



REPORT OF THE OF THE 1ST ANNUAL POSTAL/COURIER
STAKEHOLDER FORUM

HELD ON 16TH MARCH 2009 AT THE INTERCONTINENTAL HOTEL,
NAIROBI
KENYA

HOSTED BY THE COMMUNICATIONS COMMISSION OF KENYA (CCK)



REPORT OF THE 1ST ANNUAL POSTAL/COURIER STAKEHOLDER FORUM HELD ON 16TH MARCH 2009 AT THE INTERCONTINENTAL HOTEL, NAIROBI

1.0 INTRODUCTION

The first meeting that brought together industry stakeholders in the postal/courier subsector was held on 16th March 2009 at the Intercontinental Hotel, Nairobi.

The forum was opened by the Deputy Secretary for communication in the Ministry of Information and Communications, Mr. Henry Mung'asia, who represented the Minister for Information and Communications, Hon. Samuel Poghiso.

The proceedings were facilitated by Mr. Aloys Ochieng Angasa, a Nairobi based consultant who has wide postal experience and expertise.

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 *Annex I*.

3.0 OPENING CEREMONY

3.1 SPEECH BY THE MINISTER FOR INFORMATION AND COMMUNICATIONS, HON. SAMUEL POGHISIO

The opening ceremony was presided over by the guest of honour Mr. Henry Mung'asia, Deputy Secretary, Ministry of Information and Communications who represented the Minister for Information and Communications Mr. Samuel Poghiso. The Deputy Secretary then delivered the Minister's Keynote address.

In his keynote address, the Minister welcomed all participants to the postal/courier event noting that the participatory governance exemplified in the forum was in line with the country's vision 2030.

He noted the government's strategies geared towards revitalising the sector and cited promotion of competition in the non-exclusive postal market segments and the restructuring of the postal corporation of Kenya as examples among others.

Noting tremendous achievements realised in the postal/courier sub-sector, the Minister cited the increased number of licensed postal/courier operators that have hit the 150 mark, promoting consumer choice. He observed that the sector was currently worth Ksh. 7 billion and growing. He pointed out that postal security was still a key challenge to be addressed adding that information and communications technologies have opened new business opportunities that should be utilised.

His full Address is contained in *Annex II*

3.2 OTHER STATEMENTS

The following were other statements delivered during the opening ceremony.

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

In a statement read by Mr. Juma Kandie ,the Director-General of Communications Commission of Kenya(CCK) welcomed all participants to the forum and:-

- Observed that the postal/courier sector was an indispensable part of the economy given the big turnover realised and the growing number of licensees;
- Cautioned that the sub-sector's business is built on trust and hence need to offer reliable and secure services;
- Recognised the sub-sector as a facilitator of trade both within and outside the country;
- Called upon stakeholders to harness their individual contributions in charting the way forward for the sub-sector;

- Highlighted some of the main challenges in the sector as security, addressing system and called for serious reflection on the same;
- Underscored the importance of manpower development as key in provision of seamless services to the customers.

The Director General's full statement is contained in *Annex III*.

3.2.2 STATEMENT BY THE CHAIRMAN OF THE COURIER INDUSTRY ASSOCIATION OF KENYA (CIAK) MR. JACK MUCHIRA

In his statement, the chairman of the Courier Industry Association of Kenya (CIAK) Mr. Jack Muchira

- Commended the forum initiative as it encouraged dialogue with a view to developing the sub-sector;
- Challenged players in the sector to embrace technology in their services if they are to remain relevant in the market;
- Reiterated CIAK's mission of enhancing harmony and representing collective interest while encouraging compliance in the sector.

Mr. Muchira's full statement is contained in *Annex IV*.

3.2.3 STATEMENT BY POSTMASTER-GENERAL OF THE POSTAL CORPORATION OF KENYA (PCK) MR. FREDRICK ODHIAMBO

In his statement, the Postmaster-General of the Postal Corporation of Kenya Mr. Fred Odhiambo:

- Thanked the CCK Director-General for the invitation to participate in such an important forum recognizing the vital role the postal /courier sub-sector plays in the country;
- Observed that changing customer needs call for shift of focus towards them;

- Emphasised the need for research in the sector in order to determine product range offering;
- Urged the sector regulator to allow flexibility in tariff review for basic services observing that there have also been delays in getting approvals on tariff proposals made by PCK;
- Called for concerted efforts in addressing challenges existing in customs clearance and mail delays at port of entry;
- Called for speedy operationalisation of the Universal Service Fund to help provide efficient basic postal services;
- Revealed PCK’s plans to enhance ICT usage in her services to counter reliance on poor road networks and the inherent service deficiencies.

Mr. Odhiambo’s full statement is contained in *Annex V*.

4.0 PRESENTATIONS

In his introductory remarks, the moderator underscored the importance of the forum which will henceforth be an annual event.

He emphasised the objective which is to establish new operational and regulatory horizons and collaborate in developing common agenda in the development of postal/courier services.

The presentations were made as follows:

4.1 Regulatory Issues

4.1.1 Topic: Regulatory issues in the Postal/ Courier sub-Sector by CCK-Director Licensing, Compliance & Standards

The presentation was made by Mr. Christopher Kemei, Assistant Director/Licensing and Compliance on behalf of the Director/ Licensing, Compliance and Standards Ms. Atieno Ochola.

In his *presentation*, Mr. Kemei:

- Explained that the day was reserved for receiving feedback and comments from stakeholders, hence the regulator would listen more;

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- Stated the vision and mission of CCK in facilitating access to communications services by all citizenry by 2030 through enabling regulation;
- Gave a brief on objectives of regulation in respect of quality of services, new technology, consumer protection, promotion of competition among others;
- Provided an overview of the postal/courier market structure and the growth in service outlets alongside number of licensees;
- Outlined key postal licence conditions which include maintenance and provision of records and returns, existence of complaint resolution procedures, clear disposal procedures of undeliverable articles, payment of annual licence fees among others.

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Mr. Kemei’s full presentation is contained in *Annex VI*.

Recommendations:

- Licensees must provide all required returns in time as these inform regulatory decisions and actions for the betterment of the industry;
- Hold frequent consultative forums as the one in point to sensitise the industry and provide fresh impetus;
- The view that CCK’s postal/courier structure is inadequate as compared to the telecom one need to be addressed by enhancement of the same in tandem with sector’s prominence.
- Enhance enforcement function of the postal regulators particularly the frequency of inspections and sensitisation exercises (the current schedule is a one week exercise per region per year);
- Postal legislation that hinder competition and negate level playing ground should be reviewed particularly on reserved services weight steps of upto 350 grammes including tariffs for reserved services;
- The regulator should ensure confidentiality of information submitted by licensees and where third parties seek such information, a written request from the regulator should be availed;
- To facilitate monitoring of mail delivery standards, operators should ensure that mail covers have clear /legible date-stamp impressions thereon;
- With regards to undeliverable articles, clear handling procedures should be in place stipulating retention periods before RTS (return to sender) or RLO (returned letter office) as the case may demand. As guidance in this respect can be found in the Kenya communications regulations, 2001;

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- Basic tariffs should be displayed at all licensee outlets as per licence conditionalities(essence of this is to provide consumers with wide choices);
- Postal/courier operators are particularly urged to comply with the following key licence conditions which are consistently being flouted as revealed by regulatr inspections:
 - ✓ PCK to avail to CCK archive a sheet each of all stamps and philatelic including 1st Day of Issue impressions of slogans
 - ✓ PCK to keep in its archives sheets of issues, artwork proofs and printing plates
 - ✓ All operators to notify CCK of any additional services they introduce to the public
 - ✓ Existence of a publicized complaint procedure which is geared towards receiving and handling complaints on postal/courier services
 - ✓ Mandatory display of tariffs by postal/courier operators for public /customer information
 - ✓ Compliance by PCK to minimum standards of monopoly services set out by the Commission(on intra-city, inter-city, intra-country, international hardship areas and issuance of private-letter boxes) Payment of annual operating licence fees as prescribed by the commission
 - ✓ Requirement that licensees operate from a permanent address registered with the Commission
 - ✓ Existence of policy on disposal of undeliverable articles
 - ✓ Complaint logbooks be maintained by operators and individual licence complaint resolution procedures filed with cck within 60 days of licensing as required by licence conditions.

4.1.2 Topic: The role of Kenya Revenue Authority (KRA) in promoting the postal / courier industry - *by Mrs. Wambui Namu, Commissioner of Customs services, Kenya Revenue Authority*

In her presentation, Mrs. Namu:

- Called for closer cooperation among stakeholders for prosperity of the postal/courier sector;
- Appreciated the sheer statistics associated with CCK's postal regulatory regime in terms of value and number of players and their role in spurring the economy;

- Assured stakeholders of KRA's readiness to collaborate in the achievement of their objectives;
- Enumerated procedures that are in place to meet the unique needs of postal/courier operators which include compliance with the World Custom Organization (WCO) recommended practices that advocate for rapid clearance of postal/courier shipments, automation of clearance processes, call centres, self assessment, free bonds, simplified procedures, and duty-free mailbags among others;
- Reported that shipment clearance has remarkably improved from 21 days in 2004 to 7 days today.

Mrs. Namu's full presentation is contained in *Annex VII*.

Recommendations:

- KRA should consider giving incentives or other assistance to taxpayers who are yet to automate their activities as this will improve the entire clearance chain;
- The role of Clearing and Forwarding Agents in exacerbating costs should be examined and whether some of them are in competition with courier operators to the extent that they deliver articles to consignees;
- KRA urged to explore whether the many taxes in existence are the cause of compliance shortfalls with a view to abolishing some taxes/duties.

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4.1.3 **Topic:** Prohibited articles that are not allowed for transmission through the postal/ mail system

by Mr. Ibrahim Lubia, Assistant Director, Regulatory enforcement & compliance/ Chief Licensing officer, Kenya Wildlife Service(KWS).

In his presentation, Mr. Lubia:

- Thanked CCK for the invitation as it provided the opportunity to inform stakeholders on prohibited items some of which are hardly known by many;
- Explained the vision and mission of KWS to the conservation and management of wildlife in collaboration with stakeholders;

- Stressed that national legislation generally prohibits trade in/possession of wildlife and wildlife products except under special authorization;
- Urged postal/courier operators to adhere to regulations pertaining to the transmission of wildlife and plants including products therefrom by requiring permits from the Designated Wildlife Authorities such as KWS and with regards to plants, scientific Authority, the Kenya Plant Health Inspectorate Services (KEPHIS) respectively.

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Mr. Lubia’s full presentation is contained in *Annex VIII*.

Recommendations:

- Postal/courier operators should demand for permits and other certificates from authorities when animal or plants and respective products are presented for transmission and seek further advice/clarification from KWS or KEPHIS (Kenya Plant Health Inspectorate Services) if in doubt;
- Postal/courier operators are urged to note other articles that are prohibited in transmission such as indecent/obscene documents or articles with like covers, words or designs thereof which are obscene, scurrilous, threatening or of grossly offensive in character, or articles bearing fictitious stamps , including injurious articles among others.
- Need to encourage voluntary compliance through sensitisation exercises among others.

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4.2. Operational Issues

4.2.1 **Topic:** Manpower development for Postal/Courier industry by *Josephine Towett, Head of Training Coordination and Marketing, African Advanced Level Training Institute (AFRALTI)*

In her presentation, Ms. Towett:

- Informed stakeholders that the institute that provides ICT training in Eastern and Southern Africa is hosted by the Kenya government through CCK;
- Encouraged postal/courier operators to use AFFRALTI training opportunities to impart skills to workers and pointed out that postal/courier business is time-sensitive and needs training to meet the challenges inherent in the dynamic sub-sector;

- Announced that the institute is due to launch a course in postal operations, policy and regulations from 18th to 22nd May 2009 at its campus on Waiyaki way, near CCK, opposite Kianda School at an all inclusive cost of US\$ 850. This will be done ahead of other courses in management skills, ICTs, international parcels and mail operations that will follow shortly.

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

Recommendations:

- 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;
- Operators are encouraged to opt for in-house training available from AFRALTI as these are cost effective.

4.2.2 Topic: Presentation on recent developments in the Postal /Courier market by *CCK- Director Competition, Tariffs & Market Analysis Mr. Matano Ndaro*

Presenting on behalf of the CCK Director/CTMA, by Mr. Richard Tonui, Manager, Competition Regulation and Tariff Analysis:

- Informed participants the results of a market study of 2007/08 done by CCK which places the sector’s worth at Ksh. 7 billion and tipped to double by 2012;
- Outlined new features emerging in the sub-sector that include street mobile collection units that promote access to services, door-to door delivery, pick-up services, evolution of telecom financial transfers, adoption of new technologies for tracking and tracing of valued postal/courier items with a view to beating competition;
- Decried lack of uniformity in pricing of postal and courier services thus impacting unfavourably on affordability and accessibility of services to consumers;

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- Stated that the postal vs. courier segments ratio was 43:57 in 2007 compared to 51:49 in 2001 signifying that the courier segment was growing faster than that of postal;
- Observed that domestic market accounted for 55% of the total postal/courier market in 2007;
- Indicated that security of items transmitted through the postal/courier systems was becoming a big concern for both operators and consumers.

Recommendations:

- Need to provide appropriate regulation for emerging telecom financial services particularly in consumer protection and fair play;
- Need to develop a fair compensation system among the over 40% of the market players that now cooperate in service delivery;
- Urgent need for a coordinating committee preferably championed by the regulator to address issues of street naming and numbering that hamper door to door mail pick-up and delivery;
- The regulator to source confidential data/information directly from the operators whenever it is conducting studies as opposed to using third parties so as to guard against likely disclosure of the same;
- Need for timely submission of returns by operators to facilitate production of up-to-date regulator statistics and market information;
- The rising security concerns in the post calls for among others, insurance of postal/courier items in order to protect public interests;
- Need to enact quality standards for all postal and courier products and services;
- Need to ensure that postal and courier services are cost-based.

Mr. Tonui’s full presentation is contained in ***Annex X***.

4.2.3 Topic: Provision of Universal Postal Services: The Role of PCK by ***Mr. Enock Kinara General Manager Mails, Postal Corporation of Kenya (PCK)***

In a presentation on behalf of the General manager Mails, Postal Corporation of Kenya (PCK), Mrs. Augusta Njagi:

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- Asserted that the right to communicate is fundamental and PCK has the obligation to offer universal postal services that are affordable and of high quality throughout Kenya;
- Enumerated areas covered in universal services that include access to service, customer satisfaction, speed and reliability, security, liability and treatment of inquires including provision of information on services among others;
- Mrs. Njagi’s full presentation is contained in *AnnexXI*.

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Recommendations:

- 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;
- The envisaged Universal Service fund should be operationalised with the postal sector in mind;
- 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.

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4.2.4 **TOPIC: Opportunities and Challenges in the Postal /Courier Sector by Mr. Sam Gichohi General Manager TNT, Courier Industry Association of Kenya(CIAK).**

In a presentation on behalf of Mr. Jack Muchira, the chairman of the Industry Association of Kenya(CIAK), Mr. Gichohi of TNT:

- Informed participants that CIAK’s objectives are geared towards enhancing harmony in the industry and representing collective interest to achieve regulatory compliance;
- Called for downward review of annual operating licence fees by 50%;
- Asked the regulator to consider the possibility of using CIAK in vetting new entrants to the regulatory regime through an MOU as is the case between KRA and KIFWA (Kenya International Freight and Warehousing Association);

- Asked the CCK to regularly check on unfair practices in the market particularly in respect to unfair pricing and enforce annual tariff returns by licensees;
- Requested KRA to remove the VAT on courier services just like is the case on airlines;
- Decried what he termed lack of standards of performance on the part of KRA staff;
- Called upon the City Council to remove the Ksh.100, 000 vehicle branding fees as these escalate costs of operations;
- Urged law enforcement authorities to enhance highway patrols to curb attacks on courier vehicles on intra-country transport;
- CIAK encouraged to join forces with other regional courier associations and join UPU (Universal Postal Union)'s Consultative Council where partnerships and international interests are fostered.

Mr. Gichohi's full presentation is contained in *Annex XII*.

Recommendations:

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| • CCK should consider fees review and inclusion of CIAK in the licensing process (to vet new players seeking licenses); | CCK |
| • 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 |
| • KRA to extend 24 hour clearance services to DHL as agreed-this should be escalated to other operators with time; | KRA |
| • KRA should consider removal of fees for bonded warehouse shipments; | KRA |
| • CIAK is urged to broaden her membership from the current 21. | |
| • Consideration should be made regarding representation of postal/courier stakeholders on the CCK board and that CIAK could recommend a representative. | CIAK
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4.2.5 Topic: The role of the local authorities in promotion of postal/courier industry by *Mr. John Gakuo Town Clerk, City Council of Nairobi*

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In an oral presentation on behalf of Mr. John Gakuo Town Clerk, City Council of Nairobi City, the Director of City Planning Mr. Peter Kibinda:

- Called for collaboration between City Council and operators in resolving issues that include street/property numbering and naming which is an ongoing function. Noted that these issues have political, economic and cultural bearings (e.g. streets can only be named after presidents or dead people, tribe-based names pose challenges to foreigners/visitors);
- Gave a historical perspective of property/city numbering which began in 1960 revealing that some properties in certain city estates are numbered and that 100 square kilometres constituting old Nairobi has street names for main streets.
- Called on major players particularly PCK to adopt a proactive approach by closely liaising with the City Council in physical addressing matters and have a forward outlook by developing properties in new and upcoming estates;
- Informed participants on challenges faced including vandalising of street boards/signs/posts for firewood and scrap metal.

Recommendations:

- CCK, PCK and CIAK should put in place an in-house committee on the issue of street naming/numbering to liaise with the City planning office as a step to facilitate door-to-door delivery;
- City Council should explore use of materials not prone to vandalism in road/street signs;
- Embrace digital mapping and numbering as a step to facilitate physical plans.

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5.0 Conclusion

In conclusion, the moderator gave a summary of the day's deliberations.

He strongly commended the Commission's decision to hold the forum, noting that this was an idea that has been long overdue and should now be the norm rather than the exception.

On the regulatory environment, he called for a relook at CCK's postal/courier structure highlighting the participants general feeling that it is not reflective of the industry's worth as highlighted in the market study and in comparison with the telecoms structure.

On KRA's presentation, the moderator urged participants to collaborate with the tax collector but cautioned that Kenyans are some of the most taxed people in the world as manifest in emerging low tax compliance.

The moderator noted that prohibited articles of game and animal products cited by the KWS were just part of the many prohibited items. Others include indecent/obscene articles with covers, words or designs thereof which are obscene, scurrilous, threatening or of grossly offensive character, or articles bearing fictitious stamps, including injurious articles among others. In this connection, he emphasised on the importance of voluntary compliance.

Regarding manpower development, he stressed the need to impart skills to workers particularly in quality of services, new technologies, familiarity with postal policies and regulations.

He noted that participants had requested for another follow up forum in the near future to review the above recommendations.

The next meeting will be convened on notice.

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Moderator:

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Mr. Aloyse Ochieng Anga'sa

Rapporteurs:

.....

M. Ngesa **R. Tonui** **J. Sogomo** **G. Tolle**

APPENDIX I

**LIST OF PARTICIPANTS FOR 1ST ANNUAL POSTAL/COURIER STAKEHOLDERS
FORUM
16TH MARCH 2009
INTERNCONTINENTAL HOTEL, NAIROBI**

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APPENDIX II

Address by Hon. Samuel Poghiso, Minister for Information and Communications, during the 1st Postal/courier stakeholders Forum at Intercontinental Hotel, Nairobi, 16th March 2009

Mr. Charles J.K. Njoroge
Director-General, CCK
Post Master General, PCK
Chairman, CIAK
CEOs and their representatives present,
Industry players and stakeholders
Distinguished guests
Ladies and gentlemen

I am delighted to join you this morning to preside over the opening of this premier event for the Postal/courier sector. I wish to commend the sector regulator, the Communications Commission of Kenya, for recognizing the importance of organizing events of this nature as way of engaging sector players in the regulatory process. This trend is in keeping with the Government's policy of participatory governance as articulated in Vision 2030.

Postal services to date remain one of the most reliable and available means of communication particularly in the rural and remote parts of our country. While universal access to postal services is yet to be attained, the Government recognizes that all citizens have a right to access basic postal services. The Government shall continue to put mechanisms in place to facilitate the provision of affordable, equitable and efficient services.

Ladies and gentlemen, the Government has deployed a number of strategies geared towards revitalizing the postal/courier sub-sector. These include promoting competition in the non-exclusive postal market segments; use of the postal network in the provision of electronic commerce; and supporting the provision of financial service over the postal network. In addition, the Government is planning to restructure the Postal Corporation of Kenya with a view to promoting the utility's commercial viability. I am pleased to note here that the implementation of some of these strategies is already beginning to bear fruit.

I now wish to illustrate the success of some of the strategies I have just enumerated. The sector regulator has to date licensed about 150 postal/courier operators in various market segments, empowering consumers with choice. The

size of the postal/courier market has grown over the years to about Kshs7billion to date, and is expected to double by 2013. The sub-sector has to date created over 7,000 direct jobs, and together with telecommunications accounted for 3.5 percent of the Gross Domestic Product in 2007. There has been a steady growth in courier outlets of the private operators from 410 in 2004 to 606 in 2008. In addition, the Postal Corporation of Kenya runs a successful electronic money transfer service on its vast network across the country. With the enactment of the *Kenya Communications (Amendment) Act 2008*, I am positive that e-commerce will become a reality in the postal/courier sub-sector.

Contrary to earlier projections, the post has ultimately weathered 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 and enhanced efficiency in the operations of the entire postal system. 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 distributions capabilities in order to retain rightful portion of communications market.

Besides ICTs, postal security remains another key challenge in the sub-sector. I say this because security of items transmitted through the postal and courier systems is becoming a big concern for consumers, operators and indeed the Government security apparatus. I am sure that you will take advantage of the participation of the Kenya Police in this Forum to address this issue as the postal industry.

Ladies and gentlemen, in spite of these challenges, there exists new opportunities in the sector. For example, the postal/courier operators can take advantage of ICTs to provide logistics services. In addition, the post should begin to exploit the huge possibilities opened up by the internet by offering online services and partnering with commercial chains to deliver products purchased through e-commerce.

Statistics from the UPU shows that more than 40% or 80 of UPU member countries are using barcodes, track and trace technology delivery performance monitoring systems and hybrid mail to deliver value added services to consumers. It is heartening that the public postal operator and a number of the private courier operators present here today have exploited ICTs to develop new products and services.

The government through my ministry has in response to the expressed challenges of mail delivery in the country appointed an inter-sectoral task force to look at the best way of addressing the door to door mail delivery challenges and recommend the best way forward in the near future.

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

With those remarks, it is now my pleasure to declare this 1st Postal/courier Stakeholders Forum officially open.

Thank you for your attention.

APPENDIX III

ADDRESS BY MR. CHARLES J. K. NJOROGE, DIRECTOR GENERAL, COMMUNICATIONS COMMISSION OF KENYA AT THE FIRST ANNUAL POSTAL COURIER FORUM, 16TH MARCH 2009, HOTEL INTERCONTINENTAL, NAIROBI

Our chief guest, Hon Dhadho Godana, Assistant Minister for Information and Communications

Eng. Jack Muchira, Chairman, Courier Industry Association of Kenya

Mr. Fredrick Odhiambo, Postmaster General, Postal Corporation of Kenya

Chief Executive Officers of various courier agencies

Philatelists present today

Invited guests

Ladies and gentlemen

I am gratified to be here at this first postal and courier stakeholders' forum in Kenya. It is very exciting to note the level of interest this forum has generated. Allow me to welcome you all to this forum in which we intend to deliberate on how we can improve the postal and courier sub sector.

As we sit here today, we recognize that postal and courier services remain an essential and indispensable part of any economy. We therefore have a responsibility to uphold this view, and one of the ways to do this is to jointly discuss and agree on how we can forge ahead together. It is for this reason that the Commission selected the theme: *Establishing new frontiers in Postal/Courier Industry in Kenya: The role of stakeholders.*

This is a sub-sector with a huge potential considering that the post alone constitutes a global network of more than 660,000 post offices and five million employees, it is a public service which continues to grow and to improve. Each year, postal services all over the world handle and deliver around 436 billion letter-post items, in their domestic and international services, and six billion parcels.

Locally, the subsector is worth about Ksh.7 billion and it is estimated that this will grow to Kshs.17 billion by 2013. This is a fairly large contribution to our

country's economy. In particular, courier operators have continued to grow in large numbers as well as geographical spread. We have licensed over 150 courier operators to date. Looking at it from a practical point of view, the future growth of the postal market is predicated on the degree of competition and adoption of modern technologies. The question we therefore need to ask as a sub-sector is whether we are ready to take on the challenge to spur the growth further. We need to galvanize the machinery around us to be able to meet this expectation especially considering the growing popularity of courier service in all parts of the country.

Ladies and gentlemen, we no longer need to be reminded of the importance of this service. Providing high quality, affordable postal and courier services in all regions, brings a number of unexpected benefits. If deliveries, or access to postal financial services, were to be restricted to cities and main urban centres, it would leave millions of people and businesses sidelined and unable to participate in the economic activities.

Additionally, since the establishment of the post in 1800's and the courier in 1920's, the business has been built on trust. It is therefore necessary that the sub-sector addresses the question of reliability and affordability alike so that majority of Kenyans can access the service as a positive effect of stable and universal coverage.

I am glad to note the possibilities presented by new technologies and the Internet and their role in improving existing services as well as promoting innovation. Providing courier and postal services across borders to all businesses and individual citizens plays an important role in the integration of markets. It is also a key facilitator of trade between countries, or between regional economic blocs. With the Kenya Communications Amendment Act (2009) and the inherent provision for e-transactions, e-commerce is bound to grow rapidly in the near future. The subsector must therefore brace itself in anticipation of this growth. This is epitomized by the dependability of commercial sites like Amazon or eBay, on courier services. The success of these businesses would never have been realised without the role of the post and courier sub sector.

Ladies and gentlemen, it is clear that the need for structural and logical reforms in the sector is inevitable. Needless to say, we must rally the effort and cooperation of all actors. The basis of our discussions today is harnessing the contribution of all stakeholders in enhancing the developments within the sector. I am happy to note the participation of the Kenya Wildlife Service (KWS), AFRALTI, and the City Council. KWS for instance, play a very critical role behind the scene to guard

against transmission of illegal items. KWS will enlighten us on these articles and how we can work together to eliminate the inherent challenges. Suffice to say, there is need to work closely with many other agencies including airlines, local government, enforcement agencies /police, and the customs, training institutions in order to eliminate some of the challenges facing the sub-sector today. Such challenges include infrastructure, addressing systems, safety, among others.

Let me not pre-empt our discussions, but I am positive that we will be able to determine many more elements that will form the basis of an integral reform process to guide us into the new frontiers we envisage.

It is also imperative that we direct our attention to value added services that the sub sector can offer to the consumer. This includes issues of speed, packaging, multi-centre coordination, security, and certainly improving the on-line monitoring of parcel movement. It is this sensitivity to the needs of customers that will lay ground for the attainment of sector efficiency and high service standards.

The high expectations also behooves us to bolster the sector's capacity through continuous training. This is a manpower intensive sub-sector and we cannot ignore the training component if we indeed want to provide the seamless services to consumers out there.

We have the opportunity to join in the global transformations which we can well achieve through a collaborative framework and recognizing the contribution of all actors. Ours is an era where even competitors must work together to make use of each other's networks and ultimately expanding the services throughout the country.

The Commission, in recognition of the need for continuous improvement of the sub sector, will facilitate this forum on an annual basis and help draw insights that will help this sub sector grow. Additionally, the Commission will also endeavour to carry out periodic market studies that can inform the regulatory process and provide a basis for sound decision making on subsector issues. We will have the opportunity at this forum to get a glimpse of the most recent sector developments and draw lessons that add value to our work.

Let me take this opportunity to thank all our speakers for accepting to make presentations that will lay the foundation for our discussions. I look forward to the deliberations and also interacting with all of you further in the course of day at this forum.

With those few remarks, I thank you all for your attention.

APPENDIX IV

MESSAGE FROM COURIER INDUSTRY ASSOCIATION OF KENYA (CIAK) CHAIRMAN, ENG.JACKSON MUCHIRA

HON SAMUEL POGHISIO, Minister, Information and Communications

DR BITANGE NDEMO, Permanent Secretary, Ministry of information and Communication

MR CHARLES JK NJOROGE, Director General, Communications Commission of Kenya

MR FREDRICK OTHIAMBO, Postmaster General, Postal Corporation of Kenya

GOVERNMENT EXECUTIVES

DISTIGUISED GUESTS,

LADIES AND GENTLEMEN

On behalf of Courier Industry Association of Kenya (CIAK), I'm extremely delighted to affirm our commitment to this very noble initiative 0 encouraging dialogue among industry players and stakeholders of Postal/Courier services in Kenya. This initiative resonates very well with CIAK's fraternity. CIAK joins with the rest of the players and stakeholders in commending the Director General, Communications Commission of Kenya (CCK) for bringing us all together for prosperity with a view of developing the industry to greater heights. The presence of our minister, Hon Poghisio and Permanent Secretary Dr. Ndemo confirms the importance that is attached to this initiative, which is also a demonstration f great leadership.

Indeed today we mark a very important day for the postal/courier services sector in achieving a new milestone in the evolution of our industry.

The postal/courier industry has evolved in the recent times due to a number of converging trends and ability to adapt to challenges in the changing global landscape. Technological advancement especially e-commerce and e-business has evolved to impact heavily on the pace, speed and cost effectiveness in our industry. We are all challenged to embrace technology and postal courier services should consider use of new technology to provide new services.

To project this further, technology will be the platform upon which the future of the industry will be pegged both at local and global level. We are challenged and must invest in technology if we are to remain relevant.

Dr Ndemo's unique focus in the development of communications infrastructure will be greatly rewarding to our industry in the short, medium and long run.

The courier services rendered by the CIAK members have an indisputable contribution to all sectors of the Kenyan economy and a positive impact on the global economy. According to the Director General Mr. Njoroge CIAK members made an annual contribution of approximately Ksh. 7billion to the Kenyan economy.

Our main goal is accessibility by all persons and sectors of the, courier/postal services and the widest possible reach to Kenya, and to the rest of the world. That is the destination find the path to it. We will only arrive at this destination if our course is set, we keep that path clearly in focus, every step of the way, now. This can only be realized through collaborative efforts convergence here today.

CIAK's living mission is to enhance harmony within the courier industry in Kenya, by representing collective interests of members and encouraging members to provide world class services and achieve regulatory compliance.

CIAK recognizes that the average working day is more time pressured now than ever before. Documents, packages and parcels need to be delivered urgently. Our members offer a range of time critical on-demand and customized regular courier services to satisfy the demands of our esteemed customers.

I take this opportunity on behalf of CIAK to appreciate the great contribution of our regulator, the CCK under the leadership of the CEO Mr. Charles Njoroge, the Postal Corporation of Kenya led by the CEO Mr. Fred Odhiambo and the Government of Kenya through the Minister for Information and communications, Hon. Samuel Pogishio and the Permanent Secretary Mr. Bitange Ndemo.

For our international players Mrs. Wambui Namu, commissioner of customs, the Kenya police, Kenya bureau of standards and the airline industry represented here by and all the other sector players have made immerse contribution in the development and growth of this industry.

Each of you, and the organizations that you represent here today, are pillars of strength for this very productive and growing industry.

Thank you all for your contribution, today and in the future, and for your continuing commitment to the development of postal/courier services to the Kenyan people and to the economy of our great country.

The world is going through **turbulent times and facing daunting issues**, but we must seek opportunity in the middle of all the Challenges that we confront and we will only surmount them by collaborating together.

As I conclude, let me wish you all a very successful day

Eng. Jackson Muchira
Chairman (CIAK)

APPENDIX V

SPEECH BY MR. FRED ODHIAMBO, POSTMASTER GENERAL OF THE POSTAL CORPORATION OF KENYA DURING THE OPENING THE FIRST ANNUAL POSTAL/COURIER STAKEHOLDERS FORUM AT INTERCONTINENTAL HOTEL, NAIROBI ON 16TH MARCH 2009

Hon. Samuel Poghisio, Minister for Information and Communications

The Permanent Secretary, Dr. Bitange Ndemo

The Director General CCK, Charles Njoroge

Eng. Jack Muchira, Chairman, Courier Industry Association of Kenya

Participants

Ladies and gentlemen

I wish to sincerely thank the regulator, CCK and the Director General in particular, for inviting me and my colleagues from PCK to participate in this forum. We accepted the invitation immediately, fully aware of the central role we play in providing basic communication services , and building the postal and courier business in our country. Mr. Chairman, we at the same time appreciate and acknowledge the presence of other stakeholders here including our customers, without whom we cannot exist in the first place.

As stakeholders we have a critical role to play in ensuring delivery of relevant products , excellent service and contribute to the community where we live and work.

Businesses exist for different reasons. You will probably find these in different strategic plans and mission statements. In most cases however, business exist to make money .But they also have a responsibility to deliver excellent service and be good corporate citizens. With fast changing customer needs and increased levels of sophistication, more and more businesses are now moving away from traditional service delivery to more customer focused value propositions to win the hearts of customers in the market place.

As service providers sometimes we have a problem knowing who our customers are and therefore their needs. We tend to assume that customers want the same product all the time and therefore offer generic products with a view to making quick profits. Time is now ripe for us to exploit the benefits of research to determine the usage and attitude of customers towards our products with a view to enhancing product offerings.

The beauty of our game as communicators in the public sector is that the referee is always neutral and ensures that rules are followed to the letter. The only challenge I would like to give to the Regulator is that as the market fundamentals change and competition gets higher, we as individual players should be allowed certain degrees of flexibility to self-adjust especially in matters to do with tariff reviews.

Today, we have the privilege of coming together to synergize and work out ways of adding value to the lives of our customers and make a contribution to the

economy. We obviously have common challenges whose solutions can only come from this kind of forum.

In the world of public postal operators, we have a noble undertaking that is commonly known as universal service obligation. We are aware that in this era of liberalization, this responsibility is given out to designated operators, whether public or private. However, the term and the concept of universal service are defined in the Acts of the UPU. The essential role played by governments in the provision of universal postal service as a basic human right is underscored regardless of any economic considerations affecting service operation in the postal market. Experience elsewhere has shown that lack of appropriate legislation and regulations governing market operations is detrimental to both the government and the general public.

Now that we have clearly defined the universal service in our legislation, we now need to fast track the operationalization of the universal service fund in order to appropriately cushion the designated operators of the service, as provided for in the Communications Act.

One of the biggest challenges we continue to face is the state of our road networks. At PCK, we cover more than 2000kms a day dropping mail in every location of this country. The costs associated with this especially fuel, wear and tear is such that we must replace our fleet within 2 to 3 years. To overcome these challenges however, we are planning to enhance our ICT capacity so that we can come up with e-products that do not require too much physical delivery. One such product is Hybrid Mail.

Other challenges that we will seek to address in this forum include, customs clearance and secure handling of mail at ports of entry.

Mr. Chairman, I wish to conclude my remarks by once more commending the organizers for making it possible for us to meet and look into some of these issues that are so critical in our ability to serve customers better.

I thank you!

