



UPU

UNIVERSAL  
POSTAL  
UNION

EC 2019 Doc 17

# APPU Executive Council Meeting

## UPU: THE WAY FORWARD

*Presentation by the UPU IB Deputy Director General*

August 2019



# Agenda

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## **1- Context**

- Geopolitical and macroeconomic trends
- Postal economic trends

## **2- The strategic direction of the UPU**

- The 2017-2020 strategy
- Progress in the implementation of the current strategy
- Regional Strategy Forums as part of a wider consultation with regions
- Postal Vision 2030 and Strategy 2021-2024

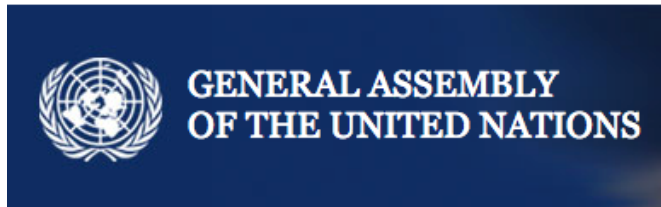
## **3- Wrap-up and next steps**

- Key takeaways
- Next steps



# 1- Context

*The demand for multilateralism remains strong*



- The General Debate was held between 25 September and 1 October 2018.
- World leaders highlighted the importance of multilateralism and international cooperation.
- This was deemed necessary to address global challenges, and promote human rights, sustainable development, security, and stability.

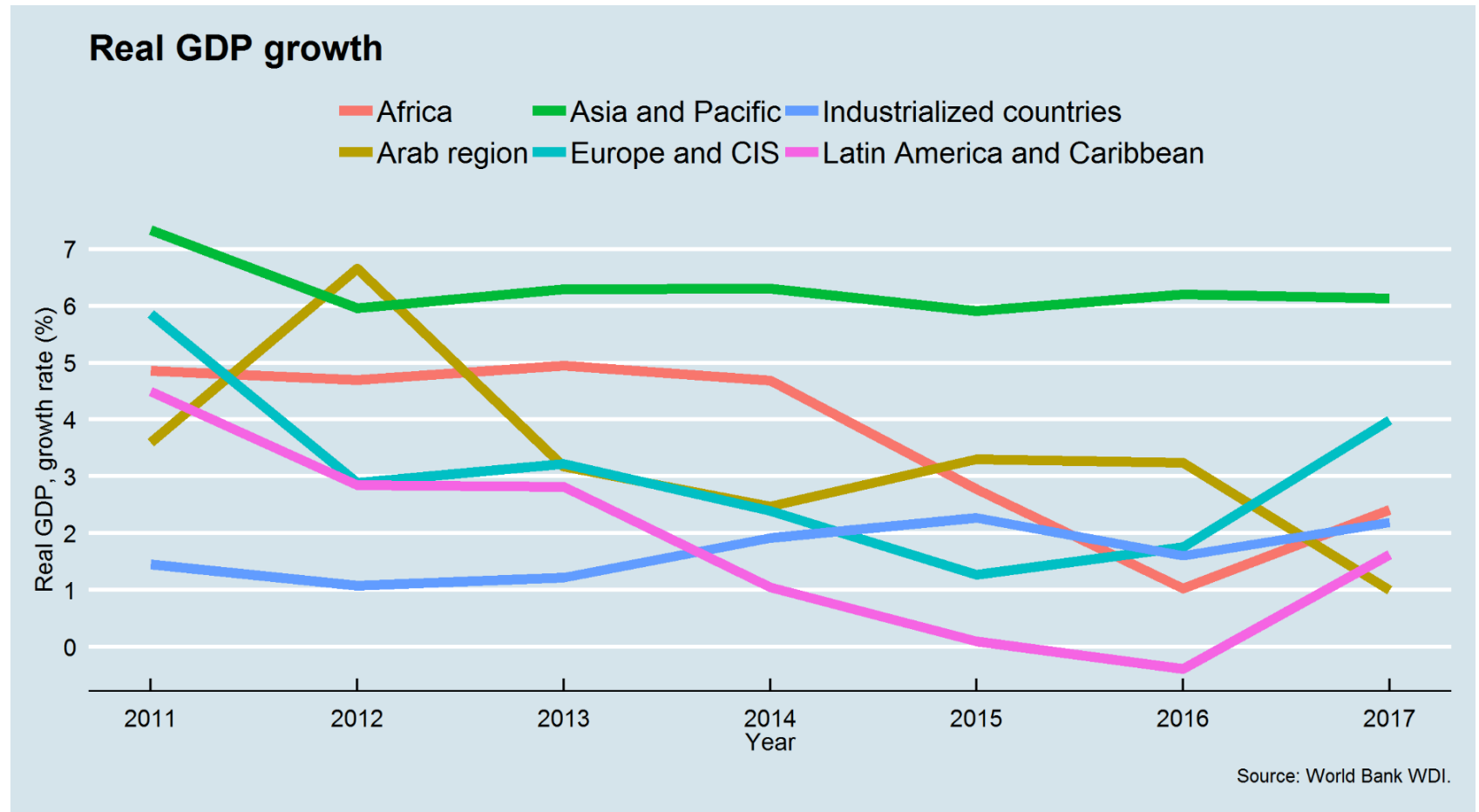


- Adopted in January 2016 by the UN system and member countries
- 17 goals and 169 targets
- UPU has conducted quantitative and qualitative research on SDGs and the postal sector.
- The postal sector has a potentially high impact in areas associated with financial inclusion, digitalization and disaster-risk management.



# 1- Context

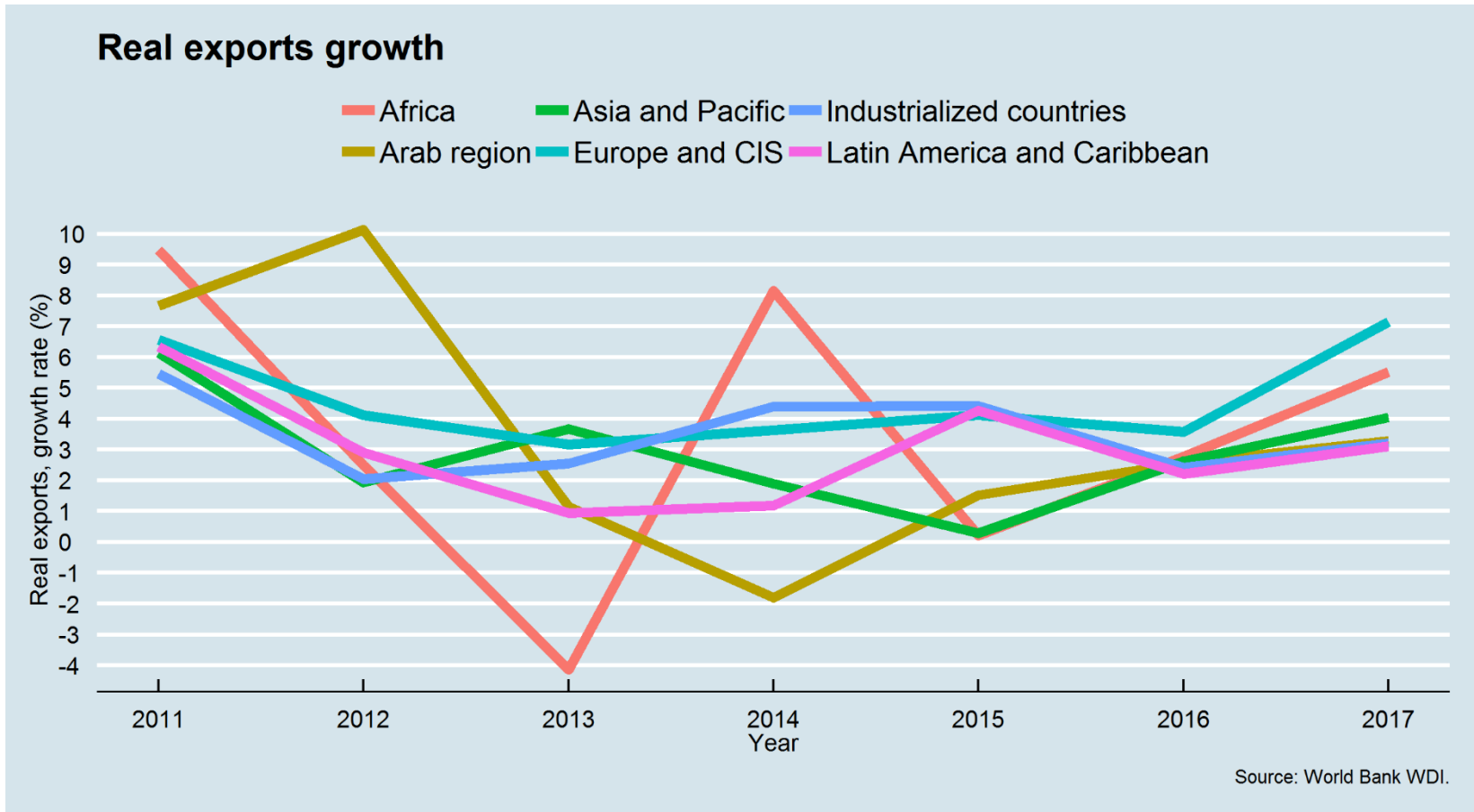
*Asia-Pacific remains the world's fastest growing region*





# 1- Context

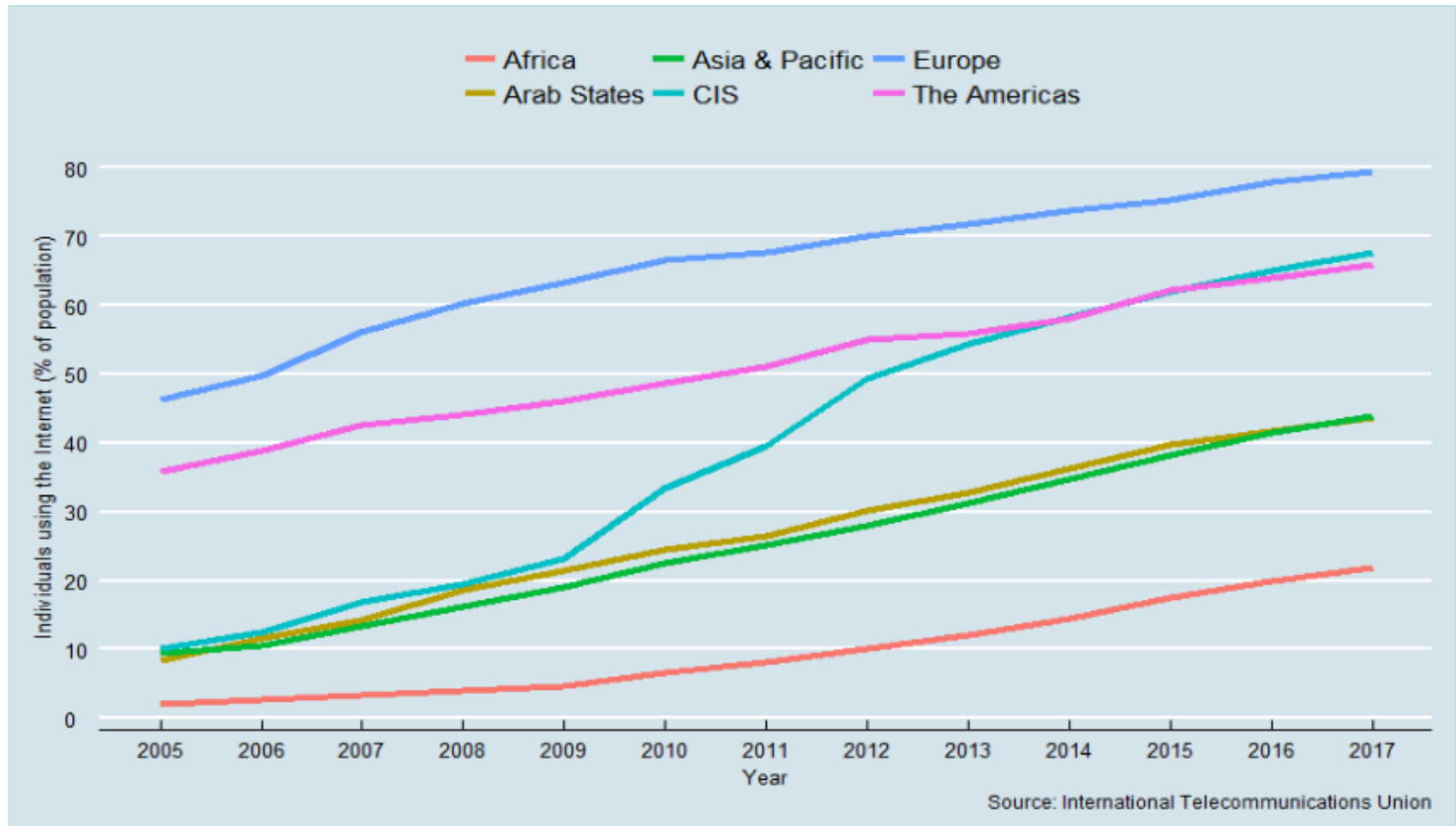
*However, export growth has been more modest*





# 1- Context

*But connectivity is still up*

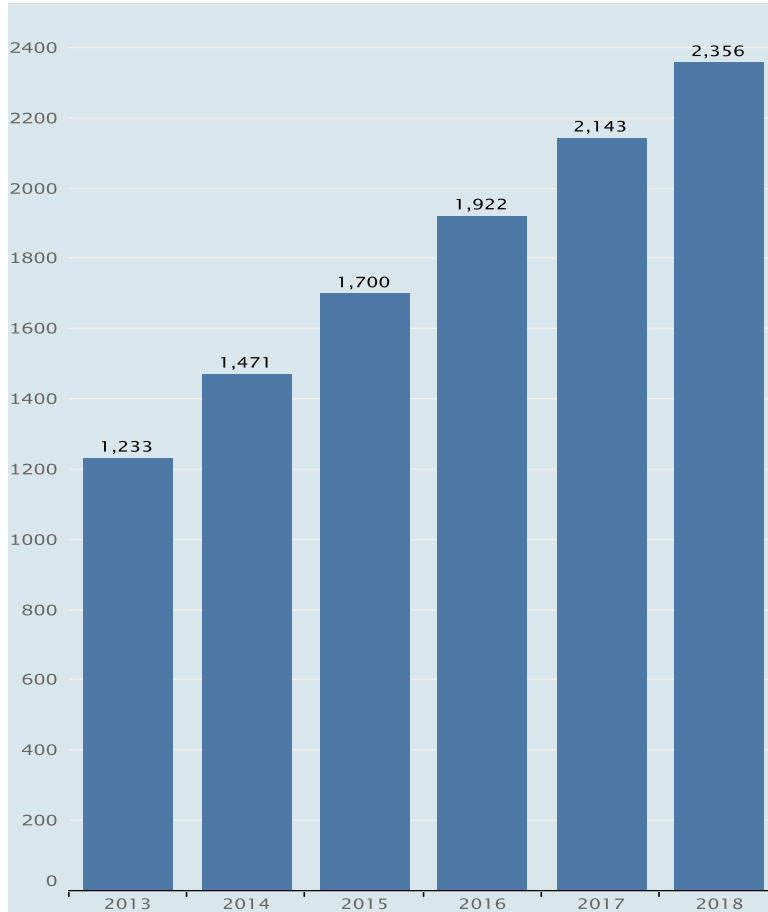




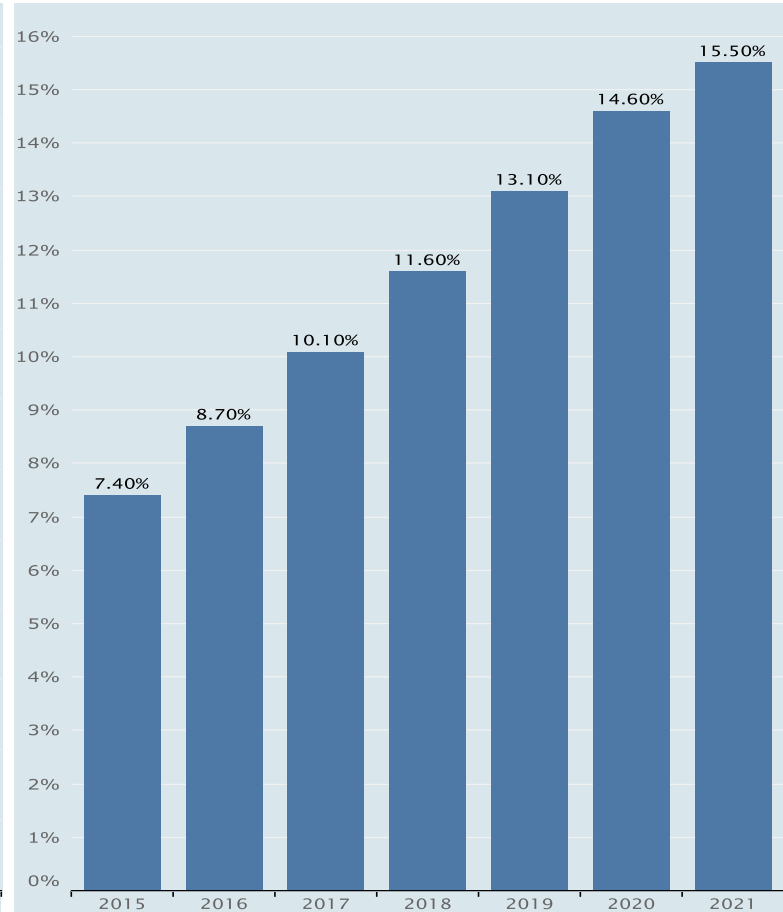
# 1- Context

*Boosting e-commerce...*

Global B2C e-commerce sales (USD billions)



E-commerce share of total retail sales





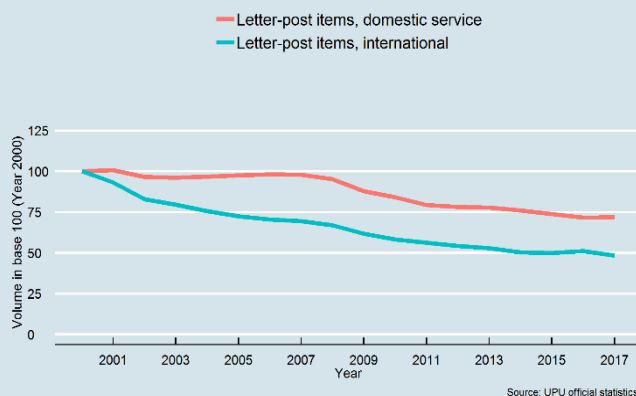
# 1- Context

*...and transforming the nature of the demand for postal services...*

## LETTERS

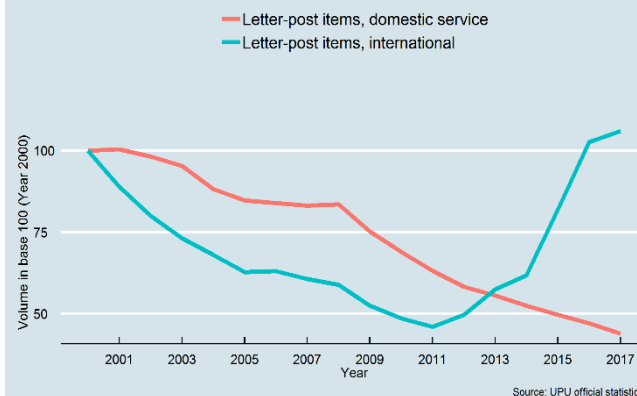
### Global

Worldwide evolution of letters (in base 100)



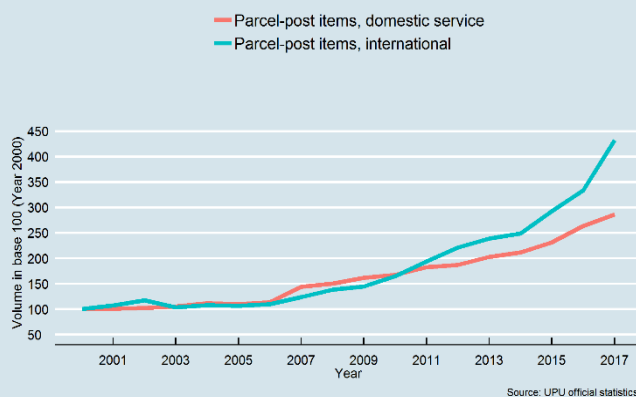
### APPU countries

APPU, evolution of letters (in base 100)

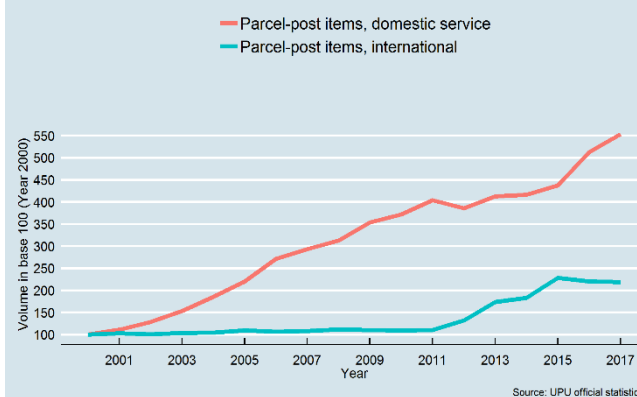


## PARCELS

Worldwide growth of parcels (in base 100)



APPU, growth of parcels (in base 100)







## 1- Context

*Yet, the postal sector remains a powerful infrastructure in the world...*

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**256.3** billion SDR  
in revenues  
2016-2017: **+4.0%**

**85.8%** of  
population receiving  
mail at home

**668'455**  
post offices  
2016-2017: **-0.01%**

**5.26** million  
Employees  
2016-2017: **-1.1%**



## 1- Context

*... and in APPU*

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**76.3** billion SDR in  
revenues

2016-2017: **+8.1%**

**78.6\*** % of  
population receiving  
mail at home

**354'220**  
post offices

2016-2017: **-0.6%**

**2.09** million  
Employees

2016-2017: **-0.01%**

*Source: UPU Statistics.*

*\* India excluded from the calculations.*



# 1- Context

*Indeed, the postal sector remains a key contributor to the SDGs...*



## Global and regional performance + full 2IPD ranking

Table 1 - Integrated Index for Postal Development (2010 - 2017 global average)

Rank	Country	2010 Index	2017 Index	2017 Index	2017 Index
1	Switzerland	0.91	0.91	0.91	0.91
2	Denmark	0.89	0.89	0.89	0.89
3	Japan	0.87	0.87	0.87	0.87
4	France	0.85	0.85	0.85	0.85
5	Canada	0.83	0.83	0.83	0.83
6	Germany	0.81	0.81	0.81	0.81
7	United Kingdom	0.79	0.79	0.79	0.79
8	Sweden	0.77	0.77	0.77	0.77
9	Finland	0.75	0.75	0.75	0.75
10	Netherlands	0.73	0.73	0.73	0.73
11	Belgium	0.71	0.71	0.71	0.71
12	Austria	0.69	0.69	0.69	0.69
13	Spain	0.67	0.67	0.67	0.67
14	Italy	0.65	0.65	0.65	0.65
15	Portugal	0.63	0.63	0.63	0.63
16	Greece	0.61	0.61	0.61	0.61
17	Poland	0.59	0.59	0.59	0.59
18	Czech Republic	0.57	0.57	0.57	0.57
19	Slovakia	0.55	0.55	0.55	0.55
20	Hungary	0.53	0.53	0.53	0.53
21	Slovenia	0.51	0.51	0.51	0.51
22	Lithuania	0.49	0.49	0.49	0.49
23	Latvia	0.47	0.47	0.47	0.47
24	Estonia	0.45	0.45	0.45	0.45
25	Malta	0.43	0.43	0.43	0.43
26	Cyprus	0.41	0.41	0.41	0.41
27	Belarus	0.39	0.39	0.39	0.39
28	Ukraine	0.37	0.37	0.37	0.37
29	Armenia	0.35	0.35	0.35	0.35
30	Georgia	0.33	0.33	0.33	0.33
31	Albania	0.31	0.31	0.31	0.31
32	Bosnia and Herzegovina	0.29	0.29	0.29	0.29
33	Montenegro	0.27	0.27	0.27	0.27
34	Serbia	0.25	0.25	0.25	0.25
35	Bulgaria	0.23	0.23	0.23	0.23
36	Romania	0.21	0.21	0.21	0.21
37	Moldova	0.19	0.19	0.19	0.19
38	North Macedonia	0.17	0.17	0.17	0.17
39	Albania	0.15	0.15	0.15	0.15
40	Kosovo	0.13	0.13	0.13	0.13
41	Turkey	0.11	0.11	0.11	0.11
42	Iran	0.09	0.09	0.09	0.09
43	China	0.07	0.07	0.07	0.07
44	India	0.05	0.05	0.05	0.05
45	South Africa	0.03	0.03	0.03	0.03

## High cross-country potential impact was found in 4 areas...





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## 3- Wrap-up and next steps

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## 2- The strategic direction of the UPU

*The Istanbul World Postal Strategy (2017-2020)*





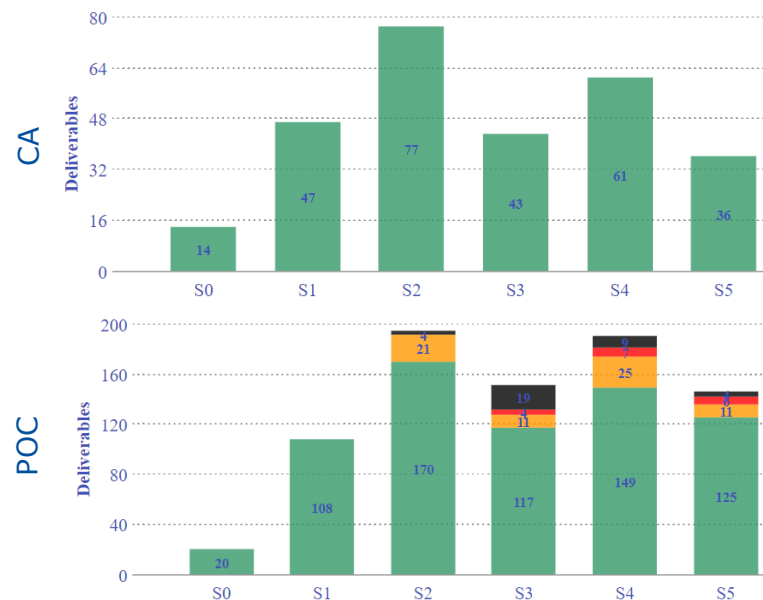
## 2- The strategic direction of the UPU

*Achievement of strategic targets – overview for 2017 & 2018*

### KPIs

Goal	2017												2018												Performance ■ On target ■ In progress
	002	002	002	003	003	003	005	005	007	007			002	002	002	003	003	003	005	005	007	007			
Goal 1: Improve the interoperability of network infrastructure	008	008	010	010	010	010	013	013	013	013			008	008	010	010	010	010	013	013	013	013			
	013	015	021	023	023	023	031	031	031	038			013	015	021	023	023	023	031	031	031	038			
	038	C 18	P27	P31									038	C 18	P27	P31									
Goal 2: Ensure sustainable and modern products	001	001	004	004	004	009	009	011	012	014			001	001	004	004	004	009	009	011	012	014			
	018	024	024	025	026	026	027	027	027	027			018	024	024	025	026	026	027	027	027	027			
	028	028	029	029	030	032	033	034	034	035			028	028	029	029	030	032	033	034	034	035			
	035	037	044	044									035	037	044	044									
Goal 3: Foster market & sector functioning	006	006	017	017	019	019	019	020	020				006	006	017	017	019	019	019	020	020				
	039	039	040	041	041	043	043	P8					039	039	040	041	041	043	043	P8					
IWPS supporting lever	016	016											016	016											
Functional support	P22	P24	P36	P37	S-Cab	S-Fin	S-Fin	S-HR	S-HR	S-Leg			P22	P24	P36	P37	S-Cab	S-Fin	S-Fin	S-HR	S-HR	S-Leg			
	S-Leg	S-Leg	S-Leg	S-Leg	S-Sec								S-Leg	S-Leg	S-Leg	S-Leg	S-Leg	S-Leg	S-Leg	S-Leg	S-Leg	S-Leg			

### Deliverables





## 2- The strategic direction of the UPU

*The Regional Strategy Forums contributed to the process of consultation*

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**Initial draft of  
future strategy**



Regional Strategy Forums 2019		
Region	Location	Date
Asia-Pacific	Thailand	25–26 April 2019
Africa	Burkina Faso	14–15 June 2019
Caribbean	Cuba	24–25 June 2019
Europe & Central Asia	Belarus	9–10 July 2019
Arab	Egypt	23–24 July 2019
Americas	Costa Rica	12–13 August 2019



**Revised draft of  
future strategy**



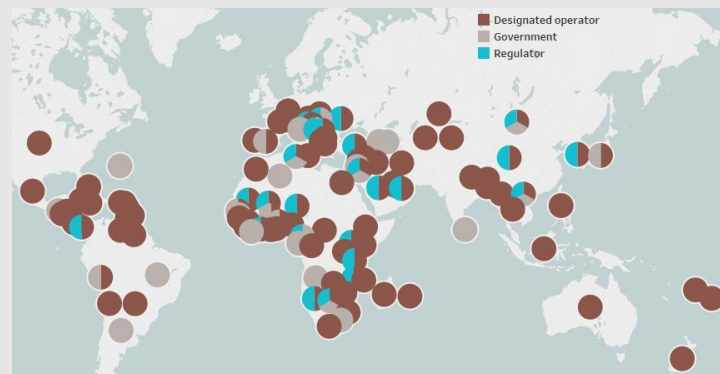
## 2- The strategic direction of the UPU

*As part of a wide consultation with stakeholders around the world*

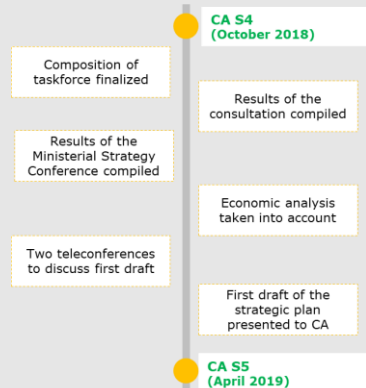
**Ministerial Strategy Conference (Sep. 2018)**



**Consultation / questionnaire (Q4 2018)**



**CA Task Force (Q1 2019)**



**Regional Strategy Forums (Q2-Q3 2019)**

Region	Location	Date
Asia-Pacific	Thailand	25–26 April 2019
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## 2- The strategic direction of the UPU

*Postal Vision 2030: the UPU's advocacy message for the sector*

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Governments should decrease gaps in postal development through increased investments and focused policies, and promote various ways to utilize the postal network for socio-economic development



Regulators should harmonize and enhance the sector's regulatory framework



Operators should seek to enhance their performance by implementing diversified strategies and operational improvements



Other stakeholders from the private sector and public institutions should pursue integration into the sector by engaging with traditional stakeholders, and vice-versa. This means opening up the market, fostering partnerships and enhancing the role of the UPU



## 2- The strategic direction of the UPU

*Strategy 2021-2024: boosting the UPU's solutions for the sector*

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**Strengthen the UPU's mandate as the foremost forum for postal sector stakeholders**

Organization of events and meetings of technical working groups

Treaties and international agreements

Settlement mechanisms

**Reinforce the UPU's role as a provider of affordable technical solutions for postal sector stakeholders**

Consulting and capacity building

IT solutions

Standards

**Enable the UPU to become the prime knowledge centre of the postal sector**

Research and insights on market trends

Focused analysis on various topical issues

Data storage and protection



## 2- The strategic direction of the UPU

### *Inputs from the Regional Strategy Forums*

Component	Pillar	Solution		Region
Postal Vision 2030	1- Reduce development gaps	NA		Africa Americas Arab region Asia-Pacific Caribbean Europe & Central Asia
	2- Harmonize and enhance regulation	NA		
	3- Improve performance	NA		
	4- Open up and integrate	NA		
Strategy 2021-2024	1- Forum	Events & meetings of tech. Working groups		
		Settlement mechanisms		
		Treaties and international agreeme..		
	2- Provider of technical solutions	Consulting and capacity building		
		IT solutions		
		Standards		
	3- Knowledge center	Data storage and protection		
		Focused analysis on various topical issues		
		Research and insights on market trends		



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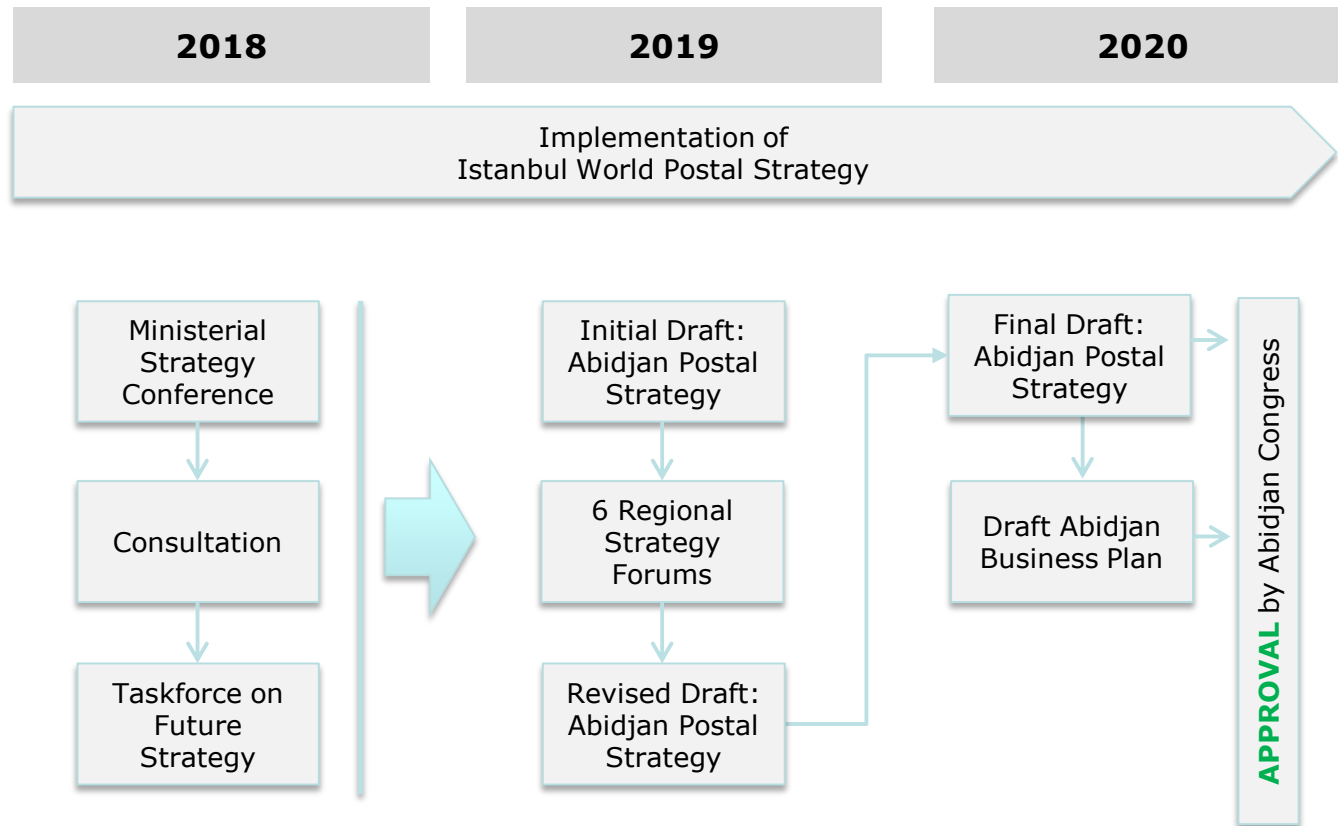
## **3- Wrap-up and next steps**

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### 3- Wrap-up and next steps

*The road to Abidjan*





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# THANK YOU!