



REGIONAL DEVELOPMENT PLAN 2026–2029

EUROPE and CIS

Published by the Universal Postal Union (UPU)
Berne, Switzerland

Printed in Switzerland by the printing services
of the International Bureau of the UPU

Copyright © 2026 Universal Postal Union
All rights reserved

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

AUTHOR: Development and Cooperation Directorate,
Universal Postal Union

TITLE: Regional Development Plan 2026–2029, Europe
and CIS

ISBN: 978-92-95116-44-3

DESIGN: Sonja Denovski

CONTACT: info@upu.int

Table of contents

FOREWORD	5
Chapter 1	
GLOBAL DEVELOPMENTS IN THE POSTAL SECTOR.....	6
Global trends and challenges.....	7
Achievements and lessons learned from the 2022–2025 cycle.....	8
Strategic orientation for 2026–2029.....	9
Chapter 2	
REGIONAL POSTAL SECTOR ANALYSIS	10
Overview of the postal sector	11
Postal development performance (2IPD insights).....	11
Trends in employment and services.....	11
Key dimensions	12
Socio-economic role of the postal sector.....	14
Chapter 3	
EVALUATION AND LESSONS LEARNED.....	16
Evaluation of regional project implementation.....	17
Challenges and lessons learned	18
Key recommendations.....	19
Pandemic response	21
Chapter 4	
DEVELOPMENT COOPERATION FRAMEWORK FOR THE 2026–2029 CYCLE	22
Regional objectives and alignment of priorities	24
Cooperation modalities and funding strategy.....	30
Conclusion.....	32

FOREWORD

Today, technological developments and the globalization of trade continue to reshape economies and societies worldwide. As a result, the activities and characteristics of the postal sector have changed profoundly, along with the expectations of society and businesses with regard to postal services. In this evolving environment, our role in facilitating communication across borders is more relevant than ever. Governments must provide the necessary enabling environment and ensure that universal postal services are maintained. In parallel, postal operators around the world must adapt to these shifts and meet the evolving demands through structural reforms, innovative services and continuous modernization.

Supporting our member countries in building resilient and future-ready postal services is central to the UPU's mandate. In this regard, the regional development plan (RDP) constitutes a key document, translating our shared priorities into concrete support at regional level. During the Abidjan cycle, we significantly strengthened our field presence, including doubling the number of regional offices. This demonstrates the high priority we continue to place on development cooperation.

This RDP reflects detailed analyses of the region's current situation and the lessons we learned from the Abidjan cycle. It provides both an overview of the global and regional postal environment, together with a targeted set of development cooperation actions tailored to the needs of the region for the 2026-2029 cycle. I believe that it will serve as a guiding reference for implementing development cooperation in line with the discussions held at the Dubai Congress on regionalization.

As the United Nations specialized agency responsible for postal services, we work closely with our regional partners to identify priorities for development cooperation activities and initiatives. This RDP is therefore the result of an inclusive regional dialogue between us and our stakeholders. Despite present challenges, significant opportunities arise from the continued growth of cross-border e-commerce and trade. By leveraging their extensive networks and trusted reputation, designated postal operators are well placed to support governments in advancing national policy objectives.

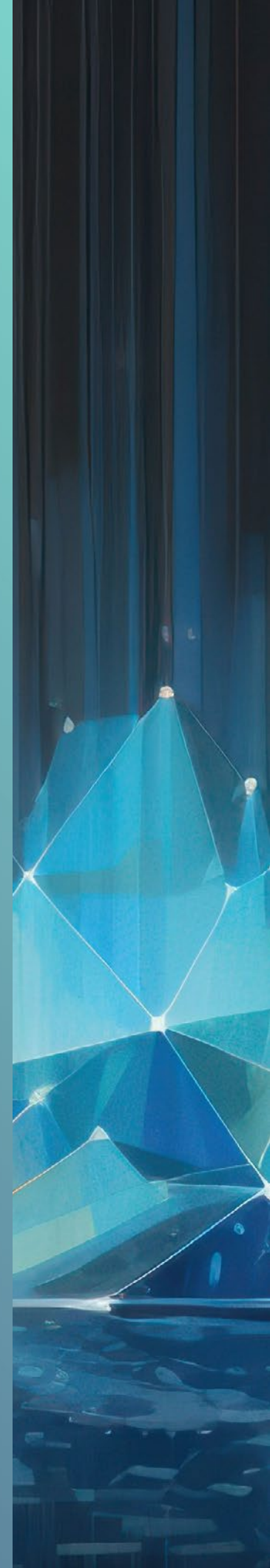
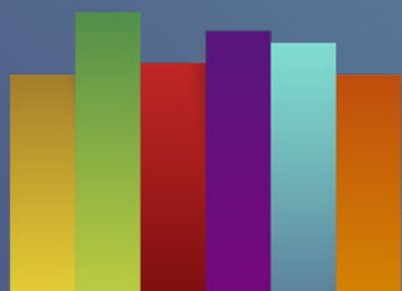
I look forward to strengthening our close cooperation with regional partners as we work together with our 192 member countries to maximize the impact of their socio-economic development efforts and deliver tangible benefits to citizens and businesses across the region.

MASAHIKO METOKI

Director General of the UPU International Bureau

CHAPTER 1

GLOBAL DEVELOPMENTS IN THE POSTAL SECTOR



GLOBAL TRENDS AND CHALLENGES

The global postal sector is undergoing a profound transformation. Although the world economy grew at an average annual rate of 3.38% between 1996 and 2023, in terms of gross domestic product adjusted for purchasing power parity (GDP PPP), the postal sector recorded slower growth of 2.28% in real revenue. This divergence, commonly referred to as “postal decoupling”, reflects both the structural challenges and the potential of the sector amid digital disruption and evolving customer needs.

Despite the decline in traditional letter mail, the sector has shown resilience through the expansion of e-commerce, logistics and financial services. In 2023, for the first time, global revenue from parcels and logistics (32.5%) surpassed that from letter post (32.4%), marking a pivotal shift in the sector’s economic profile.

Structural shift in the sector

Postal operators are rapidly transitioning from traditional, letter-dominant service models to integrated networks that encompass parcel logistics, digital services, financial inclusion and public service delivery. This transformation is driven by the need to remain relevant in the digital economy and to respond to the evolving expectations of citizens and businesses. However, the pace and depth of transformation vary greatly across regions. New business models, investment in digital infrastructure, the reskilling of the postal workforce and the establishment of agile regulatory frameworks are essential prerequisites for success.

Diverging regional dynamics

The trajectory of postal sector development differs markedly between regions, revealing disparities that must be addressed through targeted cooperation:

AFRICA is a prime example of postal decoupling: while GDP has climbed steadily over the past 20 years, postal revenue has shrunk by 2.53% per year on average. Key constraints include underinvestment in infrastructure, low mail and parcel volumes, patchy regulation, and slow uptake of electronic advance data (EAD) and digital standards. In many countries, universal service obligations (USOs) are still to be defined, and access to international funding remains limited;

ARAB COUNTRIES have shown robust growth in postal revenue, outpacing GDP growth, largely owing to the rapid uptake of financial services and government-backed modernization programmes. Nonetheless, the Arab region faces challenges in addressing cross-border operational fragmentation and in harmonizing regulations for postal and digital services;

the **ASIA-PACIFIC** region has emerged as a global leader in postal innovation. The region boasts strong growth in e-commerce logistics, digital payment systems and postal financial services. However, the pace of growth is uneven, with countries in the region still facing infrastructure and policy bottlenecks that limit last-mile delivery and digital inclusion;

the **CARIBBEAN** has recorded modest economic growth, but postal revenue remains low owing to small market size and high operational costs. Regulatory inconsistency, low digital uptake and limited Post–Customs integration constrain development. There is an increasing need for targeted capacity building and climate-resilient digital transformation efforts;

the **EUROPE AND THE COMMONWEALTH OF INDEPENDENT STATES (CIS)** region shows relatively high levels of service reliability and resilience. However, it faces strong competition, with customer-centric innovation and both exogenous and endogenous regulation among the main challenges. Demographic shifts and labour shortages also pose structural issues for the sustainability of national postal operators;

LATIN AMERICA displays moderate economic growth, but postal revenue lags behind. Outdated and fragmented regulatory frameworks, uneven digital adoption and limited investment capacity hinder progress. Demand is rising for capacity building and more coordinated digital transformation strategies.

These divergences underscore the need for tailored intervention, strong regional coordination and continued alignment of UPU-led actions with national strategies.

Climate, resilience and inclusion

Across all regions, the increase in climate-related disasters, geopolitical tension and pandemics has exposed the vulnerability of postal supply chains. The need to mainstream disaster risk management (DRM), business continuity planning and climate resilience into postal development has become imperative. In parallel, the postal network continues to serve as vital infrastructure for social inclusion, particularly in rural and underserved areas. Postal operators are uniquely positioned to deliver essential services such as social payments, e-government services, digital identification and financial access – reinforcing their role as enablers for the UN Sustainable Development Goals (SDGs).

ACHIEVEMENTS AND LESSONS LEARNED FROM THE 2022–2025 CYCLE

Under the Abidjan Postal Strategy, the UPU achieved significant progress:

By the end of the cycle, the majority of planned development cooperation activities had been completed across all regions, reflecting sustained delivery under the Abidjan Business Plan;

Implementation of the UPU's broader strategic priorities advanced consistently across the Council of Administration (CA) and Postal Operations Council (POC) work programmes, as reflected in the progress reports presented during the cycle;

Development cooperation was strengthened through regionalization, with expanded field presence and broadened partnerships with restricted unions and donors, in line with Congress mandates.

Key lessons from this cycle include the importance of strong regional engagement, flexible and diversified funding, and enhanced cross-cutting coordination within the UPU and with member countries – particularly through increased field presence, harmonized project management and improved collaboration with restricted unions.

STRATEGIC ORIENTATION FOR 2026–2029

The Dubai Business Plan translates the UPU's long-term vision into 38 domain work proposals (DWP), structured around three strategic goals:



GOAL 1

GOAL 1: LEVERAGE THE SINGLE POSTAL TERRITORY THROUGH AN EFFECTIVE RULES-BASED SYSTEM;



GOAL 2

GOAL 2: STRENGTHEN THE GLOBAL POSTAL ECOSYSTEM THROUGH INNOVATION FOR FACILITATING COMMUNICATION AND TRADE;



GOAL 3

GOAL 3: ENABLE POSTAL DEVELOPMENT THROUGH ENHANCED COOPERATION AND REGIONALIZATION.

Among these, the importance of goal 3 is underscored by the fact that it requires the largest share of projected resources, at 133.58 million CHF over the 2026–2029 cycle. This highlights the Union's commitment to ensuring that no member country is left behind.

A core pillar of this commitment is the deepening of regionalization, which now serves not only as a delivery mechanism but as a strategic approach in its own right. Regionalization is no longer limited to field implementation; it is being positioned as a means of co-creation, empowerment and resilience building. Through enhanced regional presence – including the expansion of regional offices, the deployment of field experts, and closer engagement with restricted unions and local stakeholders – the UPU aims to tailor solutions more precisely to the unique needs of each region.

Key proposals such as DWP 27 (Development and cooperation – regionalization and projects), DWP 101 (Development and cooperation – emergency assistance) and DWP 205 (Development and cooperation – regionalization) support this approach by:

- elevating regional offices into centres for technical assistance, policy dialogue and resource mobilization;

- ensuring that regional strategies are shaped with – and not just for – member countries;

- strengthening alignment between regional priorities and global goals, particularly in areas such as digital transformation, financial inclusion, logistics development and regulatory modernization.

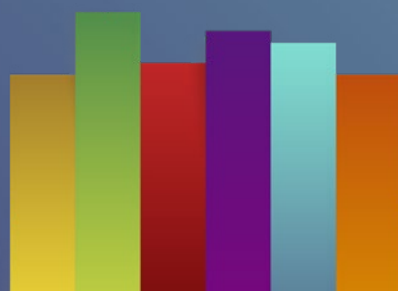
In this way, regionalization is both a structural lever and a political message: development must be regionalized, inclusive and responsive. It reinforces the idea that no solution is truly global unless it is regionally relevant.

This renewed emphasis on region-specific delivery models, combined with the results-based approach of the DWPs through key performance indicators (KPIs), sets the foundation for a more agile, equitable and accountable UPU that is prepared to support its members in navigating uncertainty, embracing innovation and achieving sustainable postal development.

The regional development plan (RDP) for the 2026–2029 cycle will be defined by its responsiveness to regional needs, its emphasis on resilience and sustainability, and its integration with the Dubai Business Plan and the UN SDGs. Chapter 2 will present a detailed regional analysis to guide priority setting and cooperation modalities tailored to each region.

CHAPTER 2

REGIONAL POSTAL SECTOR ANALYSIS



OVERVIEW OF THE POSTAL SECTOR

The Europe and CIS region encompasses a diverse array of countries with varying postal infrastructure and economic contexts. Some countries in the region enjoy a highly integrated and advanced postal network, as shown by the UPU's Integrated Index for Postal Development (2IPD), making the postal sector a crucial element of economic and social infrastructure.

Member countries of the region, together with their designated operators (DOs), are devoting efforts to modernization, in order to enhance service reliability, affordability and sustainability by expanding access, particularly in rural and remote areas.

DOs serve as key facilitators of trade, communication and financial inclusion, playing an essential role in the daily lives of businesses and individuals.

POSTAL DEVELOPMENT PERFORMANCE (2IPD INSIGHTS)

In the 2025 edition of the 2IPD, the Europe and CIS region achieved a median score of 72.5, which is considerably higher than the global median of 50.8. This strong showing places the region second only to the industrialized countries group, which includes all countries in the European Union (EU), whose median stands at 94.4. Even so, the overall picture reveals a wide range

of postal development levels (PDLs) among countries within Europe and CIS: while some, such as Estonia and Slovenia, perform near the top of global rankings, others score more modestly, reflecting considerable intraregional differences in postal development.

Across the four main 2IPD dimensions – reliability, reach, relevance and resilience – most countries in the Europe and CIS region perform well in ensuring reliable domestic deliveries and maintaining solid inbound and outbound international connections. By contrast, many of these DOs face greater variability in relevance, which measures service demand intensity, digital integration, and business model adaptation. This gap suggests that some DOs, though strong in traditional delivery and international connections, still need to align themselves more closely with today's digital-driven market.

Estonia exemplifies the region's success, with a 2IPD score of 88.6 (PDL 9), bolstered by especially high reliability, reach and resilience scores. Hungary, scoring 82.8 (PDL 9), stands out as another noteworthy performer, having recently made significant gains in reliability and reach. In the PDL 8 category, Belarus, Czechia, Latvia, Rep. of Moldova, Romania, Serbia and Slovakia all exhibit robust postal infrastructure but also show areas where they can continue to progress, particularly around service relevance or resilience.

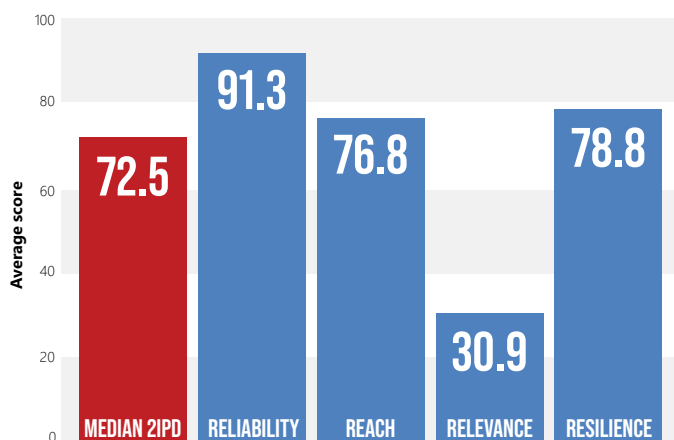
Although postal development in Europe and CIS compares favourably to most other developing regions, notable disparities remain. Overall reliability and international reach are typically strong, but the digital transformation of services and business models remains uneven. Many DOs thus still have substantial opportunities to innovate and upgrade their postal services to attain the highest levels of global postal excellence.

TRENDS IN EMPLOYMENT AND SERVICES

As of 2023, the postal sector within the EU employed approximately 1.8 million individuals, maintaining a consistent employment level since 2018. However, the sector has experienced some shifts in service volumes. For example, in the same year, the combined volume of inbound and domestic letters decreased by 6.1%, while inbound and domestic parcels saw a 0.5% decline compared to 2022, following several years of sharp increases.

On the other hand, the CIS region comprises countries which have experienced growth in their postal sector (such as Belarus, Kazakhstan and the Russian Federation), primarily driven by the expansion of e-commerce. In general, DOs in the CIS region have

Postal sector performance in the Europe and CIS region



Source: State of the Postal Sector 2025

been adapting to the increasing demand for parcel deliveries, investing in infrastructure and enhancing service quality to meet customer expectations.

KEY DIMENSIONS

Infrastructure

The postal sector operates in all regions within a three-dimensional framework: physical, digital and financial. The Europe and CIS region is no exception.

PHYSICAL INFRASTRUCTURE

It goes without saying that there is substantial physical infrastructure in the region for last-mile delivery, particularly for small items (packets):

In Europe, a dense network of post offices, automated sorting centres and integrated logistics hubs exists, with facilities to optimize mail and parcel distribution. The largest DOs have invested heavily in automation, robotics and (green) electric vehicle fleets in order to streamline their operations, with a focus on modernizing facilities and improving efficiency to meet the demands of e-commerce and digital communication.

In the countries of the CIS region, physical infrastructure varies widely. While urban areas benefit from developed networks, rural and remote regions often struggle with postal accessibility. Efforts are underway to modernize sorting centres, improve road transport logistics and trial/introduce alternative delivery points (parcel lockers, mobile post offices and drone delivery). The goal is to improve accessibility and efficiency, particularly in remote areas.

DIGITAL INFRASTRUCTURE

Digital transformation is a key trend reshaping the postal sector. In Europe, DOs have fully integrated digital services, including electronic registered mail, online parcel tracking, and logistics management driven by artificial intelligence (AI). Many postal services partner with e-commerce platforms to provide seamless

delivery options, leveraging predictive analytics and blockchain technology for secure transactions.

In the CIS area, digitalization is advancing, albeit at different paces across the region. Member countries such as Kazakhstan and the Russian Federation lead in adopting digital postal solutions, offering mobile apps, e-government integration, e-registered letters, e-notifications, letter digitalization services, and AI-powered delivery systems. Other countries still face challenges related to Internet penetration, digital literacy and infrastructure investment. Many DOs provide financial services, especially in regions with limited banking infrastructure. These services include money transfers, savings accounts and payment processing. By integrating financial services, DOs enhance financial inclusion and diversify their revenue streams. Over 90% of DOs worldwide offer financial services: with more than 80% of post offices located in rural areas, these Posts are ensuring financial access for customers in remote and underserved communities.

FINANCIAL INFRASTRUCTURE

In Europe, postal banking is well established, with countries like France (La Banque Postale) and Italy (Poste Italiane) operating comprehensive financial networks. In the CIS area, postal financial services are developing on the basis of UPU technical solutions (International Financial System, PosTransfer), by expanding to support economic development: digital banking services, pension disbursements, utility payments, and remittances. The integration of fintech solutions into postal networks is expected to further enhance financial inclusion in the region.

It is worth mentioning that in Europe, DOs face challenges such as adapting to the rapid growth of e-commerce, which requires the modernization of sorting facilities and delivery networks. Security threats, including risks from improvised incendiary devices (IIDs) and improvised explosive devices (IEDs), necessitate updated safety protocols. Additionally, stringent electronic advance data (EAD) requirements for risk assessment and customs processes add complexity. Regulatory changes, such as lowering de minimis thresholds for customs clearance, further strain the system.

In the CIS region, DOs are focused on modernizing outdated infrastructure and integrating digital technologies to improve service quality. Ensuring accessibility in remote areas remains a significant hurdle, as does enhancing cross-border cooperation. Security threats and stringent EAD requirements also pose challenges. Countries are modernizing their systems using updated UPU standards in accordance with market trends and current regulatory requirements, in order to prevent any disruption in the international postal network.

Despite these challenges, international collaboration through the UPU aims to harmonize regulations

and improve postal services across the region.

Regulatory and governance framework

In terms of regulation, European postal services are characterized by a robust regulatory framework, competition, and extensive cross-border logistics integration. The EU, for example, has established directives promoting fair competition and play, as well as consumer protection and innovation in postal services. Almost all EU countries have highly developed postal ecosystems, featuring efficient parcel delivery systems and innovative digital solutions. Key areas of focus include promoting environmental sustainability, digitalization, and a user-oriented universal service, which aims to foster a competitive single postal market in the EU, particularly in the context of the growing e-commerce sector.

The postal sector is so diverse in the Europe and CIS region that varied scenarios can easily be found. As an example, in Denmark, the universal service obligation (USO) ended on 1 January 2024, a decision that was supported with safeguards in respect of postal services to island communities, free shipments for the blind, and international mail. In another example, postal reform efforts are underway in Austria, Germany and the United Kingdom of Great Britain and Northern Ireland. In a number of countries, questions arise in terms of how the postal sector should be defined, in particular in relation to the adjacent delivery market. At the same time, examples of reform show the remit of the national regulatory authority being reviewed and, in some cases, enhanced in terms of both i) the operational delivery activities beyond those of the designated universal service provider, and ii) the inclusion in its portfolio of new areas of competence, such as compliance with labour conditions or reporting on environmental sustainability.

The postal sector in the CIS region, where national authorities regulate postal services, is at varying stages of transformation, focusing on modernizing infrastructure and improving service quality. While some countries have advanced infrastructure and e-commerce integration, others are still improving their networks. The lack of uniform regulation across the CIS countries creates disparities in service quality and efficiency, though efforts are underway to harmonize postal development strategies. Key themes include digital integration, the USO and enhanced cross-border cooperation, aiming to make services more accessible and efficient, especially in remote areas.

The revision of the integrated postal reform and development plan (IPDP) into the Postal Reform Plan (PRP), including the new methodology, will provide for technical assistance through regulatory advisory services to member countries to undertake postal reform and find synergies for reform with broader policy agendas.

Postal service diversification in the Europe and CIS region

Postal service diversification in the Europe and CIS region has become a strategic imperative amid declining traditional mail volumes and the rapid evolution of digital communications. Many national DOs have pivoted to diversify their services beyond conventional mail delivery, focusing on logistics, e-commerce fulfilment, digital services and financial products. In Western Europe, DOs such as Deutsche Post DHL and La Poste (France) have capitalized on their logistics infrastructure to become leading e-commerce parcel carriers. Meanwhile, postal institutions in Eastern Europe and CIS countries, such as Ukrposhta and Kazpost, have integrated banking and government services into their networks, especially in rural areas, thus bridging the digital and financial divide.

E-commerce growth across the region has driven postal services to upgrade their infrastructure, streamline cross-border shipping, and improve customer experience. For instance, partnerships with international e-retailers and investments in sorting automation and last-mile delivery have enabled faster and more reliable services. Many DOs are also leveraging their vast networks to offer value-added services such as warehousing, customs brokerage and returns management. In CIS countries where financial inclusion is a challenge, postal networks have become essential touchpoints for digital financial services, enabling citizens to access pensions, transfer money and pay bills through mobile applications or post offices.

To remain competitive and financially sustainable, postal services in the Europe and CIS region are increasingly adopting digital transformation strategies. This includes the launch of digital mailboxes, electronic ID services and e-government platforms. Regulatory support and innovation ecosystems have played a key role in this transition, especially within the EU. However, challenges persist, including aging infrastructure in some CIS countries, regulatory fragmentation, and the need for significant capital investment. Despite these hurdles, postal diversification continues to be a key pillar of socio-economic inclusion and digital economy development across the region.

SOCIO-ECONOMIC ROLE OF THE POSTAL SECTOR

Developments in postal services

The postal services market in the Europe and CIS region has undergone significant transformations over the past few years.

While this region displays a mixed performance overall, it generally exhibits high levels of resilience compared to other regions. For example, Europe has faced considerable decline in inbound traffic from the Asia-Pacific region, with drops of up to 83.0%. This indicates ongoing challenges in maintaining strong international postal links, potentially owing to new trade and customs regulations that complicate cross-border shipping.

The postal sector plays a crucial role in the economic growth of the Europe and CIS region. The market size is projected to reach over 306.74 billion USD by 2031, growing at a compound annual growth rate (CAGR) of 1.7% from 2023 to 2031. The sector contributes significantly to GDP through various services, including mail delivery, parcel services and financial services.

Contribution to GDP: The postal sector's contribution to GDP varies across countries. Over recent decades, countries in the CIS region have experienced a sevenfold increase in GDP, with an average annual growth of 6.2%, surpassing global and developing country averages. The European postal market is more mature, with moderate growth rates influenced by economic cycles and shifts in consumer preferences. For instance, in Germany, the postal and logistics sector contributes approximately 1.5% to the national GDP; in Kazakhstan, the postal sector's contribution is around 0.6%; and in Uzbekistan, it is around 0.4%.

Economic growth: The growth of the postal sector is closely linked to the overall economic growth of the region. Countries with robust postal services tend to have higher economic growth rates owing to improved trade facilitation and communication infrastructure.

Exports: The postal sector contributes to exports by enabling micro, small and medium enterprises (MSMEs) to access international markets. The region's foreign trade in goods reached 180 billion USD in 2023, a significant increase over the past 20 years. As an example, Swiss Post has developed specialized e-commerce solutions to support Swiss businesses in exporting their products globally.

Trade facilitation: Postal networks play a crucial role in trade facilitation by offering products and services tailored to the needs of businesses. This includes customs clearance, international shipping and tracking services.

Remittances: DOs facilitate remittances by offering affordable and accessible money transfer services. For instance, HayPost in Armenia provides money transfer services that are widely used by migrant workers to send money back to their families.

Financial inclusion: Postal services contribute to financial inclusion by providing banking services in remote areas. PostFinance in Switzerland and Poste Italiane in Italy offer a range of financial products, including savings accounts, insurance, and investment services.

Poverty reduction: Postal services help reduce poverty by providing employment opportunities and facilitating access to financial services. The increase in export revenues, remittances and foreign direct investment has contributed to income growth and reduced poverty in the region.

Socio-economic services: DOs offer various social services, such as delivery of medical supplies and essential items to vulnerable populations. In this way, whether mandated by the government or on their own initiative, DOs play a role in economic development and employment by supporting e-commerce and logistics growth, promoting financial inclusion and adapting to digitalization. In one example of this, Azerpost in Azerbaijan has implemented programmes to deliver food and medical supplies to remote areas.

The USO ensures all citizens have access to affordable postal prices. However, declining mail volumes and financial constraints make maintaining the USO challenging for many national DOs, as in the above-mentioned case of Denmark.

On the one hand, some components of the USO are consistently found throughout the region, such as nationwide mail delivery at uniform rates, accessibility in remote areas, and minimum service standards. On the other hand, there is a need to highlight the challenges in maintaining the USO, such as the reduction in traditional mail volumes owing to digitalization, rising operational costs, or the competition in the region from private companies and non-DOs.

In this context, no homogeneous regulatory framework exists in the region. In the EU, the Postal Services Directive mandates member countries to ensure universal postal service provision, though implementation varies. In addition, EU candidate members work and focus their efforts on aligning their policies and frameworks to those of the EU. Countries of the CIS region operate within different regulatory frameworks across the area, with varying degrees of market liberalization and state involvement.

Market development and other trends point to reviewing the definitions of postal services and the sector in the context of the gradual convergence of the postal sector and the delivery market. There are varying regulatory responses to this matter. Along with other developments, there is a need for further analysis and development of postal regulatory activities and capacity building in the next Congress cycle (DWP 27 – 27D05 and DWP 205), including the implementation of PRP projects to support member countries in their postal reform efforts.

Economic impact of the postal industry

Given this context, the postal sector is a vital economic driver in the Europe and CIS region and contributes significantly to employment, trade, logistics efficiency and financial inclusion.

The postal industry has a significant contribution to GDP by facilitating domestic and international trade. Postal networks support SMEs by enabling affordable shipping solutions, ensuring business connectivity and expanding market reach. Efficient postal services also play a critical role in cross-border trade, particularly within the EU, where harmonized regulations facilitate smooth logistics operations. Postal infrastructure services, acting as a key enabler for numerous economic activities and transactions, directly or indirectly contribute to 9% of GDP in EU countries, against a global average of 7%.¹

For CIS countries, postal networks act as essential trade facilitators, particularly in areas where private courier services are limited. The modernization of customs clearance procedures (including online customs declarations), the possibility of advance payment of customs duties, and the introduction of digital tracking systems are expected to improve efficiency in DOs in the region.

The postal industry employs around 2 million people across Europe and CIS, providing jobs in mail handling, logistics, IT, customer service and management, among other positions. The current essential shift towards automation and digitalization is reshaping job requirements, with increasing demand for tech-savvy employees. While some traditional postal jobs are declining, new opportunities in data management, e-commerce logistics and financial services are emerging.

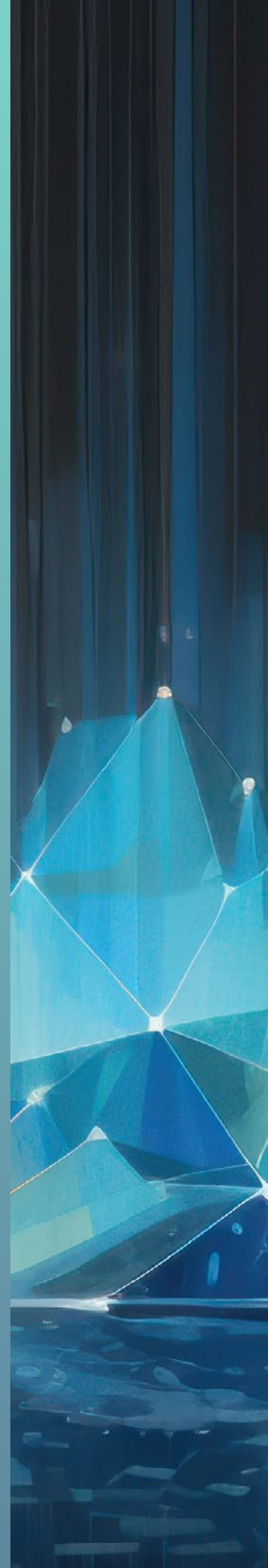
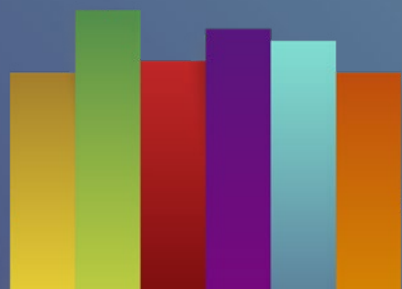
The surge in e-commerce has significantly boosted postal revenues, particularly in Europe where online shopping is deeply integrated into consumer behaviour. DOs from countries such as France, Germany, Italy, Spain and the UK have developed postal services that collaborate with major e-commerce platforms like Amazon, Temu and Alibaba, among others, to optimize delivery networks. The rise of same- and next-day delivery services has led to increased investments in sorting technology, automated fulfilment centres and smart delivery systems.

In CIS countries, e-commerce is expanding rapidly, with Kazakhstan and the Russian Federation leading the way. The demand for reliable parcel delivery services has prompted DOs to modernize their logistics infrastructure. However, challenges such as inefficient cross-border customs procedures and last-mile delivery constraints still need to be addressed to maximize growth potential. For example, Russian Post provides different delivery options for time and place of delivery for customer convenience.

¹ State of the Postal Sector, 2023.

CHAPTER 3

EVALUATION AND LESSONS LEARNED



EVALUATION OF REGIONAL PROJECT IMPLEMENTATION

The RDPs for 2022–2025 were fully aligned with the UPU development cooperation strategy for the Abidjan cycle. With the support and collaboration of regional partners (restricted unions and regional organizations), the UPU International Bureau implemented various activities during the 2022–2025 cycle, for the benefit of member countries.

The first year of the cycle (2022) was devoted mainly to the development of the RDPs and the preparation and formulation of the projects stemming from these plans. In contrast, the second year (2023) focused on implementation, whereby some of the formulated projects were launched and rolled out. Years 3 and 4 continued in this direction, with several significant activities scheduled for member countries, such as the Regional Strategy Forum (2024) and the Europe and CIS Postal Leaders Forum (2025).

As of December 2022, four regional projects were planned and formulated. All of the projects were implemented by December 2025. As part of the development cooperation strategy for the 2022–2025 cycle, a total of 87 cooperation activities were planned, associated with projects of interregional, regional and/or national scope.

The concept of regionalization started to gain traction as a part of the regional approach pursued through the UPU regional office network. In the region, the UPU regional offices in Tbilisi, Georgia, and Ankara, Türkiye, have enhanced the focus on regionalization, promoting the concept among DOs, regulators and ministries in Europe and CIS throughout the cycle. This has been further reinforced through cooperation with the regional restricted unions – namely, the European Committee for Postal Regulation of the European Conference of Postal and Telecommunications Administrations (CEPT–CERP), the Regional Commonwealth in the Field of Communications (RCC) and the Association of European Public Postal Operators (PostEurop).

The regional approach, as implemented through the RDPs, is a primary tool for all field activities supporting developing countries, taking into account the specific needs of beneficiary countries of the region. As such, one of the objectives of the Europe and CIS Programme at the UPU International Bureau has been to enhance the approach during the 2022–2025 cycle and continue it through to the 2026–2029 cycle to consolidate the progress achieved. Some of the UPU field activities have been also supported by regional stakeholders and donor member countries through joint funding of activities and the provision of technical experts, as well as logistical

support from countries that have hosted regional events. Cooperation and partnership are therefore another important pillar for the Europe and CIS Programme.

In support of DOs and member countries, and following the great success of the Postal Leaders Forum concept developed in 2023, the Regional Postal Leaders Forum took place in Baku, Azerbaijan, in 2025 with the participation of around 150 senior leaders from over 35 countries. Attendees included C-level executives and representatives and experts from ministries, industry, technology providers, e-commerce companies, restricted unions and other stakeholders in the Europe and CIS region. The agenda for the three-day forum was inspired by and based on the main pillars of the RDP for 2026–2029. The partnerships forged as a result of this gathering – not only among DOs but also between DOs and private sector partners – provide new opportunities for growth and collaboration in the sector.

As part of the preparatory actions for the 28th UPU Congress in Dubai, the Europe and CIS Programme, in cooperation with the restricted unions and International Bureau directorates, organized a series of coordination roadshows and masterclasses between May and July 2025 to ensure government authorities, regulators and DOs were conversant both with the logistical arrangements of the Congress, as well as the content to be discussed. Aligned to this, the programme was involved in the meeting organized by the International Bureau for ambassadors and permanent representatives of developing member countries in Berne in July 2025.

Under the framework of cooperation and partnership agreements, the International Bureau also participated in several events organized by restricted unions in the region and by other organizations at the regional level. These joint actions provide access to regional forums and networks, allowing the UPU to share its vision of the postal sector. Relations with regional actors, particularly the restricted unions (CERP, RCC and PostEurop) are key to supporting cooperation and development activities. The Europe and CIS Programme has organized regular meetings with the restricted unions throughout the cycle in order to continue enhancing coordination and foster cooperation with them. It intends to continue with this approach for the 2026–2029 cycle.

For the 2022–2025 cycle, the International Bureau initiated a whole array of activities, including reviewing and developing domestic policies in the region – through which two beneficiary countries have benefited from ad hoc missions. On the postal regulation front, more than 300 participants from regulatory authorities were trained, gaining valuable expertise in core areas of postal regulation.

The IPDP methodology has allowed the International Bureau to successfully engage with governmental authorities and national actors involved in developing the postal sector, in order to implement postal sector modernization projects that include support for digitalization activities at national level.

For the 2026–2029 cycle, the Europe and CIS Programme will continue to engage with national authorities for more coordinated actions to review postal policies and implement regulatory frameworks to develop the postal sector.

In continuation of the efforts to respond to postal emergencies and in order to provide technical assistance in DRM and disaster preparedness, the first regional workshop on DRM was held in the region in 2024, representing a milestone for the programme.

CHALLENGES AND LESSONS LEARNED

A number of lessons learned can be noted from the implementation and deployment of programme activities over the 2022–2025 cycle:

Effective regional cooperation – with restricted unions and regional partners and organizations – has proven essential for the successful implementation of RDP activities, together with the support of the UPU regional offices in Tbilisi and Ankara. Implementation of these activities has enabled the alignment of regional initiatives with the 2022–2025 development cooperation strategy.

High engagement and participation from DOs, regulators and ministries in regional activities has been substantial. Events like the Regional Strategy Forum in 2024 and the Europe and CIS Postal Leaders Forum in 2025, together with large regional technical meetings, have fostered strong partnerships and collaboration.

Comprehensive training under capacity-building programmes for regulatory authorities and the development of a detailed regulatory framework have been successful in enhancing expertise and consistency in postal regulation.

Postal sector digitalization and modernization, where the IPDP methodology enabled effective engagement with governmental authorities, has led to the implementation of postal sector modernization activities.

The first regional workshop on DRM and disaster preparedness emphasized the need for continuous capacity building and the sharing of best practices in this area.

Preparations for Congress strengthened regional engagement, providing essential readiness for the 28th UPU Congress in Dubai. Aimed at government authorities, operators and regulators, to ensure they were well informed and kept up to date for the Congress, these initiatives reinforced the effectiveness of the previous work carried out by the different stakeholders.

Various challenges can be highlighted alongside these lessons learned, which can also be taken into consideration for the new 2026–2029 cycle. In the following section, the most significant challenges will be analyzed:

Delays in activity implementation:

Despite a high execution rate, some planned activities needed to be rescheduled owing to constrained resources, administrative hurdles and the need to coordinate different member countries and International Bureau specialists. Good examples in this area can be found in the planning and implementation of ad hoc missions to the countries involved.

Resource allocation: The Europe and CIS Programme operates with a comparatively modest budget allocation relative to programmes serving beneficiary countries in other parts of the world. The need to combine joint funding, technical experts and logistical support has raised some challenges.

Coordination among stakeholders: Effective coordination among various stakeholders, including DOs, regulators and ministries, is crucial. Ensuring seamless communication and cooperation can be challenging, especially owing to the different interests and points of reference of each stakeholder.

Inconsistent regulatory frameworks: Variations in national policies and regulations can pose challenges to uniformity. Although activities have enhanced regulatory expertise, gaps remain in the harmonization and implementation of policies across member countries.

DRM: The implementation of DRM is still in its early stages in the region, and further efforts and focus are required to implement response frameworks.

Digital divide in postal modernization for UPU beneficiary countries: While digitalization efforts are progressing, some least developed countries and landlocked developing countries in the region face challenges in accessing technological resources, funding and expertise.

KEY RECOMMENDATIONS

Having taken into full consideration the above-mentioned lessons learned and challenges, the Europe and CIS Programme should follow a set of recommendations for the next cycle to bring focus to the axes of the programme for the coming years. These recommendations should be monitored throughout the cycle, under the leadership of the UPU:

Continue strengthening regional partnerships and regionalization efforts by fostering collaboration with regional stakeholders to ensure the sustainability of regional activities and initiatives. Collaboration between the UPU regional offices in Tbilisi and Ankara and the restricted unions must be promoted to further streamline field activities.

Expand activities to other fields by increasing the scope for regulatory authorities, ministries and DOs, with a focus on emerging areas such as digitalization, quality performance or DRM. Continue training activities for regulatory authorities to enhance expertise in postal regulation.

Leverage the PRP by continuing to explain the methodology to engage national authorities and players, and expand its application to new areas and projects to further modernize the postal sector.

Enhance DRM by institutionalizing training programmes as a part of capacity building for the postal sector and establish a network of regional experts from member countries.

Maintain regular meetings and consultations with restricted unions to ensure continued coordination and a collaborative environment for the cycle.



By integrating these lessons learned and implementing the key recommendations, the Europe and CIS Programme can further strengthen its role in fostering sustainable postal sector development, ensuring that regional efforts remain aligned with global strategies and emerging sectoral needs.

PANDEMIC RESPONSE

The COVID-19 pandemic significantly impacted the postal sector across the world. The sector faced unprecedented challenges, including disruptions in international and domestic supply chains, increased demand for parcel deliveries, and the need to implement health and safety measures for employees and customers. Among the essential services, the postal sector played a critical role in ensuring communication, delivery of goods and public service continuity. In this context, DOs had to quickly adapt operations to continue serving communities.

Additionally, DOs worldwide faced substantial disruptions owing to border closures, reduced air freight capacity and staff shortages, leading to delays and changes in delivery processes. On the other hand, a notable shift from letter mail to parcel deliveries as e-commerce surged during lockdowns was seen. As a whole, the sector experienced financial strain owing to increased operational costs and to the fluctuations described above.

Many DOs, supported by government resilience plans for the pandemic, started introducing some mitigations and adopting innovative measures, such as contactless delivery and digital signatures, temporary suspension of certain international routes or mail types, use of alternative transport means, and the development and implementation of health and safety protocols. Digital transformation was accelerated, with an expansion of digital services. From online postage and customs forms to mobile apps for tracking items, measures were implemented to help reduce in-person contact and improve service efficiency.

During the pandemic, postal services experienced record parcel volumes, with an increase of around 25%, requiring a scaling-up of sorting, transport and last-mile delivery capacities. DOs, like La Poste (France), reported year-on-year parcel volume increases of 30 to 60%. In contrast, this period also saw a sharp decline in revenue from traditional letter mail. Generally speaking, the support provided by governments varied by global region, affecting recovery trajectories.

Different approaches were applied by the postal sector within the Europe and CIS region to respond to the situation. European DOs benefited from relatively strong institutional support and digital infrastructure. Within the EU, the European Commission facilitated coordination among national DOs and Customs to maintain cross-border flows and some green initiatives, while pandemic response guidelines were drafted by PostEurop. DOs showed a great capability for adaptation, such as by deploying predictive analytics to manage volumes. Moreover, Deutsche Post, for example, created a special e-commerce platform for small businesses; La Poste (France) and Correos (Spain) offered their postal logistics network to deliver personal protective equipment; and Poste Italiane used drones and smart lockers to reduce contact.

On the other side, governments introduced policies to support the postal sector, including financial aid and regulatory flexibility, as the pandemic tested the flexibility of the USO framework. Indeed, some countries temporarily adjusted their obligations to maintain operations.

While innovation and policy support ensured the implementation of mitigating measures in the Europe area, the CIS region faced operational challenges and its resilience was tested. Despite these challenges, postal services in CIS countries focused on maintaining continuity, especially for essential deliveries.

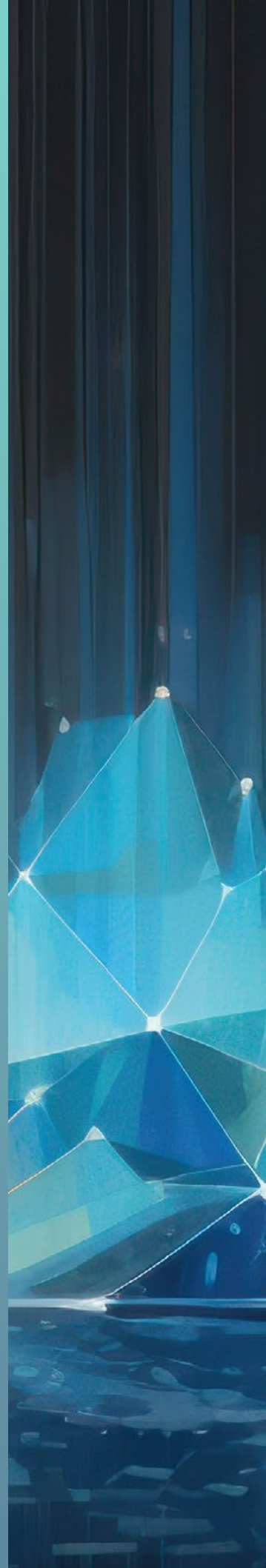
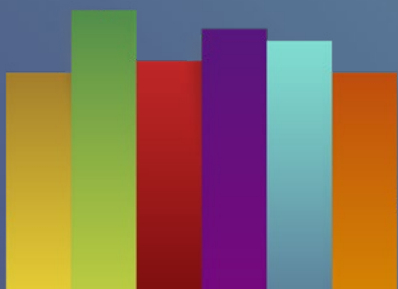
Limited digital services and rural coverage posed challenges for scaling up delivery. However, some DOs introduced contactless delivery and expanded digital service offerings, as well as strengthening partnerships with e-commerce players to expand their courier services.

The involvement of governments was also critical to supporting postal operations, especially in remote areas. In this regard, coordination between the RCC and countries in the region to share best practices was key.

Despite limited resources, many DOs were able to implement temperature checks, distribute personal protective equipment, and reorganize shifts to reduce density in postal facilities.

The postal sector proved indispensable during the COVID-19 pandemic. DOs around the world – and especially in the Europe and CIS region – adapted rapidly to sustain essential services and demonstrated resilience and adaptability. While the pandemic exposed vulnerabilities, it also accelerated innovation and transformation. Building on these lessons is vital for a more resilient, inclusive and future-ready postal sector.

CHAPTER 4
**DEVELOPMENT
COOPERATION
FRAMEWORK FOR
THE 2026–2029
CYCLE**



AREA 1

CONSOLIDATION OF THE REGIONALIZATION PROCESS – UPU FIELD PRESENCE, RDPS AND COOPERATION WITH RESTRICTED UNIONS

The UPU will seek to increase visibility and regional representation as a key objective for the 2026–2029 cycle. To this end, different activities will be organized and deployed.

Reliance on the expertise of the regional offices in Ankara and Tbilisi will focus on areas such as project management and efficient communication between countries, the restricted unions (or “regional unions” as they will soon be called) and the International Bureau. In order to reach this level, models focusing on autonomy and flexibility under the International Bureau’s coordination will be applied.

DWP 205 will help to decentralize UPU-led actions in the field in order to strengthen the Union’s regional and global activities and ensure a greater local influence. In this regard, the role of the UPU regional offices in promoting, implementing and managing regional UPU projects and the contribution of the restricted unions in supporting those activities and developing their own projects are also recognized for their importance in maximizing implementation efficiency, effectiveness and impact.

Another important focus for the regional offices will be related to the formulation and implementation of the RDP in cooperation with member countries, the restricted unions and other partners in order to ensure that projects and activities align with regional and national priorities.

The role of the regional offices will be strengthened by enhancing expertise, particularly in key areas such as project management and implementation, and by guaranteeing efficient and responsive communication between the offices and the International Bureau. Greater flexibility and autonomy in the field presence model will be promoted in order to quickly adapt to changing conditions and emerging needs. This includes cooperating with restricted union teams in the region, which are capable of rapidly responding to events and opportunities.

In addition, the regional offices will work to strengthen partnerships with governments, restricted unions, international and regional organizations and other stakeholders of interest to ensure that projects align with regional and national priorities and have the greatest possible impact.

The regional offices will also support resource mobilization, by taking advantage of the UPU’s closer proximity to member countries, regional development

banks and other development partners in the region to help to strengthen the postal network. Enhanced coordination across sectors and regions will be prioritized to minimize duplication, ensure strategic consistency, and maximize the efficient use of resources.

A key consideration to consolidate the regionalization approach and also respond to the needs raised by restricted unions is the completion of a mid-term assessment of the RDP in view of the evolving dynamics within the Europe and CIS postal landscape.

AREA 2

DEVELOPMENT COOPERATION ACTIVITIES

In the context of fostering inclusive development across the region, cooperation activities play a pivotal role. These initiatives primarily focus on training and awareness-raising activities, coupled with the procurement of essential equipment and the provision of targeted advisory services. Through this comprehensive approach, the activities aim to support member countries in strengthening their capacity to deliver universal postal services, thereby helping to bridge existing development gaps within their national postal systems.

Development cooperation activities will be implemented within the framework of the strategy and its business plan, including the relevant DWPs and their respective deliverables. To successfully implement these initiatives, excellent coordination is essential, as synergies among different areas of intervention must be ensured to maintain consistency, efficiency and effectiveness through an integrated, transversal and cross-functional approach.

The proper assessment of needs and the establishment of strong links with the regional priorities of the overall cooperation policy will also shape the alignment of capacity-building interventions (DWP 27 – 27D05) in the Europe and CIS region, prioritizing targeted and tailored capacity-building activities. Such alignment ensures that the support provided is both relevant and responsive to the specific challenges faced within the region. The formulation of country-specific outputs and outcomes remains at the core of this work, with activities and applications tailored to deliver tangible and measurable results.

Furthermore, these activities will be systematically embedded within the strategy’s framework and business plan, ensuring coherence with the broader cooperation agenda. The integration of DWPs and their respective deliverables will reinforce a structured, goal-oriented approach to implementation. This will be carried out in a way that fosters cross-functional synergies and enhances operational efficiency, strengthening the overall impact of capacity-building efforts.

Development cooperation projects lay emphasis on South–South and triangular cooperation to ensure the effective implementation of technical cooperation projects which will help member countries to guarantee universal postal services and reduce development gaps in postal operations. This will be achieved by procuring relevant equipment, training staff, raising awareness, facilitating technical cooperation and partnerships, and providing advisory services.

The cross-cutting nature of the UPU’s development cooperation projects in the field calls for greater coordination to ensure consistency between the different areas of intervention and to avoid duplication between projects and inefficient dispersion of resources.

AREA 3

DISASTER RISK MANAGEMENT AND EMERGENCY ASSISTANCE

Activities and actions that support DRM, climate resilience and social inclusion are another central focus in the RDP for the Europe and CIS region for the 2026–2029 cycle. Owing to recent experiences of crisis (e.g. natural disasters, supply chain shocks), the Europe and CIS Programme will continue to scale up and implement activities aimed at developing and introducing DRM skills and tools into the national postal networks and strategies of member countries, in order to prepare them to respond effectively to natural disasters.

The programme will carry forward a range of initiatives, including awareness-raising, prevention, mitigation and preparatory activities such as risk assessments, emergency response plans, and training for postal staff. By embedding capabilities within national postal frameworks, the aim is to cultivate a culture of preparedness and adaptability in the region.

One of the main interests of the development cooperation approach in this area, from a regulatory perspective, will be the development and implementation of a regional model DRM framework, which will seek to address and provide the following:

A harmonized regional definition of the concept and practice of DRM as it relates to the postal sector and how, from a management and operational perspective, it will combine mitigation and preparedness with response and recovery;

Recommended procedures for responding quickly to, and recovering rapidly from, disruptions and emergencies affecting national and regional postal sector infrastructure, expressed as a framework of regulatory requirements;

Recommended operational measures for incorporating the concept and practice of disaster risk reduction, focusing primarily on pre-disaster mitigation and preparedness in the postal network, as a component of the DRM regulatory framework mentioned above;

Identification and promotion of international best practices in DRM in the postal sector;

A harmonized regional approach towards incorporating the entire risk management lifecycle (risk prevention, mitigation, preparedness, response and recovery) in the regulatory requirements applicable to licensed DOs in the Europe and CIS region.

Enhanced risk management strategies should expand to cover both global climate-related risks and region-specific political and reputational risks, with targeted modules on scenario planning and business agility.

REGIONAL OBJECTIVES AND ALIGNMENT OF PRIORITIES

It is important and useful to systematically align the RDP for the Europe and CIS region for 2026–2029 with the region’s rapid policy development panorama, as reflected in collaborative UPU and national strategies. Therefore, the RDP has been developed following a strategic initiative involving both the UPU regional offices in Ankara and Tbilisi and the regional restricted unions, aimed at working on different aspects of logistics, cybersecurity, regulatory compliance, and sustainability within the region over the next cycle. The whole contribution has been designed to address the evolving needs of the postal sector and to ensure that the region remains competitive and efficient in the face of emerging challenges.

The RDP includes three main pillars based on the supply chain (postal operations and logistics), innovation and digitalization. Regulation and policy aspects are cross-cutting elements for the pillars and must be also considered owing to the fast evolution of the postal market, which in turn leads to changing regulatory frameworks too. On the other hand, emerging policy objectives, such as sustainability, digital economy, government services and changing customer behaviour also present opportunities.

In terms of the UPU Strategy 2026–2029, the RDP for the Europe and CIS region 2026–2029 is fully aligned with the goals and outcomes therein.

Postal operations and logistics

Enhancing the cross-border postal supply chain is a top priority for the member countries of the Europe and CIS region, in order to address the ever-increasing security and customs requirements. On the other hand, there is strong demand for the exchange of best practices among member countries in the region, such as on parcel lockers, the deployment of alternative-energy delivery fleets and more.

This pillar is fully aligned with goal 1 of the Dubai cycle UPU Strategy, specifically with strategic outcomes 1.2 and 1.3:

In relation to the supply chain (transport/security/customs) (DWPs 05, 06 and 07, in correlation with DWP 27 – 27D09, 27D10 and 27D11), the plan emphasizes the importance of keeping mail moving through a more flexible and secure mail logistics network. It also highlights the need to develop new tools and solutions, such as the postal air waybill, updated and expanded security certification, and the delivered duty paid (DDP) solution, as well as ensuring compliance with the latest regulatory and operational requirements. These include the EU's Import Control System (ICS2), aviation security and EAD requirements, and those established by global organizations such as the International Civil Aviation Organization (ICAO), World Customs Organization (WCO) and International Air Transport Association (IATA). This involves adhering to updated regulations and undertaking training in processes to enhance efficiency and reduce delays in the delivery of goods (DWP 27 – 27D05). By simplifying and digitalizing logistics procedures, the plan aims to improve overall customer experience and service.

Green delivery practices (DWPs 03, 24 and 36, in correlation with DWP 27 – 27D06) are a key focus of the plan, with an emphasis on implementing eco-friendly logistics methods that reduce environmental impact while enhancing operational efficiency. This includes adopting sustainable transportation solutions, optimizing delivery routes to lower carbon emissions, and integrating renewable energy sources. By streamlining final-stage logistics with sustainable technologies and adaptive routing, the plan aims to create a supply chain that is not only environmentally responsible but also more accessible, cost-effective and efficient. These efforts will enhance service reliability, reduce emissions, and ultimately elevate customer satisfaction by ensuring faster and more sustainable deliveries.

Regional DRM workshops (DWPs 24 and 101, in correlation with DWP 27 – 27D21) are planned to improve regional capabilities through training and development. These workshops will focus on building resilience and preparedness for natural disasters and other emergencies. By equipping regional DOs with the necessary skills and knowledge, the plan aims to mitigate the impact of disasters on logistics operations and ensure continuity of services.

Accountancy and remuneration systems (DWPs 17 and 21, in correlation with DWP 27 – 27D15) are being developed to improve financial management within the postal sector. This involves updating accounting practices, implementing fair and transparent remuneration policies, and ensuring that financial operations are aligned with international standards. Improved financial management will contribute to the overall stability and sustainability of the sector. Training on this matter is an important issue in this RDP for member countries in the region (DWP 27 – 27D05).

Optimizing operations and logistics through automation and AI (DWPs 01, 02, 03, 10 and 11, in correlation with DWP 27 – 27D06 and 27D18) is crucial for enhancing efficiency and reducing operational costs. This plan aims to support member countries in becoming familiar with advanced technologies such as robotics, AI, and postal addressing tools integrating geographical information systems and machine learning, in alignment with the applicable standards and the integrated plans related to physical products, remuneration and quality. By incorporating these elements, member countries and DOs can enhance operational efficiency while adhering to industry regulations, improving processing times, minimizing human error and ensuring high service quality.

As shown in the diagram below (section 2.4), these topics are based on the following cross-cutting foundations:

The development of e-commerce (DWPs 01, 02, 10, 11, 21, 25 and 26, in correlation with DWP 27 – 27D07) among all market players is a cornerstone of the RDP, driving operational efficiency and fostering seamless global trade. Strategic service differentiation and the integration of e-commerce logistics enhance the efficient exchange of goods and documents while addressing accessibility, reliability and scalability challenges. Strengthening capacity building ensures postal networks have the infrastructure and expertise to manage increasing transaction volumes effectively.

The Quality of Service Fund (QSF) (DWPs 10 and 11, in correlation with DWP 27 – 27D12) can be used to improve service quality and support the implementation of key initiatives on the postal operations/logistics pillar. Activities facilitated through the QSF help drive continuous improvement for member countries.

The RDP will encourage member countries to work on defining services offered (DWPs 15 and 18, in correlation with DWP 27 – 27D13 and 27D18), in order to provide clarity to customers. One of the benefits of defining services is that it can contribute to enhanced customer satisfaction and can drive service adoption. This is due to the aforementioned evolution in the postal market, which is also compelling member countries in the region to seriously consider and undertake to revise concepts and definitions, ensuring that postal system development is not hindered.

The adoption of paper-free processes in the supply chain represents a transformative shift towards greater efficiency, accuracy and speed. It is especially critical in the logistics and postal sectors. In fact, accelerating the introduction of paper-free processes in logistics and postal operations has become a strategic imperative. Paper-free operations not only improve execution of day-to-day tasks; they also lay the groundwork for integrating advanced digital tools, while supporting leaner and more agile systems to respond quickly to market demands.

Goal 2 of the Dubai cycle strategy centres around the above-mentioned topics, with strategic outcome 2.2 representing the target milestone for member countries.

Innovation

Innovative development in the postal sector must go hand in hand with meeting other requirements and achieving digital and trade inclusion as part of broader social and economic policy goals. As the industry evolves to meet the demands of the digital age, member countries and their DOs are increasingly expected to adopt cutting-edge technologies and new business models. However, without explicit inclusion measures, digital transformation frequently benefits easier-to-reach populations, inadvertently deepening inequalities and the digital divide, especially across the urban–rural, gender and age dimensions. Digitalized postal infrastructure, through its digitally enabled in-person services, can help implement an “inclusion by design” approach that would leave no one behind. At the same time, reducing environmental impact has become a challenge in recent years. Investment in greener delivery methods, optimizing logistics to lower emissions, and promoting circular economy practices are just some examples of actions undertaken in this area. Countries in the region have found that balancing innovation with sustainability is not just a regulatory necessity, but a strategic imperative for ensuring the long-term relevance and resilience of the postal sector.

Service diversification (DWPs 01, 02, 15, 22, 23, 24, 25 and 26, in correlation with DWP 27 – 27D06 and 27D07) aims to expand the postal sector’s capacity to respond to evolving market demands. By strategically broadening the product portfolio and optimizing logistics, the objective is to enhance service efficiency, improve accessibility and drive volume growth. This approach entails introducing new products and services, refining existing offerings for higher customer retention, and leveraging innovation to address emerging market opportunities. The coexistence of new services alongside the USO and traditional postal offerings must be seamlessly integrated to ensure operational efficiency and sustained relevance in a competitive landscape. Furthermore, strengthening logistical capabilities is essential to support service expansion and accommodate increasing demand. Investments in streamlined distribution networks, enhanced delivery infrastructure, and data-driven operational strategies will ensure that growing service volumes are managed effectively, leading to improved customer satisfaction. By prioritizing a robust product portfolio and efficient logistics, this diversification initiative aims to drive substantial growth while reinforcing the postal sector’s commitment to quality and reliability.

Cooperation with stakeholders (DWPs 23, 27, 32, 34 and 303, in correlation with DWP 27 – 27D13, 27D16 and 27D18), including platforms and other partners, is vital for improving service delivery. The plan emphasizes the importance of building strong partnerships and fostering collaboration to access markets and enhance the efficiency and effectiveness of logistics operations. This includes working with e-commerce platforms, regulatory bodies and other stakeholders to streamline processes and improve service quality, in full alignment with strategic outcome 2.4.

Standards (DWPs 05, 08, 10 and 11, in correlation with DWP 27 – 27D13) ensures consistency and quality across operations. This involves member countries correctly implementing current or recently developed UPU standards for new business models, and striving for alignment with international standards and best practices to ensure that services are delivered in a consistent and reliable manner.

The Europe and CIS Programme could work with countries in the region to outline key reform milestones over the next decade (DWPs 15, 18 and 19, in correlation with DWP 27 – 27D16), which would serve as a guide to explain key reforms and challenges and to achieve strategic objectives.

The UPU Online Solution for Carbon Analysis and Reporting, known as OSCAR (DWPs 18 and 24, in correlation with DWP 27 – 27D17) is being developed for better statistical analysis and environmental improvements. This involves leveraging the OSCAR platform to collect, analyze and report data on various aspects of logistics operations. The RDP will fully support the use of data-driven insights to identify areas for improvement, track progress and make informed decisions to enhance service quality and environmental sustainability.

Innovation through AI and blockchain technologies (DWPs 22 and 301, in correlation with DWP 27 – 27D18) will advance logistics and operations to optimize routeing, manage security risk assessments, predict demand, and automate decision-making processes, while ensuring the integrity and security of transactions. Moreover, the possibility for AI to support the development of new models of regulation for the postal services market could be explored. Member countries in the region need to be aware of these new topics.

Use of technologies in logistics (DWPs 01, 02, 05, 10, 11 and 22, in correlation with DWP 27 – 27D06 and 27D18) is an evolving issue with great potential for member countries of the region, such as the adoption of advanced tracking and monitoring systems, the use of drones for last-mile delivery, and the implementation of smart logistics solutions. By embracing new technologies, the plan aims to enhance the efficiency and reliability of logistics operations based on tools and digital systems that facilitate the growth and sustainability of postal services, including direct marketing, in a cost-effective and environmentally friendly manner.

The development of sustainable infrastructure is necessary to adapt to climate change and ensure the resilience of logistics networks (DWPs 01, 02, 10, 11, 24, 26, 27 and 101, in correlation with DWP 27 – 27D21). This area also involves conducting DRM activities, promoting the use of green building materials, and implementing energy-efficient solutions. The goal is to create a logistics network that is both sustainable and resilient to the impacts of climate change.

These topics are based on the following cross-cutting foundations:

Exchanging best practices (DWPs 24 and 25, in correlation with DWP 27 – 27D05 and 27D17) among DOs, ministries and regulators fosters knowledge sharing and provides the opportunity to discuss challenges and identify solutions. The RDP aims to promote best practices and drive continuous improvement in the regional postal sector, in line with strategic outcome 1.3.

Capacity-building and training activities (DWPs 22 and 23) can be conducted for policymakers and DOs, and the role of postal operators in increasing the digital and trade inclusion of MSMEs, women and entrepreneurs through the postal sector can be promoted.

Working on a system that could provide real-time data and insights on various aspects of the postal sector, to reflect the current state of the postal sector (DWPs 15 and 17, in correlation with DWP 27 – 27D17), can aid better decision-making. Work in this area could support informed decision-making and drive continuous improvement for member countries in the region.

Digitalization

Digitalization has become a central force shaping the way we operate, work and deliver value in an increasingly connected world. Indeed, digitalization is no longer optional, but strategically necessary. DOs, member countries and customers search for efficiency, agility and responsiveness provided in a sustainable manner. In this regard, paper-free processes also present as a foundational element of digitalization among postal players in terms of operations and logistics (accounting, customs clearance, data capture, etc.). However, digitalization involves other features which can be taken into account too, such as:

Addressing cyber risks in the supply chain (DWPs 22 and 301, in correlation with DWP 27 – 27D18) is critical for overall risk management. The RDP intends to work to enhance cybersecurity and protect against cyber threats. Member countries need to be aware of robust security protocols, risk assessments, and the importance of providing training to staff on cybersecurity best practices (DWP 27 – 27D05). By addressing cyber risks, the plan aims to ensure the security and integrity of logistics operations.

Enhancing cybersecurity for e-commerce and cross-border transactions (DWPs 01, 02, 05, 06, 07, 10, 11, 22 and 301, in correlation with DWP 27 – 27D07, 27D10 and 27D18) is essential for ensuring protection and stability in digital trade. This involves implementing secure payment systems, safeguarding customer data, and maintaining compliance with international cybersecurity standards. Strengthening these measures also reinforces the security of digital supply chains, mitigating risks such as fraud, data breaches and operational disruptions. As e-commerce continues to expand globally, robust cybersecurity safeguards in the region are crucial to maintain seamless transactions, protect online marketplaces, and ensure customer trust. The RDP aims to build confidence in e-commerce and cross-border transactions.

Ensuring data quality, security and privacy (DWPs 22 and 301, in correlation with DWPs 05 and 08 and DWP 27 – 27D18) safeguards information and protects against data breaches. The RDP intends to work on activities linked to these topics to protect sensitive information and maintain customer trust.

Anti-fraud mail tools (DWPs 01, 02, 05, 06, 07, 10 and 11, in correlation with DWPs 05 and 08 and DWP 27 – 27D10) are of great importance for member countries to protect themselves against fraudulent activities. Advanced detection and prevention

measures, regular monitoring, and sharing of best practices are key for a strong defence against cyber threats. In this regard, illicit goods or counterfeit mail, although found in the supply chain, may also have an impact and relevance under this pillar.

These topics are based on the following cross-cutting foundation: By advancing drafting guidelines and best practices for cybersecurity in the postal sector (DWPs 22 and 301, in correlation with DWP 27 – 27D13 and 27D18), the RDP aims to enhance the security and resilience of the sector.

Common basis for the three main pillars

In a highly competitive environment, member countries in the Europe and CIS region may face challenges in terms of market competition (DWPs 15, 17, 18 and 21, in correlation with DWP 27 – 27D16 and 27D19), which need to be addressed. This requires a competitive strategy that focuses on innovation, efficiency and customer satisfaction. Identifying and addressing the key challenges facing the postal sector, developing strategies to enhance competitiveness, and implementing initiatives to drive growth could be the focus of some of the activities to be developed in this area by the Europe and CIS Programme during the Dubai cycle. By addressing the challenge of market competition, the RDP aims to ensure that the postal sector remains competitive and sustainable.

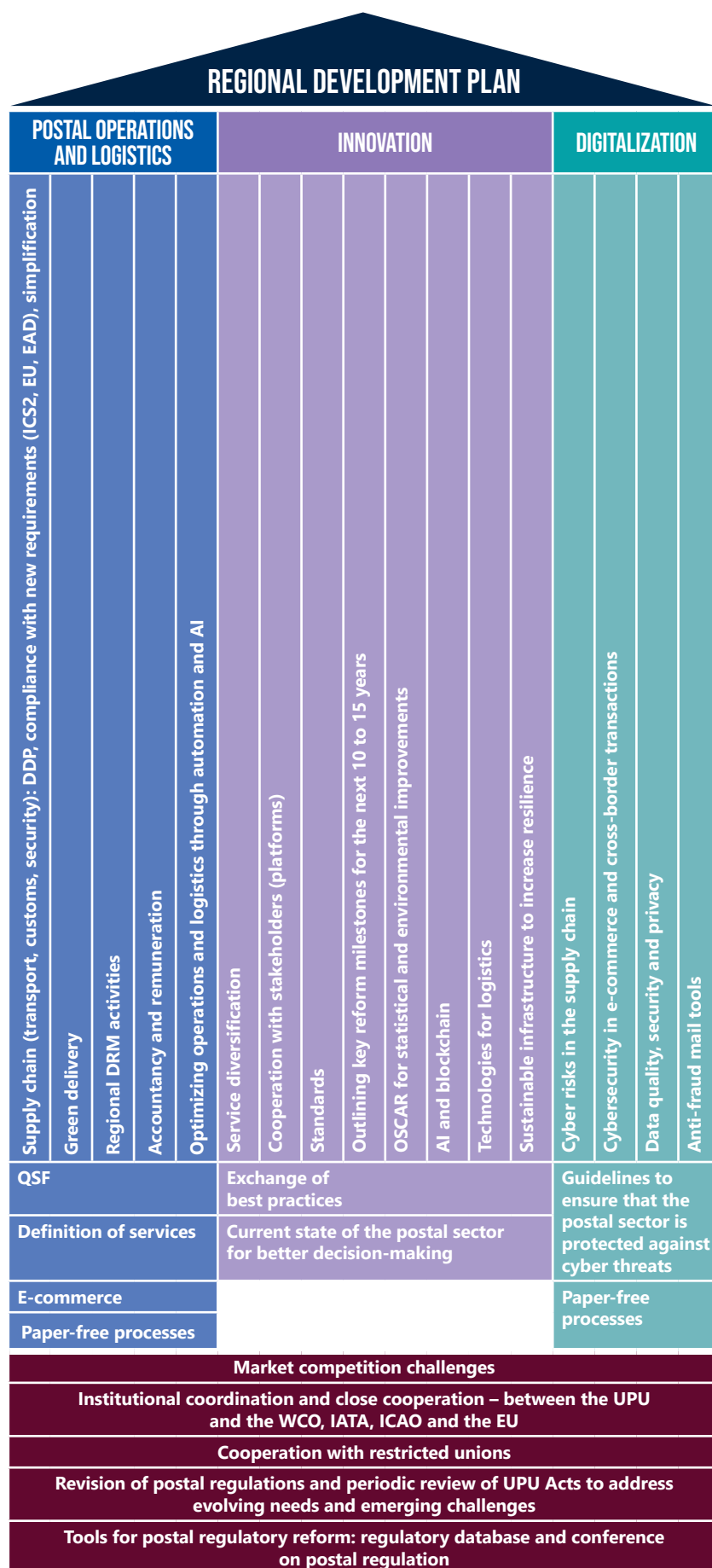
Revision of the UPU postal regulations (UPU Acts and Regulations) (DWPs 15 and 16, in correlation with DWP 27 – 27D13 and 27D14) will reflect current sector needs and address emerging challenges and evolving requirements. The Europe and CIS Programme will assist member countries in preparations for the POC and CA sessions during the cycle, as well as providing support ahead of the 2029 UPU Congress (DWP 16). These efforts will always maintain the aim of creating a supportive regulatory environment to promote innovation and growth, to meet goal 1 of the UPU Strategy 2026–2029.

Institutional coordination (DWP 27 and 32, in correlation with DWP 27 – 27D13, 27D14 and 27D19) will be pursued, including close cooperation between the UPU and entities such as the WCO, IATA, ICAO and the EU. This will also involve collaboration with restricted unions, aiming to address operational and regulatory issues among member countries by providing expertise in the region, coordinating efforts, and implementing joint initiatives. In particular,

this work will take place together with the UPU regional offices in Ankara and Tbilisi. Moreover, cooperation with academics and experts from the UPU Consultative Committee (i.e. from institutes, universities and consulting firms) can also be of great interest for the member countries of the region, in terms of market research and regulation, strategic planning and regulatory impact assessments (DWPs 19, 32 and 34).

Strengthening the role of regionalization and the UPU regional offices (DWP 27 – 27D04 and DWP 205) is a key aspect of the RDP. This involves enhancing the capabilities of the UPU regional offices in Ankara and Tbilisi, promoting the work of the UPU in the field, and ensuring the regional offices play a central role in the implementation of the plan. By strengthening the concept of regionalization, the RDP aims to enhance regional coordination and support the successful implementation of key initiatives. In this regard, DWP 27 focuses on meeting goal 3 of the Dubai cycle strategy, specifically outcome 3.2.

Member countries of the region have expressed their interest in tools for postal regulatory reform (in line with DWP 27 – 27D13). The scope of the revised IPDP covers this new context and the reality of the postal services market (DWPs 15 and 19). Careful assessment and rigorous analysis could be conducted with active engagement from members and stakeholders on emerging regulatory matters, in order to respond to member countries' needs and new trends in the market and society. The regulatory database, a centralized repository of regulatory requirements and standards, along with various events such as a conference on postal regulation (DWP 15), will serve as an inclusive platform each cycle for the exchange and sharing of knowledge, experiences and insights among member countries and stakeholders. These initiatives are critical to enhance the postal regulatory framework, improve transparency and facilitate better regulatory oversight.



COOPERATION MODALITIES AND FUNDING STRATEGY

The successful implementation and accomplishment of this plan will be based on an integrated cooperation model combining institutional partnerships, regional coordination and resource mobilization. In line with DWPs 27 and 205, regionalization will be pursued through the strengthening of regional offices, enhancing flexibility in field operations. Cooperation methods will continue to prioritize strategic partnerships with governments, regulators, DOs, restricted unions and international organizations, ensuring that activities reflect regional priorities and generate tangible impact.

Under the guidance of the Development and Cooperation Directorate, the UPU's regional programmes will serve as a single window for all technical cooperation activities. Regional offices will support coordination with the restricted unions, national authorities and development partners of the Europe and CIS region, to ensure alignment with regional priorities and efficient delivery.

The UPU will promote partnership-based implementation through collaboration with restricted unions, as well as with international financial and non-financial institutions and United Nations agencies. Priority will be given to South–South and triangular cooperation among the countries of the region, along with the pooling of regional expertise and the joint delivery of capacity-building initiatives and the regional expert pool mechanisms established in DWP 27.

Resource mobilization will be embedded in project design, drawing on a mix of regular budget funds, voluntary contributions and in-kind support. The goal is to secure predictable and diversified financing while fostering ownership by member countries.

In terms of funding strategy, the implementation of the RDP for the Europe and CIS region for the 2026–2029 cycle will require a robust, diversified and strategic approach to funding and resource mobilization. Therefore, the identification of opportunities linked to donor-funded regional development programmes that can be implemented through regional postal networks will be a central work item on the agenda.

Leveraging UPU development cooperation instruments

UPU technical assistance budgets:

Utilize regular UPU budgetary allocations to support core RDP activities and regional projects. For the entire 2026–2029 period, around 31.18 million CHF has been allocated globally to support the implementation of DWP 27 – comprising 22.31 million CHF from the regular budget and around 8.87 million CHF from voluntary contributions. The Europe and CIS region will benefit from a proportional share of these global resources, with funding distributed based on the scale of its projects and alignment with the regional priorities identified in this plan. Complementary financing will be sought through voluntary contributions, in-kind support and co-financing agreements with regional and international partners.

QSF: Target allocations to improve mail quality, operational efficiency and capacity building for beneficiary countries.

QSF Common Fund projects: Mobilize and coordinate multi-donor contributions under joint projects that align with the RDP objectives.

UPU Emergency and Solidarity Fund (ESF): Supported by regular and voluntary contributions, continue to use the ESF for rapid response in the event of natural disasters and emergencies.

Strengthening voluntary contributions from development partners

Engage possible contributors and development partners to co-finance regional flagship initiatives.

Forge partnerships with international financial institutions and bilateral agencies for larger-scale infrastructure and digital transformation projects.

Undertake joint initiatives with restricted unions and development partners.

Mobilizing domestic resources

Encourage governments to integrate postal sector development into national strategies for the digital economy and financial inclusion, allocating budgetary resources accordingly.

Promote the inclusion of postal sector funding within national development frameworks and budgets, encouraging governments to recognize postal modernization as a key component of digital and economic development policies.

Public-private partnerships (PPPs)

Foster PPPs through independent and/or private institutions to co-develop activities.

The UPU will adopt an integrated results-based budgeting and monitoring system to ensure transparent and accountable use of funds. All projects will include built-in evaluation components and follow the standardized project management framework established by the Project Management Office and the SIGA platform. Regular financial and implementation status reports will be submitted to the CA in accordance with DWP 27, deliverables 27D02 and 27D03.

CONCLUSION

The RDP for the Europe and CIS region outlines a strategic vision for building a modern, inclusive and resilient postal sector. With its work centred on three core pillars – postal operations and logistics, innovation and digitalization – the UPU, in cooperation with the restricted unions of the Europe and CIS region, seeks to reduce development disparities, promote digital and financial inclusion, and enhance the region's ability to navigate future challenges.

This plan demonstrates the dedication of the UPU and the restricted unions to ensuring that the region advances together towards sustainable and fair postal progress. It embodies a refreshed approach to cooperation rooted in proximity, innovation and shared accountability, helping the postal system remain a driver of connectivity and inclusive development throughout the region.



UNIVERSAL POSTAL UNION

International Bureau
Weltpoststrasse 4
3015 BERNE
SWITZERLAND

Tel: +41 31 350 31 11
E-mail: info@upu.int