



**Communications
Commission
of Kenya**

REPORT OF THE 3RD ANNUAL POSTAL/COURIER STAKEHOLDER FORUM

HELD ON 18TH APRIL 2011 AT THE INTERCONTINENTAL HOTEL, NAIROBI
KENYA

HOSTED BY THE COMMUNICATIONS COMMISSION OF KENYA (CCK)



**REPORT OF THE 3RD ANNUAL POSTAL/COURIER STAKEHOLDER FORUM HELD ON
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1.0 INTRODUCTION

The third edition of the Postal/courier Stakeholder Forum that brings together all stakeholders in the sector took place on 18th April 2011 at the Intercontinental Hotel, Nairobi. The theme adopted for the year was “*meeting consumer concerns and expectations in a liberalized postal/courier environment*”.

The opening ceremony was graced by Hon. Samwel Poghiso, Minister of Information and Communications.

The proceedings were facilitated by Mr. Aloys Ochieng Ang’asa, a renowned Nairobi based postal consultant and Mr. Stanley Moyi a Nairobi based consultant in communications regulations.

This report presents the proceedings and recommendations made following the interactive sessions.

2.0 PARTICIPATION

The list of industry stakeholders and other participants who attended the forum is contained in *Appendix I*.

3.0 OPENING CEREMONY

3.1 SPEECH BY THE MINISTER OF INFORMATION AND COMMUNICATIONS HON. SAMWEL POGHISIO

In his written and off-the-cuff address, the Minister:

- Welcomed all participants to the postal/courier event noting the seriousness the government accorded the postal sector;
- Paid tribute to the postal/courier industry and its role in nation building ;
- Observed that the communications regulator CCK is well-recognized and highly respected internationally with whom others benchmark on international best practices;
- Challenged the industry to take advantage of new technologies presented by ICTs, to be in tandem with new customer trends and prevailing realities.
- Noted that the government was developing roads, ports, airports and other infrastructure that would facilitate postal/courier business;
- Called on sector players to take advantage of a well-trained work force in the sector that should be used to rejuvenate it;
- Stated that the on-going initiatives in property numbering and development of national addressing system would further facilitate sector growth;
- Cited Kenya as an emerging ICT hub and is endowed with enormous resources as the government believes in making ICT an engine for growth.

His full Address is contained in *Appendix II*

3.2 OTHER STATEMENTS

The following are other statements delivered during the opening ceremony.

3.2.1 STATEMENT BY THE CHAIRPERSON OF THE COURIER INDUSTRY ASSOCIATION OF KENYA (CIAK) MS. JANE BABSA-NZIBO

In her statement, the chairperson of the Courier Industry Association of Kenya (CIAK) Ms. Jane Babsa-Nzibo:

- Thanked CCK for hosting the interactive forum yet again;
- Decried unfair pricing in the market especially from what is believed to be unlicensed courier operators and called on CCK to promote a level playing field;
- Objected to the proposed postal/courier licensing fees framework that is believed to result into higher charges urging that the current one be retained;
- Called for a review of the Universal Service Fund (USF) regulation on contributions by postal/courier operators which she observed are discriminatory and the amendment of 350gms and below reserved letter services requirement noting that these issues need to be reviewed to attract investment in the industry.

Ms. Jane Babsa-Nzibo's full statement is contained in *Appendix III*.

3.2.1 STATEMENT BY DIRECTOR-GENERAL OF CCK, MR. CHARLES K. NJOROGE

In a statement read on his behalf by Mr. Matano Ndaro the CCK Director-Competition, tariffs and market analysis, Mr. Njoroge welcomed all participants to the forum and:-

- Emphasized the essence of such engagements as a platform of dialogue without resorting to confrontation;
- Hailed the year's theme as a careful selection that directly impacts on the consumer;
- Underlined the Commission's commitment to empower consumers as attested by current steps in launching a consumer education campaign;
- Called on operators to exploit new ICTs to create more services so as to widen consumer choices;
- Said that postal /courier sector was an integral part of the ICT Access Gap Study commissioned by CCK in collaboration with Kenya National Bureau of Statistics noting that CCK decisions are scientific and participative .

The Director General's full statement is contained in *Appendix IV*.

3.2.3 STATEMENT BY POSTMASTER-GENERAL OF THE POSTAL CORPORATION OF KENYA (PCK) MAJ-GEN (RTD) ALI M. HUSSEIN

In a statement read on his behalf by Ms. Elizabeth Mwaura PCK's Courier Services General Manager, the Postmaster-General:

- Welcomed the event as an opportunity to exchange views and ideas;
- Highlighted the importance of postal networks as oldest form of communications that is affordable, reliable and accessible;
- Called on culture change by operators and policy makers with the advent of new technologies to remain relevant and meet the needs of an increasingly sophisticated customer;
- Expressed Posta's commitment to deliver mail – it has been there longer than other communication channels;
- Called for embracing of new technology in delivering postal and financial services;
- Observed that the Post needs to ride on the ICTs and new technologies to deliver new services such e-commerce to meeting customer concerns in a liberalized market.

The Postmaster-General's full statement is contained in *Appendix V*

3.2.4 STATEMENT BY CHAIRMAN OF THE COUNCIL OF ADMINISTRATION (CA) OF THE UNIVERSAL POSTAL UNION (UPU) AMB. BISHAR HUSSEIN

In his oral remarks, the Chairman of the UPU Council of Administration Amb. Bishar Hussein:

- Commended the Director-General of CCK for hosting the important forum observing that globally, countries are being urged to embrace dialogue as the *modus-operandi*;
- Observed that liberalization and globalization are realities that the postal industry must live with stressing that communications is a universal service of which all human beings are entitled to irrespective of where they are;
- Described competition as a healthy attribute that benefits the customer and called on the government to give postal/courier industry necessary prominence in national plans and improve infrastructures;
- Called for cooperation and not hostility between operators-interconnection pacts between operators will maximize on relative strengths of one another;
- Singled out priority areas in the industry as being physical mail movement, electronic dimensions and financial services;
- Announced that Universal Postal Union is coming up with a technology savvy financial service that will be unrivalled.

4.0 PRESENTATIONS

- In introductory remarks, the moderators lauded CCK for organizing the event which is now an annual activity on its calendar.

- Observed that this is the 3rd Forum that the CCK is hosting; last year's forum focused on postal addressing system as the theme. This year's forum however focuses on the addressing consumer concerns and expectations in a liberalized postal and courier market
- Explained that there would be presentations followed by question and answer after each presentation.

The presentations were made in two sessions as follows:

4.1 Session 1

4.1.1 Topic: *enhancing mail security in provision of postal services*-By Director, Licensing, Compliance and Standards, Communications Commission of Kenya (CCK) Ms. Atieno Ochola

In a presentation on her behalf, the **Manager-Postal Licensing and Compliance** Mr. Martin Ngesa:

- Defined the mandate of CCK with regards to security in postal services and objectives of security measures in postal networks;
- Reviewed recent security incidents in the postal/courier networks in Kenya and internationally;
- Defined prohibited articles and gave examples including pictorial depiction of the same;
- Pointed out that Operators must inform the Commission immediately of articles are sent in contravention if the Act. This has not been happening as many cases have gone unreported;
- Explained offences and penalties inherent in the transmission of prohibited articles;
- Cited various proposals that could enhance security in postal/courier networks.

Ms. Ochola's full presentation is contained in ***Appendix VI***.

Recommendations:

- Obtain identification particulars of senders of postal courier articles (knowing your clients) to include original ID, Tel No. etc.
- Declaration of cover contents at all times and the sender to counter sign the same;
- Electronic Screening of Postal couriers at Border points/offices of exchange mail in collaboration with KRA/Immigration Authorities.
- Endeavour to acquire screening devises such as : X-ray machines, explosive/vapour detectors, metal detectors, explosive detectors, radio-active(radiation) detectors,
- The Courier personnel should verify articles before sealing especially for international and regional postal courier services at the point of exit/entry;
- Training should be conducted at the grass root level on security issues through seminars.
- Liaison with Kenya Revenue Authority to install mail screening equipment at all borders for both outgoing and incoming postal courier items.

- Sealing of covers at points of acceptance where possible especially for those who do not have screening equipment.
- Preventive measures by counter clerks who should take precautions when items are posted/sent-alertness of mind and handling with due care;
- Only authorised staff with photo ID to access mail loading and unloading zones;
- Impose working procedures on mail violations/theft-assigning specific duties, hidden CCTV monitoring of entrances and exits;
- Regular staff briefs/updates by Anti-Narcotics Police unit.

4.1.2 **Topic:** *Cross-border screening of mail- by Beatrice Memo (Ms.) Senior Deputy Commissioner, Kenya Revenue Authority (KRA)*

In a presentation made on her behalf, by Mr. Samuel Kariuki Githigi Senior Assistant Commissioner, Ms. Beatrice Memo:

- Outlined the role of customs in facilitation of trade and Protection of society by monitoring what enters and leaves the country among others;
- Explained to participants what Mail clearance entails and information required to facilitate this:
- Cited the challenges manifest in customs clearance including manual processes, lack of non-intrusive inspection tools such as scanners, absence of drug detector dogs(K9) and lack of integrated approach in mail clearance.

Recommendations:

- Installation of Scanners by Postal/Courier Service providers
- Usage of K9 drug detector dogs
- Automation of Sorting systems
- Installation of Tracking systems
- Regular meetings of stake holders to address emergent issues
- Establish a formal Engagement framework.
- Improvement of Security Systems
- Integrity of our staff (both postal/courier and customs) is critical.

Ms. Memo's full presentation is contained in **Appendix VII.**

4.2. Session 2

4.2.1 **Topic:** *new business opportunities in a dynamic postal / courier industry by Mr. TITUS E.JUMA, Postal Corporation of Kenya (PCK)*

In his presentation, Mr. Juma:

- Outlined global best practices of postal administrations in the world who are differentiating their offerings from the traditional mail delivery to new areas and included examples from South Africa, Italy, Brazil and Swiss Post ;
- Highlighted various business opportunities that include agency banking, government front office services, clearing and forwarding, hybrid mail, remittance services, strategic alliances, and national address system as it promotes courier services among other opportunities in the sector.

Recommendations

- Foster partnership in payment of Utility bills for power, water & pay-television, Telecommunication companies and money transfer.
- Seek ventures in payment of social protection programs e.g. Orphans & Venerable Children, Persons with disabilities & Elderly Citizens.
- Agency Banking – with commercial banks in Kenya.
- Partnership with Micro Finance Institutions across the country.
- Partnership with insurance firms for payment of premiums.
- Partnerships in the last mile delivery.

Mr. Juma's Memo's full presentation is contained in **Appendix VIII**.

4.2.2 **Topic:** *postal Consumer education campaign By CCK- Assistant Director Consumer affairs –Ms. Patricia Muchiri*

In her presentation, Ms. Muchiri:

- Defined Empowerment with respect to the consumer as increasing the capacity of individuals to make informed choices and transform those choices into desired actions and outcomes
- Explained existing markets with regards to consumers and pointed out that consumer needs entail timely delivery, product availability, product safety, reliability, accessibility, too much information in the market, prices/value for money, confidentiality of personal information among others as per a study done by the Commission;
- Highlighted key drivers in protecting consumers as price, quality, choice, diversity, affordability, safety among others;

- Cited UN Consumer Rights guidelines of 1999 on– safety, education, information, redress, information, choice and satisfaction;
- Listed Consumer Expectations as being reliability, affordability, accessibility, timely, full disclosure of terms and conditions, professionalism – understanding empathy and fairness, service features and options among others;
- Pointed out the Objectives of postal and courier campaign as raising awareness, making operators to adhere to the law and licence conditions, enabling consumers to make informed choices, knowing their rights and responsibilities;
- Warned that consumers today are more sophisticated, knowledgeable and demanding, meaning that industry players must address consumer concerns to remain in business.
- Informed participants that CCK would continue to invest in research, strengthen consumer protection regulations, consumers to enjoy innovative services, considerable benefits, as consumer welfare is at the heart of the industry.

Ms. Muchiri’s full presentation is contained in **Annex IX**

Recommendations

- operators should enhance interconnectivity for the convenience of their customers
- operators should provide information on tariffs, complaints reporting and handling, service outlets etc on websites and other channels;
- Consumers should be educated on their rights and the fact that they can seek recourse with the regulator if not satisfied with operator answers.

4.2.3 Topic: *New business opportunities in a dynamic postal/courier market - by Mr. Samuel Gichohi, Secretary, Courier Industry Association of Kenya (CIAK)*

In his oral presentation, Mr. Gichohi:

- Stated that e-commerce with high potential in logistics and internet shopping provides immense opportunities for operators;
- Called for 24-hour economy in courier operations;
- Asked for operators to embrace technology declaring the mobile device as an asset and not a threat;
- Reported that the CIAK membership had not improved with operators reluctant to join citing a flat payment regardless of scale of operations;
- urged the licensees to join CIAK by contacting the secretariat at gichohi@tnt.com –fees would be reviewed to take cognizance of level of operations as is the case for CCK licensing fees.

Recommendations:

- CIAK needs to devise ways of bringing more licensed operators on board including providing separate categories of contributors according to size of operator;
- Explore the option of using CIAK as a reference point for those seeking to be licensed by CCK the way KIFWA related to KRA on licensing issues

4.2.4- TOPIC; *status report on the implementation of past recommendations by Mr. Martin Ngesa, Manager/postal licensing and Compliance, Communications Commission of Kenya (CCK)*

In a presentation, Mr. Ngesa of CCK:

- Gave an overview of past postal forums of 2009 and 2010;
- Highlighted action by CCK towards obtaining feedback from stakeholders on how to hold future forums which elicited very low response;
- Decried to low response from participants on action areas in the circulated implementation matrix which is contained in the forum reports now on CCK website;
- Action by various stakeholders (CIAK, PCK, COURIERS, and CCK) on their areas in the matrix was given as per the matrix below.

4.2.5- ACTION MATRIX ON RECOMMENDATIONS AT THE 1ST, 2ND AND 3RD POSTAL/COURIER FORUM OF 2009, 2010 & 2011

RECOMM. NO.	TOPIC ITEM AND RECOMMENDATIONS IN THE REPORT	ACTION BY	REMARKS
2009/10			
1.	Licensees must provide all required returns in time as these inform regulatory decisions and actions for the betterment of the industry;	All licensees	Licensees are yet to comply satisfactorily. Only a small fraction of licensees have complied and the regulator may have to impose penalties to noncompliant operators.
2.	Hold frequent consultative forums to sensitize the industry and provide fresh impetus;	CCK	Ongoing-this is the third forum in succession.
3.	The CCK's postal/courier structure is inadequate as compared to the telecom one need to be addressed by enhancement of the CCK organizational structure in tandem with sector's prominence.	CCK	CCK has a consultancy team on the ground currently reviewing its organization structure which would take into account this concern
4.	Enhance enforcement function of the regulator particularly the frequency of inspections and sensitization exercises;	CCK	Yearly inspections covering all regions including the hardship areas in done yearly. Findings requiring corrective action communicated to affected licensees.- is a continuous exercise.
5.	Postal legislation that hinder competition and negate level playing ground should be reviewed particularly on reserved services weight steps of up-to 350 grammes including tariffs for reserved services;	MOIC/ CCK	CCK will in due course initiate stakeholder consultation in this matter
6.	To facilitate monitoring of mail delivery standards, operators should ensure that mail covers	All licensees	Inspection in many outlets countrywide reveals existence of illegible impressions and even

	have clear /legible date-stamp impressions thereon;		missing date types and worn out date stamps.
7.	With regards to undeliverable articles, clear handling procedures should be in place stipulating retention periods etc. As guidance in this respect can be found in the Kenya Communications Regulations, 2010 ;	All licensees	Operators to report
8.	Basic tariffs should be displayed at all licensee outlets as per licence conditionality(essence of this is to provide consumers with wide and informed choices);	All licensees	This is not being observed by many licensees
9.	CCK to consider sponsoring smaller courier licensees to the scheduled AFRALTI postal courses as requested in the forum as a way of empowering players in the sector with requisite skills;	CCK	The Universal Service Fund which is in the process of being implemented is expected to partly take care of the concern by enhancing capacity in the ICTs.
10.	Need for timely submission of returns by operators to facilitate production of up-to-date regulator statistics and market information;	All licensees	See recommendation 1 above
11.	Given the falling level of postal outlets from 1030 in 1999 to just 700 today, CCK should put in place deliberate strategies to promote provision of universal postal services in liaison with the provider-PCK;	CCK	The universal service fund is in the process of being implemented

12.	The envisaged Universal Service Fund should be operationalise with the postal sector in mind;	CCK	See recommendation 19 above
13.	Courier operators should desist from practices that impede provision of universal services such as applications of tariffs below the allowable levels in the reserved service segment.	All licensees	Penalties for those levying illegal tariffs to be applied.
14.	CCK should consider fees review and inclusion of CIAK in the licensing process (to vet new players seeking licenses);	CCK	Fees have been reviewed and operators who feel the flat-rate amount is high can opt for the turnover-based that recognises level/scale of operations.
15.	The regulator should consider reviewing the reserved market segment of basic letters weighing upto 350grammes in order to further open up the market for competition;	CCK/ MOIC	See Recommendation 5
16.	CIAK is urged to broaden her membership from the current 21 to cover the 150 licensed by CCK:	CIAK	CIAK intends to categorize members and charge them accordingly to address affordability issues raised.
17.	Consideration should be made regarding representation of postal/courier stakeholders on the CCK board and that CIAK could recommend a representative.	MOIC	COMMENTS BY MOIC/NCS
18.	City Council should explore use of materials not prone to vandalism in road/street signs;	CCN	NCC to comment/report
19.	Embrace digital mapping and numbering as a step to facilitate physical plans.	CCN/ LOCAL GOVT	NCC has numbered most buildings in an ongoing exercise.
2010			

20.	Harassment by Nairobi City Council on vehicle branding and parking-	CCK/ MOIC	Noted that possession of CCK licence does not exempt nor exonerate one from other legally requirements-but CCK may lobby local authorities through MOIC to ease these concerns.
21.	display prices for consumers to make informed choices and promote competition	ALL LICENSEES	
22.	Put in place a good National Addressing System	MOIC/CCK/ OPERATOR S/LOCAL GVT/LAND S	This will be a multi-sectoral initiative of which CCK is a member-be fast tracked- as an intensive collaborative exercise that may entail changing some urban byelaws, will involve mapping to promote e-commerce , security, emergency response and open up many other opportunities.
2011			
23.	Consumers should be educated on their rights and the fact that they can seek recourse with the regulator if not satisfied with operator answers.		
24.	Cck should consider issuing stickers to be attached to postal articles signifying licensing status of courier operators		
25.	CCK/CIAC/AFRALTI to come together and discuss training in the sector including development of the curriculum.	CCK/ CIAC/ AFRALTI	
26.	Urge licensees to use K9 drug detector dogs in their operations	All Licensees	
27.	Licensees encouraged to automate their Sorting systems		
28.	Operators urged to install Tracking systems		
29.	Put in place measures that enhance integrity of our staff (both postal/courier and customs).		

30.	CCK need to come up with interconnection regulations for postal and courier licensees to enhance competition as it has done for the telecommunications	CCK	
31.	CIAK needs to devise ways of bringing more licensed operators on board including providing separate categories of annual membership according to size ;	CIAK	
32.	Explore the option of using CIAK as a reference point for those seeking to be licensed by CCK the way KIFWA relates to KRA on licensing issues.	CCK/MOIC	
33.	Operators should obtain identification particulars of senders of postal courier articles (knowing your clients) to include original ID, Tel No. etc. in enhancement of security.	All operators	
34.	Operators should seek declaration of cover contents at all times and the sender to counter sign the same;	All operators	
35.	Efforts should be put in place for Electronic Screening of Postal couriers at Border points/offices of exchange mail in collaboration with KRA/Immigration Authorities.	CIAK/CCK/O PERATORS	
36.	operators should endeavour to acquire of screening devises such as : X-ray machines, explosive/vapour detectors, metal detectors, explosive detectors, radio-active(radiation) detectors	All operators	
37.	The Courier personnel should verify articles before sealing especially for international and regional postal courier services at the point of exit/entry.	All operators	

38.	Training should be conducted at the grass root level on security issues through seminars.	All operators	
39.	Sealing of covers at points of acceptance where possible especially for those who do not have screening equipment.	All operators	
40.	Only authorised staff with photo ID to access mail loading and unloading zones;	All operators	
41.	Operators urged to host regular staff briefs from Anti-Narcotics Police unit sensitise staff.	All Licencees	
42.	CCK to re-double its efforts in bringing all operators under the regulatory regime. CIAK should assist in identifying and reporting illegal operators	CCK/ CIAK	
43.	CIAK to develop a code of conduct for its members as a first step in initiating self-regulation for its members.	CIAK	

5.0 Conclusion

In conclusion, the moderators:

- Gave a summary of the day's deliberations;
- He strongly commended the Commission's for fulfilling some of the agreed in the last forum particularly one on seeking feedback from participants on how future forums should be managed and inviting consumer groups which were represented at the 2011 forum;
- He recommended that CCK should come up with interconnection regulations for the postal industry the same way it has been done for telecoms operators to address some emergent issues in the sector;
- Thanked participants for their engaging and insightful discussions that saw important recommendations made;
- Closed the forum at 5.21 P.M .

The next forum will be convened on notice.

MODERATORS:

.....
Mr. Aloys Ochieng Anga'sa

.....
Stanley Moyi

RAPPORTEURS

.....
Martin Ngesa

.....
Caroline Murianki

.....
G. Tolle

.....
Samwel Andati

APPENDIX I

PARTICIPANTS LIST OF THE 3RD ANNUAL POSTAL COURIER STAKEHOLDERS FORUM 2011 HELD AT THE INTERCONTINENTAL HOTEL, NAIROBI ON THE 18TH OF APRIL 2011

No	Name & Title	Organization & Physical contacts	No	Name & title	Organization & Physical Contacts
1.	Alloys Ochieng Angasa Postal Consultant	P.O. Box 48779-00100 Cell: +254 - 722 163406 Email:aloysochieng@yahoo.com	2.	Titus E. Juma Manager Retail & Financial Services	Postal Corporation of Kenya Posta House P.O.Box 34567-GPO Nairobi Tel: +254-20-3242000 ext 3202/2045 D/L:+254 20 324245 Email:tjuma@posta.co.ke
3.	Ahmed Ali Financial Director	Document Express Courier Ltd Sonalux House, 8 th floor,Moi Avenue P.O. Box 100370-00101 Nairobi L/L:+254-20-2227407 Fax:+254-20222297 Cell:+254-721 068326	4	Ann Kwamboka General Manager	Topdeck Courier Services Bruce House, 11 th floor Standard Street P.O. Box 74750-00200 Nairobi Tel:+254-202222714 Fax:+254-20-2219681 Cell:+254-722-202441/0734 600418 D/L:0722 845700 ann@topdecktravel-kenya.com www.topdecktravel-kenya.com
5	Ken Oluoch Director	Planet Associates Hurlingham Place Suite No 3 Argwings Kodhek Road P.O. Box 40615-00100 GPO Nairobi ,Kenya D/L: +254-20-2733574 Cell:+254-722 728446 Email: kenoluoch@gmail.com	6	Helen K. Nyaboga Administration and Logistics	Real time Courier P.O. Box 15926-00100 Nairobi Tel:+254-20-2727277 +254-20-3585257 Cell:0733 699968 email:realtimcourier@gamail email:realtimcouriers@nbinet.co.ke
7.	Carol G. Mbutura Director	Mail Manager Ltd Town House 8 th floor Room 811 Kaunda Street P.O. Box 65062-00618 Ruaraka Nairobi Tel:+254-20-311213/2248741 CDMA:+254-202012613 Mobile:0725 291116/0724 765605	8	Stanley Moyi Director	Modern ICT Consultants Upper Basement,UB 14 Reinsurance Plaze Taifa Road/Aga Khan Walk P.O. Box 28594-00200 Nairobi Tel:+254-02-2230961 Fax:+254-02-218457 Mobile: 0722-518444 email: mictc2007@yahoo.com

No	Name & Title	Organization & Physical contacts	No	Name & title	Organization & Physical Contacts
9	Hamida Masasabi Office Administrator	Urban Cargo Networks Limited Libra House-Mombasa Road Go-Down No.3 P.O. Box 4-00507 Nairobi Tel:+254 -20- 2643027/8 Mobile (office) +254: 715 622484 +254: 732 675474 email: hamida@urbancargonetWORKS.com www.urbancargonetWORKS.com	10	Jama Ahmed Mohamed Legal Department Manager	Kampala Coach River Road Nairobi P.O. Box 5254 Eldoret Cell +254 - 717 738 877 +254 771 130937 +254 733 896 652 Email:jamalqubati@kampalacoach.com
11	Paul G. Macharia Secretary	Nyena Sacco P.O. Box 865 Nyeri Cell: 0722606801	12.	Caroline Muriuki Customer Care	Reliance Courier P.O. Box 5719-00100 Nairobi Cell:0716 616149
13.	Yasin Hassan Abdi	Bisharo Parcel Service Nairobi Cell: 0721677555	14	Abdiweli Abdullahi Ali	Bisharo Parcel Service Nairobi Cell: 0725 059295
15.	Johnson Wachira Chairman	Neighbours Welfare Organization P.O. Box 5291-00506 Nairobi Email:wachirajohnson@gmail.com	16	Lawrence Magambo Manager Courier	Postal Corporation of Kenya P.O. Box 34567-00100 Nairobi Cell:0722 696156 email:lmagambo@posta.co.ke
17.	John Ileri Proprietor	Quick Link Courier Services P.O. Box 7343-00300 Nairobi Cell;0723 664796 email:joireri@yahoo.com	18	Samuel Kariuki Githigi Senior Assistant Commissioner	Kenya Revenue Authority Times Tower P.O. Box 48240 Nairobi 00100 Cell :+254 -722 823206 L/L :+254 -20-2812051 Email:kariuki.githigi@kra.go.ke
19.	Caroline Waswa General Manager	Union Express Ltd P.O. Box 52967 Nairobi,00100 Tel: 0722 715844 +254-20-828647 Email:carolynew@globeflight.co.ke	20.	Joseph Kimani Kamau General Manager	Hatari Security & Courier P.O. Box 22921-00400 Nairobi Tel: 0722952500 D/1 4441590 Email"info@hatarisecurity.net
21.	Peter Waithaka Gachara Manager	Ganatra Parcel Services P.O. Box 32929=00600 Nairobi Cell:0722516606	22.	Jones Kimeu Assistant Director/internal Audit	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel:020 424200 Fax: 4451866 Email kimeu@cck.go.ke

No	Name & Title	Organization & Physical contacts	No	Name & title	Organization & Physical Contacts
23.	Celine Oduor Customer Service	MasterPiece Courier Services P.O. Box 2619-00100 Nairobi Tel: 020 2045043 info@masterpiececouriers.co.ke	24	Betty Rucha Regional Manager/Nairobi	Postal Corporation of Kenya P.o. Box 63200-00200 Nairobi Tel:0722845471 email: brucha@posta.co.ke
25	Julius Olwero	Kwanza Helppcare Ltd P.O. Box 578 Kitale Email:j.musoliza@yahoo.com	26	Joseph M. Mumo HeadPostmaster, City Square	P.O. Box 63200-00200 Nairobi Tel: 020 2220799 Email:jmumo@posta.co.ke
27	Atieno Ochola Director/Licensing Compliance & Standards	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel:020 4242000 Fax: 020 4242448 Email:ajochola@cck.go.ke	28	Jane Babsa-Nzibo Managing Director	Skynet Worldwide Express P.O. Box 40545 Nairobi Tel: 020 2635299/98/97 D/I:020 2633154 Cell:0722 525427 Email skyinfo@skynetexpress.co.ke
29	Stephen England Area Commercial Manager Equatorial Africa	DHL House Witu Road off Lusaka Road P.O. Box 67577-00200 Nairobi Tel:020 6925100/120 Cell:0722 740020 Email: Stephen.England@dhl.com	30	Azym Dossa Managing Director	EasyCoach Railways Godowns Haile Selassie Avenue P.O. Box 3185-00200 Nairobi Tel: 020 2210712 D/I: 020 2537812 Fax: 020 2220096 Email:md@easycoachltd.com
31	James Gathira Area Customs Liasion & Security Manager	DHL HOUSE WITU Road off Lusaka Road P.O. Box 67577-00200 Nairobi Tel: 020 6925100/120 Cell: 0722 517855 Fax: 020 536673 James.Gathira@dhl.com	32.	Blake Miller Country Manager	One World Courier Limited Panesar's Centre Ground Floor P.O. Box 10438-00100 Nairobi Tel:+254 -20- 829000 Fax: +254 77 3009322 Cell:+254 701 696287 Email:blake@oneworldcouriers.com
33.	Esther Wanyoike Sales Manager	Tomic Express Services P.O. Box 4630-00506, Nairobi Association of Evangelicals in Africa Bldg Valley Road Tel: +254 -20- 3005054 Cell: +254 -736 308985 Email: esther@tmxglobal.com	34.	Nicholas Makau Senior Sales Executive	Polo Cottage Jamhuri Grounds P.O. Box 21606-00505 Nairobi Tel: +254 -20- 3870449 /3867701 Fax: +254 -20- 3868671 /3873249 Cell:+254 722 417764 /735 417764 Email: nmakau@bmsecurity.com

No	Name & Title	Organization & Physical contacts	No	Name & title	Organization & Physical Contacts
35.	Emily Waithera Marketing Executive	Tomic Express Services P.O. Box 4630-00506 Nairobi Tel: ++254-20-3005054/2214194 Cell:+254 770 238000, 0727 671605 Email:info@tmxglobal.com	36	Rogers Sultani Director Courier Services	G4S Security Services Kenya Limited North Airport Road, Embakasi P.O. Box 30242 Nairobi GPO Tel:+254 20 6971000 DL:6971080,8233041 Email:rogers.sultani@ke.g4s.com
37	Matano Ndaru Director - Competition, Tariff & Marketing Analysis	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel: +254 -20- 4242451 Fax: +254 -20- 4451866 Email:ndaru@cck.go.ke	38	Mary Mutheu Mutuku Front Office Secretary	Prime Group Limited P.O. Box 101726-00101 Nairobi Tel:+254 -20- 2506464 Email:info@primegroup.co.ke Customer service@primegroup.co.ke
39	Patricia Muchiri Asst. Director/Consumer Affairs	Communications Commission of Kenya P.O. Box 14448-00800 Tel: 020 4242412 Fax: +254 -20- 4451866 Email:muchiri@cck.go.ke	40	Hellen Sewe Marketing Director	Skynet Worldwide Express P.O. Box 40545 Nairobi 00100 Tel:020 2124792 Email:hsewe@skynetexpress.co.ke
41	David Wamugunda Operations Manager	Fedex P.O. Box 47802 Nairobi 00100 Mobile:+254 722870187 Email:david.wamugunda@paxtransport.com	42.	Ahmed Ali Farah Financial Director	Document Express courier P.O. Box 100370 Nairobi 00101 Cell: +254 - 721968326
43	William K. Kagwanja	Freight Supervisor P.O. Box 52114-00200 Nairobi Tel: 020 2826000 Email:wkuria@eacco.com	44.	Naaman Kariuki Coordinator	Mwaridi Enterprises Limited P.O. Box 272-10400 Nanyuki Tel:+254 - 722 785 762 Email:waridi@ymail.com
45.	Moses K Muove Manager	Kinatwa Parcel P.O. Box 11054-00400 Nairobi Tel:0723 213678	46	Simon Mwanthi Managing Director	Kinatwa Parcel P.O. Box 7696-00300 Nairobi Cel:+254 - 722 668580 Email: mwanthis@yahoo.com
47.	Muchina Nahason Muraguri General Manager	East African Courier P.O. Box 52114-00200 Nairobi cell:+254 - 725 670305 Fax:+254 -20- 2211307 nmuchina@eacco.com	48	Rachel Alwala Assistant Manager/Corporate Affairs	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel: +254 -20- 4242475 Fax: +254 -20- 4451866 Email: alwala@cck.go.ke

No	Name & Title	Organization & Physical contacts	No	Name & title	Organization & Physical Contacts
49	Brenda Ngugi PRO	Ministry of Information & Communications P.O. Box 30025 GPO Nairobi Tel: +254 -20- 2251152 Cell:0728327186 Email: breshiee@yahoo.com	50	Vusumuzi Mkhumane Director	Afralti P.O. Box 58902 Nairobi 00200 Tel: +254 -20-4440633 Fax:+254 -20- 4444483 Email Vmkumane@afralti.org
51.	Joe Areri OPS Manager	Netlink Business Servicess Ltd P.O. Box 78468 00507 Nairobi Tel: +254 -20- 241749 Cell:+254 -734 790231 Email:Imatheka@yahoo.com Joe areri@yahoo.com	52	Suleiman Siolibe Director	Rush Nairobi P.O. Box 54006 Nairobi 00200 Tel: +254 -722 523701 Email: info@rushnairobi.com
53.	Brian Changangu Muthiani Head of Logistics	M&S Logistics P.O. Box 15779 00100 Nairobi Tel: +254 -729 666555 Email:bchangangu@mantslogistics.co.ke	54	Janice Wanja Mwaniki EMS customer Care P.O. Box 34567 00100 Nairobi	Postal Corporation of Kenya P.O. Box 34567 00100 Nairobi Tel:+254 20 3242211 Email:jmwaniki@posta.co.ke
55.	Sospeter N Njue Postal Controller	Postal Corporation of Kenya P.O. Box 34567 00100 Nairobi Tel: +254 20 3242380 Fax: +254 20 2240374 snjue@posta.co.ke	56	Augusta Njagi Manager Mails	Postal Corporation of Kenya P.O. Box 34567 Nairobi GPO Tel:+254 -20- 3242052 Email:anjagi@posta.co.ke
57	Severin Kariuki Kiragu Director	Neno Courier Services Ltd P.O. Box 660 60100 Embu Cell: +254 - 722 618884 Email:kiragus sk@yahoo.com	58	David Njagi Ngonge Director	Neno Courier Services Ltd P.O. Box 6060 60100 Embu Cell:- 0722 795317 Email:davidngonge@yahoo.com
59	Mololine Services Ltd Manager	Stephen J. Kamau Njihia P.O. Box 34700 00100 Nairobi Cell:+254 - 722 586484	60.	Kombe Fredrick Esau Branch Manager	Eldoret Shuttle Sacco Ltd P.O. Box 129 Eldoret 30100 cell:+254 - 0724-4671157 +254 -734 656909 Email:eldsacco@yahoo.com

No	Name & Title	Organization & Physical contacts	No	Name & title	Organization & Physical Contacts
61.	Stephen K Kangethe Marketing Manager	Urban Cargo Networks Limited P.O Box 4 00507 Nairobi Tel: +254 -20- 2643027/8 kangethe@urbancargonetwo rks.com	62	Francis Kiyapyap	Ministry of Information Communication P.O Box 30025 00100 Nairobi Tel:+254-20--344001/2 Fax:+254-20- 316004 Email:fkiyapyap@gmail.com
63	Nicholas Makau Wambua Senior Sales Executive	Bob Morgan Services Ltd P.O. Box 21606 00505 Nairobi Cell:+254 - 722 417764 Email:nmakau@yahoo.com or nmakau@bmsecurity.com	64	Moses Omoongeh Manager	Evafast Couriers Limited P.O. Box 9208 Nairobi 00100 cell:+254 - 722 863319 +254 - 722 716056 Email:everfastcourier@ymail.c om Email:omoongen@yahoo.com
65	Mr. Jamal Ahmed Mohamed Legal Manager	Kampala Coach Limited P.O. Box 5254 Eldoret Tel: +254 -717 738877 Email:jamalahmed@kampa l a coach.com	66.	Fred Azelwa Odanga Coordinator	Intergrated Commutter Transport, Safely Network P.O. Box 27100 00100 Nairobi Tel:+254 -20- 2666972 Email fazelwa@yahoo.com
67	Mweteri Francis Operations Manager	Quicklink Courier Services Limited P.O. Box 100547 00101 Nairobi Tel:+254-20- 2011892 mobile+254 - 720 441021 email:quicklinkcourier@yah oo.com	68	Hamida Masasabi Office Administrator	Urban Cargo Networks Limited P.O. Box 4 Oo507 Nairobi Tel: +254 -20- 2643027/8 Email:hamida@urbancargonete owrks.com
69	Noor Begum Kaka Manager	Modern Coast Bus Services Tel: 0720 453657 Nairobi	70	Eva Njuki Managing Director	Data Rush Services P.O. Box 10102 00100 Nairobi cell: +254 -722 762582 email: eva.njuki@data-rush
71.	Robinson Saila General Manager	Roy Parcels Services P.O. Box 11883 00400 Nairobi Tel:+254 -20- 2121444 Fax: +254 -20- 558511 Email info@myparcel.com	72	Catherine Wambui Director	Adonai Logistics & Freight Services P.o. Box 66155 00800 Nairobi mobile: +254 - 7223877171 tel: +254 -20- 8032929 email:adonailogistics@gmail.co m
73	Epims M. Muriithi Director	Neno Courier Services P.O. Box 660 60100 Embu Cell: +254 -722 581005 Fax;+254 -20- 68 31513	74	Joseph Chege Mwangi Operations Manager	Roy Parcel Services P.O. Box 11883 Nairobi 00400 Tel: +254 -20- 2121444 Fax:+254 -20- 558811 info@myparcel.com

No	Name & Title	Organization & Physical contacts	No	Name & title	Organization & Physical Contacts
75	Naftaly Gichuki Mutugi	Nucleur Investments Limited P.O. Box 923 Nairobi 00515 Tel: +254 - 721 409871 Email:gichukimutugi@yahoo.co.uk	76	Samuel Gichohi General Manager	TNT P.O. Box 25133 00100 Nairobi Tel: +254 -20- 4922000 Email info@kaetnt.com
77	Gichuki Njeru Ag/Manager	Postal Corporation of Kenya P.o Box 34567 GPO Nairobi Tel: +254 -20- 3242064 /2472 gnjeru@posta.co.ke	78	Cyprian Birgen Assistant Manager/EMS	Postal Corporation of Kenya P.O. Box 34567 Nairobi 00100 Nairobi Tel: +254 - 722 2980817 Email cbirgen@posta.co.ke
79	Bernard O. Ayuma Markeing Manager	Easy Coach ltd Marketing Manager P.O. Box 3185 00200 Nairobi Tel:+254 -20- 2210711/2 Cell: +254 - 726354300 Email:info@easycoachltd.com	80	Charkes Mogaka Osiaboke Chief Executive Officer	Real Time Courier P.O. Box 15926 00101 Nairobi Tel:+254 -20- 2727277 Cell: +254 - 715 400988
81	Ken Oluoch Consultant	Tetralink NK Taylor & Associates P.O. Box 40615-00100 Nairobi Cell: 0722-7284446 Email kenoluoch@gamil.com	82	Charles Githaiga Kiruma Senior GIS Officer	Ministry Of Lands P.O. Box 30046 00100 Nairobi Tel:+254-20--8569204 Cell:+254 - 722 365403
83	Joy W Njeru PRO	Ministry of Information Communication P.O Box 30025 00100 Nairobi Tel:+254--20--344001/2 Fax:+254 -20- 316004 Cell:+254 - 711 624386 Njewan1923@yahoo.com	84	Ismael Mwanja Kamenyi Manager Cash & Courier	Bob Morgan Services P.O. Box 21606 00505 Nairobi Cell: +254-722 445124 Email:kmenyi@bmsecurity.com
85	Victor O Nyang'or PRO	Ministry of Information Communication P.O Box 30025 00100 Nairobi Tel:+254-20-344001/2 Fax:+254 -20- 316004 Email:victor82@gmail.com	86	Freshier Lungahi PRO	Ministry of Information Communication P.O Box 30025 00100 Nairobi Tel:+254-20-344001/2 Fax:+254 -20- 316004 Email:flungahi@gmail.com

No	Name & Title	Organization & Physical contacts	No	Name & title	Organization & Physical Contacts
87	Hellen Kerubo Nyaboga Accounts Manager	Realtime Courier P.O. Box 15926 00100 Nairobi Tel: +254 -20- 2727277 Email:Realtimecourier@gmail.com	89	James Kabia Manager	Kiriti Couriers P.O. Box 18554 Nairobi Tel:+254 - 710046254 Email:kwaithaka2000@yahoo.com
90	Charity Mwanzia R. Ndinda Operations Manager	Muthiani & Sons Logistics Ltd P.O. Box 15779 Nairobi 00100 Tel: -20- 8089426/7 Cell; +254 -722 488695 Email:charity@mandalogistics.co.ke	91	Elizabeth Mwaura General Manager/Courier Services	Postal Corporation of Kenya P.O. Box 34567 Nairobi 00100 Tel: +254 -20- 3242028 Email :emwaura@posta.co.ke
92	John Juma Vice chairman	Consumer Federation of Kenya (COFEK) P.O. Box 68249 Nairobi Tel: +254 - 722 254130 Email:henryjuma2002@yahoo.com	93	Patrick Komo General Manager/Business Development	Reliance Courier Services P.O. Box 5719 Nairobi Tel: +254 -20- 318674 Email:service@reliancecourier.co.ke
94	James Gachathi Strategic Officer	Dikko Communications P.O. Box 59522 Nairobi Tel: +254-714267174 Email:jamesgachathi@yahoo.com	95	Milicent Chepkemioi Financial Advisor	Consumer Information Network P.O. Box 7569 Nairobi 00300 Tel: +254 - 711467273 Email:admin@consumerupdate.org
96	Douglas Mbaka Wilson PRO	Ministry of Information Communication P.O Box 30025 00100 Nairobi Tel:+254-20-344001/2 Fax:+254 -20- 316004 Cell: +254- 723 632930 Email :mbkadouglas@yahoo.com	97	Gerald Kimeu Manager	Kenya Communication Ltd P.O. Box 19227-0200 Nairobi Tel: +254 -727 598393 Email: kimeuge@yahoo.com
98	Emily Waithira Gitere Sales Representative	Tomic Express Service Limited P.O. Box 4630 Nairobi 00506 Tel:+254 -20- 3005054 Email: Emily@tmxglobal.com	99	Esther Wanjera Sales Manager	Tomic Express Services P.O. Box 4680 Nairobi 00506 Nairobi Tel: +254 -20- 3005054 Email"esther@tmxglobal.com
100	Serah Wanjiru Ndungu Operations Manager	Psacan Courier P.O. box 66834 00800 Nairobi Tel:+254 -20- 4441906/07 Cell:0725 595715 Email:psacam@yahoo.com	101	Peter Ndungu Kiarie Managing Director	Psacam Courier P.O. Box 66834 00800 Nairobi Tel: +254 -20- 4441906/07 Cell:0724 797223 Email:psacam@yahoo.com

No	Name & Title	Organization & Physical contacts	No	Name & title	Organization & Physical Contacts
102	Joseph Njeru Ileri General Manager	Naekana Rt 143 Sacco Society Ltd P.O. Box 6940 00300 Nairobi Tel: +254 -20- 2609874 Cell:+254 - 723982005 Email njeru- 2006@yahoo.com	103	Dickson Nyagah Manager/GPO	Postal corporation of Kenya P.O. Box 34567 Nairobi GPO Tel: +254 -20- 310061 Cell: +254 - 722 590690 Dnyagah @posta.co.ke
104	Carol Mbutura Managign Director	Mail Manager Ltd P.O. Box 65062 Nairobi 00618 Ruaraka, Tel: +254 -20- 224874 Cell:0725291116 Fax:+254 -20- 2248741 Email:cmbutura@yahoo.com	105	Lucas Ileri Assistant Manager	Channia Transport Co Ltd P.O. Box 215 Thika 0100 Tel; +254 - 721 279235 Email:ireri51@gmail.com
106	Margaret W. Kamau Accountant	Channia Transport Co Ltd P.O. Box 215 0100 Thika Tel: +254 - 721 279235 Email maggkamau@yahoo.com	107	Christopher K. Kemei Assistant Director/Licensing Compliance & Standards	Communications Commission of Kenya P.o. Box 14448-00800 Tel; +254 -20- 42 42 000/449 Fax: +254 -20- 4242 408 Email:Kemei@cck.go.ke
108	Kipngetich Rotich Manager/HRA	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel; +254 -20- 424200/309 Fax:+254 -20- 4451866 Email:kipngetich@cck.go.ke	109	Joyce Nyanamba Manager/procure ment	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel: +254 -20- 4242 000/325 Fax: +254 -20- 4451866 Email:nyanamba@cck.goke
110	John Omo Commission Secretary	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel: +254 -20- 4242000/289 Fazx; +254 -20- 4451866	111	Peris W Karanja Admin Director	Prestige Courier Services Ltd P.O. Box 11862-00100 Nairobi Tel: +254 --20--2252080 +254--20--2252090 info@prestige courier.com
112	Joy G Kinyua Business Dev Director	Prestige Courier Services Ltd P.O. Box 11862 00100 Nairobi Tel: +254-20-2252090 /2252080 Cell:+254-722 956595 Email:info@prestige courier.com	113	Samuel Andati Economist	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel: +254 -20- 4242225 Fax: +254 -20- 4242221 Email: andati@cck.go.ke

No	Name & Title	Organization & Physical contacts	No	Name & title	Organization & Physical Contacts
114	Geoffrey G.K. Tolle Postal Officer	Communications Commission of Kenya P.O. Box 14448 00800 Nairobi Tel: +254 -20- 4242000 Fax: +254 -20- 4242408 Email: tolle@cck.go.ke	115	Martin Ngesa Manager/Postal Licensing & Enforcement	Manager/Postal Licensing & Enforcement P.O. Box 14448-00800 Nairobi Tel: +254 -20- 424239 Cell: +254 - 726 177548 Email:ngesa@cck.go.ke
116	Daniel Loki David Director	Naekana RT 134 Sacco P.O.Box 6940-00300 Nairobi Cell:+254 - 722 318116	117	Japheth Ondiek Program Officer	Nairobi Central Business District Association P.O. box 61781-00200 Nairobi Tel:+254 -20 002342 Cell: +254 -20- 735231645 Email:info@ncbda.co.ke
118	Benjamin Kibuchi Customer Care Manage	Data rush P. O. Box 10102 Nairobi Cell:+254 - 722692209 Email:ben.sales@data-rush.com	119	Jolly Sogomo Postal Officer	Communications Commission of Kenya P.O. Box 14448 Nairobi 00800 Tel: +254 -20- 424200/247
120	Richard Tonui	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel; +254 -20- 424200/229 Fax: +254 -20- 4242 221 Email:tonui@cck.go.ke	121	Caroline Murianki Consumer Affairs	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel: +254 -20- 424200/246 Email:murianki@cck.go.ke
122	Joy Kimiywe Procurement Officer	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel: +254 -20- 424200/308 Email:kimiywe@cck.go.ke	123	Viola Munyoki Logistics Officer	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel: +254 -20- 424200/218 Email:Munyoki@cck.go.ke
124	Linet Onyando Corporate Affairs	Communications Commission of Kenya P.O. Box 14448-00800 Nairobi Tel: +254 -20- 424200/475 Email:onyando@cck.go.ke	125.	(Rtd. Major)Eliud Ikua Security Officer	Communications Commission of Kenya P.O. Box 14448-00800 Tel: +254 -20- 424200/345 Email:ikua@cck.go.ke
126	Nahason Muchina General manager	East Africa Courier Limited EACL House Charan Centre Block C, P.O. Box 52114 00200 Nairobi Tel: +254-20 2826000 cell:0725 670305 email:nmuchina@eacco.com			

APPENDIX II

KEYNOTE ADDRESS BY HON. SAMUEL POGHISIO, MINISTER FOR INFORMATION AND COMMUNICATIONS, DURING THE 3RD ANNUAL

POSTAL/COURIERSTAKEHOLDERSFORUM AT INTERCONTINENTAL HOTEL, NAIROBI, 18TH APRIL 2011

Mr. Charles J.K. Njoroge, Director-General, CCK

Mr. Bishar Abdulrahman. Hussein, Chairman of Council of Administration (CA) of UPU

Maj. General (Rtd) Hussein Ali, Postmaster General, Postal Corporation of Kenya

Madam Jane Babsa –Nzibo, Chairperson, CIAK

CEOs and their representatives present,

Industry players and stakeholders

Distinguished guests

Ladies and gentlemen

I am pleased to join you this morning at the official opening of the third Annual Postal/courier Stakeholders Forum. I am pleased to note that this Forum has now become a permanent fixture in the Communications Commission of Kenya (CCK) annual calendar of events. I wish to take this opportunity to commend the CCK for providing sector stakeholders and interested parties with the opportunity to discuss pertinent and current issues that will inform the future policy and regulatory direction of the post.

As you all appreciate, the Ministry of Information and Communications appreciates the importance of engaging stakeholders in the process of policy and legal formulation. This explains why the *ICT Sector Policy Guidelines of March 2006* and supporting legal framework were developed after extensive consultations with the communications sector players and other interested parties. My Ministry has been actively participating in the Annual Postal/courier Stakeholders Forum in order to appreciate the policy, legal and regulatory concerns that may have a bearing in the development of the postal sector in the country.

Ladies and gentlemen, the Government recognizes the importance of the post in the Kenya's socio-economic development. For many of our people, particularly in the rural

and remote locations, the post remains the only cost-effective and easily accessible means of communication. The Government will continue doing everything within its power to ensure that the country has a vibrant and efficient postal service. This will be achieved by among others ensuring that postal operators provide affordable, equitable and efficient universal service.

To ensure that universal postal services are attained, the Government has designated the Postal Corporation of Kenya as the National Postal Operator with Universal Service Obligations. To give impetus to the attainment of the policy objective of universal access to postal services, the Government has reviewed the sector law and regulations to provide for the establishment of a Universal Service Fund. I wish call on the CCK to fast-track the implementation of the sector regulations relating to the Universal Service Fund so that postal services can be made available all.

For the post to remain relevant today's world where customers want services to be delivered fast and efficiently, focus should be concentrated on meeting customer concerns and expectations. This is the only way the post will be able to hold its own in face of the dramatic uptake of ICT services in the country. The post utilize the opportunities presented by ICTs to position its services in tandem with new customer trends and prevailing market realities.

The theme this year, *“meeting consumer concerns and expectations in a liberalised postal/courier market”* aptly captures the focus all operators in the sector should encompass. Indeed, it cannot be overemphasised that today, consumer demands and expectations shape products and services in the market and this is particularly pertinent in an industry that must respond to the fast changing technology in the global arena.

The Government of Kenya through my ministry acknowledges that good addressing and high quality address data constitute an important part of a nation's infrastructure. In response to the demand from consumers on the need to have door-to-door delivery service, my ministry and the CCK are in the process of developing a national addressing system through a multi-stakeholder taskforce.

Worldwide, it has been acknowledged that addresses are an essential tool for economic and social development and that the existence of complete, correct and unique address data should be seen as being of fundamental importance for all countries.

Inaccurate and unreliable location address has a financial cost and human loss, particularly in dispatch of police, fire and ambulance in emergency situations. These costs are increasing as the range and use of address information increases. A good

addressing system reduces undeliverable-as-addressed mail, and provides mutual cost reduction opportunities through improved efficiency.

Ladies and gentlemen, an informed consumer is an empowered one. In recognition of this fact, I wish to laud the Communications Commission of Kenya for the deliberate efforts being undertaken to educate consumers of postal/courier services. This will increase consumer demand thereby empowering postal/ courier consumers to make informed choices .There have been issues ranging from transmission of prohibited items in the postal/courier networks that put consumers' lives on the line, to ignorance of available complaints recourse mechanisms inherent in utilising services from licensed operators.

Dear participants, my Ministry recently reviewed fourteen sets of regulations in the ICT sector in tandem with feedback from interactions with stakeholders in forums such as the one in point. This is aimed among others at providing clarity and facilitating the consumer to make informed choices. Furthermore, the regulations have enabled effective competition, investment and innovation to thrive in the sector.

Contrary to earlier predictions, the post is weathering the initial storm presented by ICTs and instant messaging technologies. Although new technologies have eaten into some of the traditional postal business segments, ICTs have opened new business opportunities for the post. .For instance, in the present world goods are ordered online but delivered by post and courier services.Physical mail volumes remain positive in most regions of the world despite increased competition particularly from electronic communication together with the global economic slowdown. In response to the new business environment, the postal industry should exploit ICTs to develop new products and services that merge the opportunities of cyberspace with the extensive physical distribution capabilities in order to retain fair portions of the communications market.

As I conclude, I wish to assure the postal/courier fraternity that the government will continue to support the development of this industry. This we shall do, recognizing as we do, its importance in the development of the economy and in achieving the Millennium Development Goals.

With those remarks, it is now my pleasure to declare this third annual postal/courier stakeholders forum officially open.

Thank you for your attention.

APPENDIX III

**Guest of Honour, Hon. Samuel Poghiso
Minister for Information and Communication**

**Mr. Charles J.K. Njoroge
Director General - CCK**

**Ambassador Bishar Hussein
Chairman of UPU Council of Administration**

**Rtd. Major - General Hussein M. Ali
Postmaster - General Postal Corporation of Kenya**

**Distinguished Guests,
Ladies and Gentlemen**

I would like to take this opportunity to thank the Director General of CCK Mr. Charles Njoroge for facilitating this forum for three consecutive years, and CIAK's participation in the USF Africa Leaders Forum and HR41CT'11 Conference. This affirms the importance that the Postal/Courier sub-sector plays in our economy and the Director General's continuous commitment in ensuring that dialogue continues to exist between the Regulator and CIAK.

In line with this year's theme, "*Meeting Consumer Concerns And Expectations In A Liberalised Postal/Courier Market*", some of the main concerns of CIAK in a liberalised market are unfair pricing and continued operation by unlicensed operations, these include Bus Companies, Matatu Sacco Operators, Boda Boda operators to name but a few. As much as CIAK appreciates what has been done by the regulator we still feel that more needs to be done to create an even playing field.

Licensing Fee:

We wish to once again refer to Section 32.1.2 which states:

On 1st July of each year, an annual operating fee equivalent to 0.5% of the audited annual gross revenue accruing from the Licensing Service during the previous financial year of KShs.... Only whichever is higher.

CIAK members continue to object to this change in licensing fee approach.

Following extensive consultation with CCK and the Ministry of Information Communication in 2006, it was agreed that the license fee would be 0.5% or a fixed fee whichever is **LOWER** where the fixed fee varied by category of operator. The proposed change to whichever is **HIGHER** will adversely affect a number of our members.

Universal Service Fund:

Section 32.1.3 of the Kenya Communications (Postal and Courier Services) Regulations, 2009 states: *any other fees payable under this License including but not limited to fees to the Universal Service Fund.*

CIAK would like to propose that the Universal Service Fund be amended to cover the reserved weight definition of 350 grams and below. This will create a level playing field for our members who are in direct competition with freight and transportation companies. The application of this Fund should not be discriminatory and needs to apply to all who are involved in the provision of this service.

Conclusion:

With the current state of the economy and in particular the recent surge in the price of fuel, it is important that these issues be reviewed as a matter of urgency. This will not only address the concerns of our members but will create an enabling environment that will attract further investments within the industry.

Jane Babsa-Nzibo
Chairperson
Courier Industry Association of Kenya (CIAK)

APPENDIX IV

**REMARKS BY CHARLES J.K. NJOROGE, DIRECTOR GENERAL,
COMMUNICATIONS COMMISSION OF KENYA DURING THE 3RD
ANNUAL POSTAL/COURIER STAKEHOLDERS FORUM AT THE
INTERCONTINENTAL HOTEL, NAIROBI, 18TH APRIL 2011**

**Our Chief Guest, Hon. Samuel Poghiso, Minister of Information and
Communications**

Amb. Bishar Hussein, Chairman, UPU Council of Administration

**Rtd. Major General Hussein Ali, Postmaster General, Postal Corporation of
Kenya**

Mrs. Jane Babsa Nzibo, Chairperson, Courier Industry Association of Kenya

Representatives of Postal and Courier Operators

Invited guests

Distinguished Delegates

Ladies and Gentlemen

I wish to convey sincere apologies from our Director General, Mr, Charles Njoroge, who is not able to join us today. My name is Matano Ndaró, Director for Competition, Tariffs and Market Analysis, holding fort for Mr. Njoroge. Allow me therefore to deliver our Director General's remarks on his behalf.

I am delighted to join you this morning at this 3rd Annual Postal/Courier Stakeholders' Forum here at Intercontinental Hotel, Nairobi. I am also happy to note the sustained level of interest from the industry stakeholders in this forum Allow me to welcome you all to this forum whose theme is: *'Meeting Consumer Concerns and Expectations in a Liberalized Postal/Courier Market'*

The theme was selected with due consideration for the ever increasing capacity of the Postal and Courier industry to directly impact on daily lives of citizens. We at CCK take cognisance of this fact but also note that the future of the industry highly depends on the degree of investment and innovation pursued by postal and courier operators.

In carrying out our mandate therefore, the Commission continues to encourage dialogue and consultation among players and stakeholders in order to inform the regulatory process with the objective of promoting development of postal and courier services and

the industry in general in accordance with recognised international best practices and market trends.

The battle fronts for service also continue to shift and diversify from product offering to customer service. In this respect, the Commission is committed to maintaining a competitive and level playing field for operators, to ensure consumers get choice. At the same time CCK is also continuously making efforts to empower and protect consumers. Later today, the Commission will be sharing with you a foretaste of the consumer education campaign that has been prepared for rollout in the near future. It is one of the avenues that the Commission is using to reach out to the consumer to create awareness of their rights and responsibilities in the postal and courier sector.

Ladies and gentlemen, on a more general level, the resilience of the postal and courier subsector to the global tides is testimony to the potential of this subsector. The volumes of physical mail continue to rise in many regions of the globe despite increased competition emanating from electronic communication and economic slowdown experienced during the financial crisis in the recent past.

This scenario also plays to show the increased need for the industry to aptly respond to the fast changing business environment by exploiting new information and communication technologies (ICTs) to develop new products and services. The opportunities arising from the growth of the cyberspace are enormous and are poised to make the postal and courier industry leapfrog. The extensive physical distribution of the postal and courier networks countrywide, also strategically place the industry at a position that will help retain its rightful share in the ICT market in Kenya.

Ladies and gentlemen, the whole country is relying on the ICT industry in general to deliver its mandate to 'mwananchi' more effectively. On the part of the Commission, in order therefore to ensure universal access to ICT services by all in Kenya by the Year 2030, we commissioned, among other studies, an ICT Access Gap Study to identify the ICT gaps in the country and the challenges facing service provision in the ICT sector. The ICT Survey carried out in collaboration with the Kenya National Bureau of Statistics; will enable the Commission to derive data and statistics that forms the bedrock for designing and building sustainable universal access programs.

I wish to note here that the postal and courier sector is also an integral part of the study. The results of the study will provide policy makers and the Commission with accurate data on deficiencies in service provision in the sector. The results of this study will be shared with the industry to see how best we can derive incentive mechanisms for

operators in order to leverage and stimulate investment in ICTs particularly in high cost areas, and other areas that remain underserved and un-served. The Public Postal Licencee, PCK together with over 160 courier operators demonstrates the potential that lies here in. Just to show how expansive the industry is, there are over 672 courier outlets and 744 postal outlets. This combination speaks to the wide network that can be effectively utilised to reach customers locally.

Ladies and Gentlemen, the consumers and players in the postal and courier industry alike, have continued to enjoy the benefits of liberalization. With this there is evident competition and an array of choices to the increasingly knowledgeable and sophisticated consumers. The onus is on the postal and courier industry to rise up to the challenge to meet the demands of the consumer and also increase profitability through innovation and strategic use of emerging technologies. The Universal Postal Union (UPU), to which Kenya is a member, offers the opportunity for interoperability of logistics services, seamless online services and partnerships with commercial chains, and ultimately the backend support for e-commerce, which is the future of the post. It is my hope that we shall continue to take advantage of the exiting prospects that are poised to invigorate this industry.

I wish to assure the postal and courier fraternity that the Commission will continue to support the development of this industry in its endeavour to provide services to the ever changing needs of consumers. I am also confident that the industry will make an even higher contribution to the growth and development of our economy in years to come.

Let me take this opportunity to wish you fruitful deliberations and a successful 3rd Annual Forum for postal and courier stakeholders.

Thank you all for your attention

APPENDIX V

REMARKS BY MAJ. GEN. (RTD) ALI M. HUSSEIN, POSTMASTER GENERAL DURING THE ANNUAL POSTAL/COURIER STAKEHOLDERS FORUM AT THE INTERCONTINENTAL HOTEL NAIROBI ON 18TH APRIL 2011

It is my great pleasure to be here today for this important forum that brings together Postal and Courier Services Operators and Stakeholders. The meeting gives us a great opportunity to exchange views and share experiences on various issues affecting the postal and courier services sectors. In my view, the Post will continue to be relevant in the midst of rapid changes and advances in the communications landscape simply because it has over the years continued serving the needs of the people around the globe.

It is not difficult to appreciate why the Post occupies this notable position in society. It has been around longer than most forms of communication. In some communities, especially in developing countries, the Post is the only window of communication. In most cases, its affordability, reliability and accessibility make it the communication medium of choice for these communities.

Today, the Post presents a vast physical, electronic and financial infrastructure, spanning all continents, connecting citizens of the world and commonly linking people regardless of their economic, social, cultural or racial background. The universal postal service is our greatest opportunity to build and deliver the information society. For centuries, the Post has been the community's link to the outside world. From the basic delivery of a letter, to a parcel or money order, the Post has been the proverbial people's messenger. With the advent of Information Communication Technologies, that role has greatly been challenged but it must not by any means be left to diminish.

Times are changing fast and before we think of introducing and adopting state of the art systems and technologies, we must embrace a culture change. In other words we should change the mindset not only among the thousands of employees of the Post across the globe but also the policy makers in government. It must be appreciated that the customer of the 21st century is different from that of say, the 19th century and hence delivering postal, communications and financial services today is a different ball game altogether simply because;

- We are dealing with a more sophisticated, more informed and demanding customer.
- New technologies are changing people's lifestyles and exerting pressure on postal operators to adopt or die.

- Competition is giving our clientele alternative products and services, which are in most cases superior and better priced.
- Globalization and liberalization have brought a whole new dimension to the traditional structures and modes of communication.
- The shareholders are not only interested in giving service, they are demanding return on investment.

However, these are just challenges that we must live with and also take advantage of, to ensure the Post remains relevant now and in future.

Information and Communication Technologies have presented the Posts with a myriad of opportunities to reinvent themselves, expand their range of products and services, enhance reliability, security and operational efficiency of the network, as well as bring to the fold the marginalized communities in both remote rural areas and the poor urban centres.

Presently, there is a whole new way of doing differently what the Post has been doing for many centuries, and this is by riding on the emerging technologies in the communications and financial sectors.

The Postal Corporation of Kenya is currently utilizing the technology platform to deliver several e-products and services such as money transfer, utility payments on agency basis and letterbox rental management system. We are also considering taking advantage of a host of other existing opportunities to introduce more products including hybrid mail and delivery of e-commerce. Indeed, we trust through such developments, we will be able to meet consumers' concerns and expectations in a liberalized market as per this forum's guiding slogan.

In conclusion I want to emphasize the point that the Post is a key integrator of communities considering its enduring track record as a people's messenger. Its vast global network, reinforced by common international delivery standards and harmonized operational rules and procedures makes it a key stakeholder in the delivery of the information society. Therefore, the delegates who are attending this forum today have a task of drawing the most suitable plans that will be useful in driving the postal and courier business to the desired level of prosperity in future.

Thank you.