

# UNION POSTALE

MOVING THE POSTAL SECTOR FORWARD SINCE 1875 | SPRING/SUMMER 2026



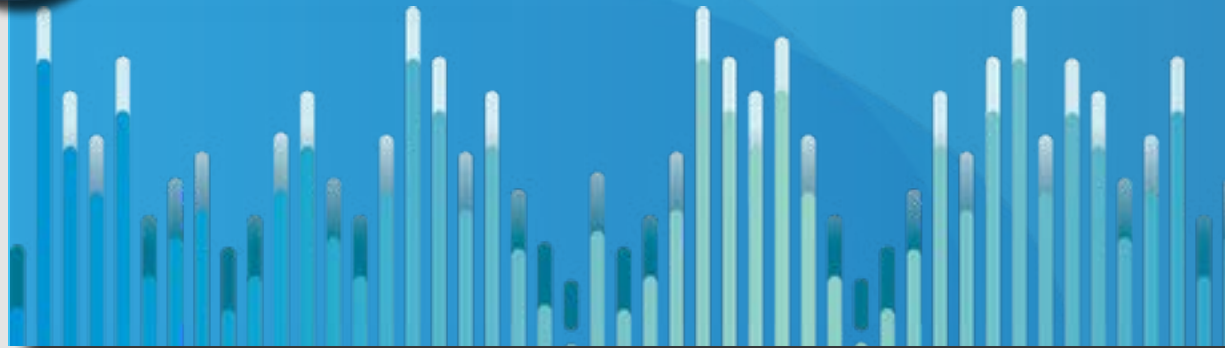
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**READYING  
THE NETWORK  
FOR A REGULATORY  
OVERHAUL**



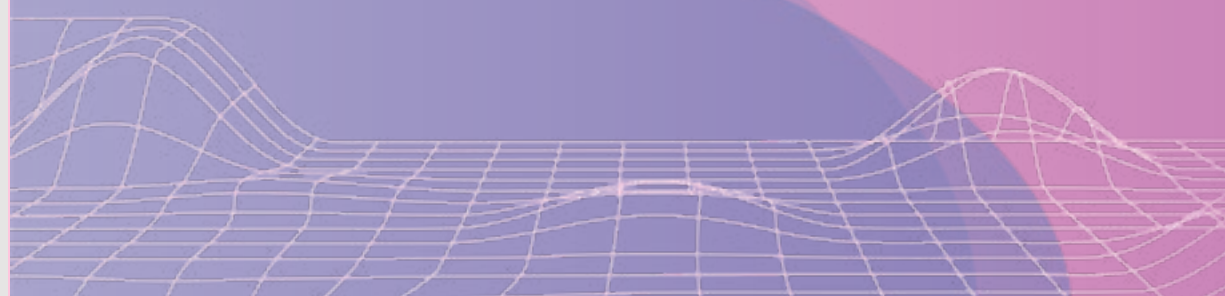
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## UNION POSTALE

UNION POSTALE is the Universal Postal Union's flagship magazine, founded in 1875. It is published quarterly in five languages and takes a closer look at UPU activities, featuring international news and developments from the postal sector.

The magazine regularly publishes well researched articles on topical issues facing the industry, as well as interviews with the sector's leading individuals. It is distributed widely to the UPU's 192 member countries, including thousands of decision-makers from governments and Posts, as well as other postal stakeholders. All regard it as an important source of information about the UPU and the postal sector at large.

UNION POSTALE is also published in French, Spanish, Arabic, and Chinese.

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**“As this edition of UNION POSTALE illustrates, regulation has become a strategic enabler of a modern postal sector. Effective regulatory frameworks must preserve the universal service while remaining flexible enough to support innovation, promote fair competition and respond to changing patterns of communication and commerce.”**

**Masahiko Metoki**  
Director General, UPU

# PREPARING THE POSTAL NETWORK FOR A NEW REGULATORY ERA

The postal sector has always evolved to meet the changing needs of society. For more than 150 years, the Universal Postal Union has helped ensure that this evolution is based on cooperation, common rules and a shared commitment to connecting people everywhere. Today, as digitalization continues to reshape economies and global trade, the pace of change is accelerating once again.

The growth of e-commerce, the emergence of new business models and rapidly evolving customer expectations are transforming postal markets around the world. At the same time, governments are reviewing universal service obligations, introducing new customs requirements and strengthening expectations for cybersecurity, data protection and consumer rights. Together, these developments are reshaping how postal services are delivered, regulated and secured.

As this edition of UNION POSTALE illustrates, regulation has become a strategic enabler of a modern postal sector. Effective regulatory frameworks must preserve the universal service while remaining flexible enough to support innovation, promote fair competition and respond to changing patterns of communication and commerce. Achieving this balance will be essential to ensuring that postal services continue to create value for citizens, businesses and governments alike.

These developments also reinforce the importance of international cooperation. The postal network is built on global connectivity, and regulatory decisions in one market increasingly have consequences across many others. Addressing these challenges therefore requires dialogue, shared knowledge and coordinated action across the global postal community.

As these reforms gather pace, the UPU continues to bring together governments, regulators and postal operators to exchange experience, develop common approaches and strengthen regulatory readiness. Alongside the implementation of the UPU Strategy 2026–2029, the recent launch of the Postal Reform Plan provides member countries with an evidence-based framework for designing reforms that reflect their national priorities. Together with the Integrated Product Plan, the Integrated Remuneration Plan and the Integrated Quality of Service Plan, these initiatives are helping the sector adapt to a rapidly evolving operating environment, facilitating reliable, accessible and responsive postal services.

This progress also depends on continued investment in capacity development and technical cooperation. By drawing on expertise from across the postal ecosystem, the UPU supports member countries in efforts to translate policy into practice, strengthen operational readiness and respond to emerging challenges. Equally important is providing all member countries with the knowledge, tools and partnerships needed to navigate an increasingly complex regulatory landscape.

The postal sector has never stood still. Every period of change has brought new challenges, but also new opportunities to rethink how the network serves people, businesses and societies. As regulation continues to evolve alongside technology and global trade, cooperation and readiness will remain essential to ensuring that the postal sector continues to meet the needs of an increasingly interconnected world.

**MASAHIKO METOKI**  
Director General, UPU



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# A SECTOR IN REFLECTION

## EDITOR'S NOTE

As the UPU begins implementing its 2026-2029 Strategy, it does so against a backdrop of rapid change in the postal operating environment. From redefining its core mandate, to navigating shifting trade dynamics, to guarding against growing cybersecurity threats, the Post finds itself at the frontier of major regulatory change. This edition's cover story explores some of these regulatory gamechangers.

Complementing the cover story are several pieces examining how the postal sector is adapting – or working to adapt – to this new business landscape.

At the global level, our feature with UPU Lead Economist José Anson and Statistician Lukasz Piotrowski offers insight into how the sector is faring economically, and what the UPU needs to provide the industry with accurate, regular outlooks. We also look at how the UPU has renewed its Operational Readiness for E-commerce (ORE) project, helping countries advance digital interoperability, supply chain integration, customs alignment, and economic inclusion for micro-, small- and medium-sized enterprises (MSMEs).

Regionally, we examine how the UPU's African Postal Leaders Forum brought in youth voices to offer fresh perspectives on tackling the Post's greatest challenges, alongside reflections from our Consultative Committee members on taking part in the region's recent events.

An interview with Brazil's Vice-Minister of Communications, H.E. Sônia Faustino Mendes, sheds light on how the country is restructuring its postal services to ease financial pressures without compromising its commitment to universal service. In a similar vein, our Market Focus section looks at Denmark's recent move to open letter post services to the free market, while Egypt and the Philippines share new initiatives launched to better serve their customers.

As always, the magazine closes with a look into the past through the eyes of our historian, Vincent Schicker – this time, exploring the role of women throughout postal history.

Happy reading!

**YANA BRUGIER**  
*Editor-in-chief*



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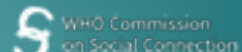




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# POSTAL RESTRUCTURING UNDERWAY IN BRAZIL

H.E. Sônia Faustino Mendes, Brazil's Vice-Minister for Communications, shares the country's plans to improve the Post's financial sustainability while reinforcing its role as a pillar of universal public service.

*Interview by* KAYLA REDSTONE



**UNION POSTALE:** Brazil has faced mounting pressure to privatize the postal service due to financial hardships but remains firm on keeping this a public service. Can you explain your perspective on the social concept of the Post?

H.E. Sônia Faustino Mendes: Brazil is a country of continental dimensions, marked by significant regional differences. Our challenges are equally substantial, and public policy must ensure that all citizens have access to the same opportunities. In this context, it is essential to have a postal network capable of enabling government institutions to reach everyone and deliver public services and citizenship to every Brazilian, regardless of whether they live in a major capital city or in a small rural community.

What we have observed is that, to this day, only Correios has been able to fulfill this role by maintaining a nationwide presence and close connection with citizens across the entire country. We believe this unique capacity and public mission should be preserved and strengthened. At the same time, Correios must continue to maintain a dynamic and outstanding commercial presence in the country's most relevant commercial corridors.

**What are your short-, medium-, and long-term strategic priorities for postal restructuring and how will they help make Brazil's postal services financially sustainable?**

The Ministry of Communications, as the government body of Correios, together with the Brazilian Government as a whole, is fully committed to supporting the restructuring plan that has been established. The first financial results are expected to emerge in 2026, paving the way for a more substantial recovery of the postal company beginning in 2027. This addresses the short-term outlook.

Looking further ahead, we are continuing to develop a new legal framework for postal regulation. This work will logically consider the role of the designated operator in implementing public policies, while also recognizing the existence of a broad, competitive market in which change occurs rapidly. Defining rules that ensure the right balance between the needs of the universal service and the dynamics of the competitive market is our greatest challenge.

**The restructuring plan includes closing post offices and reducing staff. What specific measures are being taken to ensure that these cuts do not compromise service access or quality?**

The list of postal facilities eligible for closure was developed based on a set of objective criteria established by the designated operator. These criteria, in turn, are guided by a few fundamental principles – one of which is the rule that requires the existence of at least one service unit per municipality, which is a goal of the postal universalization policy.

Accordingly, no municipality is losing access to Correios services because of the execution of the closure plan. In locations where there is only one branch, the Correios plan provides for a change in the service delivery model: the company-operated branch is replaced by a facility operated in partnership with the local municipal government, known as the “Correios Essencial (CEL)” branch. The company-operated branch is closed only after the CEL post unit has been established and is ready to provide service.

The “Correios Essencial” model represents a significant improvement over the previous partnership model offered

to local communities. Under the new model, these facilities are integrated into the corporate network of Correios, expanding both the range and the quality of services available to the public. As a result, the compensation paid by Correios to municipal governments for the provision of postal services is also higher, making this solution more attractive for smaller municipalities.

**How is the government reforming the regulatory framework to level the playing field between Correios and private operators? What consumer protections are being strengthened in parallel?**

The regulatory model has not yet been definitively decided. However, we believe the most likely approach is to formally create a regulatory structure within the Ministry of Communications. This model already exists, for example, in the broadcasting sector, whose regulation is made at the ministerial level.

The postal regulatory unit would have responsibilities that go well beyond the Ministry's current role as the supervisory authority for Correios. The extent of these competencies and the form of action are still under study, based on benchmarking with other postal regulators and considering the characteristics of the Brazilian context.

In regulated postal markets, operators that use the universalization structure provided by the designated operator usually contribute to the financing mechanism for postal universalization implemented and maintained by the state. At the same time, this presupposes that the postal regulator has legal, regulatory, and administrative instruments to fully exercise its regulatory role. All these issues are currently under analysis and development within the Ministry of Communications and will be discussed through the appropriate channels once we have a robust proposal to present to society.

**How is the Government enabling Correios to diversify into new service areas?**

Within the scope of its responsibilities, the Ministry of Communications has closely monitored Correios' efforts to diversify its portfolio, issuing, whenever necessary, the corresponding authorizations that enable the company to operate in areas such as logistics, electronic services, mobile telephony, and others.

We remain committed to ensuring legal certainty for the commercial and operational activities of Correios. For example, in May 2025, we managed to get a new Presidential Decree to be issued to regulate the Postal Law, enacted in 1978. This Postal Decree brought updated guidelines for Correios, removing some old barriers that limited the commercial performance of Correios, as they prevented the company from performing certain services or transporting certain types of items – limitations that no longer made sense in the current postal world.

In addition, in 2024, the Ministry of Communications worked on the issuance of a Presidential Decree establishing

"Looking further ahead, we are continuing to develop a new legal framework for postal regulation. This work will logically consider the role of the designated operator in implementing public policies, while also recognizing the existence of a broad, competitive market in which change occurs rapidly. Defining rules that ensure the right balance between the needs of the universal service and the dynamics of the competitive market is our greatest challenge."

**H.E. Sônia Faustino Mendes**

Vice-Minister for Communications, Brazil



a preference for contracting Correios to provide non-exclusive postal services to federal public administration bodies. This rule provided legal guarantee to the processes of direct contracting of the designated operator and strengthens the performance of Correios as a logistics operator of many public policies at the government level.

**Brazil was recognized as the regional champion for Latin America in the UPU's 2025 Integrated Index for Postal Development (2IPD), with particular strengths noted in international reach and resilience. At the same time, the index pointed to room for improvement in reliability and relevance. How has this assessment informed the government's approach to postal development?**

We give great importance to the UPU studies, and the 2IPD is an element that we use in our analyses and in the planning of our performance as the body responsible for the postal public policy. Although Brazil was the regional leader in 2025, we recognize that the country's position in the global ranking does not yet reflect its full potential.

Naturally, our results are directly impacted by the performance of Correios. Although we still have challenges in 2026, our expectation is that the actions that are part of the restructuring plan and are being implemented throughout this year to recover the quality of services, diversify revenue sources and expand the company's operations, will have positive impacts on the 2027 index. Our goal is to see both Brazil's 2IPD score and its position in the global ranking improve year after year.

"Within the scope of its responsibilities, the Ministry of Communications has closely monitored Correios' efforts to diversify its portfolio, issuing, whenever necessary, the corresponding authorizations that enable the company to operate in areas such as logistics, electronic services, mobile telephony, and others."

**H.E. Sônia Faustino Mendes**

Vice-Minister for Communications, Brazil

**Brazil and India recently signed a memorandum of understanding on postal cooperation. Can you tell us more about the key areas of collaboration envisaged, what you hope to learn, what you hope to bring to the table?**

Brazil and India are countries that share characteristics, challenges and opportunities. The rapprochement between the two countries is natural in different sectors and it would be no different regarding postal services.

International cooperation is one of the key pillars of the global postal sector, and we have been working to strengthen and formalize cooperation mechanisms with other countries. In the case of India, with whom we share the Presidency of Commission 1 of the UPU Council of Administration, we expect that the exchange of experiences and a better understanding of the specific characteristics of each country's postal market will allow the expansion of our postal exchanges, in particular with the development of initiatives to promote e-commerce between the two countries.

India has a recognized expertise around postal financial services, a sector that is not yet adequately explored by Correios in Brazil. On our side, we have experience in nationwide logistics projects that can be useful for a country of India's size and population. Our complementary strengths can lead to projects that benefit both our countries and the international postal community.

**How have discussions at the UPU level informed Brazil's approach to navigating challenges and harnessing opportunities facing the Post?**

As mentioned earlier, we attach great importance to UPU studies. Although the Union does not interfere directly in the domestic postal market of its members, the trends it signals at the international level end up having national repercussions.

In addition, many of the challenges we face in Brazil have already been – or are still being – faced by other countries, and they shape the work of the UPU. An example of this is the reduction in mail volumes due to digital substitution and the challenge of maintaining the designated operator's market share in the parcel sector, despite the growth of this segment.

For this reason, we have sought to follow all UPU discussions, both at the governmental/regulatory level and at the operational level. In fact, this is one of the main motivations behind our candidacy for the Council of Administration (CA) and the Postal Operations Council (POC) during the Dubai cycle. In our view, we cannot build solutions in isolation without knowing what is happening in the world around us.

The UPU is the natural forum for exchanging experiences, seeking inspiration and support, and sharing knowledge. Although it is a multilateral organization, the UPU and its institutions also favor bilateral cooperation and, in turn, bilateral relations also strengthen the UPU's actions.



Brazil was recognized as the regional champion for Latin America in the UPU's 2025 Integrated Index for Postal Development (2IPD) during the 28th Universal Postal Congress in Dubai.

I would also like to emphasize the important role that the UPU, and the regional unions have in supporting their member countries. In the case of Brazil, we see as very positive the fact that the actions of the UPU and our regional union, the Postal Union of the Americas, Spain and Portugal (PUASP), are increasingly coordinated and that there is a very close collaboration between the two organizations.

**Is there anything you would like to add?**

I would like to emphasize that, in line with Brazil's position in the discussions led by the UPU, the Brazilian Ministry of Communications has incorporated issues related to sustainability and gender equality into its strategic agendas. These initiatives are based on our conviction that the strengthening of the postal sector and digital transformation must be aligned with the principles of sustainable development and the expansion of opportunities for women in the sector.

In this context, the Ministry develops sustainability policies based on UN Sustainable Development Goals (SDGs) 4 and 12, promoting initiatives focused on the proper disposal of electronic waste, computer reconditioning digital and social inclusion, while contributing to the advancement of the environmental, social, and governance agenda in Brazil.

Finally, I would like to thank the UPU for the opportunity to present this overview of the postal sector in Brazil and reiterate the support of the Brazilian Ministry of Communications for the UPU and its fundamental role as a catalyst for international postal cooperation, in its regulatory, operational, and commercial dimensions, in

collaboration with regional unions. The many challenges that the sector faces require an active and effective UPU, and Brazil is willing to contribute so that the dialogues and discussions within the Union produce meaningful outcomes for the benefit of the global postal community. **KR**

**"We give great importance to the UPU studies, and the 2IPD is an element that we use in our analyses and in the planning of our performance as the body responsible for the postal public policy. Although Brazil was the regional leader in 2025, we recognize that the country's position in the global ranking does not yet reflect its full potential."**

**H.E. Sônia Faustino Mendes**

Vice-Minister for Communications, Brazil



# READYING THE NETWORK FOR A REGULATORY OVERHAUL

Three game-changing trends  
shaping the postal landscape





**The rise of e-commerce and entry of new service providers in the market are prompting major shifts in the way the sector is regulated. UNION POSTALE takes an in-depth look at how changing customer needs, increasing customs pressure and data protection requirements are expected to shape postal sector regulation over the coming years.**

*Text by* **KAYLA REDSTONE**

## REDEFINING THE POSTAL LANDSCAPE

When state-run postal services were conceived, governments had the provision of affordable and accessible communications services as their target. It is in that context that letters have traditionally formed the basis of postal universal service obligations, how governments have upheld the right to communication for their citizens.

However, the liberalization wave of the 1980s made way for the entry of new courier, express and parcels (CEP) providers in a market where the Post had previously held a monopoly. As customers shifted interest from exchanging communications to exchanging goods with the rise of online commerce, CEP providers thrived. Additionally, the rise and vertical integration of marketplaces, which has seen them offer their own or partnered at-home and out-of-home delivery services, has further increased competition in delivery markets. The operating environment of designated operators has thus become more complex in the face of these market pressures and the costs associated with meeting their universal service obligations.

Postal operators are also being confronted with demand-side pressures. Business-to-consumer e-commerce has skyrocketed, while customer expectations for transparency and control over their items – particularly parcels – has increased.

The converging trends are causing a ripple in the postal regulatory

landscape, prompting policymakers and postal regulators to rethink the sector across three dimensions: what are the boundaries of the postal market; how should postal services be defined; and what falls under the regulator's watch.

## HOW COUNTRIES ARE RESPONDING

Policymakers and regulators are responding by moving away from a one-size-fits-all, mandated-services model of the universal service obligation and toward more dynamic frameworks that combine different distribution models and prioritize customer needs and protection.

In 2024, following an extensive public consultation process, Australia implemented reforms to its postal regulation that reduced letter post delivery frequency, eased delivery time requirements, and gave the Post the flexibility to manage priority letters in a more commercially favourable manner.

At the end of 2025, Denmark opened letters up to the free market almost entirely, with some protections for the most vulnerable populations (read more about the reform on page 42).

In June of this year, the Swiss Federal Council launched a consultation process for the revision of its Postal Services Act. The proposed changes would allow for dynamic adaptation of the universal service obligation to changing customer needs and habits.

On a larger scale, the European Union is soon expected to launch its new EU Delivery Act, which will harmonize regulation on postal services and cross-border delivery services, focusing on fair pricing, fair competition and consumer protection. Consultations have been ongoing since 2025 and, while the full changes aren't yet announced, they are expected to expand the material scope of postal services.

## BLURRING MARKET BOUNDARIES

This spring's UPU Conference on Postal Regulation in Berne intended to help postal regulators identify practical, policy-ready approaches in the rapidly changing landscape.

The first, and perhaps most fundamental, question regulators are grappling with is where the boundaries of the market lie – in other words, where genuine demand substitution exists between postal services and other forms of delivery.

Roel Gevaers, a professor with the University of Antwerp's Department of Transport and Regional Economics and keynote speaker at the conference, argues that any modern definition of the postal-parcel market must include e-commerce platforms.

"If you look to the definition of postal-parcel markets today, the power of the e-commerce market should be taken into account somewhere in the definition."

Gevaers points to the increasingly blurred line between what constitutes parcel delivery and mail delivery, and, more broadly, where these services fit between post and parcel, logistics and supply chain markets. Leaving e-commerce players out of the regulatory equation risks market cherry-picking by e-commerce platforms, says Gevaers.

This concern for consumers is shared by Brian Mwansa, Acting Executive Secretary of the Communications Regulators' Association of Southern Africa, who also spoke during the spring conference. He adds that excluding e-commerce platforms from the regulatory remit would leave consumers "open to several ills," including a lack of quality standards, a pathway for dispute resolution or basic privacy standards.

"One of the main things that regulators need to do to protect consumers is to formalize those activities which are happening on the periphery of the regulated space, bring those operators into the influence of regulatory oversight so that basic rights and obligations can be handed out to them in the interest of consumer protection," he says.

**"One of the main things that regulators need to do to protect consumers is to formalize those activities which are happening on the periphery of the regulated space, bring those operators into the influence of regulatory oversight so that basic rights and obligations can be handed out to them in the interest of consumer protection."**

### Brian Mwansa

Acting Executive Secretary of the Communications Regulators' Association of Southern Africa



Brian Mwansa, Acting Executive Secretary of the Communications Regulators' Association of Southern Africa, presented during the UPU's Conference on Postal Regulation this spring.

## CUSTOMER-CENTRIC PRODUCT APPROACH

Policy should also centre on user needs, reflecting a shift from sender-oriented to recipient-oriented regulation with an emphasis on rights and transparency.

When it comes to postal products, Antonia Niederprüm, Head of Postal Services and Logistics at WIK Consult, highlights the benefits of new players.

"The entry of very different players in the wider delivery market is first a good thing because it has extended the choice for consumers, for businesses and drives quality and innovation," she says. "But for designated operators, this is obviously a challenge."

Here, data can and should play an important role to determine what exactly customers want and how often it needs to be delivered.

"I think that analyzing data, for example, using AI tools to analyze what customers want, what type of e-commerce needs to be delivered on a daily basis, which other types of parcels are delivered in another way. I think data technology, analysis of consumer data can help a lot in [developing] this legislation"

### Roel Gevaers

Professor with the University of Antwerp's Department of Transport

"I think that analyzing data, for example, using AI tools to analyze what customers want, what type of e-commerce needs to be delivered on a daily basis, which other types of parcels are delivered in another way. I think data technology, analysis of consumer data can help a lot in [developing] this legislation," says Gevaers.

For Niederprüm, customer protection is also a concern. She adds that these in-demand products should be included in the USO to protect against exclusion in more costly, but less profitable rural and remote areas.

"Here I see that there is a need for basic postal services, including parcel services in rural areas, too, at affordable prices and this could be a challenge."

## THE RIGHT REMIT, WITH THE RIGHT COMPETENCE

The challenge, then, is to find the right regulatory remit to manage these dimensions. Competent authorities need to be equipped with adequate mandates, tools and powers to promote competition, define and analyze markets, impose access conditions and to collect comprehensive industry data – including revenue, volumes and environmental metrics such as carbon emissions – to support ongoing sector analysis and strengthen regulatory competences.

Gevaers points out that there's also a balancing act between consumer protection and regulatory flexibility to enable

innovation. While there are many rules about the use of consumer data, he explains that enabling the limited use of this data can also provide valuable insights for logistics, supply chains and postal services to make them more sustainable in the long term.

"Regulating nothing is not OK, but over-regulating might kill innovations and forecasting. It's always about finding a balance," he says.

This forecasting will be essential to determining regulation that will protect consumers, enable fair competition and ensure a market that can not only meet but anticipate its users' needs.

The conference also highlighted the potential for horizontal regulatory approaches with agency's responsible for adjacent areas, like trade and digital affairs.

Mwansa highlights a major gap in expertise for many regulators, noting the lack of formal education in this area. He added that the UPU could be the pathway needed to determine common approaches to regulatory frameworks.

## SUPPORT FOR REGULATORS AND POLICYMAKERS

The UPU is working to help develop and provide guidance for postal policymakers who might not have the expertise to manage these majors shifts on their own.



Roel Gevaers, Professor with the University of Antwerp's Department of Transport, gave the keynote address during the UPU's Conference on Postal Regulation this spring.





Antonia Niederprüm, Head of Postal Services and Logistics at WIK Consult (centre-right), participated as a panelist in the UPU's Conference on Postal Regulation this spring.

First, the UPU is closely monitoring the trends with a view to modernizing the global postal policy and regulatory framework. Some of this work is being carried out within the Council of Administration, under the Postal Sector Reform Standing Group, which works on four fronts: to provide harmonized definitions for the postal sector, to develop conceptions of the universal postal service, to further the alignment with customs policy and regulatory regimes being implemented around the globe, and to provide good governance models and best-practice recommendations for AI governance, data protection and security.

Beyond the global policy and regulatory framework, the UPU has also developed and approved three integrated plans – the Integrated Product Plan, the Integrated Remuneration Plan and the Integrated Quality of Service Plan – which together provide a unified roadmap to modernize products, ensure fair and sustainable remuneration, and raise service standards globally. These reforms aim to keep postal services reliable, affordable and customer-centric while securing the long-term sustainability of universal service.

The UPU is also actively working to support policymakers and regulators to define tailor-made regulatory reform plans, based on the

recently released Postal Reform Plan (PRP) policy advisory assistance framework. The framework provides a structured, evidence-based approach to reform planning, supported by substantive information, theoretical and practical models, best practices and guidelines relevant to different areas of postal sector policy available in the UPU's Postal Reform Guide.

Learn more about the UPU's policy advisory services: <https://www.upu.int/en/members-centre/policies-regulation/policy-advisory-assistance>

## MANAGING CHANGING TRADE DYNAMICS

E-commerce isn't just raising questions about how postal services are defined – it's also drawing them into broader trade policy reform, prompting countries to remove *de minimis* exemptions that once protected low-value postal consignments from usual customs procedures and payments.

There are multiple motives behind the shift. While *de minimis* thresholds were initially put in place to ensure efficient customs

**Watch the full interviews with  
Roel, Antonia and Brian:**

<https://www.youtube.com/watch?v=hd0grgO3VTM&t=103s>



<https://www.youtube.com/watch?v=oD5cS4aLGKg>



<https://www.youtube.com/watch?v=eVrVT3Q3oXE>



processes for items with low value, the rapid rise in low-value e-commerce items has changed the dynamics. According to the European Commission, 98% of goods handled by customs in 2025 were low-value small packages – a volume of nearly 6 billion items. Dropping the threshold is one way to capture revenue for handling while ensuring foreign goods undergo the same level of tax and compliance scrutiny as domestic goods.

Last August, the United States of America suspended its duty-free *de minimis* threshold for goods arriving in the country, including through the postal network. The change meant that now all items containing goods would have to go through customs procedures and, for the first time, taxes and duties would have to be remitted before arrival and through specified qualified parties, not the destination postal operator.

The change prompted a near stop in inbound traffic to the US for the weeks following, until the UPU and other providers were able to implement the first iteration of a delivered duty paid solution (DDP) meeting the new requirements.

**“We are moving towards a model where data quality becomes critical, duties and taxes must be anticipated and integrated upfront and customer experience must remain seamless despite increased regulatory complexity. This is a difficult balancing act.”**

**Jean-Paul Forceville**

Representing France as Chair of the UPU’s Postal Operations Council

Now, as of 1 July, the European Union has dropped its *de minimis* threshold and applies an automatic EUR 3 per-item duty on low value consignments. Sending postal operators will now also have to provide additional pre-arrival data on items to ensure they meet new customs compliance rules. As an added layer of complexity, each of the EU’s 27 countries is implementing slightly different import procedures to meet the new criteria.

The trend is expected to continue, with other UPU member countries signalling similar reforms in the near future.

## EXPECTED IMPACT

Jean-Paul Forceville, who represents France as Chair of the UPU’s Postal Operations Council, describes the trend as a “systemic change”.

Opening a recent UPU webinar that sought to give UPU member countries a forum to interface with EU representatives on the reform, Forceville explained that simplified customs treatment frameworks formerly in place had enabled the rapid growth of e-commerce. Postal operators benefited from that growth, playing a central role connecting businesses to consumers.

“That era is now coming to an end,” he said.

When *de minimis* thresholds are removed, every parcel becomes subject to customs duties, controls, and data requirements.

While the full impact of the changes in the EU won’t be clear right away, Forceville highlighted three known risks: the expected financial impact on postal operators, a shift in liability for compliance, and, more worryingly, a complete change of the postal business model.

These types of customs reforms are increasingly requiring postal operators to advance duties and taxes on behalf of customers. At the same time, they lack visibility on the customer’s transaction with the responsible party, the retailer or e-commerce marketplace. It’s not always clear whether costs will be recovered when items cannot be delivered or must be returned.

As customs authorities tighten requirements for low-value postal consignments, postal operators are finding themselves more legally exposed. As they become key actors in the customs compliance process, they are not only becoming focal points for settling customs debts, but also potential targets for penalties over non-compliant goods, inaccurate data, and other regulatory breaches. This concern has been shared by transport partners, such as airlines, who worry that the postal items they are carrying may not be accepted once they reach their destination country.

These customs reforms are also necessitating the formation of new bilateral agreements for data-sharing between



Customs reforms were among the topics discussed at the UPU’s spring Postal Operations Council session.

postal operators and new partners like customs brokers and DDP solution providers.

Finally, these reforms are forcing what Forceville refers to as a “profound transformation” of postal business models as postal operators scramble to adapt their processes and technology to their new role. This requires time and a financial investment at a moment when postal operators are balancing the cost of delivering on their USO while working to innovate.

“We are moving towards a model where data quality becomes critical, duties and taxes must be anticipated and integrated upfront and customer experience must remain seamless despite increased regulatory complexity. This is a difficult balancing act,” Forceville explained.

“At the same time, expectations from customers – both senders and recipients – remain unchanged. They continue to demand speed, transparency, predictability, and affordability. The challenge, therefore, is not only regulatory compliance, but also maintaining a strong customer-centric approach in a far more complex environment,” he added.

These changing conditions are weakening the postal value proposition, which relied on its affordability and smooth customs clearance. One risk is that customers move over to private carriers, who have more end-to-end visibility on the processing of items because they manage their supply chains independently. The other risk is that more retailers switch to cargo channels with the intent of filling local warehouses, rather than relying on the postal network to deliver single items from abroad.

Underscoring this is the challenge that e-commerce sellers are quick to find new channels to reach foreign markets, making efforts to adopt tailored solutions for each destination country unsustainable.

“The pace of regulatory change we are experiencing today is extremely fast – sometimes faster than the capacity of operators to adapt. This creates a real risk of disruption, both for businesses and for end customers,” Forceville warned.

## PREPARING THE NETWORK

Discussions during the spring Council sessions highlighted that the rapid fragmentation of rules across different markets has put pressure on the Union’s regulatory model and forced the organization into a reactive posture. The message was clear: the focus must shift from fragmented responses to a coherent global approach, with strong support from both the Postal Operations Council and the Council of Administration, as well as the active involvement of regulators.

In the meantime, the POC, its subsidiary Customs Group, and the secretariat have been doing their utmost to prepare the network for expected changes by providing a platform for discussion, collecting and distributing pertinent information to operators, and developing technical solutions to meet the demands.

The UPU has been proactive in ensuring its DDP solution is kept up to date with all regulatory requirements. Its US import-specific solution was launched at the beginning of October and helped get mail flowing to US-based customers after weeks of delays.

In the weeks ahead of the EU changes, the team collected the needed import process

information from the region’s 27 countries to prepare tailored solutions for each case.

Looking to the near future, the UPU intends to integrate its DDP solution with UPU\*Clearing, resulting in a centralized settlement system through which origin postal operators can pay customs debts in all countries via one invoice. The addition is expected to cut payment complexity, processing time and costs.

UPU is also working to interconnect with other DDP solutions on the market to ensure full coverage for users.

“The postal sector is fully committed to this transformation. It understands the stakes. It embraces the need to evolve. But it also needs the time and the conditions to do so in a sustainable way,” Forceville urged.

## GROWING CYBERSECURITY EXPECTATIONS

As postal operators move more of their business online – from the exchange of personal data related to e-commerce to the exchange of money via online payment networks – they are finding themselves increasingly more exposed to debilitating cyber attacks.

## THREAT LANDSCAPE

Massimiliano Aschi, Cybersecurity Lead, Poste Italiane, and Chair of the UPU Cyber Resilience Expert Team, explains that, while the UPU has not yet published its study that gives a view on the global postal sector’s cybersecurity posture, a few emerging trends are clear.

“The postal sector is not immune to the growing global threats to digital services and is actually more exposed than other sectors due to its cross-sectoral business nature and its role as an international cooperation and logistic network,” says Aschi.

He points first to an emergence of phishing-as-a-service providers targeting postal delivery services and financial institutions. Sectoral studies like Cyble’s *Transport & Logistics Threat Landscape Report 2025*

**“The postal sector is fully committed to this transformation. It understands the stakes. It embraces the need to evolve. But it also needs the time and the conditions to do so in a sustainable way”**

**Jean-Paul Forceville**

Representing France as Chair of the UPU’s Postal Operations Council





The UPU DNS Security Forum sought to raise awareness of security threats, promote best practices and foster collaborative cyberresilience among UPU member countries and the wider postal sector.

and Aon's *Global Risk Management Survey 2025* have reported a significant increase in ransomware attacks impacting various parts of the post and logistics supply chain, he says. Data breaches and supply chain attacks involving third parties are also on the rise.

The adoption of AI has complicated the situation, explains Filipe Beato, Manager, Technology and Innovation, World Economic Forum (WEF).

"The increased adoption of AI has accelerated both cybercriminal capabilities and cyber defense efforts, while simultaneously introducing new challenges to digital infrastructure resilience."

He highlights the results of WEF's *Global Cybersecurity Outlook* survey, which found that 87% of respondents identified AI-related vulnerabilities as the fastest-growing cyber risk, while 94% expect AI and machine learning technologies will have the greatest impact on cybersecurity in the coming years.

AI has reduced the time it takes for criminals to compromise systems from days to minutes.

Tadas Jakštas, who leads the Cyber Security Capacity Building Team at NRD Cyber Security consultancy in Lithuania, adds that

generative AI has enabled malicious actors to produce convincing, personalized scams communications in any language at volume – a high risk for an industry whose customers are accustomed to receiving regular delivery notifications and payment requests.

"More structurally concerning is the attack surface created by IoT-enabled sorting and logistics equipment," says Jakštas. "This is operational technology that was never designed with security in mind and is now internet-connected and increasingly integrated into live operational environments. As these systems become more deeply embedded in day-to-day postal operations, the potential for a cyberattack to cause direct disruption to physical infrastructure, such as sorting facilities, delivery networks, logistics hubs becomes very real."

This increased threat exposure is now colliding with a wave of new regulation.

## REGULATORY CATCH-UP

Around the world, governments are rewriting the rules on how critical infrastructure – increasingly including postal and logistics networks – must detect, report, and withstand cyberattacks. The result is a sector being pulled, often

**"The postal sector is not immune to the growing global threats to digital services and is actually more exposed than other sectors due to its cross-sectoral business nature and its role as an international cooperation and logistic network."**

### Massimiliano Aschi

Cybersecurity Lead, Poste Italiane, and Chair of the UPU Cyber Resilience Expert Team

unevenly, from a culture of quiet internal handling into one of mandatory disclosure and hard compliance deadlines.

Jakštas sees real upside in this: "On the benefit side, designation brings stronger frameworks for incident response coordination and intelligence sharing with national security agencies, an access

that most operators could not obtain independently. It also elevates cybersecurity to a board-level and governmental priority, which can unlock funding, regulatory support, and in some cases direct state investment in resilience."

But the designation comes with strict compliance regimes and significant financial penalties.

"The burden is immediate and concrete while the benefits tend to materialize over a longer horizon. Compliance brings costs in terms of mandatory security audits, investment in monitoring and reporting infrastructure, staff training, certification, and in some cases costly system upgrades to meet baseline requirements. For financially stretched operators, these obligations could be difficult to manage," he adds.

With that said, Jakštas concludes that the designation is apt and recommends that governments ensure that additional obligations are matched with meaningful technical and financial support, particularly for small- and medium-sized operators.

This shift toward formal critical infrastructure designation is matched by a shift toward mandatory reporting.

Many postal operators have historically been hesitant to share information on attacks, instead positioning incidents as IT-related disturbances. That posture is no longer tenable; governments are transforming corporate cyber incidents into real-time national intelligence inputs.

Much of this scrutiny is now falling across the supply chain. Regulators are pushing liability onto the manufacturers of digital infrastructure and heavily restricting the use of geopolitically risky tech vendors. According to WEF's *Global Cybersecurity Outlook* survey, 65% of large organizations identify third-party and supply chain vulnerabilities as their greatest challenge to cyber resilience, with the inability to adequately safeguard third-party software, hardware, and services cited as a primary concern.

"In the current geopolitical environment, cyber risk is increasingly shaped by geopolitically motivated activity, supply-chain vulnerabilities and the growing dependence on digital infrastructure. These trends are relevant for critical infrastructure operators, including postal and logistics networks, because disruptions can affect the continuity of essential services," explains Beato.

Jakštas adds, "Due to complex interdependencies within the sector, third-party logistics integrations are also heavily exploited as attackers often find it easier to compromise a smaller supply chain partner than the operator directly."

Posts often work with smaller IT partners and customs brokers to manage e-commerce processes. These smaller companies are not usually subject to the same regulation as postal operators, so it falls to the operator to ensure their partners uphold a rigorous standard.

"You can require partners to implement security measures that are proportionate and appropriate to the context being protected, so that everyone does their part in a financially and operationally sustainable way," explains Aschi, adding, "The UPU has active instruments to support standardization and certification efforts and to deploy state-of-the-art infrastructures and technologies that help operators and

**"The increased adoption of AI has accelerated both cybercriminal capabilities and cyber defense efforts, while simultaneously introducing new challenges to digital infrastructure resilience."**

## Filipe Beato

Manager, Technology and Innovation,  
World Economic Forum (WEF)



UPU Director General Masahiko Metoki launched the UPU's information sharing and analysis centre (POST-ISAC) at the DNS Security Forum in June 2026.

“Due to complex interdependencies within the sector, third-party logistics integrations are also heavily exploited as attackers often find it easier to compromise a smaller supply chain partner than the operator directly.”

**Tadas Jakštas**

Cyber Security Capacity Building Team  
Lead, NRD Cyber Security

their partners achieve secure, resilient digital interactions and exchanges.”

One such instrument is the UPU-TechCert programme, which validates both a provider's compatibility with the UPU's global postal IT solutions and its compliance with UPU standards.

## PREPARING THE NETWORK

Cooperation through the UPU will play a vital role in helping postal operators keep pace with changes globally – this will be vital to a sector working to grow cross-border business, while navigating inter- and intraregional readiness disparities.

“International organizations play a unique role due to their broad reach, convening power, and ability to facilitate collaboration at scale. In an increasingly interconnected digital environment, organizations such as the Universal Postal Union can provide strategic guidance, facilitate information sharing, promote best practices, and foster collaboration among postal operators, governments, and industry stakeholders,” Beato explains.



The POST-ISAC is a first-of-its-kind centralized cyber threat-sharing and collaboration hub dedicated to the post and logistics sector.

WEF's research has shown that more resilient organizations are more likely to engage with government agencies and information-sharing groups, he adds. UPU is in the right position to make both connections.

Aschi envisions an exchange where Posts advanced in their cyber resilience journey invest in supply chain security, while those in the beginning stages focus on agility, autonomy and adaptability to come up to speed. “Together, these actions can build a more resilient, reliable, and future-ready postal network.”

The UPU's 2026–2029 strategic plan mandates the organization to provide member countries and wider postal sector players access to cybersecurity tools and platforms that will help protect the network from emerging threats.

Central to this push is POST-ISAC, an information sharing and analysis centre

for the postal sector recently established by the UPU. The collaboration enables stakeholders to share intelligence on current threats, as well as their best practices, with the goal of drawing up shared standards, guidelines and rules on information security.

The long-term goal is to establish a fully-fledged cybersecurity certification programme for postal operators and other wider postal sector partners – giving the network a common baseline of resilience even as the pace of threats and regulation continues to accelerate.

Learn more about POST-ISAC here:  
[isac.post](https://isac.post) **KR**





# CONNECT•POST

## CONNECT A POST, CONNECT A COMMUNITY

ADVANCING UNIVERSAL DIGITAL INCLUSION  
THROUGH THE POST BY 2030.



# AFRICAN YOUNG PROFESSIONALS HELP CHART NEW COURSE FOR THE REGION'S POSTS

Africa is the youngest continent globally and engaging with this emerging group of future leaders, policymakers and innovators will be essential to the survival of African postal operators.

Text by KAYLA REDSTONE

The UPU invited young professionals aged 25-35 from ICT, data science, logistics, engineering, business, fintech and public policy backgrounds to its first-ever African Young Postal Leadership Day during the African Postal Leaders Forum in Praia, Cabo Verde, on 26 February – a day-long intergenerational exchange that confronted current leaders with some harsh realities, while helping young participants see fresh potential in the Post.

"The idea was not only to cultivate the next generation of postal leadership, but also to solicit their views on how to transform the Post from a legacy institution to a platform for innovation, leadership and future opportunity," says Amadou Amadou, UPU's Coordinator for Africa.

UNION POSTALE connected with four participants to learn more about the impact that the dialogue had on their perspectives of the Post.



African Young Postal Leadership Day was held as part of the UPU's African Postal Leaders Forum in Cabo Verde in February.

## SHATTERING STEREOTYPES

Participants admittedly held some unflattering perceptions of the postal sector before their participation.

Mariam Simbeye, a project manager with Breaking Barriers in Tech – an organization dedicated to helping build an inclusive, resilient and competitive digital workforce in Tanzania – describes an assumption that many of the participants held: that the Post only dealt with post.

This was echoed by Chimango Febbie Chihana, a Malawian accounting and audit professional who leads a youth empowerment organization tackling unemployment, skills development and innovation. She candidly describes her previous belief that the Post was mainly used by those who did not have access to more efficient private courier services.

However, the invitation to participate in the forum itself spurred a new realization – that the postal network can be used for so much more than delivering mail.

"I came to learn that the postal sector is undergoing a major transformation globally and many African postal institutions are actively reinventing themselves through digital services, e-commerce integration, logistics innovation, and interoperability initiatives," says Nigerian brand strategist, Temitope Adeyemi Ogunyemi.

Mohammad Nour Sadou, Commercial Manager at a Cameroonian consulting and leadership development firm, confesses he underestimated how critical African postal operators were to the continent's economic future. For him, alignment with younger customers' needs was imperative.

"My generation does not move toward services anymore, services move toward us," says Sadou. "The



Chimango Febbie Chihana suggested that postal employees serve as “Digital Inclusion Officers” for the Post.

My generation does not move toward services anymore, services move toward us. The conversations reinforced my belief that the future of the sector will depend less on infrastructure alone and more on the ability to build customer-centric, data-driven and operationally agile services adapted to new consumption habits.”

**Mohammad Nour Sadou**  
Commercial Manager, Cameroon

conversations reinforced my belief that the future of the sector will depend less on infrastructure alone and more on the ability to build customer-centric, data-driven and operationally agile services adapted to new consumption habits.”

## EMPOWERING PEOPLE

“One of the major points I raised was the need for African postal operators to redefine their target market,” says Chihana. “The sector should move beyond traditional mail users and instead position itself as a bridge between the digital world and underserved communities.”

She viewed employees as potential intrapreneurs and “Digital Inclusion Officers”. This idea was also reflected in Simbeye’s proposed Postal Ecosystem Transformation Initiative (PETI) framework – a methodology that would leverage the insight and relationships of postal staff to create that connection between new technology and the people it serves.

“Postal systems do not operate on infrastructure alone, they operate on trust, on relationships, on people who explain, guide, translate, reassure, and

help others navigate systems,” explains Simbeye, adding that postal staff are an “invisible layer” contributing to postal operators’ success. Her PETI framework would prioritize this social infrastructure as a catalyst for postal reform.

“We are so quick to integrate technological innovations because we are quick to believe that tech alone brings us closer to modern service provision. In Africa, it’s the people that push innovations to success,” she adds.

## INTENTIONAL YOUTH INCLUSION

“Intentional youth inclusion is essential, not only as beneficiaries of transformation, but as contributors to strategy, innovation, and leadership renewal. Africa has a very young population, and I believe the postal sector can benefit greatly from integrating youth perspectives into modernization efforts,” says Ogunyemi.

Postal operators should support youth-led service initiatives, for example, through grants to launch pilot projects, Chihana adds.

“By doing this, the postal sector would not only modernize itself, but also create employment opportunities, empower young professionals, and encourage a culture of innovation and critical thinking. The next generation is not here to inherit systems as they are. We are here to rebuild them for relevance and create new opportunities for upcoming generations,” she says.

## SMALL, AGILE, MEASURED CHANGES

For Sadou, innovation was about agility, not necessarily sweeping changes. He suggested a 30-day challenge where operators select one city, sorting centre or delivery zone and monitor their progress across five indicators – parcel revenue, waiting time before dispatch, average delivery time, number of complaints and complaint resolution time – holding brief daily scrums to analyze the data, identify issues and develop immediate solutions.





Mariam Simbeye proposed a methodology to leverage the insight and relationships of postal staff to create connections between people and new technologies.

"Modernization does not always require major reforms or expensive technology. It starts with simple operational discipline, daily data monitoring and faster decision-making on the ground. Budget requirements often make institutions static, waiting for large investments before acting. In reality, many improvements can start immediately with existing tools and teams," he says.

"I was encouraged by the progress already made in areas like addressing systems, interoperability, track-and-trace and the UPU Unified Data Platform. The next step is making these tools part of daily operations across all levels of the organization," he says

Chihana agreed that monitoring and transparency would be critical to success, especially for financing. She suggested real-time reporting and digital monitoring systems to track performance, reduce financial leaks, support strategic decision-making.

"What gets measured, gets managed," she states.

## FUTURE ENGAGEMENT

The four participants all agreed that the intergenerational dialogue had not only changed their perception of the sector but piqued their interest in supporting its evolution.

"I would like to commend the Universal Postal Union for intentionally creating space for youth voices within such an important continental dialogue. I believe forums like this are important not only for the future of the postal sector, but for strengthening Africa's broader culture of collaboration, innovation, and institution-building. I hope we will be invited to more forums like this," adds Ogunyemi.

Amadou explains that the organization plans to extend the success of African Young Postal Leadership Day by developing a longer-term African Young Postal Leaders Fellowship Programme. The programme will include mentorship, innovation labs, pilot projects and structured leadership exposure throughout the UPU's 2026-2029 work cycle. **KR**

"One of the major points I raised was the need for African postal operators to redefine their target market," says Chihana. "The sector should move beyond traditional mail users and instead position itself as a bridge between the digital world and underserved communities."

**Chimango Febbie Chihana**

Accounting and audit professional, Malawi

# LATEST POSTAL STATISTICS CALL FOR RAPID TRANSFORMATION

The UPU's latest Postal Statistics yearbook release shows that real postal revenue is in decline across all regions – a signal that current operating strategies are insufficient and driving the call for swift diversification of postal business models.

Text by KAYLA REDSTONE



The report collected data from 186 countries and territories, up to 31 July 2025. According to the data, 2024 was the third consecutive year that real postal revenues declined (see figure 1). This decline was felt universally – even in regions with the highest level of postal development.

José Anson calls the findings an “alarm signal” for postal operators.

Posts had the opportunity to grasp their relevance during COVID-19 when much of the world's population relied on delivery services to access necessities, he explains. The years following show that postal operators did not evolve rapidly enough to maintain this relevance once the situation cleared.

While, in general, postal operators have focused on boosting parcels services to offset losses in letters volumes, the strategy has not brought about the desired effect for all of them

Domestic parcel volumes grew by 6% in 2024, demonstrating a slight recovery after two years of consecutive shrinkage. International parcels grew a slight 1.3% in 2024 but are still low compared to pre-COVID levels. The data shows that letter post still accounts for 33.3% of revenue, on average.

“One could have been thinking that parcel logistics would be a silver bullet for postal operators, but it has actually not been the case,” explains Anson. “There is heavy competition in the parcels market and profit

margins are quite small. While a number of postal operators have improved the delivery experience for customers, others still need to better cater to the needs of e-shoppers.”

## DIVERSIFICATION WITHOUT CONTRACTION

While the trends are worrying, Anson says there are opportunities for rebound.

“This situation necessitates serious thought about the future of postal services – only deeper changes could start fixing the situation,” he says.

While declining revenue has been a broadly global phenomenon, there have been outlier success stories. The UPU analysed these cases as part of its *State of the Postal Sector 2025* report and found that investing in diversification while reinforcing the physical postal network was a winning strategy.

The advice goes against the move by operators to close post offices in a bid to reduce operating costs without revisiting the concept of postal access and proximity.

“Having a physical network leads to engagement with all your customers. If you reduce that network to save money without alternative plans to ensure access to postal services, you are trading savings with relevance and this could eventually backfire,” says Anson. “Posts can provide new services at the counter, with a human face, that are critical to peoples' daily lives. Those who do this, often do better.”

Anson emphasizes that postal operators still have yet to grasp the full potential of e-commerce and associated services.

"Cross-border e-commerce is growing but not our share in it – why can't we benefit from this growth in cross border purchases?" he asks, adding that the UPU will be critical to ensuring Posts have the tools, knowledge and agreements in place to facilitate new services here.

## IMPROVING DATA COLLECTION

The annual postal statistics is collected by the UPU via a survey sent to the designated postal operators and regulatory bodies of its 192 member countries. The data collected forms the foundation of critical research, including the yearly *State of the Postal Sector* report and its associated Integrated Index for Postal Development, explains UPU statistician Lukasz Piotrowski.

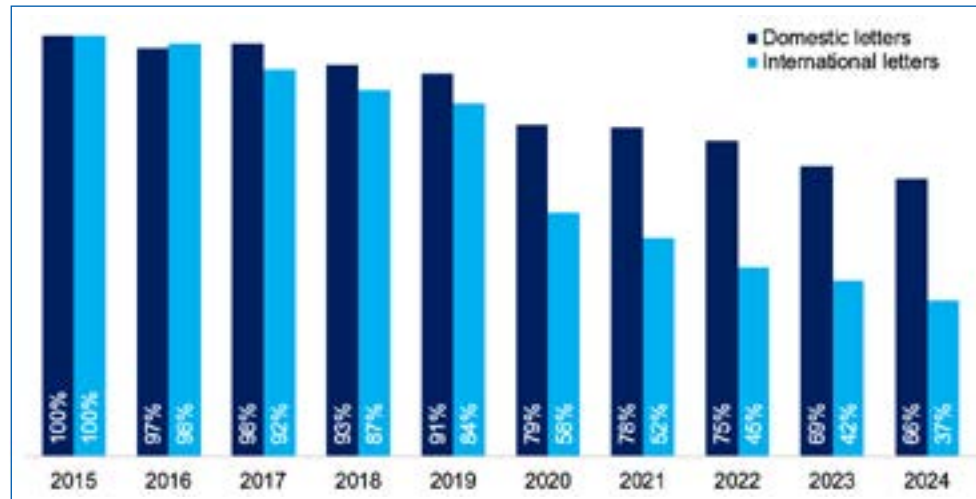
Incomplete questionnaires reduce the value of the longitudinal data used to track and inform the sector's progress. "If we don't measure the sector properly in times like this, we don't have the relevant metrics to help provide advice," says Piotrowski.

The UPU's Council of Administration has recently launched an informal working group to guide the reform of UPU Postal Statistics that will focus on reforming how and which statistics are collected. Experts from member states and the International Bureau are working together to identify response barriers, information gaps and typical data collection procedures to produce a new format that will be tested in 2027 and rolled out in 2028. **KR**

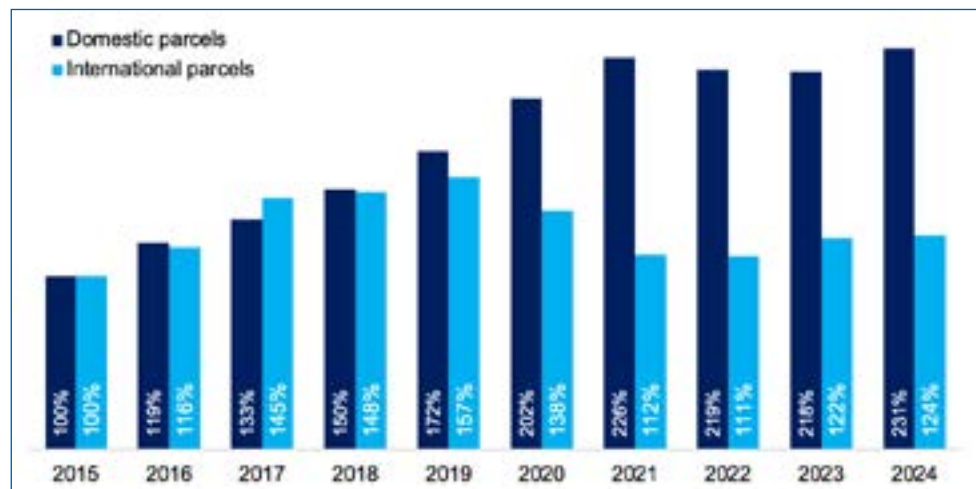
### POSTAL REVENUE: NOMINAL REVENUE COMPARED TO REAL REVENUES ADJUSTED FOR PURCHASING POWER PARITY (PPP)

|                             | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|-----------------------------|------|------|------|------|------|------|------|------|------|------|
| Nominal revenue             | 100% | 101% | 105% | 109% | 112% | 120% | 130% | 132% | 134% | 132% |
| Real revenue (PPP adjusted) | 100% | 101% | 104% | 106% | 109% | 115% | 119% | 116% | 115% | 110% |

### POSTAL VOLUMES: LETTER POST, PERCENTAGE OF ITEMS COMPARED TO 2015



### POSTAL VOLUMES: PARCEL POST, PERCENTAGE OF ITEMS COMPARED TO 2015



### POSTAL REVENUE BY CATEGORY

|                          | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2022  | 2023  | 2024  |
|--------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Letters                  | 40,8% | 38,9% | 38,8% | 38,7% | 35,2% | 32,4% | 33,6% | 30,9% | 32,2% | 33,3% |
| Parcels                  | 20,0% | 23,0% | 24,9% | 26,9% | 28,2% | 29,9% | 32,4% | 31,3% | 32,7% | 31,6% |
| Postal financial service | 17,7% | 17,9% | 16,6% | 17,0% | 16,3% | 18,3% | 16,2% | 17,1% | 15,8% | 16,7% |
| Other                    | 21,5% | 20,3% | 19,7% | 17,4% | 20,3% | 19,4% | 17,8% | 20,7% | 19,3% | 18,4% |

### POSTAL WORKFORCE, PERCENTAGE OF STAFF COMPARED TO 2015

|                 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|-----------------|------|------|------|------|------|------|------|------|------|------|
| Number of staff | 100% | 100% | 99%  | 98%  | 98%  | 94%  | 92%  | 90%  | 86%  | 87%  |





An ORE Plus launch workshop was held in Cotonou, Benin, from 1 to 3 April 2026.

# UPU LAUNCHES ORE PLUS TO ADVANCE POSTAL E-COMMERCE READINESS

The Universal Postal Union has officially launched ORE Plus, its most ambitious operational readiness programme to date, building on nearly a decade of targeted support to help postal operators worldwide handle the growing demands of cross-border e-commerce.

Text by HELEN **NORMAN**

Running from 2026 to 2029, ORE Plus follows three previous programme cycles and represents a significant expansion in scope, moving beyond foundational operational improvements to address digital interoperability, supply chain integration, customs alignment, and economic inclusion for micro-, small- and medium-sized enterprises (MSMEs).

## THE EVOLUTION OF ORE

The Operational Readiness for E-Commerce (ORE) programme was first introduced during the UPU's 2017–2020 cycle, at a time when the rapid growth of global e-commerce was fundamentally reshaping what postal operators were expected to deliver.

"Recognizing early that e-commerce would become a primary driver of parcel growth, the UPU emphasized the need for

designated operators to modernize operational processes and reinforce their digital and logistical capabilities to remain competitive," explains Chokri Ellili, Physical Services Implementation and Capacity Building Programme Manager at the UPU.

The most recent iteration, ORE 3, ran from 2022 to 2025 and supported more than 150 designated operators across all postal regions. The results were substantial. End-to-end item tracking reached or exceeded 80% in many regions. Data quality compliance improved by between 30 and 65 percentage points depending on the region. End-to-end transit times were reduced by six to 12 days and import customs clearance times dropped from multiple days to minutes in several countries.

Some of the most striking gains came from Africa and the Arab region. Africa improved EMS on-time performance from 33.9% to 79.3%, while customs import clearance times fell from 69 hours to just 0.42 hours. The

Arab region saw Electronic Advance Data (EAD) compliance rise from 31.95% to 97.72%, with import customs processing cut to 15 minutes.

Ellili describes how those results were achieved: "ORE 3 supported designated operators through a combination of regional workshops, targeted diagnostics, and hands-on technical assistance. These activities integrated structured classroom training, practical field exposure, and country-specific roadmaps and tailored action plans, ensuring that operators could translate global e-commerce standards into effective and sustainable national implementation."

## LESSONS LEARNED

Despite the progress made, ORE 3 also exposed persistent weaknesses. Certification and full e-commerce ecosystem integration, including returns management, marketplace connectivity, and digital payment linkage,

remained underdeveloped globally. Transport connectivity continued to challenge regions such as the Caribbean, parts of Africa, and Latin America. Data completeness was inconsistent across several designated operators, with Latin America recording the most significant regression. Infrastructure limitations persisted in smaller and least-developed countries.

These shortcomings have directly shaped the design of ORE Plus. "Experience from earlier cycles highlighted three key lessons," says Ellili. "First, approaches must be adapted to regional contexts and differing levels of digital maturity. Second, digitalization remains uneven and requires continued investment in automated workflows and complete, reliable data exchanges. Third, continuous capacity building is essential to institutionalize improvements. ORE Plus incorporates these lessons through flexible regional deployment, enhanced monitoring tools, and a reinforced emphasis on interoperability."

**"ORE Plus strengthens the programme's scope from basic operational readiness to comprehensive ecosystem integration, enabling all posts, particularly those in developing regions, to meet international standards and participate effectively in digital trade."**

#### Chokri Ellili

Physical Services Implementation and Capacity Building Programme Manager, UPU

## WHY ORE PLUS?

The context for ORE Plus is clear. Regulators now require complete and timely EAD information for every international item. *De minimis* thresholds are being reduced in many markets, and customs inspections are becoming more stringent. The nature of postal flows is also changing, with declining letter volumes giving way to complex parcel logistics that require multimodal transport solutions and tighter carrier integration. At the same time, newer security threats, including improvised incendiary and explosive devices, demand more robust and frequently updated protocols.

"Modern e-commerce requires seamless data flows, interoperable systems, and coordinated logistics involving postal operators, customs, and private stakeholders," says Ellili. "ORE Plus strengthens the programme's scope from basic operational readiness to comprehensive ecosystem integration, enabling all posts, particularly those in developing regions, to meet international standards and participate effectively in digital trade."

## THE STRUCTURE OF ORE PLUS

ORE Plus is built around three strategic pillars. The first focuses on process improvement and expertise building, encompassing operational diagnostics, on-site and virtual training missions, and the deployment of accredited regional experts. The second establishes a collaborative knowledge community, centred on a centralized online hub, thematic communities of practice, and peer-to-peer learning between operators. The third pillar promotes standardization for sustainability and customer experience, through harmonized KPIs, regular performance reviews, and a new ORE Plus certification process, including a Combined Certificate of Excellence.

Ellili explains more: "The ORE Plus programme is anchored in three strategic pillars that ensure a coherent and sustainable approach to modernization. The third pillar promotes consistent and high-quality service delivery through

harmonized KPIs, alignment with UPU standards, and regular audits and performance reviews designed to reinforce accountability and long-term operational excellence."

The programme also introduces a new dimension absent from previous iterations: trade integration and inclusive market participation. This encompasses support for MSME trade readiness, women-led enterprises, and pathways into regional and global value chains through UPU initiatives such as TradePost and Heya, which supports women-led businesses.

## ROLLING OUT ORE PLUS

Regional inception activities for ORE Plus are already underway. In Africa, a launch workshop held in Cotonou, Benin, from 1 to 3 April 2026 brought together more than 160 participants. Country Action Plans were developed and refined during the event, aligned with the Dubai Postal Strategy 2026-2029.

The programme's 2026 priorities are clearly defined. "Four priorities are essential: completing baseline assessments; establishing and training national ORE Plus teams; launching the first cycle of workshops and digital training; and deploying strengthened performance dashboards," says Ellili.

Full implementation and capacity building will follow in 2027-2028, with consolidation, final evaluations, and certification targeted for 2029.

Ellili is clear about what the programme ultimately represents: "ORE Plus represents a significant advancement in the UPU's support for global postal modernization. Its emphasis on sustainability, digital readiness, and inclusive trade positions postal operators as strategic facilitators of economic development.

"Success will rely on collaborative engagement across designated operators, regional postal unions, national authorities, and private partners, ensuring that all posts can participate fully in the evolving digital economy," Ellili concludes. **HN**

# UPU CONSULTATIVE COMMITTEE MEMBERS EYE POSTAL DIGITIZATION IN AFRICA

The UPU's Consultative Committee (CC) membership provides unique opportunities connecting wider postal sector players with postal operators and other partners that might benefit from their solutions. Three CC members share how participating in two high-level events in the African region provided unparalleled insight into the region and their ability to help African Posts meet their digitization goals.

*Text by* **KAYLA REDSTONE**

In February, the UPU hosted the third edition of its Africa Postal Leaders Forum in Praia, Cabo Verde, bringing together executives from 45 African countries to discuss modernization and interoperability for the Post. In March, African postal leaders gathered again for the Southern African Postal Operators Association (SAPOA) Postal Forum to discuss driving economic growth and development through the postal network. Both events emphasized the importance of partnerships with the wider postal sector to drive innovation and digitization.

UPU Consultative Committee (CC) members received the exclusive opportunity to participate in both high-level events. Reason Solutions, a CC gold member specializing in postal automation solutions, and

Avalara, a CC gold member specializing in cross-border solutions attended both forums. e-Boks, a CC bronze member providing secure, digital post box services, benefited from participation in the Africa Postal Leaders Forum.

Their presence provided an opportunity to meet new partners, learn more about the needs of postal operators in the region, and share how their solutions could help foster postal transformation across Africa.

## REACHING AFRICAN PARTNERS

Reason Solutions' Chief Technology Officer Wilson George describes the meetings as an important means of connecting with regional partners to tailor

the company's technology accordingly. This includes not only regional cloud and infrastructure providers, logistics networks, customs technology companies, and mobile money platforms, but also development funding institutions and donor bodies looking to reach underserved populations with modern services.

"Our counter automation software is particularly relevant here, where modernizing physical post office touchpoints is often the first and most visible step in a broader digital transformation," he says.

Avalara Senior Revenue Marketing Manager Stuart Daines explains that Africa is an important growth region for cross-border e-commerce.





Consultative Committee members were among the attendees of the SAPOA Forum in Cape Town.

"We hope to build practical partnerships with designated postal operators, regional postal unions, customs and regulatory stakeholders, ecommerce platforms, marketplaces, logistics providers, and other UPU Consultative Committee members. The objective is to co-create repeatable models that help African Posts better support merchants, improve cross-border delivery experiences, and make ecommerce more transparent for consumers," he adds.

## DRIVING DIGITIZATION

Participants emphasized that their aim was to provide postal operators in Africa and beyond with fit-for-purpose solutions that would help them evolve in line with the changing postal business.

"Africa's postal operators face a unique combination of challenges: aging counter infrastructure, the rise of mobile-first consumers, underserved rural populations, and intense competition from private couriers," says George.

He highlights how Reason Solutions' counter automation software can deliver rapid transformation that's visible to postal

customers. Reason Solutions also offers a suite of tools – including e-commerce, mobile, tracking and AI-based customer service and back-office solutions – to help Posts build a trusted foundation.

"Africa's posts do not need to be disrupted by digital commerce – they need to become the infrastructure that digital commerce runs on. That is exactly the role our combined platform is designed to enable," says George.

As global customs regulation rapidly changes, adding additional burden to postal operators trying to harness e-commerce opportunity, Daines explains that Avalara's solution can help simplify tax and trade compliance. The solution helps posts classify goods, calculate customs duties and import taxes, support landed cost transparency at checkout, and ensure the right data is provided before items reach the border.

"For postal operators, these capabilities can help build trust with merchants and consumers by reducing surprises, delays, and manual compliance challenges," he says.

"Participation through the CC transformed what could have been a traditional conference into a series of meaningful conversations about real opportunities and real projects. The CC is evolving from a platform for dialogue into a platform for collaboration and action."

**Dame Damevski**  
International Business Director, e-Boks

## LESSONS LEARNED

Participants also shared the insights they gained from the forums' discussions.

e-Boks International Business Director, Dame Damevski, notes the potential to help African postal operators leapfrog.

"Across the continent, many postal operators are not constrained by decades of legacy infrastructure, creating unique possibilities to move directly into modern digital communication, identity and commerce ecosystems," says Damevski. "The technology exists – the real accelerator is progressive policy and regulatory thinking."

He added that, along with the right frameworks and strategic direction, governments would need to provide funding to enable leapfrogging.

George added that many of the operators he spoke with – even the most well-resourced – were looking for turnkey solutions to kick-start their modernization journey.

"As a UPU CC member, these forums gave us valuable opportunities to engage directly with postal leaders, regulators, and private-sector partners on topics such as customs readiness, interoperability, ecommerce growth, data quality, and the role of technology in modernizing postal networks."

### Stuart Daines

Senior Revenue Marketing Manager, Avalara

"There is widespread fatigue with long, expensive implementation cycles. Operators want platforms that are pre-integrated, proven elsewhere, and deployable quickly," he said, adding this was especially true for AI solutions.

Daines added that the discussion highlighted a need for interoperable solutions that would serve not only Posts, but also merchants, customs authorities and customers.

"Interoperability should be viewed as a commercial enabler: when systems, data, and standards connect more effectively, merchants can sell with greater confidence and consumers can receive cross-border parcels with fewer surprises," says Daines.

George also noted that CC members could work together to co-create interoperable solutions.

## BENEFITS EARNED

These exclusive discussions provided a helpful basis develop business strategy and target necessary partnerships, they agreed.

"As a UPU CC member, these forums gave us valuable opportunities to engage directly with postal leaders, regulators, and private-sector partners on topics such as customs readiness, interoperability, ecommerce growth, data quality, and the role of technology in modernizing postal networks," Daines summarizes.

Damevski added that the CC was a credible platform for all partners – from policymakers, to Posts, to the private sector – to engage and move modernization projects forward.

"Participation through the CC transformed what could have been a traditional conference into a series of meaningful conversations about real opportunities and real projects. The CC is evolving from a platform for dialogue into a platform for collaboration and action," he says.

For his part, George reiterates the importance of sharing these experiences across the CC and the broader UPU.

"We are eager to contribute beyond our own commercial interests. Whether that means participating in UPU working groups, co-authoring standards inputs, sharing deployment learnings with operators in UPU's development programmes, or collaborating with fellow CC members on joint solutions, we are here as long-term participants in this community." **KR**

"We are eager to contribute beyond our own commercial interests. Whether that means participating in UPU working groups, co-authoring standards inputs, sharing deployment learnings with operators in UPU's development programmes, or collaborating with fellow CC members on joint solutions, we are here as long-term participants in this community."

### Wilson George

Chief Technology Officer, Reason Solutions



# THE EVOLVING ROLE OF WOMEN IN THE POSTAL SECTOR

For much of postal history, women were present in the workforce but rarely visible in official records. According to Vincent Schicker, historian at the Universal Postal Union (UPU), the expansion of postal services during the nineteenth century gradually opened the door to women's participation, although often under restrictive conditions.

Research by VINCENT **SCHICKER**  
Text by MAKIKO **HAYASHI**

An 1876 article published in *UNION POSTALE* examined the role of women in postal administrations worldwide. The piece provided a revealing snapshot of the era. Around 5,000 women worked in the postal service in the United States, 171 in Sweden, and 424 in Switzerland, where women represented a minority among the country's 5,355 postal employees. Yet many countries still barred women from postal employment or imposed strict conditions on their participation.

For Schicker, these historical examples reveal a broader pattern: the story of women in the postal sector is one of gradual access, resistance and eventual transformation.

## ENTERING THE POSTAL WORKFORCE

Schicker explains that, as postal administrations modernized, they became increasingly attractive employers for women seeking financial independence and social mobility. In France, for example, postal employment was considered one of the few respectable professions available to women from lower-middle-class families.





New postal uniforms in New Zealand, 1974. The archival record of NZ Post notes that the term "postmen" had become a misnomer, as women outnumbered men in mail delivery, and these employees delivered all mail and parcels weighing up to three pounds. [UPU Archives – New Zealand, 1974.]

He points to a striking figure from 1894, where 5,500 women applied for just 400 positions within the French postal and telecommunications administration. "The numbers themselves show how sought-after these positions had become," he notes.

At the same time, women's opportunities remained tightly controlled. Schicker highlights how many postal administrations imposed restrictions based on marital status or age, while others confined women to duties considered socially acceptable for them. In countries such as Bavaria, Luxembourg, Egypt, Russia, the Netherlands and Norway, women were either excluded from postal work altogether or confined to limited functions considered "appropriate" for them.

## THE FIRST ROLES WOMEN OCCUPIED

According to Schicker, the earliest roles available to women reflected the social attitudes of the period. Women were largely directed toward clerical and administrative work such as secretarial duties, typing, translation and counter services.

The 1876 UNION POSTALE article explained that women were considered unsuited to strenuous work and were instead directed toward occupations requiring "delicacy". Telephone operators became one of the most emblematic examples. "Women were recruited because their voices were considered more pleasant and reassuring," Schicker explains, noting that young men employed in similar roles were often perceived as too rowdy or ill-mannered for customer interactions.

Such views illustrate how gender stereotypes shaped recruitment practices and the division of labour within postal administrations. Women were also commonly paid less than their male counterparts, reflecting broader inequalities in the workforce at the time.

Schicker also notes how office technologies changed women's relationship with work. In many households, the typewriter gradually replaced the piano as a symbol of feminine education and preparation for professional life. Yet even as women entered the workforce in larger numbers, social expectations surrounding marriage and motherhood continued to limit their careers.

## WOMEN STEP INTO NEW POSTAL ROLES DURING WARTIME

For Schicker, the two World Wars represented major turning points in women's place within postal services.

"As men left for military service, women stepped into operational positions that had previously been closed to them," he explains. Women delivered mail, worked in sorting facilities and ensured continuity of postal operations during periods of immense disruption.

Although many women were later expected to leave these roles when men returned from the front, Schicker argues that perceptions had permanently shifted. Women had demonstrated that they could perform physically demanding and operationally critical tasks just as effectively as their male colleagues.

He points to the hiring of Switzerland's first female PostBus driver in 1971 as a symbolic example of this gradual expansion beyond clerical functions.

For Schicker, the story of women in the postal sector is one of gradual access, resistance and eventual transformation. As postal administrations modernized, they became increasingly attractive employers for women seeking financial independence and social mobility.

## RESISTANCE AND STEREOTYPES IN THE WORKPLACE

Schicker notes that women entering postal administrations often encountered suspicion and resistance from male colleagues. Postal services, like many public institutions of the time, had long been male-dominated environments.

"The arguments used against women were often contradictory," he explains. Women were criticized for supposedly lacking physical strength or authority, while simultaneously being praised for qualities such as patience, dexterity and delicacy that were associated with clerical work.

These stereotypes persisted well into the twentieth century and mirrored attitudes found across other industries. Women were frequently perceived as suitable for repetitive or delicate work, but not for positions involving authority or operational responsibility.

For Schicker, these tensions reflected broader social attitudes toward women in the workplace during the late nineteenth and early twentieth centuries.

## WOMEN RISE TO LEADERSHIP

Despite these barriers, women gradually advanced into supervisory and management roles. Schicker points to the early existence of female “postmistresses” managing local post offices in several countries, as described in the 1876 UNION POSTALE article.

By 1875, the United States counted 2,500 female postmistresses, while France had nearly 4,000 women overseeing local offices, often in rural communities. However, the largest and most prestigious offices remained overwhelmingly led by men.

Progress toward senior leadership positions remained slow for decades. Schicker highlights that women only gained access to management positions in Switzerland in 1972, with the country’s first female post office manager appointed in 1981. It was not until 2012 that Susanne Ruoff became the first female CEO of La Poste Suisse (Swiss Post). Similar milestones were achieved internationally by leaders such as Moya Greene at Royal Mail (United Kingdom) in 2010 and Megan Jane Brennan at the United States Postal Service in 2012.

The 1876 UNION POSTALE article explained that women were considered unsuited to strenuous work and were instead directed toward occupations requiring “delicacy”. Telephone operators became one of the most emblematic examples.

## TRAILBLAZERS WHO CHALLENGED THE STATUS QUO

Among the stories Schicker finds most striking is the response written by an anonymous Swiss postal employee shortly after the publication of the 1876 UNION POSTALE article.

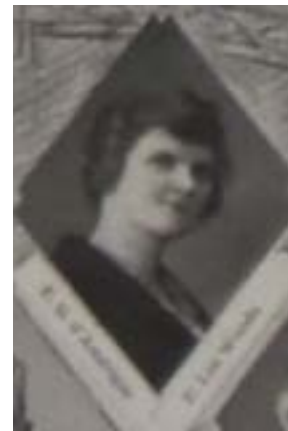
“She answered many of the stereotypes of the time with irony and remarkable clarity,” he explains. The employee argued that if women were considered capable of managing large households and supervising domestic staff, they should also be considered capable of managing post offices. She also pointed out that men, too, could be absent from work owing to illness or personal behaviour.

Schicker also highlights the gradual appearance of women within the UPU’s own history. At the 1885 Lisbon Congress, a woman from the Portuguese secretariat appeared among the participant portraits. In 1920, Elizabeth Lee Woods joined the American delegation to the Madrid Congress, causing debate over whether a woman should even be admitted to the proceedings. At the 1934 Cairo Congress, Hélène Serebriakova of the USSR became the first female delegate admitted with full rights.

For Schicker, these examples illustrate how women progressively carved out their place within both national postal systems and the wider international postal community. Today, women occupy leadership positions across postal administrations worldwide, reflecting decades of perseverance and change across the sector. **VS & MH**



Ms Hélène Serebriakova (USSR), Head of the Postal Section of the International Communications Department within the People's Commissariat for Communications, Soviet delegate to the 1934 Cairo Congress (UPU archives)



Ms Elizabeth Lee Woods – Secretary, attaché within the American delegation to the 1920 Madrid Congress (UPU archives)



Unknown – Portuguese secretariat at the 1885 Lisbon Congress (UPU archives)



Not referenced – Ms N. Dobrouskina (USSR) and Ms Catherine Engler (Lithuania)

# EXPANDING FINANCIAL INCLUSION THROUGH POSTAL NETWORKS: EGYPT POST DELIVERS CITIZEN BONDS NATIONWIDE

Postal networks are increasingly being recognized as critical infrastructure for advancing financial inclusion and extending access to essential services. In Egypt, a new government initiative, Citizen Bonds, is demonstrating how postal infrastructure can be leveraged to connect citizens directly with national investment opportunities.

*Text by* TITANI JOSEPH **MKANALUMO**

The Egyptian government is utilizing the extensive reach of the postal network to distribute a government-backed financial instrument designed to encourage savings, broaden participation in public financing, and strengthen economic inclusion. At the centre of this initiative is Egypt Post, which is playing a key role in ensuring that the programme reaches citizens across the country.

The postal operator views its role as both operational and strategic, serving as a trusted intermediary between the government and the public. The institution

is helping to ensure that citizens – regardless of their location or level of access to traditional banking services – can participate in the initiative. Egypt Post is strengthening its role as a secure and reliable channel for distributing the instrument while promoting financial inclusion and offering citizens a safe investment opportunity with guaranteed returns.

With thousands of branches across urban and rural areas, this extensive physical presence is important in reaching underserved populations by enabling citizens to subscribe to the bond through



Frontline operations at Egypt Post enable public access to the citizen bond. (Photo: Egypt Post)



local post offices, thereby lowering barriers to entry and broadens participation in formal financial systems.

According to Egypt Post, “the postal network’s greatest advantage lies in its extensive reach, with thousands of branches across cities and villages. This allows citizens to subscribe easily without bank accounts while reinforcing trust in the product through Egypt Post’s longstanding reputation as a public institution.”

The successful rollout of the Citizen Bond has also depended on the operational readiness of the Post. Egypt Post reports that its infrastructure was fully prepared to support the initiative, with digital systems integrated into government platforms to facilitate seamless subscription and payment processes. This integration enables efficient handling of transactions, including the management of monthly payouts associated with the bond. Early implementation has demonstrated both strong public demand and the system’s capacity to manage high volumes of participation.

**The postal network’s greatest advantage lies in its extensive reach, with thousands of branches across cities and villages. This allows citizens to subscribe easily without bank accounts while reinforcing trust in the product through Egypt Post’s longstanding reputation as a public institution.**

“Egypt Post infrastructure is fully prepared with digital systems integrated with government platforms to ensure smooth subscription and monthly payout processes,” the postal operator commented.

Behind this readiness is a combination of technological investment and human capacity development. Egypt Post continuously works to improve staff skills through ongoing training. Clear guidelines on service procedures have been shared with employees to ensure smooth and consistent service delivery. Operational systems have also been improved to make the service easier to use and to ensure transparency for customers.

The Citizen Bond initiative forms part of a broader transformation within Egypt Post as it expands beyond its traditional role. The postal operator has long served as an integrated platform meeting diverse citizen needs from mail and parcel delivery to savings and remittances, and now government-backed products like bonds.

Egypt Post expects that this approach will encourage broader participation while reinforcing confidence in postal financial services. The availability of secure, accessible investment options helps foster a culture of savings and financial planning among citizens.

“Offering a government-backed financial product through Egypt Post enhances credibility and encourages citizen participation, strengthening public trust in postal financial services,” Egypt Post emphasized.

In future, Egypt Post is exploring opportunities to further expand its service offerings, particularly at the intersection of financial services, logistics and digital commerce.

“We are working to expand beyond traditional savings and remittances by offering integrated solutions for e-commerce and B2C services. Our nationwide network can support electronic payments and collections, while also providing advanced logistics such as distribution, and cash-on-delivery,” added Egypt Post.

**Offering a government-backed financial product through Egypt Post enhances credibility and encourages citizen participation, strengthening public trust in postal financial services.**

These developments position Egypt Post as a central player in the country’s evolving digital economy, supporting both citizens and businesses through a combination of financial and commercial services. By integrating these capabilities, the postal network is evolving into a multifunctional platform that supports inclusion, economic participation and service delivery across multiple sectors.

The rollout of the Citizen Bond through Egypt Post highlights the continued relevance of postal networks as enablers of inclusive development. By combining physical reach, institutional trust and digital capabilities, postal operators can play a vital role in extending access to financial services and supporting national development objectives.

As countries continue to explore innovative approaches to financial inclusion, the experience of Egypt Post offers an example of how trusted public institutions can bridge gaps in access and bring opportunities closer to citizens. **TJM**

# ENHANCING NATIONAL CONNECTIVITY: PHLPOST EXPANDS ITS NETWORK TO SERVE COMMUNITIES ACROSS THE PHILIPPINES

Across much of the world, postal operators are reducing their physical footprints as digital communication and evolving consumer behaviour reshape the sector. In the Philippines, however, the Philippine Postal Corporation (PHLPost) is expanding its network of post offices, a move that reflects the country's unique geographic realities and growing demand for accessible logistics and public services.

*Text by* TITANI JOSEPH **MKANALUMO**

The archipelagic nation composed of more than 7,000 islands and islets faces distinctive connectivity challenges. While digital transformation continues to play an increasingly important role in modern postal operations, physical access to reliable service points remains essential for ensuring that communities in remote and underserved areas remain connected to communication networks, logistics services and economic opportunities.

PHLPost's network expansion is therefore both a strategic investment and a response to national needs. By strengthening its nationwide presence, the postal operator aims to enhance service accessibility while reinforcing its universal service mandate. The expansion also reflects a recognition that, in a geographically dispersed country, a robust physical postal network remains a vital component of national connectivity.

"In the Philippines, expanding access is not optional, it is essential. Our network is more than infrastructure; it is a bridge to opportunity," the PHLPost notes. "Today's post office is a hub for logistics, services, and opportunities. We are enabling participation, from everyday transactions to digital commerce."

This post office expansion is guided by a strategic and data-informed approach that considers both service gaps and emerging economic activity. In remote and isolated areas, new post offices are bringing postal



PHLPost employees carry out last-mile delivery in far-flung Bongao, Tawi-Tawi province (Photo: PHLPost)

and logistics services closer to communities with limited connectivity, whereas expansion in high-growth urban centres, the post office serves to provide reliable, accessible and relevant services to an expanding population, increasing urbanization and growth in online commerce. This balanced strategy ensures that the postal network meets its universal service obligations for mail service, while supporting economic growth.

Modern post offices are evolving beyond their traditional role as points for sending and receiving mail. Under the PHLPost's expansion strategy, the new facilities are being designed as integrated service hubs that combine communication, logistics and public services. Residents and businesses can access a wide range of services including domestic and international mail, parcel handling, and express and registered delivery services that ensure secure and efficient transactions.

The role of the postal network is particularly significant in strengthening last-mile delivery services, a critical element in

supporting the growth of e-commerce. By establishing facilities closer to communities, PHLPost strives to improve operational efficiency, bringing sorting, routing and delivery functions nearer to end users. This helps reduce transit times while enhancing the reliability of parcel delivery across diverse geographic areas.

"Reach, efficiency, and reliability are the foundations of last-mile delivery," PHLPost explains. "Expanding the network means expanding who can participate in e-commerce."

The post offices are also access points for government-related services such as Postal ID registration, supporting identity verification, participation in formal systems and offer business-oriented solutions, including direct mail and logistics support to expand the reach and competitiveness of entrepreneurs and small businesses in the digital economy.

The Postal ID registration function is one example of how postal infrastructure contribute to public administration. PHLPost facilities have been used as distribution points for programmes such as KADIWA ng Pangulo, which provides access to affordable agricultural products and essential commodities. Thus, the robust physical network operates as access points where citizens can participate in financial, administrative and civic systems.

"For many communities, the post office is the government's front door. We bring public services closer to where people live," PHLPost notes.

PHLPost's strategy also reflects a broader understanding that modernisation in the postal sector requires both digital innovation and accessible physical infrastructure. While the institution is investing in tracking systems, automation and customer-facing digital platforms, maintaining a strong physical network remains essential for inclusive service delivery.

"Physical and digital are not competing priorities; they are mutually reinforcing. Modernization is about improving the experience without losing accessibility," said the postal operator.

Ultimately, the expansion of the postal network aims to strengthen connectivity

**Better access today  
creates greater  
opportunities for  
tomorrow. No community  
should be left behind in a  
connected economy**

across the Philippines and ensure that the benefits of digital commerce and public services are shared more widely. Improved access to postal facilities can reduce the time and cost associated with everyday transactions, while enabling local enterprises to reach broader markets and participate in national and international trade.

"Better access today creates greater opportunities for tomorrow. No community should be left behind in a connected economy," PHLPost emphasizes.

By expanding its physical network while continuing to modernize its services, PHLPost is reaffirming the enduring role of the postal system as a national connector linking communities, enabling commerce and supporting inclusive development across the archipelago. **TJM**

**In the Philippines,  
expanding access is not  
optional, it is essential.  
Our network is more  
than infrastructure; it is  
a bridge to opportunity.  
Today's post office is a  
hub for logistics, services,  
and opportunities. We are  
enabling participation,  
from everyday  
transactions to digital  
commerce.**



Postmaster and letter carrier Norwil Lecias delivers mail in Bongao, Tawi-Tawi province (Photo: PHLPost)





# DENMARK'S POSTAL REFORM: LETTERS, LEGISLATION AND LESSONS LEARNED

On 1 January 2024, Denmark overhauled its postal legislation, ending the requirement for a state-designated operator to provide a universal letter service and replacing it with a market-based model. Two years later, PostNord, the national postal operator, delivered its last letter on 30 December 2025, and exited the letter market to focus on parcel delivery.

Text by HELEN **NORMAN**

The overhaul did not happen overnight. It followed years of political discussion, a sharp decline in letter volumes, and a growing consensus that the traditional postal model and universal service obligation (USO) was no longer economically viable. Peter Hilmer Fuglsang-Damgaard, Head of the Cooperation and Preparedness Division at the Danish Ministry of Transport, is clear that the change should not be mischaracterized.

"The USO was not abolished," he says. "We have created a new model where the USO is performed by the market forces. After the reform of the postal sector, the USO still rests with the state according to the EU Postal Services Directive and the UPU Acts. The revised Postal Act contains regulation to meet that objective."

## THE CASE FOR REFORM

Denmark's postal market had been under pressure for years. Letter volumes fell by around 90% from the start of the millennium – the fastest rate of decline of any country in the world – driven almost entirely by digitalization. By 2023, an estimated 95% of Danish citizens were using digital mail.

The financial consequences were significant. PostNord Denmark had been receiving state compensation to cover the net cost of performing the USO since 2020, with that figure estimated at DKK 150 million

(USD 23.4 million) in 2023 alone. With a new government in place following elections in December 2022, the political discussion gained fresh momentum.

"During this process the Universal Service Provider, PostNord Denmark, declared that due to the ongoing dramatic decline in the number of letter post items, this product was no longer economically sustainable," says Fuglsang-Damgaard.

A study published in December 2022 found that postal providers were already delivering items nationwide at uniform prices, but not because the law required it, but because it made commercial sense. Emerging competition in the letter market and growing competition in the parcel market reinforced the conclusion that the regulatory framework needed updating.

The political agreement was reached on 27 June 2023, backed by a broad majority in the Danish parliament, the Folketinget. The new Postal Act came into force on 1 January 2024. "This situation was discussed politically in the spring of 2023, the result of which led to an agreement in June the same year," says Fuglsang-Damgaard. "The agreement is the basis of the new Postal Act."

## HOW POSTAL SERVICES WORK NOW

Under the reformed framework, the requirement to designate a single operator to perform a broad set of postal products

**"The decision in relation to the Danish USO highlights an accelerating policy reappraisal driven by long-term declines in letter volumes and rising costs to sustain the USO."**

### Paul Schoorl

Programme Manager for Policy and Regulatory Advisory, UPU

has been removed. Instead, any company wishing to provide postal services must obtain a licence from the National Regulatory Authority (NRA). Nationwide providers are required to offer at least one letter or one parcel product at uniform prices across Denmark, though prices themselves are not regulated.

Letter delivery in Denmark is now primarily handled by Dansk Avis Omdeling A/S (DAO). "DAO upholds full geographic coverage by integrating letter delivery with its existing distribution of newspapers, magazines and parcels," explains Fuglsang-Damgaard. "This allows fixed delivery costs to be shared across multiple products and significantly improves the economic sustainability of nationwide delivery in a market with declining letter volumes."

For international mail, a transitional arrangement is currently in place. DAO handles letters containing documents, while PostNord Denmark handles items containing goods. Both companies receive state compensation. The government has confirmed that international mail handling will be put out to tender, with any new arrangement taking effect from 1 January 2028.

## SOME SERVICES STILL REQUIRE STATE INTERVENTION

The removal of the traditional USO was not unconditional. The new Postal Act retains specific obligations for services where commercial provision cannot be guaranteed: delivery to people who are blind or visually impaired, postal services to sparsely populated small islands, and the handling of international mail.

For services to the blind, the government has entered into an agreement with DAO. Services to sparsely populated areas are managed through a government funding pool that eligible communities may apply to. The NRA continues to conduct market surveillance and handle complaints, while the Minister for Transport retains the authority to intervene, either by appointing an operator with compensation or launching a public tender, if the market fails to provide adequate coverage.

"The Danish Transport Authority closely monitors the postal market through data, surveys, complaints, and ongoing dialogue with operators," says Fuglsang-Damgaard. "In practice, nationwide coverage is still largely maintained on a commercial basis, supported by demand from businesses and public authorities. There has been no need to intervene since the adoption of the Postal Act."

According to Fuglsang-Damgaard, complaints have remained stable and largely concern service quality. Prices have increased but remain uniform, he adds.

## LESSONS FROM THE FIRST TWO YEARS

The reform has not been without its complications. "Most misunderstandings came from the fact that PostNord was to close its mail business at the end of 2025, and not about the fact that we changed the law in 2023," Fuglsang-Damgaard says. "When PostNord announced that it was closing its letter business, some misunderstood that the letter service was to stop, but DAO is still delivering letters."

Two further lessons emerged from the process: "It's important to reinforce the surveillance of the market," says Fuglsang-Damgaard. And regulation must include a mechanism to address market failure: "A safety net must be in place in the regulation so that market failure can be corrected," he adds.

So far, the numbers support the approach. "The model has proved to be sustainable and the payment of compensation from the state to this sector has gone down," he continues.

## THE UPU'S PERSPECTIVE

Paul Schoorl, Programme Manager for Policy and Regulatory Advisory at the Universal Postal Union (UPU), describes Denmark's regulatory changes as part of a broader trend rather than an isolated case.

"The decision in relation to the Danish USO highlights an accelerating policy reappraisal driven by long-term declines in letter volumes and rising costs to sustain the USO," he says.

"It signals that members are willing to redesign domestic postal obligations to reflect changed demand, although the responses will vary according to national economic and postal development, as well as geography, population size and density, social policy and regulatory choices."

Despite these national differences, a general trend can be observed in which policy and regulatory measures increasingly shift away from rigid, prescriptive regulation toward more flexible measures that are market-based and outcome-focused by design, Schoorl notes.

Schoorl also stresses the fact that removing a domestic legal obligation does not mean that the universal postal service itself has been abandoned.

"The discontinuation of the specific legal obligation does not mean that a universal postal service is not provided in Denmark," he adds.

Under the UPU framework, domestic restructuring does not remove a country's international treaty obligations. Article 3 of the Universal Postal Convention requires members to ensure a permanent provision of basic postal services, while Articles 17 and 18 set mandatory international service elements. Denmark must continue to exchange mandatory international postal services with other member countries and comply with applicable rules such as those on terminal dues, as well as other regulatory and operational requirements.

The UPU continues to actively support members navigating similar pressures to Denmark through its Postal Reform Plan (PRP) – a structured policy advisory framework – as well as Postal Regulatory Forums and a biannual Conference on Postal Regulation.

"The International Bureau can assist with technical and comparative analysis, policy advisory guidance through the PRP, capacity building, knowledge-sharing and facilitation of policy dialogues so members can design tailored transition paths," says Schoorl.

## ADVICE FOR POSTAL REGULATORS

For countries monitoring Denmark's experience and considering their own reforms, Fuglsang-Damgaard's main message is that access to postal services and the preservation of a traditional postal operator are not necessarily the same thing.

"One of the key lessons learned from the removal of the classic USO in Denmark is that nationwide access to letter services can be preserved even when the traditional postal infrastructure is fundamentally changed," he explains.

"The Danish experience demonstrates that full geographic coverage does not necessarily depend on maintaining a standalone universal letter network."

His advice to other countries is to move before the economics force the issue. "Start reforms early and base them on a solid understanding of national market conditions and user needs. As volumes decline, traditional USO models may become unsustainable, making flexibility in service standards and new business models, such as integration with parcel logistics, important."

Schoorl makes a similar point: "Any reform must balance financial sustainability with social inclusion and treaty obligations. Reforms should be evidence-based, transparent, and include measures to protect vulnerable groups and maintain mandatory international exchanges. There is a wide range of instruments and measures that can be devised to achieve those outcomes, but any intervention affecting the universal postal service should be accompanied by clear performance metrics and contingency arrangements."

Letter volumes in Denmark are expected to keep falling. From 196 million items in 2020, they dropped to 147 million by 2023 and around 90 million by 2025. Whether other countries reach the same conclusions as Denmark will depend on their own markets, their own politics, and how quickly those numbers decline. **HN**

"One of the key lessons learned from the removal of the classic USO in Denmark is that nationwide access to letter services can be preserved even when the traditional postal infrastructure is fundamentally changed. The Danish experience demonstrates that full geographic coverage does not necessarily depend on maintaining a standalone universal letter network."

**Peter Hilmer Fuglsang-Damgaard**  
Head of the Cooperation and Preparedness  
Division at the Danish Ministry of Transport



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# MARKET DIGEST

by ANQI ZHOU

## ARGENTINA

Buenos Aires gained an unusual postal space with Postdata Café Postal, a specialty café that also operates as an official **CORREO ARGENTINO** postal unit. Customers can drink coffee, write letters by hand, seal envelopes and send national or international mail through the official postal circuit. The café, operating as an authorized postal service point of Correo Argentino, has a daily collection time and offers a deliberately analogue experience in contrast to instant messaging and QR-code-heavy retail. The initiative highlights how postal services can be presented in new community-oriented formats, combining traditional mail acceptance with cultural and hospitality elements.

(Source: [iprofesional.com](http://iprofesional.com))

## AUSTRALIA

**AUSTRALIA POST** announced a 12-month free PO Box service for people experiencing homelessness in Adelaide, beginning in March 2026. The service is available at selected post offices and allows eligible individuals without a fixed address to receive important mail securely, including identification documents, medical information and housing or employment correspondence. Applicants must apply in person and present a referral letter from Toward Home Resolve, a Salvation Army service supporting people experiencing homelessness in Adelaide.

(Source: [auspost.com.au](http://auspost.com.au))

## AUSTRIA AND BULGARIA

**AUSTRIAN POST** completed the acquisition of 70% of Bulgaria-based [euShipments.com](http://euShipments.com), an e-commerce logistics company, expanding its cross-border e-commerce and fulfilment capabilities in Southeast and Eastern Europe. The move supports Austrian Post's LEAD 2030 strategy, which aims to strengthen the company's position in international parcel logistics. euShipments.com offers delivery,

fulfilment and return solutions for online retailers, giving Austrian Post a stronger regional platform for serving e-commerce customers across European markets.

(Source: [ots.at](http://ots.at))

## CAMEROON

**CAMPOST** is building a logistics warehouse in Yaoundé as part of its e-commerce expansion strategy. The project supports Bolamba, an online shopping platform that Campost plans to launch in 2026. In addition to the warehouse, Campost plans to establish logistics hubs at Douala and Yaoundé airports, using sites provided by Cameroon Airports Corporation. The wider logistics network is expected to support international cargo handling, warehousing, order processing, national distribution and last-mile delivery, positioning the postal operator as part of Cameroon's digital commerce infrastructure.

(Source: [businessincameroon.com](http://businessincameroon.com))

## CHILE

**CORREOSCHILE** is expanding its domestic last-mile role through new partnerships with Banco Santander and Cenabast, Chile's public health supply agency. Under the Santander agreement, postal workers and post offices will be equipped with payment systems, enabling services such as bill payment at customers' doors, with an initial pilot involving 100 letter carriers. In parallel, CorreosChile is piloting medicine delivery with Cenabast, allowing some patients to receive state-provided medicines at home instead of collecting them at hospitals. It showcases how postal networks can support public service access, health logistics and financial inclusion.

(Source: [latercera.com](http://latercera.com))

## COSTA RICA

Costa Rica expanded immigration filing options through a postal service pilot project. From 16 March 2026, selected foreign nationals submitted certain immigration applications at **CORREOS DE COSTA RICA** locations, including the Central Post Office in San Jose and Santa Ana branches, without relying only on immigration offices. The pilot turns postal counters into practical access points for government procedures and is particularly relevant for residents, retirees, digital nomads and families navigating immigration paperwork.

(Source: [correos.go.cr](http://correos.go.cr))

## EGYPT

**EGYPT POST** signed a cooperation protocol with Al Jazeera Higher Institutes in Mokattam to provide postal, financial and government services directly on campus. The agreement includes tuition and fee collection, delivery of graduation certificates, and access to Egypt Post's broader postal and financial services for students, faculty and staff. A fully equipped Egypt Post office will be allocated within the institutes, reducing the need for users to leave campus for administrative services.

(Source: [businesstec.news](http://businesstec.news))

## ESTONIA

**OMNIVA** launched and expanded a pilot for Picapac private parcel lockers installed at customers' homes. The pilot that began in February in Rae municipality has been expanded to two areas (Viimsi and Nomme). The lockers allow users to receive, return and send parcels from their doorstep and can be used by multiple service providers, including parcel companies and food couriers. It illustrates Omniva's attempt to test whether a dense network of home parcel lockers can become part of its last-mile infrastructure in residential areas.

(Source: [omniva.ee](http://omniva.ee))

## INDIA AND BHUTAN

**INDIA POST AND BHUTAN POST** signed an MoU to strengthen cooperation in postal operations, technology development, capacity building, logistics connectivity, philately and knowledge exchange. The agreement also supports the planned UPU-UPI cross-border remittance initiative, which will integrate the UPU's PosTransfer system with India's Unified Payments Interface. The initiative aims to make remittances between India and Bhutan more efficient, affordable and accessible through the postal network.

(Source: [pib.gov.in](http://pib.gov.in))

## JORDAN

**JORDAN POST** signed a strategic partnership with UWallet to launch a Digital Postal Wallet, expanding access to digital financial services across the Kingdom. Under the agreement, UWallet will provide a licensed, secure platform compliant with Central Bank of Jordan regulations, while Jordan Post will use its geographic reach and public trust to make the service accessible to citizens. The wallet will allow users to open e-wallet accounts and carry out payments and money transfers through a regulated digital platform.

(Source: [petra.gov.jo](http://petra.gov.jo))

## SINGAPORE

**SINGPOST** and Zelostech, an autonomous logistics technology company, signed an expanded MoU to explore fully driverless public-road deployment of autonomous logistics vehicles in Singapore. The agreement follows trials of autonomous vehicles at SingPost's Regional eCommerce Logistics Hub and aims to move toward public-road operations, fleet management and commercial deployment. SingPost sees the technology to reduce last-mile delivery costs and build a more sustainable, technology-enabled delivery network.

(Source: [singpost.com](http://singpost.com))

## TANZANIA

Tanzania's National Physical Addressing System (NAPS) was presented as a driver of e-commerce, financial inclusion and public service delivery during the Tanzania Annual Conference on Physical Addressing 2026 and Postal Technology Show. **TANZANIA POSTS CORPORATION** emphasized that verified addresses help businesses register, access banking, secure loans and use insurance services, while also improving logistics route planning and home delivery. The system is being integrated with digital postal platforms, including the Posta Kiganjani app and Kipepeo Shop e-commerce platforms, which rely on postal codes for customer verification and delivery. With more than 95% national coverage reported, Tanzania's initiative reflects the expanding role of postal-led addressing infrastructure in the digital economy.

(Source: [thecitizen.co.tz](http://thecitizen.co.tz))

## TURKMENISTAN

**TURKMENPOST** and logistics service TMDrops launched new online shopping solutions for residents of Turkmenistan. The partnership enables customers to purchase goods from popular international online stores, including Amazon, eBay and Zara, with onward delivery to Turkmenistan. The service is a practical cross-border e-commerce story from Central Asia, where access to international online retail can depend heavily on trusted forwarding and postal-logistics arrangements. It also shows Turkmenpost positioning itself as a facilitator of consumer e-commerce, not only as a domestic mail operator.

(Source: [mincom.gov.tm](http://mincom.gov.tm))

## UGANDA

**POSTA UGANDA** has launched POSTCOM, a government-owned national e-commerce platform that connects Ugandan businesses with local and international markets. The service combines a digital marketplace with the postal operator's network of more than

100 branches and last-mile delivery routes, turning post offices into e-commerce access points. Designed to support locally made products, POSTCOM aligns with Uganda's Digital Transformation Roadmap and positions Posta Uganda as a logistics and digital trade enabler beyond traditional mail delivery.

(Source: [ict.go.ug](http://ict.go.ug))

## UNITED KINGDOM

**ROYAL MAIL** began trialling 24/7 parcel lockers at selected Tesco stores across the United Kingdom, expanding customer options for sending, collecting and returning parcels. The trial forms part of Royal Mail's strategy to grow its out-of-home delivery network and triple parcel access points to 45,000 by 2030. By placing lockers at high-traffic retail locations, Royal Mail aims to make parcel services more convenient, flexible and accessible for everyday customers.

(Source: [ipc.be](http://ipc.be))

## VIET NAM

Tuyen Quang province opened 34 online public service agency points in cooperation with the provincial post office of **VIETNAM POST**. The model uses post office transaction points and trained postal staff to help citizens and businesses submit online applications, digitize documents, receive administrative-procedure requests and return results through public postal services. The pilot is aimed particularly at remote and rural areas, where digital skills and travel time remain barriers to online government services. Citizens can receive support from document preparation to tracking progress and choosing home delivery of results, making post offices access points for digital government services.

(Source: [vietnam.vn](http://vietnam.vn))



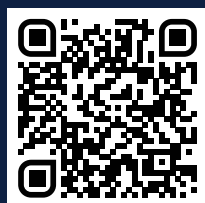
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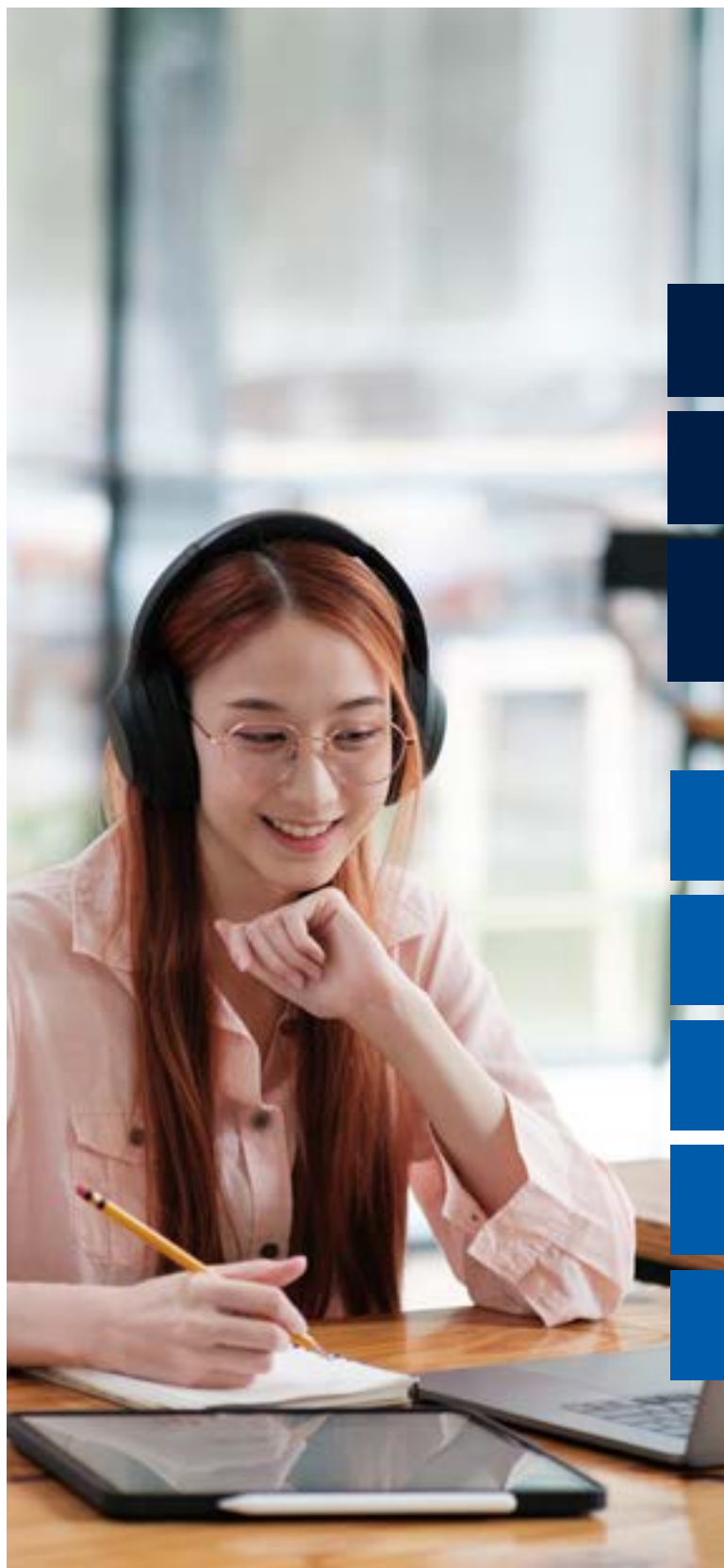
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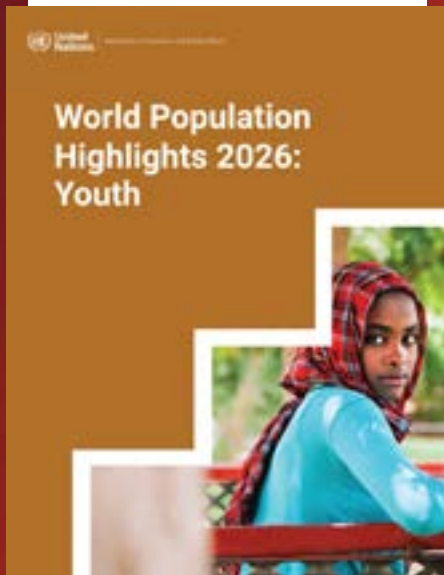


# RECOMMENDED READINGS

**UN DESA**

February 2026

**WORLD POPULATION HIGHLIGHTS  
2026: YOUTH  
(UN DESA – FEBRUARY 2026)**



<https://desapublications.un.org/publications/world-population-highlights-2026-youth-revised-june-2026>



**WHO**

June 2025

**FROM LONELINESS TO SOCIAL  
CONNECTION: CHARTING A  
PATH TO HEALTHIER SOCIETIES  
(WHO COMMISSION ON SOCIAL  
CONNECTION – JUNE 2025)**



<https://www.who.int/publications/m/item/from-loneliness-to-social-connection-summary>



**UNESCO**

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**RECOMMENDATION ON THE ETHICS  
OF ARTIFICIAL INTELLIGENCE  
(UNESCO – 2022)**



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