REPUBLIC OF CAMEROON
Peace – Work – Fatherland

MINISTRY OF POSTS AND TELECOMMUNICATIONS

REPUBLIQUE DU CAMEROUN
Paix – Travail – Patrie

MINISTERE DES POSTES ET TELECOMMUNICATIONS

REPORT TO ANALYZE
DATA ON POSTAL ACTIVITIES IN CAMEROON

2024 edition

Produced with the technical support of the **National institute of Statistics** (NIS)

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Contents

Foreword

It is with great pride and renewed optimism that I present to you this first edition of the report to analyse data on post in Cameroon. This publication marks a critical step in our quest for a robust and dynamic electronic communications sector, a true engine of development for our nation.

This edition is one of the results of the exceptional collaboration with the National Institute of Statistics, showcasing our commitment to basing our policies on reliable and up-to-date data. It embodies our deep commitment to building a resilient Posts and Telecommunications sector for a digital Cameroon.

Thanks to this strategic partnership, we are providing the public with a unique reference tool, rich in data and relevant analyses. This work offers a panoramic and detailed vision of the state of our postal, showcasing our determination to base our political decisions on solid, factual and transparent foundations.

The postal and telecommunications sector is at the heart of Cameroon's digital transformation. It is the catalyst for innovation, the vector of digital inclusion and the engine of our economic growth. In publishing this yearbook, we pursue several critical objectives:

- Strengthening transparency: By providing increased visibility on the sector's activities, we enable all stakeholders to access reliable and up-to-date information.
- Supporting decision-making: We provide decision-makers, economic operators and researchers with the essential elements to develop effective strategies tailored to our context.
- Stimulating investment: By highlighting business opportunities, we strengthen investor confidence in our dynamic sector.
- Promoting digital inclusion: We measure progress made in access to digital services and identify areas requiring additional efforts.

The data presented in this report showcase significant technological progress made in recent years. They illustrate the sector's sustained growth, increase in digital service penetration rates, scale of investments made and the growing number of jobs created. These indicators are all evidence of the positive momentum driving our digital ecosystem. Our digital inclusion initiatives are bearing fruit, reducing the digital divide and opening up new perspectives for our citizens. Strategic partnerships with key players in the sector have helped fast-track cutting-edge infrastructure deployment.

With this publication, we have a dashboard of our sector, highlighting its strengths, weaknesses, opportunities and challenges. This in-depth analysis will allow us to refine our strategies and define priority actions to accelerate our country's digital development.

However, we are fully aware of the challenges that lie ahead. We want to make Cameroon a regional digital hub, and this report helps us identify areas where our efforts need to be intensified. We are determined to continue developing an innovative, inclusive and resilient digital ecosystem that can compete with the best international standards.

As we celebrate our achievements, we remain resolutely focused on our future objectives. We are committed to:

- Intensifying the deployment of cutting edge telecommunications infrastructure across the country.
- Fast-tracking the adoption of emerging technologies (5G, IoT, AI).
- Strengthening cybersecurity to protect our critical infrastructure.
- Fast-tracking the digitalization of postal services to meet the evolving needs of our population.
- Strengthening training and awareness raising programmes to increase our citizens' digital skills.
- Fostering innovation and supporting the emergence of a dynamic start-up ecosystem in the ICT field.

I would like to express my deep gratitude to all the teams that contributed to the production of this remarkable work. I especially extend my appreciation the National Institute of Statistics for its invaluable expertise and unwavering commitment.

This report is not just a collection of figures, it is a reflection of our vision for a connected, innovative and prosperous Cameroon. It showcases our unwavering commitment to building an inclusive digital future for all Cameroonians.

I urge you to explore this report with keenness and curiosity. May it be a source of inspiration for you and a valuable tool to understand the challenges and opportunities of our rapidly changing sector. Together, let us continue to build a connected, innovative and prosperous Cameroon.

Together, let us continue to shape a Cameroon at the cutting edge of the digital revolution!

Mrs. LIBOM LI LIKENG born MENDOMO Minette
Minister of Posts and Telecommunications

List of abbreviations

%	Percentage
///	Unjustified amount
…	Data Uunavailable
-	Strictly zero value
AfDB	African Development Bank
ART	Telecommunications Regulatory Board
AU	African Union
BUCREP	Central Bureau of the Census and Population Studies
CAMPOST	Cameroon Postal Services
CAMTEL	Cameroon Telecommunications
CAPTAC	Conference of the Central African Post and Telecommunications Administrations
COPTAC	Central African Post and Telecommunications Conference
COVID	Corona virus
DRP	Department of Regulation and Control of Postal Activities of the Ministry of Posts and Telecommunications
EESI	Employment and Informal Sector Survey
ENSPT	National Advanced School of Posts and Telecommunications
FST	Special Telecommunications Fund
GDP	Gross Domestic Product
ICT	Information and Communication Technology
IEO	International Express Order
2IPD	Integrated Index for Postal Development
ITU	International Telecommunication Union
LE	Large Enterprise
ME	Medium-sized Enterprise
MINFI	Ministry of Finance
MINPOSTEL	Ministry of Posts and Telecommunications
MPT	Ministry of Posts and Telecommunications
nc	Not concerned
NDS30	National Development Strategy 2020-2030
NIS	National Institute of Statistics
PAPU	Pan African Postal Union

PIB	Public Investment Budget
PM	Prime Minister
POC	Postal Operations Council
PPS	Public Postal Service
R&D	Research and Development
RD	Regional Delegation
RGPH	General Population and Housing Census
SAA	Special Appropriation Account
SDGs	Sustainable Development Goals
SE	Small Enterprise
SME	Small and Medium-sized Enterprise
SUP'PTIC	National Advanced School of Posts, Telecommunications and ICTs
UPU	Universal Postal Union
VSE	Very Small Enterprise

List of tables

List of figures

Executive summary

Introduction

The advent of information highways and market liberalization have reduced postal monopolies and increased competition for traditional postal products. In Cameroon, reforms have been undertaken to reorganize the postal sector, especially with Law No. 2020/004 of 3 April 2020 to regulate postal activity in Cameroon, which aims to promote the harmonious, balanced and sustainable development of postal networks and services, with a view to ensuring the contribution of the postal sector to the national economy and meeting the multiple needs of users and the population.

Since 2020, Cameroon has been implementing the second phase of its National Development Strategy (NDS30), which includes the structural transformation of the economy. In telecommunications, the government is seeking to improve access to ICT, with a target of an average access index above 0.4. This includes the development of an advanced digital ecosystem and the extension of the fiber optic backbone network over 4,211 km, covering the country's municipalities. This project aims to connect users to the existing infrastructure and secure data transactions. Cameroon is also committed to respecting the Sustainable Development Goals and the African Union's Agenda 2063.

In 2024, to measure progress in achieving the objectives, the Ministry of Posts and Telecommunications (MINPOSTEL) and the National Institute of Statistics (NIS) signed an agreement to produce statistics of Posts, Telecommunications and ICT in Cameroon. This agreement includes a survey of households, enterprises, and the use of data from administrative sources.

Three main deliverables are expected:

1. a statistical yearbook of posts and telecommunications/ICT;
2. a report to analyze telecommunications and ICT data;
3. a report to analyze postal data.

After the statistical yearbook publication, a data analysis report is produced to communicate the postal sector’s performance and provide recommendations based on internal and external data analysis.

Methodology and data sources

The data in this report come mainly from the 2017 and 2024 editions of the statistical yearbook of posts, telecommunications and ICT. This information comes from surveys conducted among households and enterprises in 2017 and 2024, under the NIS-MINPOSTEL agreement, as well as from authorized private postal operators and administrations.

The data analyzed cover multiple aspects such as postal service personnel, infrastructure, financial results of CAMPOST and private postal operators, collection and delivery of postal letters and parcels, online financial and postal services, investments in postal activity, supply and demand for postal services. These data are presented in the form of cross-tabulations and figures, highlighting regional disparities and temporal trends, with a particular focus on the cities of Yaounde and Douala.

Consistency checks are conducted on the data to ensure their comparability over time and space and to identify atypical values to which explanations are subsequently provided. However, incompleteness of the data provided and non-response of some operators, due to their reluctance, affected comparability of the data.

The report includes three chapters. The first presents the postal activity ecosystem in Cameroon. The second reports on postal services performance and the third examines postal activity in relation to the national economy.

Postal sector's ecosystem in Cameroon

Postal activity in its evolution in Cameroon has undergone two main periods. These are the period before the reform of the late 1990s, characterized by the State monopoly on this sector of activity and the post-reform period, characterized by the opening of postal activity to competition.

Law No. 99/02 of 7 April 1999 liberalized the postal sector in Cameroon, ending the postal monopoly and allowing for the entry of private operators, which increased competition and improved the quality of postal services. In 2006, Law No. 2006/019 marked a decisive turning point by definitively opening the sector to competition and creating the Postal Regulatory Board. This 2006 law was repealed by Law No. 2020/004 of 23 April 2020, which made it possible to correct certain imperfections observed in the implementation of the latter.

On the organizational level, postal activity is coordinated at the international level by the Universal Postal Union (UPU). It plays an advisory, mediation and liaison role and provides, where appropriate, technical assistance. It sets the rules for international mail exchanges and makes recommendations to stimulate growth in the volumes of letter post, parcels and financial services and to improve the quality of service provided to clients. The same is true of the Pan-African Postal Union, which plays an important role in African posts development through the dynamism of the multiple sub-regional organizations.

Postal activity in Cameroon is structured around three levels: regulations, regulation, training, and operations. The main players are the State, the National Advanced School of Posts, Telecommunications and Information and Communication Technologies and postal operators.

- The State, through MINPOSTEL, is responsible for developing and implementing government policy in the areas of posts, telecommunications and ICT. In keeping with the provisions of the aforementioned Law 2020/004 of 23 April 2020, MINPOSTEL conducts the missions of the Postal Regulator through a Technical Department within it, namely DRP, pending the establishment of an autonomous board.
- The Ministry of Finance, financial supervisory authority of the public operator and provider of financial resources for the postal sector's development;
- Postal operators in Cameroon are broken down into two categories: CAMPOST, the public concessionaire, and private postal operators. CAMPOST's main missions are: (i) providing public postal services granted by the State; (ii) establishing and operating postal networks and (iii) providing financial postal services and (iv) ensuring the universal postal service. Private postal operators offer postal messaging and money transfer services and are not subject to universal postal service obligations.

To become a private postal operator, an administrative file must be submitted for evaluation. Eligible applicants must subsequently pay entry fees, which vary according to the activity and the magnitude of the network, in keeping with the regulations in force.

Postal services supply and demand

Analyzing postal services supply and demand provides a better understanding of how the postal market works and anticipates its future developments. This approach helps postal companies adapt their products and services to meet their clients changing needs and remain competitive.

In Cameroon, postal services are provided by CAMPOST and private postal operators. Postal contact points belonging to private operators were very active before 2019. Subsequently, since the granting of authorizations from 2019, the number of postal contact points belonging to approved private operators has continued to grow, from 325 in 2019 to 443 in 2023, i.e. an increase of 36%. However, concerned about profit concerns, they are investing specifically in areas considered profitable niches. In contrast, the number of post offices (276) for the public operator has remained unchanged over the same period, although it has not yet finished covering the national territory.

The gap in the post office/population ratio in 2020 is 90,000 persons for a post office (the UPU standard is 10,000 persons for a post office).

Since 2016, the total number of mailboxes (271) has not changed throughout the country. These mailboxes are distributed for 91% in secondary offices and 9% in the main collection offices.

In 2023, CAMPOST collected over 18,727 letters per working day and private operators over 86,500. Letter mail items have evolved in a saw tooth manner over the period from 2018 to 2022. The volume of letter mail items is decreasing due to the digital revolution through the use of mailboxes, SMS and other usual means of communication.

Multiple postal financial transactions have been completed. These are orders for the concessionary operator. Depending on the destination, the volume of international orders issued increased between 2016 and 2019, subsequently began a decline in 2020 with a downward trend until 2023. Conversely, in value, the amount of international orders has increased each year. It increased from 15 million in 2016 to 1 billion 80 million in 2023.

With the digital revolution, over three contact points (60%) out of five were computerized over the period 2016-2023.

The multiple services requested by the populations are express shipments, ordinary shipments, registered shipments and online services. Overall, approximately 75% of these services are consumed in urban areas. As for having a post office box, only 0.9% of households have one in 2024. This proportion is nine out of fifty (18%) in enterprises.

Users of postal services sometimes encounter several inconveniences that can make these services less practical. These may include late delivery, loss of mail, the complexity of complaints or limited accessibility. Overall, 9.5% of respondents aged 15 years or more have had inconveniences when using postal services. By area of residence, this proportion is 10.3% for urban areas as against 7.1% for rural areas.

Demand for non-financial postal services since 2019 has been driven by Very Small Enterprises (VSEs) and Small Enterprises (SEs). These enterprises (74.1%) go directly to the contact points to collect or drop off mail.

Users of non-financial postal services often encounter several problems. The main problems are related to lost items (21%), items arriving late (21%), misdirected (16.6%), diverted items (10.5%) and damaged items (11%).

Postal activity and national economy

Postal activity plays a critical role in Cameroon's economic development, although its contribution to GDP has remained low (0.021 point in 2016 and 0.026 point in 2023). Investment in this sector is mainly provided by the State, via MINPOSTEL CAMPOST and private postal operators. However, dedicated budgets remain low, with stagnation since 2019. Investments are mainly focused on logistics, with little investment in research and development. For authorized private operators, investment that is geared towards logistics, has varied between 26 million CFA francs and 515 million CFA francs, with the peak observed in 2020.

In a bid to restructure CAMPOST, the State of Cameroon signed with this enterprise, a State plan contract to the tune of 22,9 billion CFA francs on 5 axes (legal and institutional, organizational, operational, accounting and financial, and technical). Multiple financing windows were mobilized for this purpose (Ministry of Finance as financial supervisory authority, Ministry of Posts and Telecommunications as technical supervisory authority, AfDB, etc.).

As part of postal sector's development, the State has set up a special appropriation account, the majority of whose resources consist of postal fees paid by postal operators at a rate of 5% and which is comprised of 4 counters (the postal infrastructure development counter, the Postal Public Service "PPS" counter, the training counter and finally the International Cooperation counter).

In terms of employment, there has been a decline in staff number trained in postal professions and a decrease in staff numbers at the concessionary operator, meanwhile jobs in the private sector have been increasing. Indeed, the ratio of staff trained in postal professions compared to those working in postal services over the period 2016-2023 has fallen from 18% to 15.7%. In contrast, at the level of approved private postal operators, jobs have been increasing since 2019, rising from around 432 to 1,108 in 2023.

Postal companies' financial performance has declined slightly, but the competitiveness of postal activity remains high, with significant improvements in the Universal Postal Union world ranking. Postal companies' financial performance has declined slightly over the period from 2016 to 2021, for the concessionary operator. Turnover decreased from around 4 to 3.5 billion over this period. This turnover is much more driven upwards by non-financial postal services, especially postal messaging and express shipments. As for ICT development, Cameroon's score has improved and ranked 56th worldwide in 2020, after being at the bottom of the ranking (103rd worldwide) in 2018. In 2022, Cameroon also received the African champion award in postal excellence in the 2IPD ranking, which is an index measured through 4 main components: reliability, accessibility, relevance and resilience.

Conclusion and recommendations

Evolution of postal activity in Cameroon has been marked by two distinct periods: before and after the reforms of the 1990s. The liberalization of 1999 put an end to the State monopoly, opening the sector to competition and improving the quality of services.

Analysis of supply and demand of postal services in Cameroon shows a significant evolution of the postal sector, with an increase in the postal contact points of private postal operators and a stagnation of public post offices. Despite the sector's growth, several challenges persist. They mainly relate to the:

- small number of mailboxes;
- quality of services provided to users;
- digitalization of postal services and the implementation of innovative value-added services;
- capacity building of the staff of private postal operators;
- coverage of the national territory by postal services, to meet UPU standards;
- postal regulator's autonomy.

Digital revolution has also led to a decrease in the volume of letters sent.

Postal activity in Cameroon plays a critical role but has a low contribution to GDP. Investments, mainly led by the State and private postal operators, are mainly on logistics with little effort in research and development. The sector has recorded a decrease in staff numbers at CAMPOST and a growth in jobs at private postal operators. Financial performance has slightly declined, although competitiveness remains high with significant improvements in global rankings.

Recommendations:

In light of the conclusions, the following suggestions are made with a view to:

✓ **Boosting postal activity, improving its contribution to the national economy and offering better quality services to citizens through:**

- Strengthening public investments: increasing budget allocations for postal sector's development;
- Improving vocational training: developing training programmes for employees to strengthen their skills and improve the quality of services;
- Strengthening regulation: ensuring effective regulation to guarantee fair competition, quality of services and protect consumers' interests;

- Strengthening staff capacities: increasing employee training in postal professions to improve customer service and reduce errors;
- Stimulating employment in the postal sector: creating incentives to attract new talent and stabilize existing jobs, particularly at CAMPOST.

✓ **Strengthening the efficiency and competitiveness of the postal sector in Cameroon, while better meeting the needs of users through:**

- Modernizing infrastructure: continuing to computerize contact points and integrate digital technologies to improve efficiency and user satisfaction;
- Improving complaints management: setting up more efficient systems to manage complaints and reduce inconvenience for users, particularly in rural areas;
- Supporting small enterprises: facilitating access to postal services for VSEs and SMEs and offer solutions tailored to their specific needs;
- Increasing investment in R&D: fostering investment in research and development to innovate and improve postal services;
- Diversifying investments: redirecting part of the investments to other essential sectors, not just logistics, for holistic development;
- Improving postal service coverage: increasing the number of public post offices to better cover the national territory and achieve UPU standards.

Introduction

(1) Background

The advent of information and communication highways coupled with the liberalization of markets has led to a decline in postal service monopolies and an increase in competition for traditional postal products. In Cameroon, as in most Universal Postal Union (UPU) member countries, the government has implemented a series of reforms aimed at reorganizing the postal sector. In this sense, Law No. 2020/004 of 23 April 2020 to regulate postal activity gives more strength to the sector so that it can serve as a lever for national economy development and meet the various needs of multifaceted users.

Furthermore, since 2020, Cameroon has been implementing the second phase of its vision set out in the National Development Strategy (NDS30). One of the pillars of this strategy is the structural transformation of the economy. In the area of telecommunications infrastructure, the government's objective is to facilitate access to ICT for the greatest number of persons, by ensuring a high-performance and secure digital space, with an average access index greater than 0.4. More specifically, it will involve developing a latest-generation digital ecosystem, through the fiber optic backbone extension of a linear 4,211 km covering all municipalities in Cameroon. This project will make it possible for users to connect to the infrastructure already built and to protect data transactions. At the same time, Cameroon has subscribed to international commitments, more particularly the Sustainable Development Goals and the African Union's Agenda 2063, which aim to leave no one behind in the progress to be made in all areas.

With a view to measuring the progress made in achieving its objectives, MINPOSTEL and the NIS signed a technical assistance agreement in 2020 to produce the statistical yearbook of Posts, Telecommunications and ICT in Cameroon. The approach adopted to implement this agreement consisted in conducting a survey of households, public and private enterprises and using data from administrative sources.

Three main deliverables are expected at the end of the implementation of this agreement. These are:

(i) the statistical yearbook of posts and telecommunications/ICT;
(ii) the report to analyze telecommunications and ICT data; and
(iii) the report to analyze postal activity data.

After making the statistical yearbook available, this analysis report aims to better communicate through selected key indicators, on the performance of the postal sector and recommendations based on the use of internal and external data on postal activity in Cameroon.

(2) Methodology and data sources

The data used in this report come mainly from the 2017 and 2024 editions of the statistical yearbook of the postal, telecommunications and ICT sectors. The information contained in these documents comes from surveys conducted in 2017 and 2024 among households and enterprises, authorized private postal operators and administrations (MINPOSTEL, CAMPOST, NIS, MINFI), as well as the Universal Postal Union report on postal development.

The data analyzed generally concern the staff working in postal services, postal infrastructure, CAMPOST's financial results, letters and parcels collection and delivery, postal financial services, online postal services, investment in postal activity, and demand for postal services. These data are presented in the form of cross-tabulations of the analysis variables or figures, while highlighting regional disparities and temporal changes. As much as possible, the tables are presented by highlighting the specific situation of the large cities of Yaounde and Douala.

Consistency checks are conducted on the data to ensure their comparability in time and space and to detect atypical values. Explanatory elements are subsequently found for these atypical values. Incompleteness of the data provided and non-response by some operators, due to their reluctance, may have, somehow, affected comparability.

(3) Report structure

In addition to certain input and output elements, more particularly the introduction and conclusion, this report includes three chapters. The first presents the ecosystem of postal activity in Cameroon, the second reports on postal services performance and the third examines postal activity in relation to the national economy.

Chapter I: Presentation of the postal sub-sector's ecosystem in Cameroon

This chapter presents the environment of postal activity in Cameroon as well as the main institutional actors in this field.

1.1. Postal activity's evolution in Cameroon

Postal activity in Cameroon has undergone two main periods. The period before the reform of the late 1990s, characterized by the State monopoly on this field of activity and the post-reform period, characterized by opening to competition.

1.1.1. Monopoly period

This period may be subdivided into two stages: the colonial period and the post-colonial period.

During the colonial period (1884- 1960), post offices was managed by the German and then French colonial authorities. Postal services were reserved for the colonial administration and foreign enterprises.

The post-colonial period (1960-1999), which occurred after Cameroon gained independence, was characterized by the State monopoly. During this period, the State ensured the production, delivery and sale of postal services. The postal service at that time was perceived as inefficient, with long delivery times, management problems and inadequate infrastructure.

1.1.2. Sector's liberalization

Law No. 99/02 of 7 April 1999 liberalized the postal sector in Cameroon, marking the end of the monopoly. It therefore allowed the legal entry of private operators into the Cameroonian postal market. Since then, there has been increased competition in the market, with the increase in the diversified postal offer and substantial improvement in its quality.

The year 2006 marked a turning point in the transformation of the postal ecosystem with Law No. 2006/019 of 29 December 2006 to regulate postal activity in Cameroon. This law definitively enshrined the opening of this field of activity to competition with reforms, the most significant of which was the creation of the Postal Regulatory Board.

Law No. 2020/004 of 23 April 2020 consolidated the reforms initiated in 2006 and corrected some imperfections observed in it.

1.2. Postal activity's legal framework in Cameroon

Postal activity's legal framework in Cameroon has undergone many changes since the colonial period. The changes thus observed have aimed at continuous improvement with a view to modernizing this area. Postal activity in Cameroon is regulated by supranational instruments and at the national level by a legal framework.

At the international level, it is worth noting that Cameroon has been, since 1960, a member of the Universal Postal Union, which is the umbrella body for postal activity in the world. Cameroon is required to comply with the treaties and conventions it has ratified, including:

- ✓ ***the Treaty of Berne of 1874***: it has the merit of having succeeded in unifying an international labyrinth of postal services and regulations into a single postal territory for the reciprocal exchange of letters by removing all barriers and borders that hindered the free circulation and growth of international mail;
- ✓ ***the Universal Postal Union Convention***: it contains information, by country, relating to the execution of the Convention and the postal regulations;
- ✓ ***the Union's acts and other decisions***: these are the decisions adopted at the various Universal Postal Union's congresses.

At the national level, postal activity is regulated by multiple legislative and regulatory instruments of a crosscutting or specific nature.

With regard to transversal instruments, they include:

- Law No. 98/013 of 14 July 1998 relating to competition;
- Law No. 2010/021 of 21 December 2010 to regulate electronic commerce in Cameroon;
- Framework Law No. 2011/012 of 6 May 2011 to protect consumers in Cameroon.

As for the specific instruments in the postal sector, there are:

a) Laws:

- Law No. 99/002 of 7 April 1999, which is the first law regulating postal activity in Cameroon. It was followed by some implementing instruments that were unfortunately never implemented;
- Law No. 2003/001 of 21 April 2003 to institute the minimum service in the postal sector;
- Law No. 2006/019 of 29 December 2006 to correct some shortcomings observed in the previous law of 1999. This law enshrined the creation of a Postal Activity Regulatory Agency. The early foundations for effective exercise of postal activity in Cameroon were born under this law, although it also, very early on, revealed some limits;
- Law No. 2020/004 of 23 April 2020 to regulate postal activity in Cameroon.

b) Decrees and the order:

The postal sector's decrees and order are based on the laws of 1999 and 2006. These include:

- Decree No. 2002/2171/PM of 19 December 2002 to lay down the terms and conditions for for regulating and controlling postal networks and services;
- Decree No. 2004/110 of 10 May 2004 to establish and lay down the operating procedures of a special treasury appropriation account for postal activity development;
- Decree No. 2005/0704/PM of 21 March 2005 to lay down the terms and conditions for the execution of the minimum service in the postal sector;
- Decree No. 2005/0706/PM of 21 March 2005 to lay down the rates, terms of calculation and collection of the postal fee in Cameroon;
- Decree No. 20210/2428/PM of 12 August 2010 to lay down the terms and conditions for financing the provision of the universal postal service;
- Decree No. 2010/2427/PM of 12 August 2010 to regulate the conditions for consuming the services of the postal service concessionaire by Public Administrations;

- Decree No. 2010/2429/PM of 12 August 2010 to lay down the terms and conditions for authorization, installation and operation of postal networks and services;
- Order No. 00000013/MPT of 5 August 2010 to lay down the terms and conditions for postal networks declaration of operation.

1.3. Postal activity's institutional organization

Postal activity's institutional organization in Cameroon is overall as follows:

1.3.1. Supranational bodies

At the international level, there is the Universal Postal Union (UPU), the Pan-African Postal Union (PAPU) at the continental level and the Conference of Posts and Telecommunications of Central Africa (COPTAC) at the sub-regional level.

As for the UPU, it is the specialized United Nations body responsible for postal services. It comprises 192 member countries. Its head office is in Berne, Switzerland. This organization plays an advisory, mediation and liaison role and provides, where appropriate, technical assistance to member countries. It sets the rules for international mail exchanges and makes recommendations to stimulate growth in the volumes of letter post, parcels and financial services and to improve the quality of service provided to clients.

The UPU is comprised of 4 bodies, namely:

- the Congress, which is the supreme body of this institution, meets every four years;
- the Council of Administration, which ensures the continuity of work between Congresses, supervises activities and examines regulatory, administrative, legislative and legal issues;
- the Postal Operations Council (POC), which is the body responsible for technical and operational matters;
- the International Bureau, which acts as the secretariat, provides technical and logistical support to its bodies.

Cameroon is a member of the Council of Administration and several working groups. It benefits from several technical missions and is regularly requested to organize workshops.

PAPU is the African Union specialized agency whose role is postal services development in Africa. Its head office is in Arusha, Tanzania.

Its main objectives include:

- enabling the postal sector to become an essential component of the digital economy;
- raising awareness among African leaders so that they prioritize the postal sector in national development plans;
- supporting the development of a regional universal service model and strengthening Africa's voices in global postal dialogues.

Its aim is to establish a single African postal network ensuring a reliable and efficient connection between African citizens and national and international markets, through high-quality physical and digital postal products and services.

Cameroon is a member of the Council of Administration and is a stakeholder in several sub-regional projects. It held the position of Secretary General of this Union for two 4-year terms from 2012 to 2020.

The Central African Post and Telecommunications Conference (COPTAC) is a sub-regional organization in the posts and telecommunications sector, born from the ashes of the Conference of Central African Posts and Telecommunications Administrations (CAPTAC), at its extraordinary session held on 23 January 1998, in Libreville, Gabon. This sub-regional organization has the following main objectives:

- strengthening ties between member states in the areas of Posts and Telecommunications through the implementation of dynamic and effective cooperation;
- defining and implementing a policy of orientation and a common strategy in the field of posts and telecommunications;
- developing and improving the quality of service with a view to better sub-regional, regional and international integration.

Since its creation, Cameroon has been requested twice, in 2004, then in 2014 to relaunch the activities of COPTAC, which is sinking into lethargy.

1.3.2. National bodies

National authorities intervene at three levels, namely the sector's regulations and regulation, training and the operational level.

These bodies are: the State, the National Advanced School of Posts, Telecommunications and Information and Communication Technologies and postal operators.

The State intervenes through the Ministry of Posts and Telecommunications, which is responsible for developing and implementing the Government's policy in the area of posts.

In this capacity:

- ✓ it studies, produces or has produced the equipment and infrastructure corresponding to the postal sector;
- ✓ it ensures the development of information and communication technologies (ICT) as well as electronic communications in all their forms in conjunction with the administrations concerned;
- ✓ it ensures the promotion of investments in the sector in conjunction with the Ministry of Economy, Planning and Regional Development and the organizations concerned;
- ✓ it provides or commissions the provision of training for personnel in its sector;
- ✓ it monitors activities relating to e-commerce in conjunction with the administrations concerned;
- ✓ it compiles, analyses and maintains statistics relating to the postal and telecommunications field;
- ✓ it monitors the activities of the regulatory bodies operating in its area of jurisdiction;
- ✓ it liaises between the Government and the Universal Postal Union in conjunction with the Ministry of External Relations;
- ✓ it exercises supervision over the Cameroon Postal Services (CAMPOST).

It also exercises technical supervision over the National Advanced School of Posts and Telecommunications (ENSPT), which became the National Advanced School of Posts, Telecommunications and Information and Communication Technologies (SUP'PTIC) by decree No. 2016/425 of 26

October 2016 to change of name and reorganize the National Advanced School of Posts and Telecommunications.

The State also acts as a regulator of postal activity in Cameroon. The body responsible for regulating postal activities was created by the Postal Law of 2006. The terms and conditions for its organization and operation are still awaited. In the meantime, its missions are fulfilled by the Department of Regulation and Control of Postal Activities of the Ministry of Posts and Telecommunications.

To support the postal sector's development, the State has created a Special Appropriation Account of the Treasury for Postal Activity's development. Its resources, which come mainly from levies for the exercise by postal operators of the activities granted, are intended to finance development operations and missions of the postal sector as well as training.

In the area of training, the National Advanced School of Posts, Telecommunications and Information and Communication Technologies. (SUP'PTIC) is the State school responsible for training the human resources necessary for the State and the postal market.

The School provides higher professional education, specialized technical training, continuing education and applied research in the postal sector as well as in the management of enterprises in this field.

In this capacity, it undertakes:

- initial training in the field of post, and management and operating techniques of postal companies, regulations and regulation of the postal sector;
- development, retraining and specialization of staff in postal professions;
- studies and applied research in the postal fields;
- technical support to public, parastatal or private administrations and organizations in the postal field;
- technological monitoring with a view to updating training courses in the postal sector;
- in general, training of professionals in the postal sector.

Postal operators are classified into two categories: the concessionaire of the public postal service and the universal postal service (CAMPOST) and private postal operators.

CAMPOST is the national public postal operator. Its main missions are:

- fulfilling the postal public service missions granted to it by the State;
- establishing and operating postal networks;
- providing postal services of a financial nature;
- guaranteeing the universal postal service.

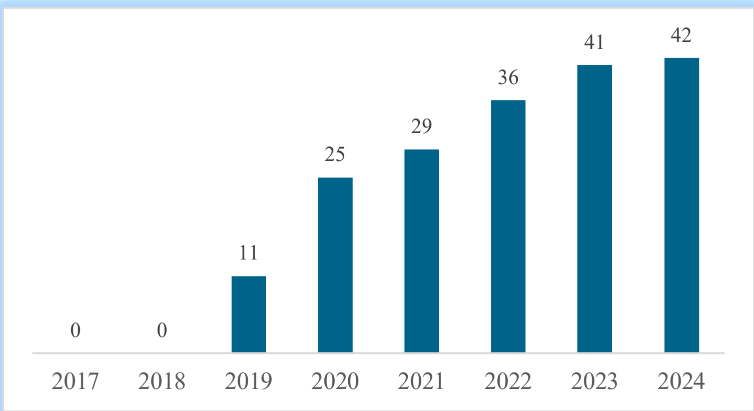
Private postal operators provide postal courier or postal money transfer services. To be a private postal operator in Cameroon, one is required to produce an administrative file, which is subject to a study at the end of which the applicant is declared eligible or ineligible. Applicants declared eligible are invited to pay the entry fees, which depend on the nature of the activity and the network's magnitude.

There are three regimes for exercising postal activity in Cameroon. These are:

- the concession regime;
- the licence regime;
- the declaration regime.

The figure below shows changes in the number of authorized private postal operators in Cameroon. It appears that before 2019, all private operators operated outside the regulations in force. As of 2019, the number of authorized private operators has been increasing, from 11 in 2019 to 42 in 2024.

Figure 1: Number of authorized private postal operators from 2017 to 2023



Source: MINPOSTEL

Chapter II: Postal services supply and demand

Analyzing postal services supply and demand provides a better understanding of how the postal market works and anticipates its future developments. This approach helps postal companies adapt their products and services to meet their clients changing needs and remain competitive.

2.1. Postal services supply

Postal services supply consists of elements that make it possible to meet the clients' varied needs while ensuring optimal performance and high satisfaction. In Cameroon, postal services are provided by CAMPOST and private operators.

2.1.1. Postal collection and delivery infrastructure

Postal infrastructure is a physical or non-physical construction necessary for a postal company operation. These include post offices, specialized establishments, post office boxes and mailboxes.

2.1.1.1 Postal contact points

The postal contact point is the place where a consumer of postal products and services can access them. These include the public operator's post offices and specialized establishments and private postal operators' points of sale.

Table 1: Trends in the proportion of postal contact points from 2016 to 2023 by type of structure

	2016	2017	2018	2019	2020	2021	2022	2023
Specialized establishments	7	7	7	7	7	7	7	7
Post offices	276	276	276	276	276	276	276	276
Private contact points	347*	341*	339*	325	318	395	419	443

*Between 2016 and 2018, functional private operators had no authorization. They obtained their authorization as from 2019.

Source: CAMPOST/authorized private postal operators

Before 2019, although awaiting authorization, the postal contact points belonging to private operators were already very active. Subsequently, since the granting of authorizations from 2019, the number of postal contact points belonging to approved private operators has continued to grow, increasing by 6 points between 2016 and 2023. However, concerned about profit concerns, they are investing specifically in areas considered profitable niches. In contrast, the public operator has not finished spreading across the national territory. At the same time, as a result of the crises prevailing in the North-West, South-West and part of the Northern part of the country, some of its contact points, although functional, were not operational during the observation period.

2.1.1.2 Post offices

A post office is used to providing multiple postal and financial services. There is an uneven distribution of contact points across the national territory, with a high concentration in urbanized areas, where economic activity is dynamic.

Evolution of post offices and specialized establishments has remained constant since 2016. In contrast, contact points at private postal operators have been very fluctuating. This situation can be accounted for by the fact that the latter, on the basis of their prior market studies, invest in so-called profitable areas.

The population served by a post office is the ratio between the population and the number of post offices.

The gap between the "post office/population" ratio and the Universal Postal Union (UPU) standard[1] is very important. Indeed, since 2016, one post office has served an average of 82,000 persons. Since the number of post offices has remained unchanged; this ratio, which is correlated with the population growth rate, has decreased to one post office for every 90,000 persons in 2020.

[1] *The UPU standard is: 10,000 inhabitants for a post office*

Table 2: Ratio of population to number of post offices

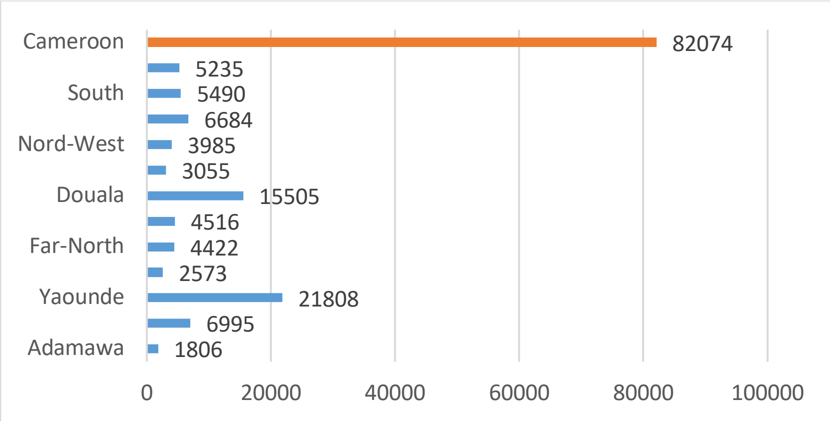
Regions	2016	2017	2018	2019	2020
Adamawa	103,012	105,982	108,989	112,035	115,118
Centre	65,896	67,841	69,826	71,851	73,917
East	35,042	35,257	35,461	35,656	35,841
Far-North	157,286	161,032	164,817	168,640	172,501
Littoral	101,364	104,075	106,808	109,564	112,342
North	178,818	182,935	186,823	190,480	193,907
North-West	80,248	81,850	83,548	85,343	87,233
West	61,017	62,043	63,128	64,272	65,476
South	34,443	34,783	35,093	35,370	35,616
South-West	72,442	74,414	76,522	78,765	81,143
Cameroon	**82,282**	**84,232**	**86,211**	**88,218**	**90,255**

Source: CAMPOST, BUCREP

2.1.1.3 Post office boxes

They exist exclusively with the public operator, which has a residual monopoly on the construction and operation of post office boxes in Cameroon by law. Although they are available in all country's regions, the number of operational post office boxes has been the same in each region between 2016 and 2023. CAMPOST estimates that its post office box use rate remains very low overall.

Figure 2: Number of operational post office boxes by region in 2024

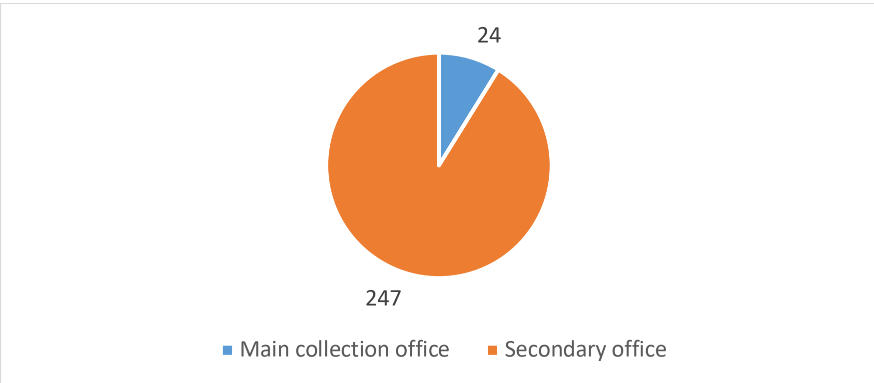


Source: CAMPOST

2.1.1.4 Mailboxes

Mailboxes are available exclusively with the public operator. They are intended at post offices to receive letters to be delivered on the national territory and/or abroad.

Figure 3: Number of mailboxes by Post Office category in 2024



Source: CAMPOST

Since 2016, the total number of mailboxes (271) has not changed throughout the country. These mailboxes are delivered in 91% of secondary offices and 9% in the main collection offices.

2.1.2 Postal non-financial services

Postal non-financial services are all the services provided by postal operators that do not involve the handling of money. They enable operators to play an essential role in the daily lives of citizens, particularly in rural areas where certain services may be less accessible. These include delivery and logistics services, communication services, and administrative services.

2.1.2.1. Letter collection

Letters are collected in several ways, depending on the needs of users and the services provided by operators. The most common forms of collection are at home, at the counter and through mailboxes.

Based on the available data, it appears that collection of letters is predominant at the counter at CAMPOST. Per open day, this operator collected an average of 7,370 letters in Adamawa and 5,460 in the West.

When looking at authorized private operators, they operate mainly at home and at the counter. In the Centre and Littoral regions, which have a large number, the volume of collection varies between 17,000 and 22,000 letters per working day at the counter.

Table 3: Average number of letter collections per working day by the concessionary operator and authorized private operators in 2023

Regions	Place of collection	Average number	
		CAMPOST	Authorized private operators
Adamawa	Home	0	362
	At the counter	7,370	8,126
	Mailboxes	0	…
	Total	**7,370**	///
Centre	Home	0	2,250
	At the counter	468	17,341
	Mailboxes	326	…
	Total	**794**	///
East	Home	…	150
	At the counter	…	5,384
	Mailboxes	…	…
	Total	///	///
Far-North	Home	…	728
	At the counter	…	13,293
	Mailboxes	…	…
	Total	///	**14,021**
Littoral	Home	…	3,114
	At the counter	…	21,369
	Mailboxes	…	…
	Total	///	///
North	Home	…	1,100
	At the counter	…	9,782
	Mailboxes	…	…
	Total	///	**10,882**
North-West	Home	…	0
	At the counter	…	130
	Mailboxes	…	…
	Total	///	///
West	Home	2,700	1,090
	At the counter	5,460	1,062
	Mailboxes	2,018	…
	Total	**10,178**	///
South	Home	85	0
	At the counter	145	735
	Mailboxes	…	…
	Total	///	///
South-West	Home	0	0
	At the counter	20	484
	Mailboxes	135	…
	Total	**155**	///
Total		///	///

Source: CAMPOST, authorized private operators

2.1.2.2. Letter mail items

Letter mail items are made either by the domestic regulations or by the international regulations. Regardless of the post item regulations, both types of mail items have evolved in a saw tooth manner over the period from 2018 to 2022. It should be noted that the years 2021 and 2022 are those during which the volume of domestic letter mail items has recorded a sharp decline compared to other years. It may be assumed that the volume of letter mail items is decreasing as a result of the digital revolution through the use of mailboxes, text messages and other means.

For registered shipments, their volume was between 900 and 12,000 between 2020 and 2023 for international shipments.

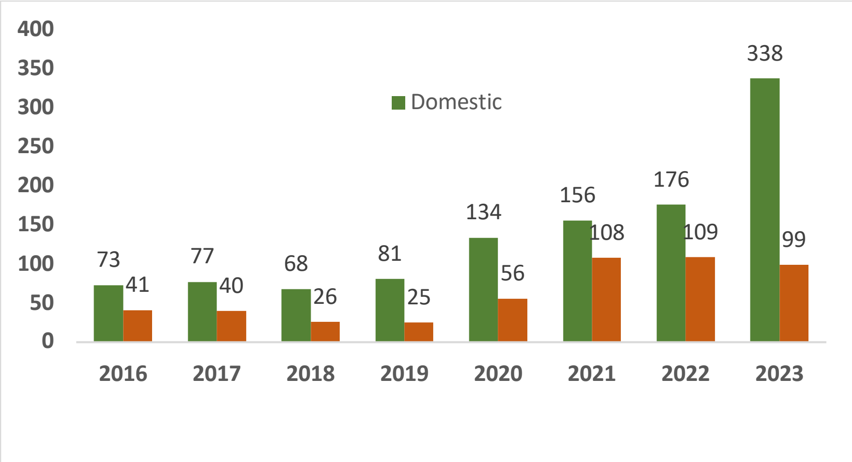
Table 4: Proportion of letter mail items by post item regulations at the concessionary (%)

	Post item regulations	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**
Letter mail	Domestic service	176,427	176,427	157,824	20,000	8,385	…
	International service - shipment	18,814	20,485	12,664	4,737	12,788	…
Registered	Domestic service	…	…	352	107	13	2,932
	International service - shipment	…	…	12,239	11,578	12,841	906

Source: CAMPOST

In general, the proportion of letter mail items by regulations and by region has fluctuated over the period 2016-2023. The volume of domestic items, although much higher than international items, has experienced a decline over the period 2020-2021. This situation may be attributed to COVID19 and the measures restricting the movement of persons, goods and services enacted to limit the spread of this pandemic. For letter mail items by international regulations, they fluctuated between 23% and 40% over the period 2016 to 2023.

Figure 4: Proportion (%) of letter mail items by post item regulations and by region from 2016 to 2023



Source: CAMPOST RD

Table 5: Number of letter mail items by post item regulations and by region from 2016 to 2023

	Post item regulations	2016	2017	2018	2019	2020	2021	2022	2023
Adamawa	Domestic	7,302	6,512	8,552	7,094	6,522	11,023	6,550	8,750
	International	1,103	1,605	1,898	2,034	1,302	1,605	1,850	1,305
	Total	**8,405**	**8,117**	**10,450**	**9,128**	**7,824**	**12,628**	**8,400**	**10,055**
Centre	Domestic	…	…	…	…	54,600	71,928	93,705	77,776
	International	…	…	…	…	35,148	73,716	79,752	64,221
	Total	///	///	///	///	**89,748**	**145,644**	**173,457**	**141,997**
East	Domestic	**…**	**…**	**…**	**…**	**…**	**…**	**…**	**…**
	International	**…**	**…**	**…**	**…**	**…**	**…**	**…**	**…**
	Total	///	///	///	///	///	///	///	///
Far-North	Domestic	11,200	10,250	11,500	12,540	13,705	21,555	15,605	15,701
	International	630	420	540	740	833	3,356	1,205	950
	Total	**11,830**	**10,670**	**12,040**	**13,280**	**14,538**	**24,911**	**16,810**	**16,651**
Littoral	Domestic	**…**	**…**	**…**	**…**	**…**	**…**	**…**	**…**
	International	**…**	**…**	**…**	**…**	**…**	**…**	**…**	**…**
	Total	///	///	///	///	///	///	///	///
North	Domestic	8,382	6,163	5,144	5,639	5,988	7,015	5,906	2,339
	International	713	524	426	388	66	48	25	56
	Total	**9,095**	**6,687**	**5,570**	**6,027**	**6,054**	**7,063**	**5,931**	**2,395**

North-West	Domestic	7,572	8,341	6,537	15,848	4,191	6,240	6,942	7,413
	International	35,153	33,342	16,207	16,012	11,835	17,833	16,275	18,345
	Total	**42,725**	**41,683**	**22,,744**	**31,860**	**16,026**	**24,073**	**23,217**	**25,758**
West	Domestic	12,981	12,450	12,340	12,145	12,945	13,010	19,025	19,121
	International	1,256	1,256	1,201	1,197	1,096	1,102	3,005	3,058
	Total	**14,237**	**13,706**	**13,541**	**13,342**	**14,041**	**14,112**	**22,030**	**22,179**
South	Domestic	5,283	4,910	3,818	3,412	2,216	3,492	6,218	5,018
	International	1,149	1,205	996	1,321	1,412	1,536	2,360	2,661
	Total	**6,432**	**6,115**	**4,814**	**4,733**	**3,628**	**5,028**	**8578**	**7,679**
South-West	Domestic	20,347	28,336	20,104	24,107	3,3450	22,108	22,151	201,503
	International	1,035	2,062	4,466	3,345	4,546	8,366	4,365	8,365
	Total	**21,382**	**30,398**	**24,570**	**27,452**	**37,996**	**30,474**	**26,516**	**209,868**
Total	**Domestic**	**73,067**	**76,962**	**67,995**	**80,785**	**133,617**	**156,371**	**176,102**	**337,621**
	International	**41,039**	**40,414**	**25,734**	**25,037**	**56,238**	**107,562**	**108,837**	**98,961**
	Total	**114,106**	**117,376**	**93,729**	**105822**	**189,855**	**263,933**	**284,939**	**436,582**

Source: CAMPOST RD

2.1.2.3. Postal item delivery

Here aspects relating to postal items delivery are analyzed while highlighting failures relating to losses and complaints.

The concept of postal item delivery refers to the delivery of postal items (letters, parcels, etc.) to the final recipient. In light of the data available in 2023, nearly 34% of daily postal item deliveries by authorized private operators were delivered to homes (residence, office) and 66% to counters.

Figure 5: Proportion of postal items delivered per working day by authorized private operators in 2023 (%)

Source: Authorized private operators

Lost postal items

Lost postal items are items that for one reason or another have not reached the recipient, have not been returned to the sender, and are neither pending at the destination office nor even traceable on the delivery circuit. Over the period 2016-2023, letter mail and private operators recorded lost items. For letter mail, this is the domestic service that recorded the highest levels compared to external service.

Table 6: Proportion (%) of lost items by type of regulations

Post item regulations	2016	2017	2018	2019	2020	2021	2022	2023
Domestic service	94.0	60.0	87.5	80.0	50.0	40.0	23.1	90.3
International service	6.0	40.0	12.5	20.0	50.0	60.0	76.9	9.7

Source: CAMPOST RD

Table 7: Proportion of items lost by authorized private postal operators from 2016 to 2023

	2016	2017	2018	2019	2020	2021	2022	2023
Adamawa	12.0	15.8	11.1	21.1	2.9	1.7	1.8	2.1
Centre	28.0	42.1	44.4	42.1	41.2	50.0	44.4	29.5
East	8.0	5.3	7.4	0.0	0.7	0.0	1.2	0.0
Far-North	8.0	5.3	0.0	5.3	0.7	1.7	0.0	0.0
Littoral	20.0	10.5	18.5	10.5	19.9	25.9	18.9	20.5
North	12.0	0.0	0.0	10.5	25.7	7.8	27.8	37.4
North-West	0.0	0.0	0.0	0.0	0.7	0.0	3.0	5.8
West	4.0	10.5	11.1	5.3	6.6	11.2	1.2	2.1
South	8.0	5.3	7.4	5.3	1.5	0.9	0.6	0.5
South-West	0.0	5.3	0.0	0.0	0.0	0.9	1.2	2.1
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Authorized private operators

Claims for lost postal items

The concept of claims for lost postal items refers to the steps taken by users of postal products and services to find their items or possibly obtain compensation. Generally speaking, over the period 2016-2023, several claims were recorded by operators for lost postal items. These claims concerned items sent by domestic and international services, more particularly business mail and letters However, it should be noted that only enterprises automatically claim their lost mail compared to other postal services users.

Table 8: Proportion (%) of claims for postal items by post item regulations and type of mail

	2016	2017	2018	2019	2020	2021	2022	2023
Post item regulations								
Domestic service	38.3	37.8	26.8	48.9	63.2	67.6	42.1	48.6
International service - shipment	61.7	62.2	73.2	51.1	36.8	32.4	57.9	51.4
Type of mail								
Official mails	0	0	0	0	0	0	0	0
Business mails	100	100	100	100	100	100	100	100
Mail franking machines	0	0	0	0	0	0	0	0

Source: CAMPOST RD

2.1.3. Postal financial services

Postal financial services are financial services provided by postal operators. These services are designed to be accessible to a large population, including in rural areas. They are characterized by their accessibility, security and reliability, financial inclusion and diversity of services (savings accounts, money transfers, bill payment, etc.).

2.1.3.1. Postal financial operations

Over the period 2016-2023, several postal financial operations were completed at CAMPOST. These were mainly orders. Depending on the destination, the volume of international orders issued increased between 2016 and 2019, and started declining in 2020 with a downward trend until 2023. Conversely, in value, the amount of international orders has increased each year. It increased from 15 million in 2016 to 1 billion and 80 million in 2023. International orders have recorded growth in volume and value over the same period.

Table 9: Number and amount (in million CFA francs) of postal orders issued and paid

	2016	2017	2018	2019	2020	2021	2022	2023
1. Orders issued								
International, including international orders								
Total number	12,503	15,710	15,939	19,065	11,006	6,066	10,768	1,378
Of which international orders	*71*	*172*	*166*	*637*	*494*	*527*	*396*	*301*
Total amount	15,408	533.782	320.925	1,155.046	644.697	1,690.990	1,024.206	1,079.885
Of which international orders	*8,120*	*519.346*	*719.070*	*924.508*	*486.386*	*919.817*	*702.732*	*956.871*
Domestic								
Total number	26,572	17,716	8,887	20,139	7211	18,793	7163	6769
Amount	3,998.770	9,119.742	6,515.184	5,920.609	5,089.570	4,812.644	4,815.798	6,023.061
2. Orders paid domestically								
Total number	47,481	33,330	12,699	19,504	7,308	17,778	12,120	12,801
Amount	8,122.789	882,826.574	5,832.844	5,837.207	2,990.853	4,404, 880	4,502.832	4,724.474

Source: CAMPOST

Money orders issued domestically also decreased in volume while maintaining an upward trend in value. As for orders paid domestically, each year there has been a decrease in volume and value compared to 2016.

2.1.3.2. International postal financial operations

International postal financial operations allow money to be remitted and received across borders via postal services. These are very important services for transactions between individuals and enterprises, facilitating payments for goods, services, or family remittances. These operations generally include international postal orders, international transfers and money transfer services. EMI MONEY and EXPRESS EXCHANGE companies, through partnerships with international integrators, including Western Union and MoneyGram, offer fast and secure international money transfer services.

Over the period 2020-2023, the total number of international orders issued was more than 60% higher than the number of international orders paid. The same observation is true for the amounts in value.

Table 10: Number and amount of international postal orders issued and paid from 2020 to 2023

	2020		2021		2022		2023	
	Issued	**Paid**	**Issued**	**Paid**	**Issued**	**Paid**	**Issued**	**Paid**
Total number	11,006	692	6,066	1,884	10,768	1,965	1,378	1,160
Of which the number of international orders	*494*	*nc*	*527*	*nc*	*396*	*nc*	*301*	*nc*
Total amount	64,4697	525,054	1,690,990	753,967	1,690,990	225,224	1,079,885	1.02E+06
Of which the amount of international orders	*486,386*	*nc*	*919,817*	*nc*	*919,817*	*nc*	*956871*	*nc*

Source: CAMPOST

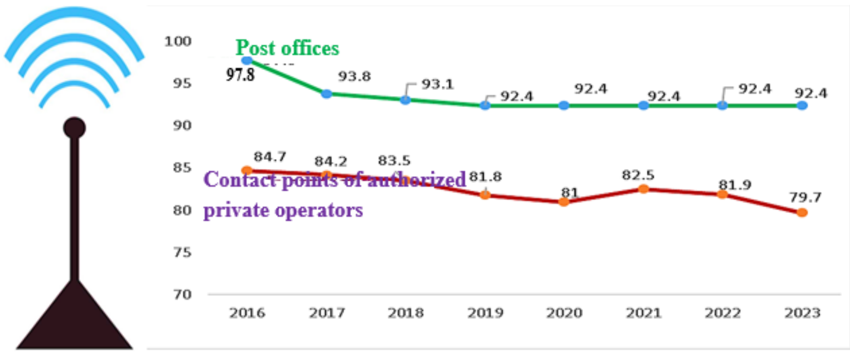
2.1.4. E-services

E-services (or electronic services) are services provided through digital platforms. These services aim to simplify and speed up processes for users, while providing increased accessibility. They cover a wide range of activities, including online banking, account management, transfers, bill payments, e-commerce, etc.

2.1.4.1. Internet connection

The Internet plays a critical role in modern post offices for several reasons. It makes it possible for them to diversify their services, improve their efficiency and play a central role in digital inclusion and enterprise economic development. Despite its usefulness, there is a downward trend in the proportion of contact points with an Internet connection. Between 2016 and 2023, the proportion of post offices with an internet connection fell by 5.3 points while remaining above 90%. Among private operators, this proportion was 79.7% in 2023, i.e. a drop of 5 points compared to 2016.

Figure 6: Proportion of post offices and contact points of authorized private operators with an internet connection (%)



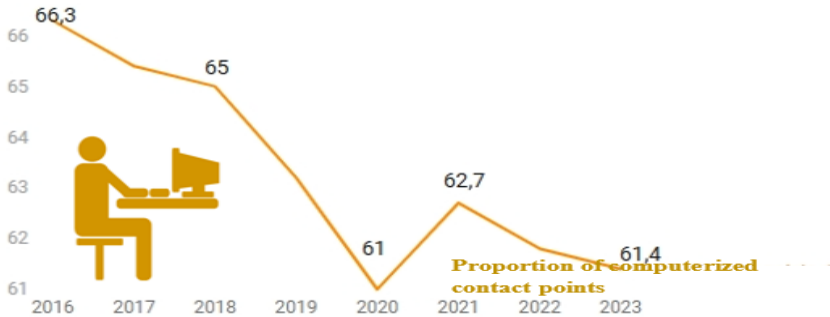
Source: CAMPOST

It should be noted that in all regions of the country, all post offices have an internet connection.

2.1.4.2. Postal services computerization

Post offices computerization helps to modernize postal services, make them more competitive and meet the growing expectations of customers in an increasingly digital world. Other benefits include improved efficiency, better data management, access to online services, customer satisfaction, etc.

Figure 7: Proportion (%) of contact points of authorized private operators that are computerized



Source: Authorized private operators

Generally speaking, over three contact points (60%) out of five were computerized over the period 2016-2023.

However, CAMPOST has the lowest number of contact points compared to the authorized private operators, whose number is increasing every year.

Table 11: Number of computerized contact points

	2016	2017	2018	2019	2020	2021	2022	2023
CAMPOST	135	135	135	126	126	127	127	127
Authorized private operators	283	273	269	258	277	298	307	319
Total computerized	418	408	404	384	403	425	434	446
Total number of contact points	630	624	622	608	661	678	702	726

Source: CAMPOST, authorized private operators

2.2. Postal services demand

Postal services demand is characterized by multiple key factors. These include the size of the population requesting (potential demand) for postal services, volume of mailings, frequency of use, type of services requested, accessibility, and pricing. Analysis focuses on the demand expressed by the population and that of enterprises.

2.2.1. **Demand for postal services by the population**

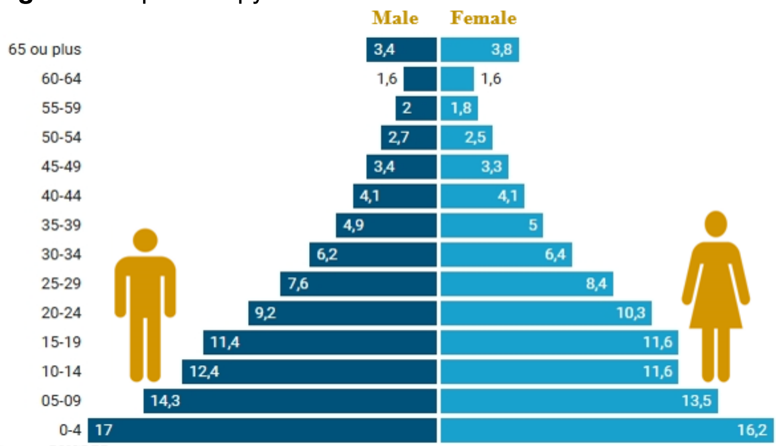
Demand for postal services by the population concerns postal financial and non-financial services.

2.2.1.1. Population structure

According to the results of the 3rd General Population and Housing Census conducted in 2005, the population of Cameroon is estimated at 23,794,164 persons as of 1 July 2018, of which approximately 14 million live in urban areas. Women account for 50.6% of the total population. Persons under 15 years represent 42.5% of the total population and those aged 65 years or more account for 3.6%. Population density is 55 persons per km².

This rapidly growing population generates a greater postal services demand. Furthermore, demographic changes such as population ageing or migrations can influence postal services demand (an ageing population or one with reduced mobility may need more home delivery services).

Figure 8: Population pyramid structure



Source: BUCREP

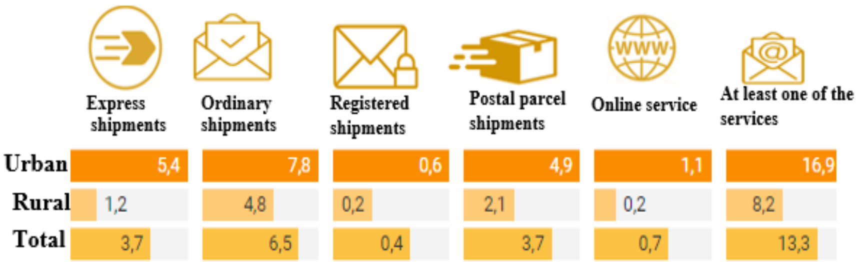
2.2.1.2. Use of non-financial postal services

The use of a non-financial postal service refers to the situation in which a user (household or enterprise) completes a postal delivery operation or benefits from a postal delivery service, in particular letters or parcels.

Non-financial postal services play a critical role for the population. They are used to ensure access to basic services, strengthen trust and security, particularly with regard to delivery and logistics services for letters and parcels, communication services, administrative services, etc.

The multiple services requested by the populations are express shipments, ordinary shipments, registered shipments and online services. Overall, approximately 75% of these services are consumed in urban areas.

Figure 9: Proportion (%) of the population (15 years or more) having used a non-financial postal service in the 6 months preceding the survey in 2024



Source: NIS 2024 – ICT postal activity survey, household component

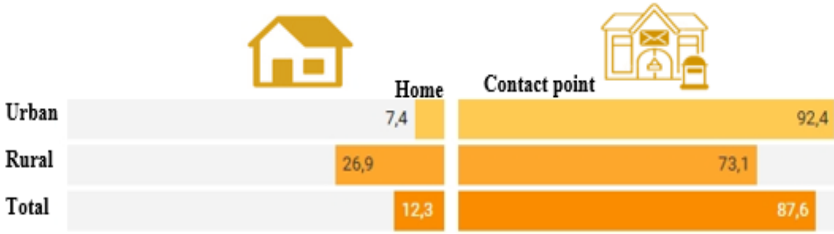
Table 12: Proportion (%) of the population (15 years or more) having used a non-financial postal service in the 6 months preceding the survey by area and region

	Express shipments	Ordinary shipments	Registered shipments	Postal parcel shipments	Online service	At least one of the services
Area of residence						
Urban	5.4	7.8	0.6	4.9	1.1	16.9
Rural	1.2	4.8	0.2	2.1	0.2	8.2
Total	3.7	6.5	0.4	3.7	0.7	13.3
Regions						
Adamawa	0.3	9.8	0.2	0.3	0.0	10.1
Centre	0.4	9.8	0.0	4.1	0.0	14.2
Douala	16.2	5.1	.6	11.4	1.4	27.0
East	12.7	14.3	1.2	1.5	0.4	26.6
Far-North	0.9	1.6	0.0	1.4	0.0	3.6
Littoral	2.8	1.8	0.5	3.7	0.6	9.3
North	0.3	7.3	0.0	1.6	0.7	8.7
North-West	1.7	2.7	1.0	5.0	1.4	10.3
West	6.1	11.1	0.4	0.0	0.4	16.0
South	1.2	1.4	0.3	0.8	0.9	4.1
South-West	2.8	3.0	0.0	6.6	0.1	12.5
Yaounde	6.2	14.6	1.4	4.9	2.5	24.8
Total	**3.7**	**6.5**	**0.4**	**3.7**	**0.7**	**13.3**

Source: NIS 2024 – ICT postal activity survey, household component

Although the mail service is more in demand in urban areas than in rural areas, the practice of postal mails/parcels collection/deposit at home is still very low overall. 12.3% of the population that benefits from a non-financial postal service uses the method of collection/shipping of mail/parcels from their home. By area of residence, it appears that in rural areas, 26.9% of the population that benefited from mail/parcel services used the method of collection/shipping from home. This proportion is 7.4% in urban areas. This demarcation may be accounted for by the fact that in rural areas, post office collectors are more efficient due to their proximity to the population.

Figure 10: Proportion (%) of the population (15 years and more) having benefited from postal mail/parcel services by collection method



Source: NIS 2024 – ICT postal activity survey, household component

Table 13: Proportion (%) of the population (15 years and more) benefiting from mail/postal parcel services by method, area of residence and region

	Home	Contact point (post office, counter)	Mailboxes	Total
Area of residence				
Urban	7.4	92.4	0.1	100.0
Rural	26.9	73.1	-	100.0
Total	12.3	87.6	0.1	100.0
Region				
Adamawa	4.7	95.3	-	100.0
Centre	29.5	70.5	-	100.0
Douala	6.2	93.8	-	100.0
East	34.8	65.2	-	100.0
Far-North	-	100.0	-	100.0
Littoral	11.4	88.6	-	100.0
North	2.2	97.8	-	100.0
North-West	-	100.0	-	100.0
West	9.3	90.7	-	100.0
South		100.0	-	100.0
South-West	32.3	67.7	-	100.0
Yaounde	9.0	90.4	0.5	100.0
Total	12.3	87.6	0.1	100.0

Source: NIS 2024 – ICT postal activity survey, household component

Possession of a post office box

Owning a post office box is a convenient and secure solution for managing household mail. In terms of security, mail is stored securely in a locked locker, reducing the risk of theft or loss. In terms of confidentiality, using a post office box protects your home address. Another advantage is managing absences, where in the case of prolonged absences, mail is kept safe until the owner can retrieve it. In addition, post office boxes can receive various types of mail, including registered letters and parcels.

Despite these advantages, only 0.9% of households have a post office box in 2024.

Table 14: Proportion of households with a post office box by region and area of residence

	Yes	No	Total
Survey region			
Adamawa	0.4	99.6	100.0
Centre (excluding Yde)	0.6	99.4	100.0
Douala	3.7	96.3	100.0
East	0.5	99.5	100.0
Far-North	0.9	99.1	100.0
Littoral (excluding Dla)		100.0	100.0
North	0.6	99.4	100.0
North-West	0.9	99.1	100.0
West		100.0	100.0
South	0.7	99.3	100.0
South-West	0.3	99.7	100.0
Yaounde	1.0	99.0	100.0
Area of residence			
Urban	1.1	98.9	100.0
Rural	0.5	99.5	100.0
Total	**0.9**	**99.1**	**100.0**

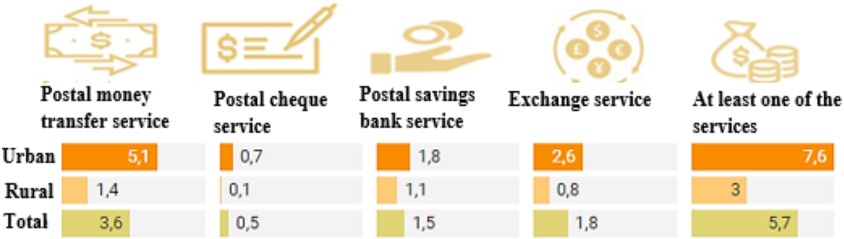
Source: NIS 2024 – ICT postal activity survey, household component

2.2.1.3. Use of financial postal services

Financial postal services in Cameroon are essential to promote financial inclusion, facilitate secure transactions and encourage savings in Cameroon. Basic services, such as savings accounts and money transfers enable unbanked persons to access essential financial services.

Overall, 5.7% of the Cameroonian population aged 15 years or more used at least one non-financial postal service in the 6 months preceding the survey. Although still low, this proportion is lower in rural areas (3.0%) than in urban areas (7.6%), reflecting a disparity in the habits of using financial postal services.

Figure 11: Proportion (%) of the population (15 years or more) having used a financial postal service in the 6 months preceding the survey in 2024



Source: NIS 2024 – ICT postal activity survey, household component

Table 15: Proportion (%) of the population (15 years or more) having used a financial postal service in the 6 months preceding the survey

	Postal money transfer service	Postal cheque service	Postal savings bank service	Currency exchange service	At least one of the services
Regions					
Adamawa	2.8	0.2	0.4	0.3	3.1
Centre (excluding Yde)	0.2	0.0	2.1	0.2	2.4
Douala	4.9	0.8	1.9	2.9	7.9
East	4.3	0.5	0.7	2.2	6.7
Far-North	0.4	0.3	1.9	0.2	2.1
Littoral (excluding Dla)	1.0	0.0	0.0	1.8	2.8
North	2.2	0.0	0.0	0.0	2.2
North-West	9.9	0.7	3.0	3.7	13.5
West	0.5	0.0	0.1	2.3	2.9
South	0.6	0.2	0.2	2.2	2.9
South-West	14.6	0.7	0.7	5.5	16.1
Yaounde	3.6	2.0	4.5	3.0	8.0
Area of residence					
Urban	5.1	0.7	1.8	2.6	7.6
Rural	1.4	0.1	1.1	0.8	3.0
Total	**3.6**	**0.5**	**1.5**	**1.8**	**5.7**

Source: NIS 2024 – ICT postal activity survey, household component

The postal services most frequently used by the population are postal cheque services and postal money transfer services. In fact, nearly 47% and 44% of persons respectively use them at least once a month. Furthermore, it is noted that at least once a month, one in three persons use the savings bank service, meanwhile one in four persons use the exchange service.

Figure 12: Frequency of use of postal services by populations (15 years and more) by type of service

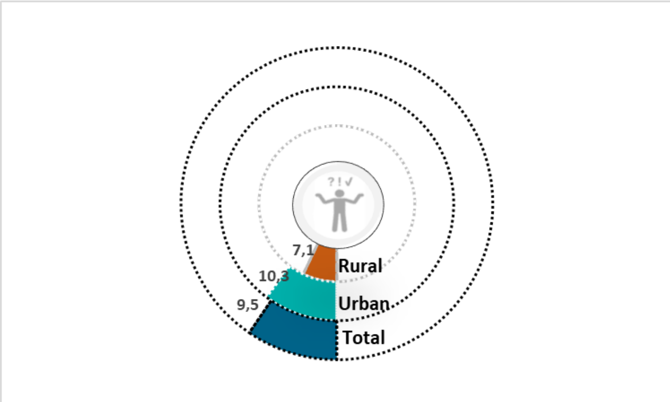
Source: NIS 2024 – ICT postal activity survey, household component

2.2.1.4. Assessment of the quality of the postal service provided to the household

At the household level, service quality, from the point of view of the population, is analyzed according to the inconveniences encountered by the populations when using postal services, as well as complaints.

Users sometimes encounter inconveniences in the requested postal services. These may include late delivery, loss of mail, the complexity of complaints or limited accessibility. Overall, 9.5% of respondents aged 15 years or more, have had inconveniences when using postal services. By area of residence, this proportion is 10.3% for urban areas as against 7.1% for rural areas.

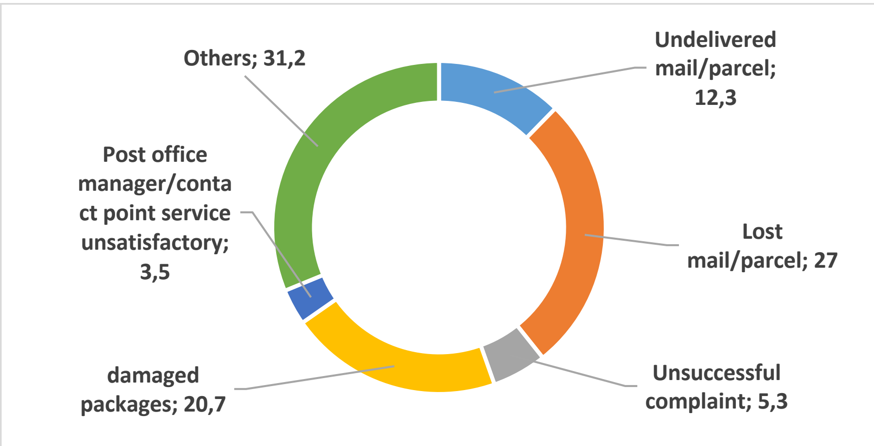
Figure 13: Percentage (%) of population (15 years or more) having experienced inconveniences when using postal services by region, area of residence and type of service



Source: NIS 2024 – ICT postal activity survey, household component

The main inconveniences experienced (Table 22) concerned the loss of the parcel (27%), the damaged parcel (21%), the undelivered parcel (12%), the unsuccessful complaints (5%) and the non-assessable nature of the contact points (4%).

Figure 14: Distribution of the population aged 15 years or more (%) by nature of the inconveniences experienced



Source: NIS 2024 – ICT postal activity survey, household component

Following inconveniences, the proportion of persons aged 15 years or more who filed a complaint to assert their rights and seek solutions with the postal services is 42%. In urban areas, one in two persons (50%) who have experienced an inconvenience have filed a complaint.

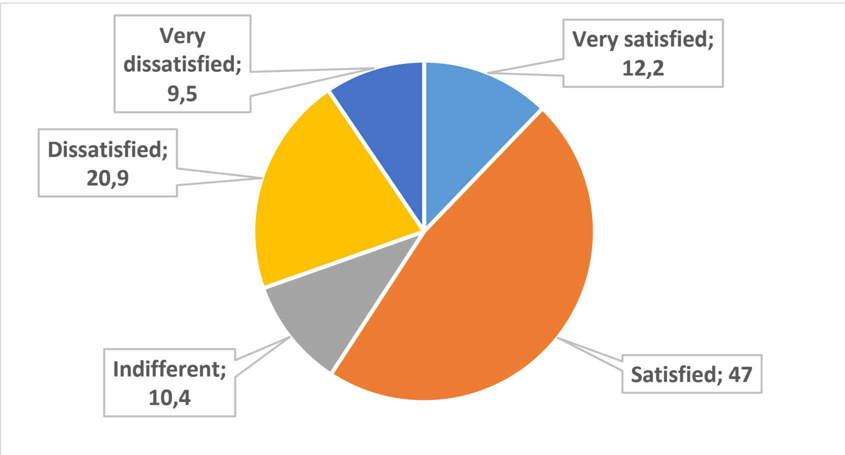
Table 16: Proportion (%) of the population (15 years or more) having already filed a claim or complaint following an inconvenience with a postal service, by region and area of residence

	Yes	No	Total
Total	**42.0**	**58.0**	**100.0**
Urban	50.1	49.9	100.0
Rural	7.2	92.8	100.0

Source: NIS 2024 – ICT postal activity survey, household component

Following their complaint, nearly 60% of the persons who filed it are generally satisfied, around 10% are indifferent and 30% dissatisfied.

Figure 15: Distribution (%) of the population (15 years or more) by level of satisfaction following the handling of the complaint made to a postal service



Source: NIS 2024 – ICT postal activity survey, household component

2.2.2. Demand for postal services by enterprises

Demand for postal services by enterprises concerns postal financial and non-financial services.

2.2.2.1. Enterprise population

Pending the update of the demographics of enterprises in Cameroon, the General Enterprise Census conducted in 2016 enumerated 209,482 enterprises and establishments. This number does not include informal non-agricultural production units estimated at 4,762 in 2021 and accounting for 52% of jobs (3rd Employment and Informal Sector Survey). The size of enterprises' workforce influences the volume of demand and revenue for postal services. For example, in 2022, the Global Postal Industry Report found that the global postal sector's revenue reached €465.6 billion, largely due to the increase in parcel volumes.

2.2.2.2. Use of non-financial postal services by enterprises

Non-financial postal services refer to delivery and logistics services, communication services or administrative services. Overall, in 2024, over the past six months, demand for non-financial postal services was driven by Very Small Enterprises (VSEs) and Small Enterprises (SEs). Providers of these services are, in order of importance, authorized private operators, non-authorized private operators and at the bottom of this ranking, CAMPOST, whose proportion of shipments made varies between 2.3% and 8.4%.

Table 17: Proportion (%) of enterprises having used a non-financial postal service in the six months preceding the survey, by type and sector of activity

		Express shipments	**Ordinary shipments**	**Registered shipments**	**Postal parcel shipments**	**Online service**
Type of enterprise	VSE	10.4	16.7	0.9	5.0	1.3
	SE	18.5	21.7	4.9	9.2	12.5
	ME	26.6	18.1	7.4	10.6	3.6
	LE	50.8	42.4	15.1	24.5	14.5
Sector of activity	Primary	12.7	34.8	6.3	10.7	1.7
	Secondary	12.8	17.0	4.5	6.8	2.1
	Tertiary	14.7	18.7	2.5	6.9	5.7
Total		**14.5**	**18.7**	**2.8**	**6.9**	**5.3**

Source: NIS 2024 – ICT postal activity survey, household component

Table 18: Distribution (%) of enterprises by their main suppliers of non-financial postal services over the past three months

		CAMPOST	DHL	MTA	ESICO	SOLEX	UPS	Other
Type of enterprise	VSE	2.6	0.0	0.9	0.2	0.0	0.0	8.8
	SE	23.9	10.2	0.9	4.9	3.8	2.0	7.6
	ME	17.4	15.4	3.6	2.3	6.2	3.8	8.9
	LE	32.3	39.2	9.9	21.6	17.2	11.0	6.9
Sector of activity	Primary	6.4	1.4	0.0	0.0	1.7	0.0	9.4
	Secondary	16.1	4.7	1.0	1.1	1.7	1.6	5.7
	Tertiary	10.4	4.8	1.2	2.3	1.8	1.0	8.7
Total		**10.9**	**4.7**	**1.1**	**2.1**	**1.8**	**1.0**	**8.4**

Source: NIS 2024 – ICT postal activity survey, household component

Regarding the method of collecting or dropping off mail, nearly three enterprises out of four (74.1%) go directly to the contact points (Figure 15). Those who go there the most are in particular VSEs (84%), SEs (66.4%) and MEs (60%).

By sector of activity, primary (91.8%) and tertiary (77.2%) enterprises have higher proportions than the national average of enterprises that have benefited from postal mail services by going to the contact point.

Figure 16: Proportion (%) of enterprises having benefited from postal mail services by method of collection or delivery

Source: NIS 2024 – ICT postal activity survey, household component

Table 19: Proportion (%) of enterprises having benefited from postal mail services by method of collection or delivery

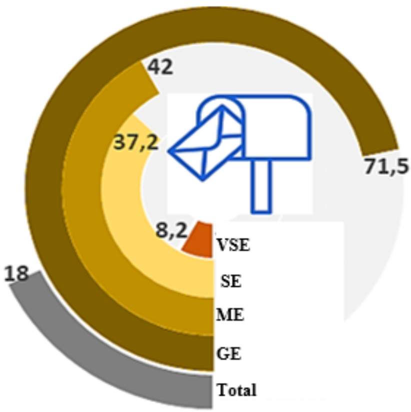
		In the enterprise (Home)	Point of contact (Post office, Operator counter)	Mailbox	Total
Type of enterprise	VSE	16.0	84.0	0.0	100.0
	SE	29.9	66.4	3.6	100.0
	ME	39.5	60.0	0.5	100.0
	LE	55.7	35.3	9.0	100.0
Sector of activity	Primary	8.2	91.8	0.0	100.0
	Secondary	37.5	62.1	0.4	100.0
	Tertiary	22.9	75.2	1.8	100.0
Total		**24.2**	**74.1**	**1.7**	**100.0**

Source: NIS 2024 – ICT postal activity survey, household component

Enterprise post office box possession

A post office box provides better mail management, reducing the risk of mail being lost or delayed. Mail is stored securely until it is collected by the owner. Every enterprise should have one. Unfortunately, the survey results show that in 2024, only one in five enterprises (18%) have one. The highest proportions are recorded in large enterprises (71.1%) and medium-sized enterprises (42%) that seem to have fully understood the importance of having a post office box.

Figure 17: Proportion (%) enterprises with a post office box in 2024



Source: NIS 2024 – ICT postal activity survey, household component

2.2.2.3. Use of financial postal services by enterprises

Postal financial services play a critical role for enterprises, especially small and medium-sized enterprises (SMEs). Post offices offer basic banking services, such as savings accounts and loans, which makes it possible for enterprises to access financial services even in rural areas. They allow for the efficient processing of large volumes of low-value payments, which is essential for enterprises that complete numerous daily transactions. By providing accessible and affordable financial services, post offices contribute to financial inclusion, enabling a greater number of enterprises to participate in the formal economy. In 2024, over the past six months preceding the survey, postal money or business order transfer services were the most requested by VSEs (69%), followed by SMEs (21%). Postal cheque services were most widely requested by SEs (47%) and MEs (30%). As regards the services of the postal savings bank, their demand was driven by small and medium-sized enterprises (48%) and very small enterprises (38%). These services are exclusively provided by CAMPOST.

Table 20: Percentage of enterprises having used a financial postal service in the six months preceding the survey, by type of enterprise and type of service

		Postal funds transfer or order	Postal cheques	Postal savings bank
Type of enterprise	**VSE**	5.8	0.3	2.0
	SE	3.0	1.5	4.5
	ME	7.0	5.0	5.9
	LE	8.4	5.1	5.4
Sector of activity	**Primary**	11.3	8.8	1.8
	Secondary	15.3	1.0	3.7
	Tertiary	3.7	1.0	3.0
Total		**5.0**	**1.1**	**3.1**

Source: NIS 2024 – ICT postal activity survey, household component

The frequency of use of financial or non-financial postal services varies according to the type of shipment. For non-financial postal services, express shipments (47.9%), ordinary online shipments (36.6%) and registered shipments (36.7%) are mainly used once a month. The proportion of enterprises making shipments two or three times a month is between 3.2% and 26.2%.

With regard to postal financial services, postal funds transfer or order (38.2%), postal cheque services (59.8%) and postal savings bank services (44.6%) are used at least once a month by enterprises. The proportion of enterprises using these services once every two months varies from 24.3% for postal cheque services to 42.1% for postal funds transfer or order.

Table 21: Frequency of use of postal services in the six months preceding the survey by enterprises by type of service

Type of postal service	Once a month	Twice a month	Three times a month	Once every two months	Once every three months	Rarely (once or twice in six months)	Total
Postal non-financial services							
Express shipments	47.9	9.5	7.4	4.7	6.5	23.9	100.0
Ordinary shipments	27.9	11.1	11.5	10.1	3.2	36.2	100.0
Registered shipments	36.7	10.8	11.1	7.0	4.6	29.9	100.0
Postal parcel shipments	28.4	10.8	26.2	4.5	8.2	21.9	100.0
Online service	36.6	3.2	15.7	6.6	1.3	36.6	100.0
Postal financial services	**At least once a month**	**Once every two months**	**Once every three months**	**Rarely (once or twice in six months)**	**Total**		
Postal money transfer service or order	38.2	42.1	3.6	16.2	100.0		
Postal cheque service	59.8	24.3	5.2	10.7	100.0		
Postal savings bank service	44.6	38.9	0.8	15.7	100.0		

Source: NIS 2024 – ICT postal activity survey, household component

2.2.2.4. Assessment of the quality of services provided by the main operators to enterprises

Quality of service is captured through the indicator of satisfaction that users have of the services provided by postal operators, the enterprise complaints, as well as the treatment reserved by the operators. Other key elements concern the management of complaints provided by customer service, depending on whether or not it is receptive and able to respond quickly and effectively to the enterprise needs and problems. Overall, over 50% of enterprises reported that they are satisfied with the services offered by CAMPOST, DHL, ESICO, MTA, SOLEX, UPS. However, these enterprises have had some inconveniences in using postal services. The highest percentages are recorded by small enterprises at CAMPOST, DHL, SOLEX and UPS.

Table 22: Distribution (%) of enterprises by the level of satisfaction with the services provided by the main suppliers

	Very satisfied	Satisfied	Indifferent	Dissatisfied	Very dissatisfied	Total
CAMPOST	38.3	38.2	6.4	14.7	2.4	100.0
DHL	64.3	31.4	2.1	0.3	2.0	100.0
ESICO	67.5	25.0	7.5	-	-	100.0
MTA	6.5	90.3	2.6	0.6	-	100.0
SOLEX	64.8	25.3	8.2	1.2	0.4	100.0
UPS	22.9	76.7	0.4	-	-	100.0
Others	11.2	64.7	17.6	6.3	0.2	100.0

Source: NIS 2024 – ICT postal activity survey, household component

Although the idea of satisfaction is independent of the service provider, overall, cases of inconvenience were reported by enterprises. They mainly concern CAMPOST services for which 5% of enterprises have had to deal. Analysis by type and sector of activity of the enterprises concerned shows that they are mainly small enterprises (12.8%) and enterprises operating in the secondary sector (7.9%).

Unfortunately, very few victims have filed complaints with the operators concerned. Analyses' results show that the practice of complaints was more significant among large enterprises for inconveniences relating to the financial postal service. It is shared between small and large enterprises for the non-financial postal service.

Table 23: Proportion (%) of enterprises having faced inconveniences in using postal services by main suppliers and type of enterprise

		CAMPOST	DHL	ESICO	MTA	SOLEX	UPS	Other
Type of enterprise	**VSE**	1.3	0.0	0.1	0.0	0.0	0.0	2.2
	SE	12.8	1.7	0.2	0.3	1.6	0.0	4.4
	ME	5.3	3.1	0.7	0.4	1.1	1.6	3.9
	LE	4.5	4.5	4.0	0.4	3.1	1.8	2.9
Sector of activity	**Primary**	1.5	0.1	0.0	0.0	0.0	0.0	5.6
	Secondary	7.9	1.0	0.3	0.3	0.6	0.1	3.0
	Tertiary	4.6	0.8	0.2	0.1	0.6	0.1	2.9
Total		**5.0**	**0.8**	**0.2**	**0.2**	**0.6**	**0.1**	**2.9**

Source: NIS 2024 – ICT postal activity survey, household component

Table 24: Proportion of enterprises that have filed a complaint with the operator in the event of inconvenience in the use of postal services by type of enterprise, sector of activity and type of postal service

		Financial postal	Non-financial postal
Type of enterprise	**VSE**	0.2	0.1
	SE	0.0	9.0
	ME	0.6	1.5
	LE	4.0	7.0
Sector of activity	**Primary**	0.0	2.5
	Secondary	0.5	0.7
	Tertiary	0.1	3.5
Total		**0.2**	**3.2**

Source: NIS 2024 – ICT postal activity survey, household component

The level of satisfaction is generally low. However, VSEs (92.5%) reported a satisfaction rate higher than the overall average (58.5%) for financial postal services. Regarding non-financial postal services, 47% of enterprises are satisfied with the processing of their complaint and 47% are indifferent.

Table 25: Distribution of enterprises by their level of satisfaction with the handling of their complaint to the operator in the event of inconvenience by type of enterprise and by type of postal service

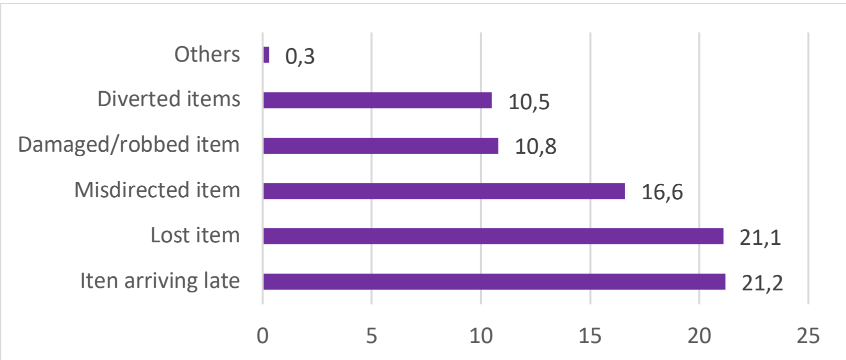
	VSE	SE	ME	LE	Total
Financial postal service	100.0	100.0	100.0	100.0	100.0
Very satisfied	-	-	32.5	12.4	9.0
Satisfied	-	100.0	-	11.1	7.3
Indifferent	-	-	-	39.8	7.7
Dissatisfied	7.5	-	30.5	36.7	17.5
Very dissatisfied	92.5	-	37.0	-	58.5
Non-financial postal service	100.0	100.0	100.0	100.0	100.0
Very satisfied	-	-	39.1	-	1.2
Satisfied	-	49.5	27.2	12.0	47.3
Indifferent	100.0	47.3	-	42.0	46.8
Dissatisfied	-	1.5	33.7	46.0	3.3
Very dissatisfied	-	1.6	-	-	1.5

Source: NIS 2024 – ICT postal activity survey, household component

2.2.3. Main problems encountered when using postal services

Users of non-financial postal services often encounter several problems. The main ones relate to lost items (21%), those arriving late (21%), misdirected (16.6%), diverted items (10.5%) and damaged items (11%).

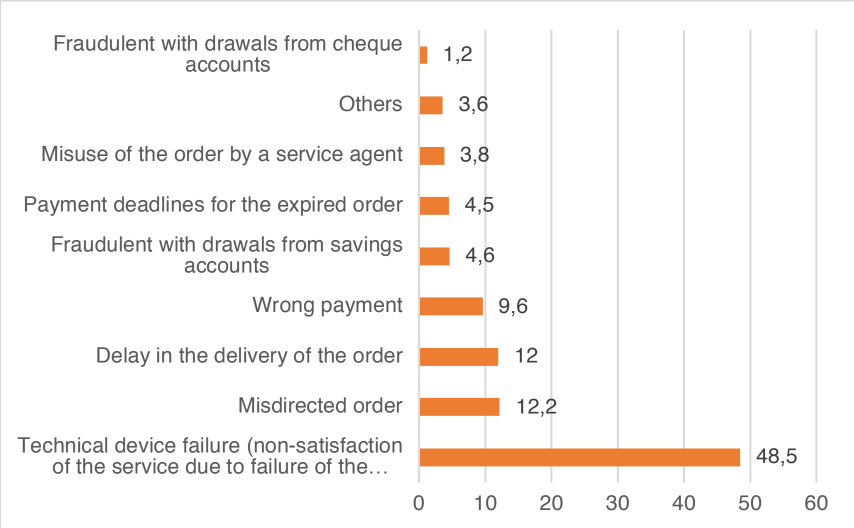
Figure 18: Main problems encountered when using non-financial postal services by enterprises



Source: NIS 2024 – ICT postal activity survey, household component

Regarding financial postal services, the main problems encountered by users relate to technical device failures (48.5%), delays in the delivery of the order (12%) or misdirected order (12%).

Figure 19: Main problems encountered when using financial postal services



Source: NIS 2024 – ICT postal activity survey, household component

Chapter III: Postal economy and national economy

Postal activity is the set of services that, as part of internal or external relations, directly or indirectly ensure communications between users of postal products and services. It includes several postal services which are: It is comprised of several postal services which are: collection, sorting, transportation and delivery of postal items, issue of postage stamps and postal fiduciary values, postal funds transfer or order and other financial services granted.

This section aims to analyze mainly the economic indicators of postal activity in the national economy or in relation to other economies. These are mainly indicators relating to the production of the postal sub-sector, investments, jobs and competitiveness compared to other economies.

3.1. Postal activity's contribution to the national economy

Post's contribution to the national economy remains very low. The share of the post office in the national GDP decreased from 0.023% in 2016 to 0.021% in 2023. In terms of economic growth, contribution of the post office to economic growth is almost zero and sometimes negative (2018 and 2023), reflecting a decline in the post office's production.

Table 26: Posts' contribution (%) to the national economy

	2016	2017	2018	2019	2020	2021	2022	2023
Posts' contribution to GDP	0.023	0.026	0.025	0.025	0.026	0.025	0.023	0.021
Post' contribution to GDP growth	…	0.0018	-0.0002	0.0000	0.0014	0.0011	0.0009	-0.0005

Source: NIS/National Accounts

3.2. Investment in postal activity

Investment is captured at the level of the State and postal operators, including the concessionary operator and authorized private operators.

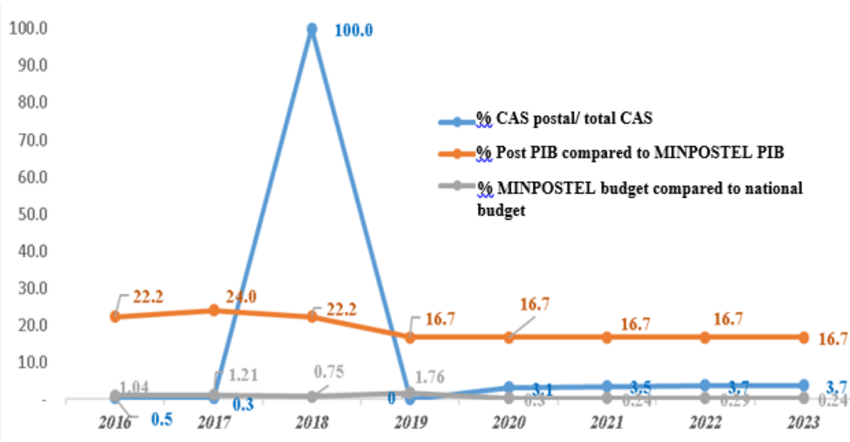
At the State level, investment is captured through the common chapter and the Special Appropriation Accounts of the MINPOSTEL budget.

The share of the MINPOSTEL budget in the national budget varied between 1.04 and 0.4 point during the period 2016 - 2023, reflecting still limited State financing in the field of posts, ICT and telecommunications. Similarly, in this ministry, the GDP devoted to postal activities has continued to decrease year after year between 2016 and 2023, from 22.2% to 16.7% between the two periods.

With regard to the Special Appropriation Accounts from which MINPOSTEL benefits for posts, ICT and telecommunications development, the following figure also shows that with the exception of the year 2018 when the Special Telecommunications Fund was frozen, the share of the Special Postal Fund in MINPOSTEL Special Appropriation Account has never exceeded the threshold of 4% between 2016 and 2023.

In any case, greater attention should be paid by the State to coordination and regulation of postal development in Cameroon through increased financing.

Figure 20: Share of the budget allocated to postal activity



Source: MINPOSTEL, Regulations laws 2021 and previous, Finance laws 2022, 2023, 2024

In terms of investment in the sub-sector by the main operators, namely CAMPOST and the approved private operators, it appears that the largest share of said investments is devoted to logistics (rolling stock, furniture, IT equipment, etc.). For approved private operators, investment in logistics has varied between 26 million CFA francs and 515 million CFA francs with a peak observed in 2020. The authorized private operators invest very little in human resource development (staff training and capacity building), as well as in research and development. This observed trend results in the limitation of innovation, a source of inefficiency in the competitiveness of the authorized private operators and the concessionary operator.

As regards the concessionary operator, investments intended for acquisition of logistics and human resource development have evolved in a saw tooth manner between 2016 and 2023.

Table 27: Postal operators' investments (in million CFA francs)

Nature of investment	2016	2017	2018	2019	2020	2021	2022	2023
Authorized private operators								
Buildings	6,500	8,500	25,300	3,500	31,567	41,343	9,145	86,141
Logistics (rolling stock, equipment, etc.)	84,978	26,280	39,421	23,256	515,155	303,456	170,431	477,506
Software	14,350	39,350	12,950	12,350	20,838	22,405	16,330	18,850
R&D	-	-	-	-	-	-	230	…
HR development (training, capacity building)	400	400	800	400	5,623	1,100	900	975
CAMPOST								
Buildings	39,413	…	…	…	…	…	…	…
Logistics (rolling stock, equipment, etc.)	132,162	6,089	3,878	14,661	321,445	1,181,035	41,785	…
Software	…	…	…	3,900	6,570	414,682	28,500	…
R&D	…	…	…	…	…	…	…	…
HR development (training, capacity building)	…	22,794	16,008	40,045	3,465	127,094	31,153	51,320

Source: CAMPOST, authorized private operators

3.3. Employment in postal services

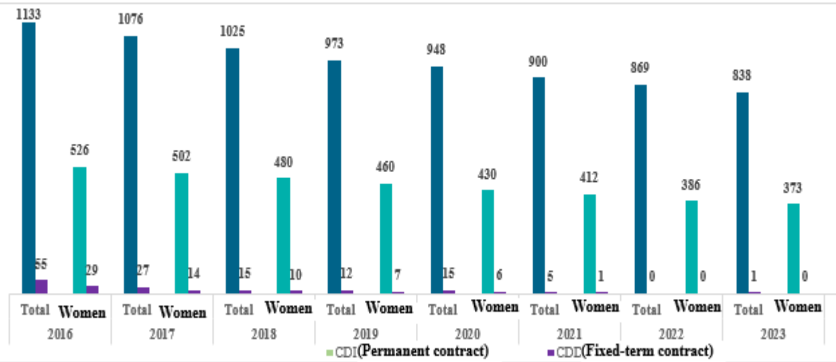
Employment in postal services consist of staff trained in postal and related professions.

Overall employment situation

Between 2016 and 2023, employment in the concession operator's postal services has declined. During this period, the number of female employees with a fixed-term contract has become almost zero since 2021.

In 8 years, the number of jobs in the concessionary operator's postal services has decreased by 26% from 1,133 in 2016 to 823 in 2023. The same trend is observed among female employees. This situation could be accounted for by the termination of the public monopoly and the rise of new media/means of communication (Internet), as well as departing staff that are not always replaced.

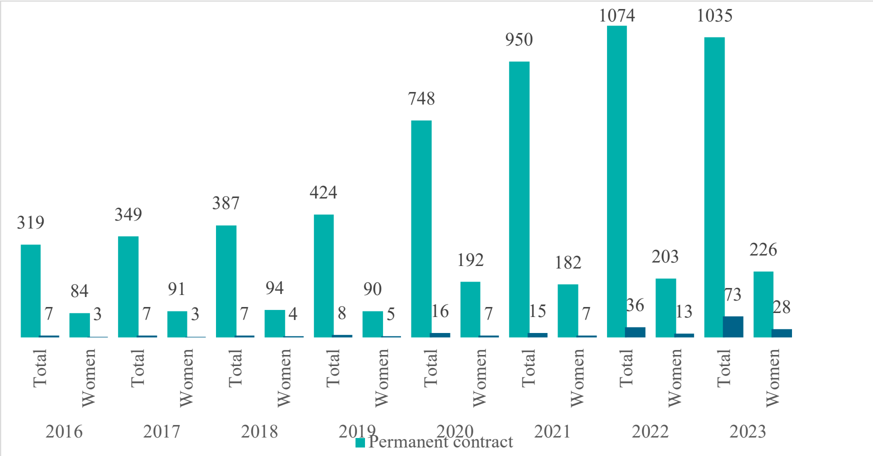
Figure 21: Distribution of jobs at the concessionary operator by contract type from 2016 to 2023



Source: CAMPOST

The rise of new private postal companies in Cameroon offers opportunities likely to increase the number of jobs in the postal sector. It appears that from 2016 to 2023, jobs in authorized private operators increased from 319 to 1,074 jobs. This can be explained by the fact that the sector is supported by quality infrastructure and stimulated by demand for its services. Nearly 20% of women are employed in the postal services of authorized private operators.

Figure 22: Distribution of authorized private operators' jobs by type of contract from 2016 to 2023



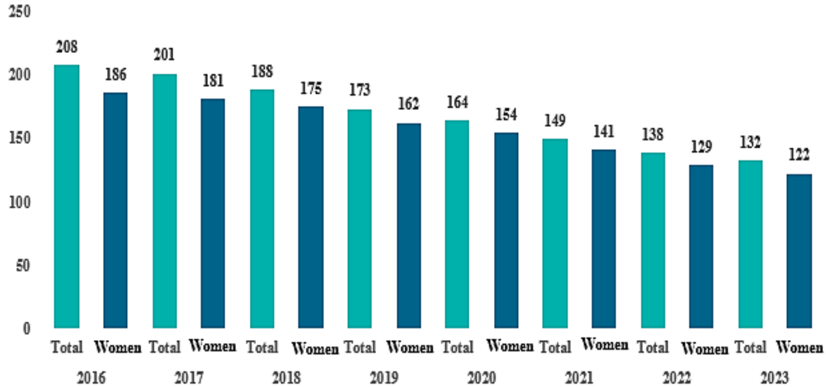
Source: authorized private operators

Employees trained in postal professions

Postal professions refer *inter alia* to post administrator, posts inspector, posts controller and operator.

The figure below shows that from 2016 to 2023, the number of persons trained in postal professions and working for the concessionary operator has decreased over time, from 208 to 122 persons. This decrease is consistent with postal service employees' trends.

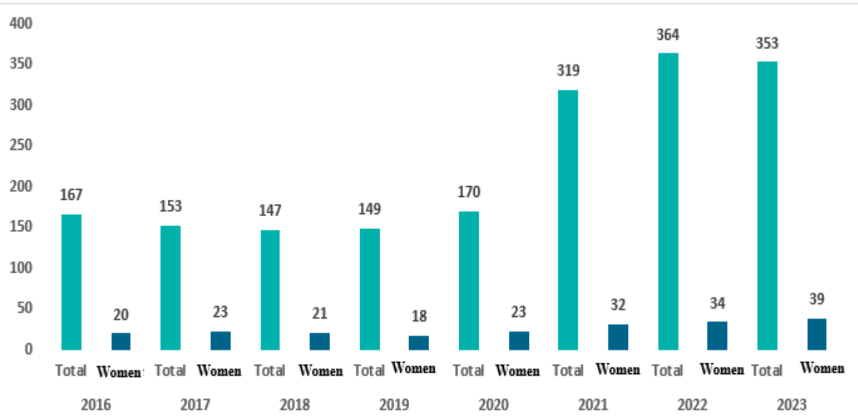
Figure 23: Number of employees trained in postal service professions from 2016 to 2023



Source: CAMPOST

In contrast, the number of employees trained in postal service professions at approved private operators has increased over the same period.

Figure 24: Number of employees trained in postal service professions from 2016 to 2023 by authorized private operators

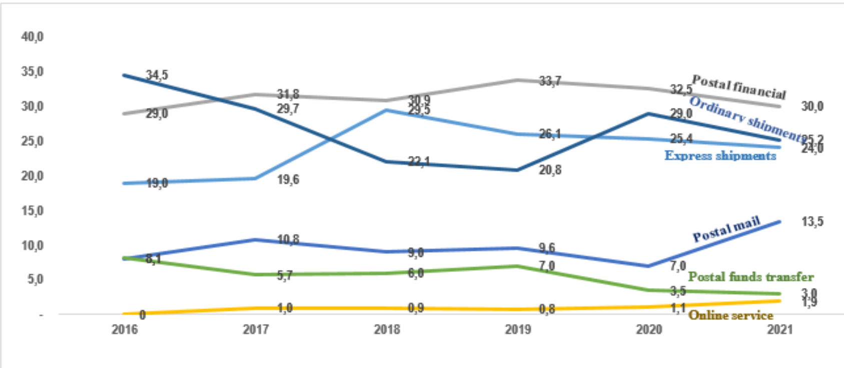


Source: authorized private operators

2.3. Postal companies' financial performance

Financial performance of the concessionary operator has slightly declined during the years 2016 to 2021. Turnover decreased from around 4 to 3.5 billion over this period. This turnover is much more driven upwards by non-financial postal services, especially postal messaging and express shipments, which alone account for approximately 50% of the revenue generated by CAMPOST.

Figure 25: Trends in the share of turnover by type of postal service at the concessionary operator between 2016 and 2021



Source: CAMPOST

Regarding financial results, it appears that the concessionary operator's operating result fluctuated between positive and negative between 2016 and 2020, reflecting a mixed financial performance with a turnover lower than expenses. In 2020, this operating result showed a negative amount estimated at approximately 3.2 billion CFA francs.

As for authorized private operators, operating expenses have been increasing year after year. The latter also generate significant revenue outside their main activity relating to the post office. These revenue reached the sum of 518.1 billion CFA francs in 2023.

Table 28: Postal operators' financial results (in million CFA francs)

		2016	2017	2018	2019	2020	2021	2022	2023
CAMPOST	Turnover	4,041.0	3,731.8	3,711.8	3,366.2	3,290.0	3,494.7	…	…
	Operating expenses	-21,254.4	-3,345.0	6,402.3	1,320.1	6,442.4	…	…	…
	Operating result	-17,213.4	386.7	-2,690.5	2,046.1	-3,152.4	…	…	…
	Non-operating income	-19,505.2	-2,591.7	15.9	251.2	14,439.8	…	…	…
	Result before income tax	-22,326.6	4,610.1	6,492.3	1,708.9	28,528.4	…	…	…
	Net result	-22,411.5	-4,694.5	6,418.2	1,628.9	…	…	…	…
Authorized private operators	Turnover	…	…	…	…	…	…	…	…
	Operating expenses	443.2	2,629.5	1,631.9	2,413.2	2,474.9	2,453.0	2,229.2	2,434.5
	Operating result	…	…	…	…	…	…	…	…
	Non-operating income	10,309.9	33,875.8	38,506.2	52,783.8	47,535.8	334,118.0	433,521.3	518,074.3
	Result before income tax	…	…	…	…	…	…	…	…
	Net result	…	…	…	…	…	…	…	…

Source: CAMPOST, authorized private operators

3.4. Postal activity's competitiveness

This section allows to situate postal activity development in relation to other Universal Postal Union member countries. Several indices allow to position oneself in relation to other economies. The UPU Integrated Index for Postal Development[2] (2IPD) is the one used in the context of this report. It offers a synthetic image of postal development in the world. It reveals not only posts relative performances throughout the world, but also the best ways to achieve excellence regarding postal infrastructure.

It is a tool for policy makers, regulators, national posts and other postal sector players who want to understand the role that postal services can play in the era of e-commerce.

It is measured through 4 main components:

- ✓ reliability which refers to quality of postal services;
- ✓ accessibility that assesses the global connectivity offered to clients;
- ✓ relevance that takes into account sales and competitiveness in the market;
- ✓ resilience which refers to the knowledge to deal with changes and transformations in the postal environment.

According to the 2IDP, in terms of postal development, Cameroon is one of the countries in Africa and even in the world with the highest level of development. At the global level, the worst ranking dates back to 2018 when the country was ranked 103rd in the world. Since then, the country's score has improved and in 2020 it was ranked 56th in the world. In 2022, Cameroon received the African champion award in postal excellence in the 2IDP ranking.

In Central Africa, the country has been ranked highest since 2016. This situation is undoubtedly due to the country's constant efforts to liberalize the postal sector and the effective implementation of the State/CAMPOST 2019-2021 plan contract, which has undoubtedly boosted postal service production.

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[2] - Other indices exist, especially the Postal Electronic Services Development Index. However, Cameroon is not yet eligible for this one. Postal electronic services are not yet developed in Cameroon.
- calculation of the index is based on three main types of data: (i) UPU mass postal data (over 5.1 billion observations, (ii) UPU official postal statistics (over 100 indicators available, (iii) UPU main surveys.

Table 29: Integrated Postal Development Index trends (2IPD)

		2017	2018	2019	2020	2021	2022
Cameroon	World rank	67	77	103	69	56	…
	Index score	42.18	37.72	24.17	38.52	43.15	47.0
CEMAC	Index score	18.32	18.32	12.85	16.18	16.76	…
Congo (Rep)	Rank	131	140	153	148	146	…
	Index score	19.64	15.89	8.8	10.43	9.59	13.5
Gabon	Rank	160	157	158	153	155	…
	Index score	9.20	10.35	7.53	9.28	7.16	13.2
Chad	Rank	161	160	147	160	156	…
	Index score	9.00	9.33	10.9	6.49	7.14	6.9
Africa	Index score	25.4	22.4	20.6	19.8	17.85	…

Source: UPU

Conclusion

Evolution of postal activity in Cameroon has been marked by two distinct periods: before and after the reforms of the 1990s. The liberalization of 1999 put an end to the State monopoly, opening the sector to competition and improving the quality of services.

Analysis of supply and demand of postal services in Cameroon shows a significant evolution of the postal sector, with an increase in the postal contact points of private postal operators and a stagnation of public post offices. Despite the sector's growth, several challenges persist, more particularly:

- small number of mailboxes;
- quality of services provided to users;
- digitalization of postal services and the implementation of innovative value-added services;
- capacity building of the staff of private postal operators;
- coverage of the national territory by postal services, to meet the Universal Postal Union (UPU) standards.
- postal regulator's autonomy.

Digital revolution has also led to a decrease in the volume of letters shipped.

Postal activity in Cameroon plays a critical role but has a low contribution to GDP. Investments, mainly led by the State and private postal operators, are mainly on logistics with little effort in research and development. The sector has recorded a decrease in staff numbers at CAMPOST and a growth in jobs at private postal operators. Financial performance has slightly declined, although competitiveness remains high with significant improvements in global rankings.

Recommendations:

In light of the conclusions, the following suggestions are made with a view to:

✓ **Boosting postal activity, improving its contribution to the national economy and offering better quality services to citizens through:**

- Strengthening public investments: increasing budget allocations for postal sector's development;
- Improving vocational training: developing training programmes for employees to strengthen their skills and improve the quality of services;
- Strengthening regulation: ensuring effective regulation to guarantee fair competition, quality of services and protect consumers' interests;
- Strengthening staff capacities: increasing employee training in postal professions to improve customer service and reduce errors;
- Stimulating employment in the postal sector: creating incentives to attract new talent and stabilize existing jobs, particularly at CAMPOST.

✓ **Strengthening the efficiency and competitiveness of the postal sector in Cameroon, while better meeting the needs of users through:**

- Modernizing infrastructure: continuing to computerize contact points and integrate digital technologies to improve efficiency and user satisfaction;
- Improving complaints management: setting up more efficient systems to manage complaints and reduce inconvenience for users, particularly in rural areas;
- Supporting small enterprises: facilitating access to postal services for VSEs and SMEs and offer solutions tailored to their specific needs;
- Increasing investment in R&D: fostering investment in research and development to innovate and improve postal services;
- Diversifying investments: redirecting part of the investments to other essential sectors, not just logistics, for holistic development;
- Improving postal service coverage: increasing the number of public post offices to better cover the national territory and achieve UPU standards.

Appendices

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Glossary

Contact point: Place where the postal service is provided

Express shipment: Category of postal shipment with special treatment, characterized by the speed of deposit until delivery to the recipient. In the case of CAMPOST, express shipments are made by the Express Mail Service (EMS). Furthermore, private operators exclusively do express postage.

Mail box: Receptacle intended for the deposit of correspondence.

Online postal service: Any postal service provided via the internet.

Ordinary shipment: Postal shipments with no special service.

Parcel postage: Postal item containing goods or objects of any other nature - with the exception of letter mail items - and whose weight is less than or equal to thirty kilogrammes, in international relations, and fifty kilogrammes within the national territory.

Post Office Box: Box, or any other device with a number, in keeping with the principle of national codification and installed in an establishment of the postal network to receive mail intended for a user, whose address is identified by this number.

Postal activity: Set of services enabling, under domestic or external relations, to ensure directly or indirectly: (i) collection, sorting, transportation and delivery of postal items, (ii) issue of postage stamps and postal fiduciary values, (iii) postal funds transfer or postal orders and other financial services granted.

Postal financial services: All postal services of a financial nature provided by public or private operators under the conditions defined by law.

Postal mail: Set of postal items.

Postal non-financial services: All postal services other than those provided as part of financial services.

Postal service: Any service offer that a customer/user can benefit from at a postal contact point. A distinction is made here between non-financial postal services and financial postal services.

Registered shipment: Category of shipments with special treatment, the specificity of which is the transfer of responsibility to the final recipient. This service is exclusively provided by CAMPOST.

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