articulates a results chain that begins with activities undertaken to support the work of the Union, and culminates in achieving the vision and mission. A set of three aspirational goals define how the overarching mission and vision can be achieved by all stakeholders working together. The goals provide a clear direction for the UPU's actions and initiatives. Each goal is supported by a set of strategic outcomes that delineate areas of focus and define the changes that the UPU wishes to bring about as a direct result of its work. These strategic outcomes can be achieved through a set of clearly defined activities in the thematic work proposals.

To ensure results orientation at the strategic level, the framework also proposes strategic indicators (SIs) to measure progress during the cycle. These SIs act as high-level key performance indicators (KPIs) for the evolutionary journey of the postal sector as a whole. They do not set targets, since these cannot be nuanced enough for a fragmented landscape with postal stakeholders at varying levels of postal development; rather, they measure progress against time, as a way of checking the overall "health and growth" of the sector.

This approach allows for more flexibility and adaptability, as it focuses on tracking the outcomes and impacts of interventions rather than rigidly adhering to predetermined benchmarks. By prioritizing strategic outcomes, the framework emphasizes the "why" behind the organization's actions, ensuring that every effort contributes meaningfully to its broader goals.

Additionally, the inclusion of SIs in the strategic framework for the first time signifies a shift towards more evidence-based decision making and accountability. The SIs are drawn from a subset of the KPIs defined in the Postal Vision 2030 (PV2030). While the KPIs used in PV2030 are more extensive, the current strategic framework takes a more focused approach as these indicators are carefully selected to capture the intended outcome (and, potentially, the impact) of the UPU's interventions, and provide actionable insights into their effectiveness.

Progress made towards the PV2030 KPIs will continue to be collected and reported on through this strategic cycle. The PV2030 will therefore form part of a broader advocacy tool that the UPU and member countries can use to show progress made by the postal sector globally.



## TO LEVERAGE THE SINGLE POSTAL TERRITORY THROUGH AN EFFECTIVE RULES-BASED SYSTEM

Goal 1 embodies the essence of leveraging the single postal territory to bring benefits to all of its stakeholders. At its core, this goal encapsulates the UPU's commitment to fostering a cohesive and interconnected, global postal network that is governed by universally accepted rules and standards and is recognized for the value it brings to society.

By fostering the development and growth of efficient cross-border postal supply chains, the UPU aims to facilitate seamless communication, the exchange of postal items, and cooperation among member countries, ensuring equitable access to postal services for governments, citizens, businesses and communities worldwide. This goal also lends itself to the role of the UPU as a platform for global and regional dialogue, discussion, and knowledge sharing, ensuring that emerging best practices are disseminated to the benefit of all postal ecosystem stakeholders.

Success in accomplishing this goal will enable the UPU to streamline cross-border flows of postal items and mitigate operational challenges, ultimately catalyzing the growth, resilience and relevance of the postal sector in the digital age.

In broad terms, goal 1 speaks to the normative role of the UPU in creating and maintaining the global rules-based system and underlying standards that govern the exchange of postal items across borders.

Goal 1 will be reached by achieving three distinct but interrelated strategic outcomes.

**Strategic outcome 1.1:** Improved, market-relevant, multilateral systems that guarantee the provision of quality, accessible, affordable, viable postal services

There are clear and growing demands for a cohesive, rules-based postal system that guarantees universal postal services which are accessible, affordable, and cost-covering. These demands continue to echo the requirements of article 3 of the Universal Postal Convention, which requires member countries to ensure that users/ customers have access to quality basic postal services at affordable prices and that such services are provided on a viable basis, thus guaranteeing their sustainability.

Though consultations, stakeholders have also emphasized the need for agile, flexible and harmonized regulatory frameworks that facilitate smooth international postal flows, ensuring access to postal services for all, including affirmative actions for least developed countries (LDCs), landlocked developing countries (LLDCs) and small island developing states (SIDS).

There is an increasing need for the global postal sector to modernize and digitalize its operations, while maintaining the universal service to ensure that no one is left behind. This will require stronger cooperation underpinned by clear policy provisions, flexible treaty instruments and harmonized standards applicable to all relevant stakeholders so as to ensure seamless, secure and efficient postal exchanges.

Additionally, there is a pressing demand for policy coherence to address the rapid development of e-commerce, the pivoting of postal services towards end-to-end logistics, and the increasing number of actors both along the postal supply chain and in the broader logistics sector. Stakeholders are calling for regulatory frameworks with more market-relevant definitions and rules to ensure effective regulation, promote a level playing field for all stakeholders, prevent market distortions, and secure the sustainability of the postal network. Modernization, sustainability and inclusivity must be balanced in any updated rules-based system to meet the growing expectations of consumers and businesses alike.

Stakeholders have also underscored the criticality of faster decision making within the UPU to ensuring the responsiveness of its policies and regulatory frameworks to market needs.

To address these demands, the UPU will provide member countries with comprehensive frameworks, treaty provisions and standards that ensure a robust, flexible, rules-based system that addresses market realities and changing customer expectations.

**Strategic outcome 1.2:** Strengthened cross-border postal supply chains

There is an increasing demand for normative rules that ensure stronger and more resilient cross-border postal supply chains.

Stakeholders have highlighted the need for improved transport and logistics systems that can keep pace with the rapidly growing e-commerce sector and the evolving demands of international trade. Postal operators are seeking end-to-end solutions to improve efficiency in customs clearance, transit times, and last-mile delivery, which can significantly impact the cost-effectiveness and reliability of international postal services.

Moreover, there is a call for greater collaboration among postal operators, customs agencies, relevant international organizations – such as the World Customs Organization (WCO), World Trade Organization (WTO) and the International Air Transport Association (IATA) – and WPSPs to ensure a seamless flow of goods across borders. Such collaboration should have as its aim the harmonization of customs procedures, transport regulations and the adoption of technological innovations to promote multimodal transport access, enhance operational efficiency and secure end-customer satisfaction.

A well-coordinated cross-border postal system is essential to support the global flow of postal items, including e-commerce goods, particularly in regions with high levels of economic disparity.

The UPU will strengthen the policy and treaty environment, as well as creating model contracts, to facilitate seamless cross-border postal supply chains by focusing on key areas such as transport integration, customs coordination and e-commerce facilitation. Initiatives will include facilitating multimodal transport networks and building regional postal hubs that streamline the movement of goods across borders. Through the provision of technical assistance and capacity building on regulatory and standards development, the UPU will help postal operators optimize logistics, reduce transit times, and improve last-mile delivery solutions.

In addition, the UPU will work closely with customs authorities and postal operators to modernize customs procedures and implement electronic advance data (EAD) systems across multimodal transport channels. This will enable faster, more agile and accurate processing of items, reducing delays and improving the quality, reliability and security of postal services. Through partnerships with WPSPs and other stakeholders, the UPU will foster regulatory innovation in supply chain management, helping postal operators be responsive to the growing demands of cross-border e-commerce.

### ● **Strategic outcome 1.3:** Enhanced platforms for dialogue, knowledge sharing and advocacy

Stakeholders recognize the value of stronger global and regional platforms for dialogue and knowledge sharing within and beyond the postal sector.

As the global postal ecosystem evolves, there is an overarching demand for more effective platforms to share knowledge, facilitate dialogue and generate solutions to foster collaboration between postal operators, governments, regulators and WPSPs. The rapid growth of e-commerce, digital services and cross-border transactions has underscored the importance of knowledge sharing to ensure that all stakeholders can keep pace with new developments in regulations, standards and operations.

Additionally, stakeholders have called for platforms that facilitate the sharing of global and regional best practices, regulatory innovations and technological advancements. There is a specific demand for regional, and potentially subregional, forums that allow stakeholders to exchange ideas on how to adapt to changes in postal services, from managing the universal service to integrating advanced logistics solutions. Effective dialogue and knowledge sharing are seen as key to enabling all postal players to operate as a single postal territory.

This need for knowledge sharing is to be coupled with evidence-driven advocacy towards member governments and other development partners on the value added by the postal sector to socio-economic growth. Leveraging its position as a trusted authority and as part of the UN system, the UPU was urged to engage with policymakers to advocate for the cause of the postal sector being integrated into national agendas for trade, economic growth and social development.

To meet these demands, the UPU will leverage its position as a global, multilateral institution to foster and enhance platforms for dialogue and knowledge sharing, as well as actively advocating for the role and value add of the postal sector in fostering sustained socio-economic growth.

This will include convening global and regional dialogues, conferences, and virtual platforms where stakeholders can discuss current challenges and potential solutions relating to innovations, regulatory frameworks, and operations. The UPU can also support the development of online knowledge-sharing tools that enable real-time communication and information exchange, making it easier for postal ecosystem stakeholders to stay informed about industry trends and best practices.

The UPU will further enhance its role as a central hub for knowledge sharing by promoting collaborative initiatives and partnerships. This includes facilitating access to case studies, technical guidelines, and data-driven insights that can help policymakers, regulators and postal operators make informed decisions.

By creating a robust ecosystem for dialogue, the UPU can ensure that governments, regulators, postal operators and WPSPs can work together effectively, driving innovation and improving the overall resilience of the postal network.

To ensure that the true value of the postal sector is recognized, the UPU will engage with policymakers, development partners and key decision makers to advocate for the role of the postal sector in securing a range of socio-economic policy objectives including e-commerce growth, development of MSMEs, deployment of e-citizen services, and deepening financial and trade inclusion.

Progress towards goal 1 will be measured through three tangible quantitative SIs:

- SI 1** Percentage of member countries with comprehensive postal regulatory frameworks aligned with UPU standards and guidelines: This indicator quantifies the extent to which member countries have established postal regulatory frameworks that adhere to the standards and guidelines set forth by the UPU. It reflects the level of regulatory alignment within the global postal network, indicating the degree to which countries have adopted best practices in postal regulation. A higher percentage suggests a greater number of countries aligned with international standards, facilitating smoother cross-border postal operations and enhancing interoperability, as well as promoting fairness and transparency in the global postal market.
- SI 2** Percentage of member countries with national policies for the postal sector: This indicator measures the proportion of member countries that have developed and implemented national policies specifically tailored to the postal sector. It serves as an assessment of the level of strategic planning and governmental commitment to the postal industry in individual countries. A higher percentage signifies a stronger foundation and potential for postal sector development.
- SI 3** Percentage annual increase in postal access points to ensure access for all: This indicator aims to track the yearly growth rate of postal access points – defined to include fixed post offices, mobile post offices, service outlets, partner outlets, and alternative delivery channels such as pick up/drop off points – all with the aim of providing ease of access to postal services. It reflects efforts to expand the physical presence of postal facilities to reach underserved communities, remote areas and marginalized

populations. While there is a shift towards digital postal services through mobile and other channels, fixed and mobile postal infrastructure still plays a vital role in engaging with citizens, businesses and communities. In this respect, the progress made for this indicator will be carefully calibrated against the general trend of the digitalization and virtualization of postal services. A positive trend in this percentage indicates progress in enhancing accessibility and inclusivity within the postal network, contributing to socio-economic development and connectivity. Increasing postal access points can lead to improved service coverage, reduced delivery times, and better customer experiences, ultimately fostering greater participation in the global postal ecosystem.



## TO STRENGTHEN THE GLOBAL POSTAL ECOSYSTEM THROUGH INNOVATIONS FOR FACILITATING COMMUNICATION AND TRADE

Goal 2 epitomizes the UPU's dedication to enhancing the global postal landscape by fostering innovation and offering a range of citizen-, business- and customer-centric services that meet communication and trade needs, including e-commerce.

It underscores the imperative of embracing a broader set of partners in a truly global postal ecosystem, capitalizing on technological advancements that promote and support service diversification, as well as creating customer-centric approaches that meet evolving demands.

This goal also speaks to the role of the postal ecosystem in facilitating the achievement of national and global development goals.

Success in achieving this goal will enable the UPU to position the postal sector as a dynamic, indispensable player in the digital economy, capable of delivering value-added services, driving socio-economic development, and enriching the lives of people worldwide.

At its core, goal 2 concerns the programmatic work that the UPU carries out in order to achieve its mission and vision. It relates to the role of the UPU in fostering and catalyzing the numerous activities that intend to support and strengthen the core capabilities of all postal sector stakeholders.

Goal 2 will be reached by achieving four distinct but interrelated strategic outcomes.

● **Strategic outcome 2.1:** Improved, customer-centric, reliable, innovative postal products, services and supply chain solutions

This strategic outcome underscores the importance of staying abreast of global trends and changes in the market to drive innovation and respond proactively to customer needs. In consultations, stakeholders have highlighted a strong demand for customer-centric postal products and services that not only get the "basics" right (service features, price, delivery speed and reliability) but are also innovative, catering to the likely future needs of society.

As customer needs evolve, there is a clear call for postal operators to diversify their service portfolios and embrace digital transformation. This transformation includes offering seamless e-commerce solutions, efficient end-to-end logistics, and postal products that cater to both urban and rural customers.

To succeed in this new reality, postal operators need to adopt flexible, market-responsive strategies that ensure that they meet the expectations of increasingly tech-savvy customers while maintaining operational excellence.

Postal operators are also expected to innovate across the entire supply chain – from product creation to last-mile delivery – to stay relevant in an evolving global market. There is a growing demand for enhanced tracking, electronic payments, AI-driven customer service systems, and greener logistics. There is also an increased call to use sustainable transport solutions and energy-efficient processes, in order to improve user experience while reducing the postal sector's environmental footprint.

In addition, some stakeholders have demanded support for postal services tailored to their unique regional needs, including cultural, economic and geographical aspects.

To address these demands, the UPU will drive customer-centric innovations by offering tools and frameworks that focus on enhancing product development and improving supply chain efficiency. The UPU will also support member countries by offering insights into global regulatory

trends, digital economics, financial inclusion, and trade analysis. These insights can help postal sector players streamline supply chains and design customer- and citizen-centric services, as well as optimizing operations for greater cost-effectiveness and service reliability.

In addition, the UPU will focus on enabling operators to adopt advanced technological solutions, such as digital platforms for real-time tracking and customer interaction, and to leverage AI to make efficiency gains in logistics, among others.

Through these collaborative efforts between postal operators, WPSPs and postal ecosystem stakeholders, the UPU will foster innovation in service diversification, operational efficiencies and customer centricity.

### **Strategic outcome 2.2:** Improved ability to diversify services, including in response to e-commerce market development

There is a growing demand for postal operators to diversify their service offerings to keep pace with evolving market conditions and customer needs.

Stakeholders emphasize the necessity of leveraging both existing and emerging digital and physical infrastructure to offer a broader range of services. This includes expanding beyond traditional mail services into e-commerce, logistics, inclusive and digital financial services, and digital solutions.

Postal operators need to adopt more agile and responsive approaches to product development, allowing them to rapidly capitalize on new business opportunities as they emerge in an increasingly demand-focused and interconnected marketplace. To achieve this, stakeholders are also seeking flexibility in service diversification which aligns with market conditions that are unique to their economies. They also require frameworks and tools to develop customized service offerings that respond to local market dynamics, consumer preferences, and regulatory environments. This diversification of services is seen as a key factor in driving revenue growth and enhancing the postal sector's relevance in the digital economy.

Furthermore, there is a need to leverage e-commerce as a tool for economic development. In this respect, it is important to recognize the diversity of needs between urban and rural customers; one-size-fits-all solutions are inadequate. It is important to distinguish between these customer groups and meet their unique needs, while boosting trade through improved e-commerce logistics and digital services.

Stakeholders have also expressed the need to foster broader partnerships with non-traditional actors to facilitate the development of new products and services, gain tangible insights into global market trends, better understand customer preferences, and implement technological advancements. Through these value-driven partnerships, postal operators will be equipped to develop new services in areas such as e-commerce integration, logistics optimization and financial inclusion, to name a few, all while maintaining core operational efficiencies.

To address these needs, the UPU will work with all postal ecosystem stakeholders to develop and implement market-relevant, customer-focused, innovative, well-differentiated postal services that enhance their sustainability, interoperability and operational efficiency.

Specifically, the UPU will support postal operators in developing a fully integrated end-to-end value chain that will facilitate e-commerce growth through efficient cooperation among postal operators and between postal operators, supply chain partners and WPSPs, to ensure full realization of the opportunities created by e-commerce. All of these initiatives will target the inclusiveness of the postal network, while facilitating the global exchange of postal items containing goods and documents, supported by appropriately tailored capacity-building activities.

Programmes will be undertaken to:

enhance the position of postal operators to support and facilitate e-commerce development using physical and digital postal services and solutions;

develop operational guides for new postal business and delivery models such B2B2C, consignment and direct access services;

promote the integration of technological systems;

develop the capability to support and facilitate e-commerce development using physical and digital postal services and solutions, including increased last-mile delivery capability, improved information integration, and enhanced customer service in the delivery of postal services.

Moreover, the UPU will facilitate innovation in traditional services, such as philately, international reply coupons and postal payment services, providing operators with the frameworks and support to modernize and expand these offerings. The UPU will also foster partnerships between postal operators and WPSPs, helping them access expertise and technology to diversify their portfolios.

By leveraging the UPU's global platforms and collaborative networks, operators can innovate in response to market demands, ensuring long-term sustainability and growth.

### ● **Strategic outcome 2.3:** Improved ability of the postal network to contribute towards socio-economic development and the UN SDGs

Stakeholders are increasingly emphasizing the importance of the postal sector's role in supporting global, regional and national development goals, especially the UN Sustainable Development Goals (SDGs).

As environmental concerns grow, there is a clear demand for postal operators to incorporate green logistics and sustainable practices into their operations and service offerings. In line with nationally determined climate targets, postal networks are expected to reduce their carbon footprint, adopt energy-efficient processes, and contribute to combating climate change.

Stakeholders have underscored how a green transition aligns with business growth strategies. It presents opportunities for diversifying their services to meet the needs of the circular economy and for accessing climate finance that can plug gaps in the investments needed to upgrade and modernize postal infrastructure.

Furthermore, there is strong demand for the postal sector to align its operations with broader societal goals, such as promoting inclusive economic growth, reducing inequalities, and supporting communities. In this respect, the need to promote and ensure gender equality within the postal sector was also underscored. Stakeholders want to see a more equitable balance in gender representation at all levels in the postal sector.

In addition to sustainability, stakeholders expect the postal sector to be resilient in the face of man-made and natural disasters and other disruptions. There is a need for robust, scalable, sustainable solutions which ensure that postal networks can continue operating effectively during crises, while providing services as first responders that help communities recover.

The UPU will lead efforts to integrate sustainability and resilience into postal services through initiatives such as the UPU Climate Facility, which provides DOs with access to climate finance, capacity-building

tools, and tailored technologies. These initiatives will support postal operators in adopting green logistics solutions, reducing their environmental footprint in line with their nationally determined climate targets, and enhancing energy efficiency.

The UPU will also promote carbon asset trading and climate finance opportunities, enabling postal operators to integrate sustainability into their long-term strategies and contribute to the achievement of global development goals.

Gender-focused initiatives across the network will ensure that key decision makers are aware of the challenges faced by women in the postal workforce. In addition to advocacy and awareness raising, multiple sets of affirmative actions will ensure that sector stakeholders at all levels remain cognizant of persistent gender gaps and actively adopt remedial measures. The UPU will work within the framework of the UN's gender equality and empowerment of women principles to support member countries in formulating and implementing such initiatives.

Furthermore, the UPU programmatic activities will be aligned with global development goals including the UN SDGs. This alignment will ensure that postal operators contribute not only to their own objectives on sustainability and resilience, but also to broader national and global efforts, such as promoting inclusive economic growth, reducing poverty and building resilient communities.

By fostering collaboration with relevant stakeholders, including other international organizations and the private sector, the UPU will ensure that the postal sector plays a pivotal role in achieving these shared goals while maintaining operational continuity in challenging times.

### ● **Strategic outcome 2.4:** Enhanced stakeholder collaboration for ecosystemic growth

This outcome underscores the significance of fostering partnerships and engagement with various stakeholders to drive collective growth and innovation.

Stakeholders have emphasized the importance of delimiting the "postal ecosystem" broadly. It should comprise not only traditional postal stakeholders, such as governments, regulators, relevant intergovernmental organizations (e.g. WCO and ICAO), DOs and their postal supply chain partners, but also WPSPs and even non-postal sector players such as academia and innovation hubs. This broader ecosystem allows for a richer network of collaboration, driving innovation and supporting the growth of postal services globally.

This demand for greater collaboration among stakeholders in the postal ecosystem is intensifying. As the postal sector continues to evolve, stakeholders are increasingly

calling for more robust partnerships and collaborations between key actors in the ecosystem. An increased call for hypercollaborative partnerships is driven by the need to ensure interoperability, service integration, and the delivery of more innovative solutions to customers.

Additionally, stakeholders are emphasizing the importance of public–private partnerships to expand the reach of postal services, enhance service offerings, and drive investment and innovation, particularly in areas such as the modernization of core operations, e-commerce, digital financial services and infrastructure development. The demand for more inclusive collaboration mechanisms that integrate technological advancements, digital platforms, shared expertise and financing is critical for the future growth of the global postal network.

To address these demands, the UPU will foster enhanced stakeholder collaboration through stronger partnerships across the postal ecosystem.

This includes promoting collaboration between DOs, regulators, WPSPs and non-postal stakeholders, ensuring that postal services remain agile and interconnected. The UPU will provide platforms for stakeholders to collaborate on initiatives such as e-commerce expansion, digital infrastructure development, and the integration of supply chains, thereby enabling a more cohesive and efficient postal ecosystem. The UPU will also drive public–private partnerships that help postal operators access cutting-edge technology and innovations, expanding the reach of postal services.

By facilitating knowledge-sharing forums, workshops and capacity-building programmes, the UPU will enable stakeholders to engage in collaborative efforts that promote ecosystemic growth. These initiatives will be further augmented by the ability of the UPU, as a global institution, to advocate for the postal sector as a whole and identify investors, who are often focused on individual countries, regions or topics, and match them with the needs of member countries. These initiatives will strengthen the postal sector’s ability to respond to market demands while fostering innovation and enhancing the sustainability of the global postal network.

Progress towards goal 2 will be measured through the following tangible quantitative SIs:

- SI 4** Percentage annual nominal growth in operating revenue (SDR): This indicator measures the annual percentage change in the operating revenue of postal operators, denominated in special drawing rights (SDR). It serves as a key financial metric often used as a proxy indicator for overall services growth, customer orientation, and revenue diversification of postal organizations worldwide.
- SI 5** Percentage annual increase in postal packet and parcel volumes: This indicator tracks the yearly percentage change in the volume of postal packets and parcels handled within the global postal network. It reflects the growth rate of e-commerce, cross-border trade, and other parcel-related activities driving demand for postal services. A higher percentage indicates a rising trend in parcel volumes, suggesting increased consumer reliance on postal delivery for goods. Additionally, it underscores the importance of postal operators’ ability to adapt to evolving market dynamics, innovate service offerings, and optimize operational efficiency to meet growing demand effectively.
- SI 6** Percentage of international postal items delivered end-to-end in accordance with applicable UPU quality of service standards: This indicator measures the proportion of international postal items that are successfully delivered from origin to destination within the specified quality-of-service standards set by the UPU. It assesses the performance of the global postal network in ensuring timely, reliable and consistent delivery of cross-border mail and parcels. Achieving a higher percentage enhances customer satisfaction, trust and confidence in the international postal network.
- SI 7** Percentage of member countries integrating the postal sector in national development plans: This indicator measures the percentage of member countries that have formally incorporated the postal sector into their national development plans or strategies. It reflects the extent to which governments recognize the socio-economic significance of the postal industry and its role in achieving broader national and global development objectives. Integration of the postal sector in national plans signifies strategic alignment with government priorities such as economic growth, employment generation, infrastructure development, digitalization and social inclusion.
- SI 8** Percentage of member countries with formal or informal national processes for consulting WPSPs and non-postal sector players in relation to postal industry matters: This indicator assesses the extent to which member countries have established formal or informal mechanisms for consulting with and engaging postal sector stakeholders, including WPSPs and non-postal sector players. It reflects the degree of inclusivity, transparency and stakeholder participation in national policymaking processes related to the postal industry. Engaging such actors in national processes enhances dialogue, promotes innovation, and ensures that policy interventions are ecosystemic and responsive to the evolving needs and challenges facing the postal sector, thereby facilitating its sustainable development and resilience in a rapidly changing environment.



## TO ENABLE POSTAL DEVELOPMENT THROUGH ENHANCED COOPERATION AND REGIONALIZATION

Goal 3 embodies the UPU's commitment to promote and improve postal development worldwide by further enhancing its cooperation, technical assistance and regionalization activities. It underscores the importance of collective action, partnership building, knowledge sharing, technical assistance and contextualizing development cooperation in addressing common challenges and realizing mutual benefits.

In addition, goal 3 counts on, and intends to integrate, the work, expertise and resources of the restricted unions, all of which play a pivotal role in postal development. Success in achieving this goal will enable the UPU to strengthen the resilience, relevance and impact of the global postal network, contributing to the advancement of universal service principles, the achievement of development goals, and the promotion of international cooperation.

Goal 3 also speaks to the capacity-building and technical assistance role of the UPU, ensuring that no member country is left behind in the postal development journey. The UPU will work with all stakeholders to ensure that every link in the global postal supply chain is equally strong.

Goal 3 will be reached by achieving two distinct but interrelated strategic outcomes:

- **Strategic outcome 3.1:** Enhanced postal infrastructure through cooperation and technical assistance

Stakeholders across all regions have emphasized the need for capacity building and development cooperation programmes to strengthen postal infrastructure – both physical and digital – as foundational elements for modernization, improving the postal sector's

relevance and securing the network's readiness against natural disasters. In addition, this outcome speaks to the role that the postal sector plays in enhancing the resilience of communities to respond to such risks.

Increasingly, postal operators are being urged to invest in systems that improve the overall quality of postal services and customer experience, including through greater reliability and predictability of delivery – all of which can only be addressed through the dual strengthening of physical and digital infrastructure. This dual approach also allows Posts to streamline operations, improve customer service, and support the expansion of digital services and e-commerce platforms.

Furthermore, there is significant demand for digital solutions that enhance service efficiency, particularly real-time tracking, data-driven insights and secure electronic payments. Stakeholders have also asked for support in faster adoption of new technologies like blockchain and AI to improve postal operations, security and efficiency.

Stakeholders have highlighted the critical need to bridge the digital divide, especially in underserved and rural areas. Postal operators are expected to offer digital and financial services that connect remote communities to national and global markets, fostering inclusive economic growth and ensuring that postal services can reach all citizens.

Through a range of capacity building, infrastructure development, equipment procurement and operational support measures, the UPU will empower postal operators to enhance their physical and digital infrastructure to deliver quality postal services and a better customer experience, as well as strengthening the disaster risk resilience of communities and postal operations alike.

As the sector becomes increasingly digitalized, cyber security is a growing concern, with stakeholders calling for enhanced support and capacity building to ensure robust security and data protection measures to protect postal infrastructure from cyber threats, protect their customers, and ensure continuity of services. By promoting the adoption of secure IT systems and real-time digital services, postal operators will be able to improve their service delivery while reducing operational inefficiencies.

There will also be a major focus on cyber resilience, ensuring that postal operators can protect themselves from cyber threats while maintaining service continuity. The UPU's digital transformation assessments (DTAs) have dedicated components on cyber resilience, helping operators develop strong security frameworks that prevent and help recover from cyberattacks. Training programmes to improve the digital capabilities of postal staff, including their ability to handle cybersecurity risks, will be delivered across target countries, enabling a safer digital transition for postal networks.

Additionally, the Connect.post initiative will leverage the physical infrastructure of postal operators to support the secure and reliable digital connectivity needed to improve postal operations while safeguarding sensitive information.

The UPU will foster capacity development and enhance collaboration between postal operators and technology service providers to ensure the integration of cutting-edge digital tools that improve operational efficiency and enable postal operators to meet the demands of the digital economy.

**Strategic outcome 3.2:** Strengthened postal capacity of member countries through regionalization

Stakeholders have emphasized the importance of strengthening postal capacity, not only at a national level but also through intraregional and regionalization efforts. There is a clear demand across regions to further bring the work done by the UPU closer to member countries through its development cooperation and capacity-building efforts.

Leveraging the new field presence model, the UPU has already successfully established a network of 15 regional offices within all the UPU regions in the course of the Abidjan strategy cycle. These efforts have been supported by member countries and restricted unions. This approach to regionalization through field presence has yielded positive working results for the UPU and the restricted unions.

While regionalization can take different forms for different multilateral institutions, the specific demand from stakeholders is to enhance the current regionalization activities to:

ensure that capacity-building interventions are targeted, taking into account national circumstances and addressing the specific needs of governments, regulators and postal operators;

further strengthen its presence in the field by deploying local experts;

deploy expertise in the same time zone as beneficiaries, offering tailored, real-time assistance in the local language (where possible); and

leverage the restricted unions to develop, deliver and ensure accountability for development cooperation projects.

Specifically, governments and regulators are seeking support in building their policy development and oversight capacities through regulatory toolkits, reform guides, topical workshops and advisory assistance.

In the case of postal operators, stakeholders underscored the need for capacity building and development cooperation programmes that help ensure that they are able to:

get the “basics” (market-responsive service features, price and quality of service) right;

enhance human capital and operational efficiencies;

diversify services as a means of securing the sustainability of the universal service provision;

be “matchmade” with potential investors that can help plug investment gaps; and

promote asset sharing within a region that allows for the transfer of equipment that is being replaced but has not reached the end of its service life.

These programmes must be geared towards equipping stakeholders with the required skills and tools, as opposed to being “handouts”. In conjunction, there is a clear call to articulate accountability frameworks in development cooperation and capacity-building programmes. This will ensure that progress made by beneficiary countries can be measured against the four axes of the Integrated Index for Postal Development (2IPD).

Stakeholders also called for the UPU to review the Quality of Service Fund (QSF), to expand its remit to a broader set of postal services as well as making special provisions for LDCs, LLDCs and SIDS. This is furthered by a call for increased South–South and triangular cooperation that aims at sharing knowledge, experience and resources among intraregional stakeholders, under the aegis of the restricted unions. There is also a call for regional, high-volume and high-potential

corridors to be enhanced for service integration and technical twinning supported by the UPU.

To address these demands from stakeholders, the UPU will support the strengthening of postal capacity in member countries through a comprehensive set of initiatives aimed at improving operational efficiencies and regional collaboration. The bulk of these initiatives will be developed through regional development plans (RDPs) in close collaboration with the restricted unions.

Through its global programme of work and RDPs, the UPU will ensure that there is greater presence on the ground, and work programmes take regional priorities into account.

In addition, the UPU will promote initiatives that facilitate resource pooling and the sharing of knowledge and best practices within and across regions, helping stakeholders address region-specific challenges. By leveraging intraregional collaboration, resource mobilization and expertise, postal sector stakeholders will be better able to modernize their infrastructure, expand their service offerings, and meet regional and global postal sector standards.

This approach will enable postal networks to play a more prominent role in supporting national and regional development goals – including those relating to the growth in e-commerce, social, financial and trade inclusion, and the sustainable growth of MSMEs to foster overall economic growth.

Furthermore, the UPU will work to align all of its capacity-building initiatives with the UN SDGs, ensuring that postal operators can contribute to inclusive economic growth, environmental sustainability and social resilience.

Progress towards goal 3 will be measured through the following tangible quantitative SIs:

**SI 9** Percentage annual increase in world median postal development score: This indicator tracks the yearly percentage change in the median postal development score (as reported by the postal development levels in the annual State of the Postal Sector report). An upward trend in this indicator indicates improvement in the overall postal development landscape worldwide, reflecting advancements in infrastructure, service quality and regulatory frameworks.

**SI 10** Percentage of postal access points offering digital services: This indicator measures the proportion of postal access points that provide digital services to customers. A higher percentage indicates a greater integration of digital technologies into postal service delivery channels, enabling customers to access services online or through digital platforms. Offering digital services not only expands the reach and accessibility of postal services but also contributes to the modernization and relevance of the postal sector in the digital age.



## INTERNATIONAL BUREAU SUPPORT FUNCTIONS

In addition to the three goals and nine strategic outcomes outlined above, an additional support outcome is proposed that would help deliver on the UPU strategy.

### ● **Support outcome 4.0:** Achievement of the strategy enabled by the IB

Support outcome 4.0 aims to facilitate the effective implementation of the UPU strategy by ensuring that essential transversal support functions are provided by the UPU IB.

This encompasses general secretariat functions such as IT support for IB and UPU meetings, cabinet and council affairs, governance and internal control, communications, finance support, resource mobilization, training and development, HR policy and administration, legal, and language and general services.

By ensuring the smooth functioning of these support functions, the IB can efficiently execute its duties.

In addition to these core functions, support outcome 4.0 will also emphasize digital transformation within the IB, ensuring the modernization of IT systems and the implementation of cybersecurity measures to support the UPU's broader strategic goals. The IB will also align with the UPU's commitment to sustainability by adopting green operational practices, such as reducing its carbon footprint and integrating eco-friendly policies across its procurement and daily functions. Furthermore, continuous capacity-building initiatives will be implemented to ensure that IB staff are equipped to handle evolving technologies and governance responsibilities effectively.

## CROSS-CUTTING ENABLERS

The strategic framework is underpinned by a number of enablers that are cross-cutting in nature and permeate across all programmes, projects and activities carried out by the UPU. The enablers will be integrated in the overall programmes of work of the UPU, thus informing its activities. They will form part of the ethos carried by all stakeholders in their approach to the way in which their work will impact the world.

The nine enablers show how the UPU intends to:

- 1 Focus on building a better tomorrow for all:** This enabler ensures the UPU's commitment to advancing global postal services and infrastructure to create a prosperous, inclusive and resilient future for all stakeholders, including citizens, businesses and communities worldwide.
- 2 Encourage member country ownership:** Active participation and ownership from member countries will foster collaboration, shared responsibility and mutual support, ensuring that collective efforts contribute to the success of the strategy within the global postal community.
- 3 Prioritize the needs of customers, citizens and postal workers:** Placing the needs, expectations and well-being of customers, citizens and postal workers at the forefront of decision making and service delivery will ensure customer centricity and stakeholder satisfaction, driving the strategy's success.
- 4 Adopt global best practices in all aspects of the UPU:** Leveraging international best practices, standards and benchmarks will promote excellence, innovation and continuous improvement in postal services, governance and performance, enhancing the effectiveness and impact of the strategy.
- 5 Take a data-driven approach to our work:** Embracing data-driven decision making will enable the UPU to harness the power of data analytics, insights and evidence to inform strategic planning, policy formulation, and performance assessment, maximizing the strategy's effectiveness and efficiency.
- 6 Make diversity, equity and inclusion central to our work:** Promoting and embedding the inclusion of initiatives on diversity (in all its forms) and equity as core values will ensure equal opportunities, representation and participation for all individuals and communities within the postal sector, fostering a culture of respect, dignity and belonging, thus contributing to the success of the postal sector as whole.
- 7 Provide accountability and transparency in all we do:** Upholding transparency and accountability as fundamental principles will ensure openness, integrity and responsible stewardship of resources, fostering trust and confidence among stakeholders, which is essential for the success of the strategy.
- 8 Ensure efficient use of all resources:** Optimizing the allocation and utilization of resources will maximize impact, sustainability and value for money in delivering the strategy's mandate and objectives, contributing to its overall success.
- 9 Align with the UN 2.0 agenda:** Aligning efforts and initiatives with the UN's 2.0 agenda will support the realization of global sustainable development goals, promoting multilateralism, cooperation and collective action to address shared challenges and opportunities in the digital era, thus enhancing the strategy's success.

# DEVELOPING THE DUBAI BUSINESS PLAN

The UPU Strategy 2026–2029 is accompanied by the Dubai Business Plan (Congress–Doc 14) – the Union’s business plan – which incorporates the fundamentals of results-based management. The structure of the business plan will enable the UPU to draw a clear, causal results chain from activities, and their resourcing requirements, all the way up to the strategic outcomes and the three goals.

This ability to clearly link activities in individual work proposals to outcomes and goals will enable the UPU to present a results-based budget, as also requested by member countries during S4.

The Dubai Business Plan will have two tiers of work proposals for Congress to consider in setting the expenditure ceiling:

## **TIER 1 WORK PROPOSALS (AT THE ABIDJAN EXPENDITURE CEILING):**

A core set of work proposals that aim to achieve all of the strategic objectives as presented in the UPU strategic framework 2026–2029 will be developed and presented to Congress. This is the bare minimum level of activities that needs to be delivered by the UPU to meet the needs of its stakeholders.

Tier 1 work proposals, therefore, represent the core functions of the UPU – a minimal set of viable activities that are all equally important, and often interrelated, which needs to be carried out in its entirety for the Union to achieve any measure of success in the forthcoming strategic cycle.

The sum total requested from the regular budget for all of these work proposals will not exceed 38,890,030 CHF – the expenditure ceiling established by the Abidjan Congress.<sup>4</sup> This enables the UPU to deliver on a core set of work activities without having to seek additional regular budget allocation.

Work proposals that fall within this approved expenditure ceiling may still be discussed, debated and prioritized at Congress for their importance to the work of the UPU.

## **TIER 2 WORK PROPOSALS (ABOVE THE ABIDJAN EXPENDITURE CEILING):**

An additional set of work proposals will be prepared, subject to demands for additional activities from member countries, that exceed the Abidjan Congress expenditure ceiling.

Tier 2 work proposals will be segregated into two different categories: tier 2A, comprising work proposals that were accepted in conjunction with an increase in the expenditure ceiling at the fourth Extraordinary Congress in Riyadh – i.e. two work proposals related to cybersecurity and the Emergency and Solidarity Fund; and tier 2B, consisting of work proposals that seek to address emerging and increasingly critical issues for member countries that would increase the expenditure ceiling above the threshold approved in Riyadh. In addition, member country proposals with financial implications will also be considered under this process.

These work proposals will be separately discussed, debated and prioritized at Congress with the potential for increasing the expenditure ceiling. A precedent for this approach to prioritization and increasing the expenditure ceiling was set at the fourth Extraordinary Congress.

<sup>4</sup> Acts of the 27th Universal Postal Congress □ Abidjan 2021. Article XX (art. 145 amended) of the Third Additional Protocol to the General Regulations, Fixing of the expenditure of the Union. Paragraph 1.

# MONITORING FOR SUCCESS

In order to monitor progress being made towards the implementation of the strategy, the IB will continue to report to the CA through regular strategy implementation reports at every session. This regular reporting will be augmented by progress reports on the strategic indicators identified under each goal.

Finally, given the importance of the Postal Vision 2030 as a strategic tool to create advocacy messaging, the IB will continue to monitor the indicators contained therein until 2030. Progress updates will be provided to the CA on a regular basis.



# ANNEXES





ANNEX 1

**UPU STRATEGIC  
FRAMEWORK  
2026-2029**

# UPU strategic framework (2026–2029)

## UPU Strategy (Dubai cycle, 2026–2029)

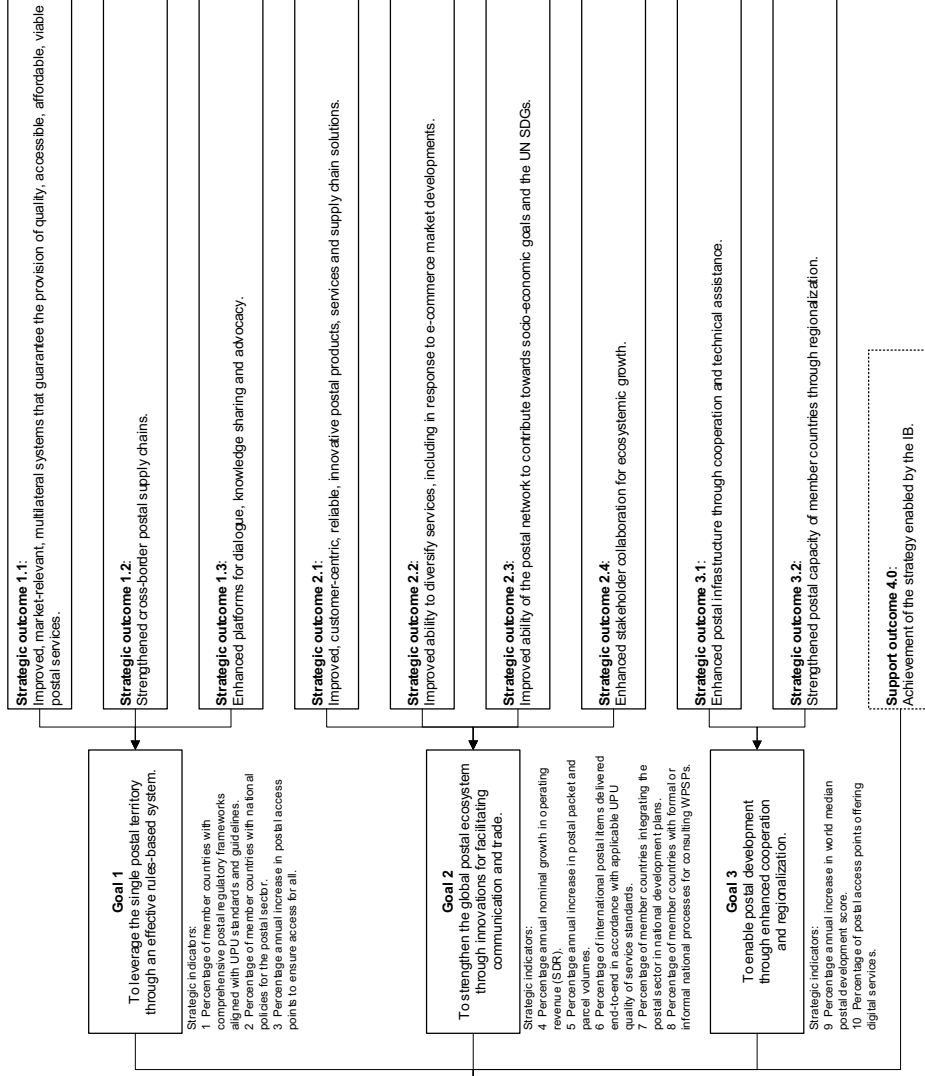
## Dubai Business Plan 2026–2029

The change that the UPU and its stakeholders wish to see in the world.

High-level goals of the UPU that will help achieve its mission and vision.

Strategic outcomes, based on work prioritized by member countries. Achieving these will enable the UPU to reach its goals.

Work proposals that show how the relevant UPU bodies will achieve their outcomes, and the resources needed.



We shall ...

### Enablers

Focus on building a better tomorrow for all

Encourage member-country ownership

Prioritize the needs of customers, citizens and postal workers

Adopt global best practices in all aspects of the UPU

Take a data-driven approach to our work

Make diversity, equity and inclusion central to our work

Provide accountability and transparency in all we do

Ensure efficient use of all resources

Align with the UN 2.0 agenda



ANNEX 2

# **VOICES OF OUR STAKEHOLDERS**

# KEY OUTCOMES FROM THE UPU STRATEGY SUMMIT 2023

The UPU Strategy Summit 2023 was held on 4 and 5 October 2023 as part of the fourth Extraordinary Congress in Riyadh, Saudi Arabia. The summit brought together ministers, CEOs and postal sector leaders under the theme “People, purpose, progress – The next chapter for the postal sector”. Outcomes from the summit were published in CA C 3 2023.2–Doc 6 (Highlights from the UPU Strategy Summit 2023) in November 2023.

The summit was organized to evaluate the needs and demands of UPU stakeholders and integrate them into the core of the future strategy, to ensure that the strategy is relevant and stakeholder-centric.

At the summit, leaders from the global postal sector exchanged ideas, shared experiences and set the vision to build a stronger, more resilient sector. More than 30 ministers, along with 120 CEOs, vice-ministers and heads of regulators, and 15 speakers participated in the summit.

Under the theme of “Strengthening the foundation: a single postal territory for economic and social growth”, speakers focused on the postal sector’s potential to capitalize on the growing opportunities in a post-COVID-19 world, given the predicted rise in global economic growth and the expansion of e-commerce. The focus was on how the postal sector could improve its relevance, deliver value and address customer concerns.

There was an emphasis on the urgent need to further capitalize on one of the largest interconnected – but often underutilized – networks in the world. Among the key actions needed by the sector, panellists highlighted the need for modernizing core postal operations, including better last-mile delivery that offers fully seamless and high-quality customer service.

The importance of improving regulatory frameworks to leverage data and emerging technologies, and of closer cooperation with international organizations like the UPU, was emphasized.

*Topics discussed in this panel form the foundation for goal 1: To leverage the single postal territory through an effective rules-based system; goal 2: To strengthen the global postal ecosystem through innovations; and goal 3: To facilitate postal development through enhanced cooperation.*

Under the theme of “Visualizing the future: co-creating value for citizens, businesses and governments”, speakers explored the future of the postal sector, taking into account the changing behaviours of citizens, particularly newer generations. The discussion centred on how the sector could anticipate the future needs of both individuals and businesses, and fulfil them.

Panellists highlighted the importance of leveraging emerging technologies as a core necessity – instead of an option – to remain relevant, and discussed the evolution of the postal sector’s role from relaying physical communication to being a physical touchpoint for digital experiences. Key actions needed by the sector included: enhancing partnerships to use postal infrastructure to bridge the gap between digital and physical customer experiences; diversifying services by providing financial inclusion for all, especially women; exploring alternative modes of delivery; and ensuring robust regulation.

The panel members strongly encouraged and advocated the role of the UPU as a forum for sharing knowledge and best practices.

*Topics discussed in this panel form the foundation for goal 1: To leverage the single postal territory through an effective rules-based system; and goal 2: To strengthen the global postal ecosystem through innovations.*

Under the theme of “Multi-dimensional change: development, diversity and dynamism for a sustainable postal sector”, speakers delved into the sustainability and environmental impact of the postal sector. They emphasized the sector’s commitment to sustainable development and its role in addressing issues like gender equality and climate change. They also underscored the urgent need for action to combat climate change and

promote sustainability, while simultaneously dealing with specific sectorial issues such as declining mail volumes.

Key actions needed by the sector and in support of governments transitioning into “green economies” were discussed, calling for the transformation of the postal sector into a global e-commerce network supported by appropriate regulation, best practices in last-mile delivery, and a focus on sustainability in all aspects. Panellists also noted that sustainability in all its dimensions should be a priority, with greater emphasis on gender equality.

The UPU was encouraged to continue playing a vital role in fostering collaboration, serving as a forum, setting standards, and advocating for change in the sector.

*Topics discussed in this panel form the foundation for goal 2: To strengthen the global postal ecosystem through innovations.*

## VIRTUAL REGIONAL ROUND TABLES 2024: REGIONAL PRIORITIES OF UPU STAKEHOLDERS

The UPU regional round tables on strategy development were held virtually, via Zoom, during the last two weeks of January 2024. All six UPU regions discussed the regional results of the stakeholder consultation survey on the UPU’s institutional strategy for 2026–2029, which was sent out in 2023, with preliminary results presented to the CA at S4.

The round tables were organized and chaired by the CA C 3 Co-Chairs, in accordance with the process laid out in the future strategy roadmap approved by the CA at S3 (CA C 3 2023.1–Doc 8).

A key principle of this step is to gather the broadest possible range of views and requirements from UPU stakeholders. This process allows the IB to identify areas of shared interest for the UPU’s core stakeholder groups.

In all regions, the round tables were led by the CA C 3 Co-Chairs, Uruguay and Zambia. A detailed presentation of regionalized survey results was presented, and participants were then provided with an opportunity to ask questions on the results, before reflecting on key questions that were posed to them.

Regional representatives were asked if there were any additional risks and opportunities that needed to be considered for their respective regions, and were invited to indicate the top cross-stakeholder risks and opportunities for their regions, as well as the UPU solutions needed to address those risks and exploit the opportunities.

The following sections provide a summary of the discussions and key outcomes for each region; the full report was presented as CA C 3 2024.1–Doc 7b (Summary of UPU strategy development regional round tables).

### AFRICA REGION

The region highlighted the importance of a clear definition of the postal sector, emphasizing the UPU’s role as a global authority for the broader postal sector. This clarity was seen as crucial from a regulatory perspective to enable the involvement of all players in the conveyance of documents and goods.

The sustainability of the USO was linked to relevance, suggesting that if customers found value, financial sustainability could be achieved. Creating an enabling regulatory environment, including pooling best practices, institutional support, evidence-based assessments and regulatory strengthening, were all identified as unique value propositions of the UPU.

*Both topics are considered in the results to be achieved by strategic outcome 1.1: Improved, market-relevant, multilateral rules-based system guaranteeing universally accessible postal services.*

At the DO level, there was a call for tangible support aligned with a regional integration agenda. Additionally, leveraging technology, especially in regions with high mobile penetration, was highlighted. Specific focus was placed on small postal companies with mobile apps and motorcycle services, raising the question of how an app-based approach could be effectively implemented in this context.

Lastly, concerns were raised about tailoring policies to address infrastructure challenges such as broadband and electricity, and a suggestion was made that the IB should become involved in the diplomacy of postal economics.

*These topics are considered in the results to be achieved by strategic outcome 2.4: Enhanced stakeholder collaboration for ecosystemic growth; strategic outcome 3.1: Enhanced digital postal infrastructure; and strategic outcome 3.2: Strengthened postal capacity of member countries.*

## AMERICAS REGION

Initial discussions covered common challenges across the region, such as difficulties with mail and parcel exchanges and in establishing regular transport mail routes in the Caribbean. Participants highlighted the importance of regulatory clarity, technical cooperation, and addressing digitalization challenges.

Some representatives emphasized the interconnectedness of regulations and operations and called for increased UPU presence at the regional level.

*These topics are considered in the results to be achieved by strategic outcome 2.4: Enhanced stakeholder collaboration for ecosystemic growth; and strategic outcome 3.2: Strengthened postal capacity of member countries.*

The potential shift in priorities from social to technical aspects was highlighted by some DOs from the region, with an emphasis on the need to convey the postal value proposition to governments.

Commitment to improving regulations, linking discussions to specific points for future strategies, and addressing challenges related to the perceived lack of importance of the postal sector among governments were all highlighted.

*These topics are considered in the results to be achieved by strategic outcome 1.3: Enhanced platforms for dialogue and knowledge sharing; and strategic outcome 3.2: Strengthened postal capacity of member countries.*

## ARAB REGION

In the discussions, participants emphasized the need to revisit and assess the previous strategy and use lessons learned from its implementation as input for future strategy development. One participant underscored the need to redefine the USO, questioning its current relevance and advocating for a more proactive approach from the UPU on this topic.

The discussion on incorporating the USO into the strategy received attention from multiple participants, with suggestions on seeking UPU support in defining the USO and reinforcing the value of postal services to governments. Additionally, the restoration of trust in postal services by citizens in the region was identified as a priority for enhancing the sector's credibility.

*These topics are considered in the results to be achieved by strategic outcome 1.1: Improved, market-relevant, multilateral rules-based system guaranteeing universally accessible postal services.*

DOs identified challenges in their value chains, emphasizing the need for UPU support in harmonizing and integrating the supply chain in the light of e-commerce and competitive last-mile delivery.

*This topic is considered in the results to be achieved by strategic outcome 1.2: Strengthened cross-border postal supply chains.*

## ASIA-PACIFIC REGION

Participants emphasized the crucial need for a clear understanding of the postal sector's definition and the importance of international treaties.

*This topic is considered in the results to be achieved by strategic outcome 1.1: Improved, market-relevant, multilateral rules-based system guaranteeing universally accessible postal services.*

From the DOs' viewpoint, concerns were raised regarding the decline in postal volumes, particularly in e-commerce and linked postal payments. The focus extended to strategies aimed at arresting declining volumes and making postal services more relevant in the macrosocial environment.

*This topic is considered in the results to be achieved by strategic outcome 2.2: Improved ability to diversify services.*

Furthermore, DOs stressed the importance of delivering citizen-centric services to make the postal sector even more relevant for governments.

*This topic is considered in the results achieved by strategic outcome 2.1: Improved, customer-centric, innovative postal products, services and supply chain solutions.*

## EUROPE AND CIS REGION

In the discussions, climate change was identified as a significant risk influencing the development of the postal sector. Concerns were raised about demographic changes, such as an ageing population and evolving skill requirements related to new technologies.

*This topic is considered in the results to be achieved by strategic outcome 2.3: Improved ability of the postal network to contribute towards development goals including the UN SDGs.*

The growing impact of e-commerce on parcel sending and consumption was highlighted as a major factor affecting the sector's development. One participant emphasized the importance of addressing customs-related issues, expressing concern that such crucial topics might be overlooked in the final strategy if they were not reflected in the survey results.

*These topics are considered in the results to be achieved by strategic outcome 1.1: Improved, market-relevant, multilateral rules-based system guaranteeing universally accessible postal services; strategic outcome 1.2: Strengthened cross-border postal supply chains; and strategic outcome 2.1:*

*Improved, customer-centric, innovative postal products, services and supply chain solutions.*

There was a call for a balanced approach between quantitative and qualitative inputs, specifically stressing the need for explicit consideration of sustainability aspects aligned with the UN SDGs. One participant underlined the importance of environmental issues and their role in the future strategy.

*This topic is considered in the results to be achieved by strategic outcome 2.3: Improved ability of the postal network to contribute towards development goals including the UN SDGs.*

There was an emphasis on the significance of regional development and cooperation activities aimed at filling gaps across different regions, and of incorporating considerations of relevance and sustainability for the future. The role of regional strategy forums planned for later in the year was highlighted as pivotal in this process.

*These topics are considered in the results to be achieved by strategic outcome 3.2: Strengthened postal capacity of member countries; and strategic outcome 2.4: Enhanced stakeholder collaboration for ecosystemic growth.*

A regulatory perspective was presented, with discussions on the sustainability of the USO in the current context of falling letter volumes.

*This topic is considered in the results to be achieved by strategic outcome 1.1: Improved, market-relevant, multilateral rules-based system guaranteeing universally accessible postal services.*

## REGIONAL STRATEGY FORUMS 2024: REGIONAL PRIORITIES OF UPU STAKEHOLDERS

Six regional strategy forums were held in person around the world between June and September 2024. Each forum featured three high-level panel discussions, focusing on each of the goals of the UPU's proposed strategic framework for 2026–2029.

The forums provided an opportunity for all member countries to give their views on the draft strategy document, identify regional priority areas, and discuss relevant UPU solutions.

At the last session of each forum, a summary of overall regional priorities was presented and validated with the stakeholders. These priorities were then further

revalidated by the respective restricted unions after each forum, to reflect the consensus obtained through the stakeholder consultations. The outcomes were duly shared with all IB directorates, with the aim of reflecting the regional priorities and needs in the draft Dubai Business Plan. The detailed outcomes of the six forums are set out as addenda to CA C 3 2024.2–Doc 6.

The following summarizes the views of each region.

### CARIBBEAN REGION

The Caribbean region met on 3 and 4 June in Grand Cayman, Cayman Islands. The region emphasized that its key priority is regional cooperation and the enhancement of intra- and interregional transport networks.

Stakeholders called for the harmonization of regulatory frameworks between Caribbean nations to promote regional postal exchanges. They also highlighted the importance of using data to enable responsive policymaking, raising postal services' visibility at a political level, and sharing knowledge and best practices in both traditional and new postal services. The need for strengthened partnerships with regional organizations and a stronger voice for the region within the UPU was also underscored.

Innovations and service improvements were central to the discussions, with a focus on developing integrated, multimodal transportation systems to boost volumes and revenues. The need for harmonized transportation, security, and customs procedures to support regional development was also emphasized. The forum highlighted the need for postal operators to adopt customer-centric innovations and ensure that their services contribute to national development goals, particularly for excluded groups.

Lastly, the forum stressed the importance of pooling volumes and developing regional hubs to reduce costs and improve service delivery across the region.

### AFRICA

The regional strategy forum for Africa was held on 13 and 14 June in Arusha, Tanzania (United Rep.). The region emphasized the need for postal sector reform through a whole-of-government approach and ensuring that regulatory frameworks were tailored to decrease regulatory burdens and improve coordination.

A critical theme was the need to revisit the mandate of the UPU, expanding beyond communications to encompass trade, e-commerce and citizen-centric services. There was a strong focus on harmonizing key regulations across Customs, security and transport to enable seamless postal supply chain integration across African countries.

Stakeholders also stressed the importance of raising awareness about the value of postal services among governments and citizens, especially young people as future customers.

In terms of innovation, the region called for the development of end-to-end solutions that address gaps in infrastructure, human capacity and technology to support the growth of e-commerce. There was a focus on building partnerships and interoperability with WPSPs to enhance the value chain, along with ensuring that postal services are aligned with national development goals.

Collaboration through pan-African partnerships was highlighted as essential for innovation sharing and service diversification, with the UPU playing a key role in advocating for investment and supporting national resource mobilization efforts.

## AMERICAS

The Americas region met in Bogotá, Colombia, on 3 and 4 September. The region emphasized the need for flexible, agile, more market-responsive regulatory frameworks, with greater reliance on flexible law instead of mandatory rules to ensure timely progress.

There was a focus on redefining the value proposition of the single postal territory and its rules, considering market realities that include multiple players, new business models, and evolving customer demands. The region highlighted the importance of harmonizing customs and operational processes, promoting multimodal transport integration, and creating regional logistical hubs to enhance cross-border postal flows.

There was also a strong emphasis on consistent, targeted advocacy to raise awareness about the role of the Post in logistics and to meet the broader needs of citizens.

In terms of innovation, the region called for a timely review and update of the UPU product portfolio to ensure market relevance, focusing on small-scale innovations to improve postal infrastructure and service quality. The region also stressed the need for increased digitalization of postal services and partnerships with the private sector to overcome capital expenditure constraints.

Additionally, there were calls for diversification of services aligned with national objectives, supported by strategic partnerships and alliances with WPSPs.

Participants underscored the importance of regionalization of the UPU's work, with a call for an enhanced UPU presence in member countries, regional-focused capacity building, and utilizing regional expertise to provide tailored advice and support.

The UPU's role in mobilizing regional and global development funds, facilitating regional cooperation, and leveraging the capabilities of the Postal Union of the Americas, Spain and Portugal to deliver capacity development programmes were seen as key to driving these efforts.

## ARAB REGION

The Regional Strategy Forum for the Arab region was organized in Doha, Qatar, on 11 and 12 September. The region emphasized the need for flexible, agile, market-responsive regulatory frameworks, with a greater reliance on "soft laws" to facilitate timely progress. The region also called for UPU support to reformulate the USO and mandatory basic services to align with the growth of e-commerce and evolving consumer demands.

A key focus was on the harmonization of customs, security and transport rules, both regionally and internationally, to support new business models focused on e-commerce and to enable multimodal, integrated transport networks.

The role of the UPU as a hub for knowledge sharing was also highlighted, with a call for greater engagement with UN and international organizations to harmonize global laws that support the postal sector.

In terms of innovation, the region prioritized the development of customer-centric postal products, with a focus on defining customer needs and creating solutions to address them. There was a strong emphasis on service diversification through public-private partnerships and the need for the UPU to facilitate partnerships and provide technical assistance.

Additionally, the region stressed the importance of digital transformation to drive operational efficiencies, with the UPU playing a critical role in providing tailored advisory support and facilitating the adoption of advanced technologies. There was also a call for a regionalization agenda that includes leveraging local technical expertise to provide proactive support, helping to close the development gap between Posts through enhanced knowledge sharing and collaboration.

## EUROPE AND CIS

At the Regional Strategy Forum for Europe and Central Asia on 16 and 17 September in Ankara, Türkiye, discussions centred on the future of the postal sector and how to adapt it to modern market needs.

Participants emphasized the need for clearer regulatory definitions that reflect the evolving boundaries between the postal and logistics sectors, alongside greater regulatory harmonization at national, European Union and UPU levels. UPU standard setting to

promote interconnectivity and interoperability was highlighted, with calls for flexible, market-responsive regulatory frameworks that foster innovation.

There was a strong focus on harmonizing customs, security and transport rules to support new e-commerce-driven business models. The UPU's role as a hub for knowledge sharing and collaboration was also emphasized, with calls for greater engagement with international organizations to align global postal regulations.

Innovation was a key theme, particularly around the development of customer-centric postal products and services. While large-scale innovations were important, there was also a focus on optimizing existing processes for operational excellence. Service diversification through public-private partnerships was seen as a vital way to meet infrastructure investment needs.

Sustainability was also a key focus area for this region, with recognition that customers are increasingly demanding environmentally focused solutions. However, while sustainability was noted as a growing priority, the main emphasis was on innovation, operational improvements, and the UPU's role in supporting digital and sustainable transitions within the sector.

## ASIA-PACIFIC

At the Regional Strategy Forum for the Asia-Pacific region held on 25 and 26 September in Ulaanbaatar, Mongolia, participants stressed the importance of regulatory reform to modernize the postal sector. This includes developing flexible, agile, market-responsive regulatory frameworks that consider the diverse circumstances of the region, including the need to provide accessible, affordable and sustainable postal services that ensure cost coverage – however, member countries in the region differed in their emphasis on these elements. There was a special call to have affirmative actions for LDCs, LLDCs and SIDS.

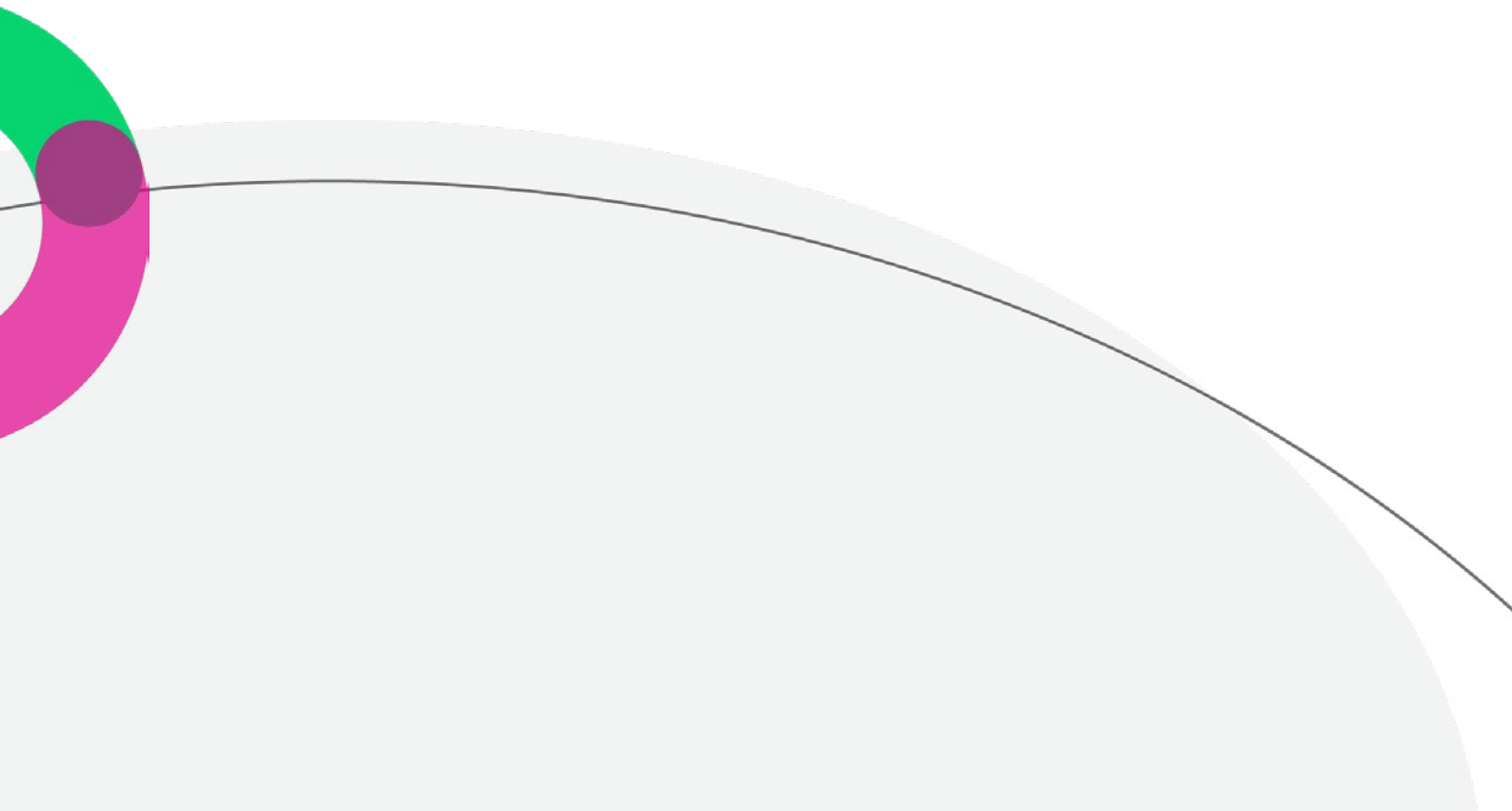
The need for greater harmonization in customs, security and transport rules to enable the development of new e-commerce business models and improve service quality was also emphasized. The UPU was recognized for its role in supporting these reforms through knowledge sharing and technical assistance, with a focus on creating a level playing field while maintaining universal service commitments.

The region also emphasized the need for advocacy to mobilize investments and involve governments in shaping postal policy to support national socio-economic development goals.

Innovation was a major theme, with a focus on developing customer-centric postal products and services that meet evolving market demands. The region called for optimization of existing operations for better price, quality and consumer focus, while also addressing end-to-end logistics needs for e-commerce. Service diversification, especially in areas like financial inclusion and government services, was highlighted as crucial, with the UPU expected to provide advisory support and facilitate partnerships.

Sustainability was also mentioned as an opportunity to reduce carbon footprints through greener logistics and packaging; however, this was framed as an emerging rather than a core focus, with carbon reduction targets remaining voluntary, context-specific, and tied to nationally determined contributions under Paris Agreement commitments.







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