



L E S O T H O
C O M M U N I C A T I O N S
A U T H O R I T Y

EXPRESSION OF INTEREST

Postal and Courier Services Market Assessment Study

12 August 2025

1. INTRODUCTION

The Lesotho Communications Authority (LCA) is a statutory body, established in June 2000, with the mandate of regulating the communications sector in Lesotho. Its primary mandate is to facilitate the provision of communications services, promotion and preservation of competition, and consumer protection.

The Authority is also mandated to regulate postal and courier services and to define relevant markets through evidence-based market studies. In accordance with its regulatory mandate, the LCA is empowered to identify dominant licensees following a detailed market study and impact assessment.

In pursuit of this statutory mandate, the Authority invites eligible and qualified consulting firms or teams (Consultants) to submit Expressions of Interest (EOI) to undertake a **Postal and Courier Services Market Assessment Study**. This study is part of ongoing efforts to enhance competition, regulatory efficiency, and service delivery within the postal and courier services sector.

2. OBJECTIVES OF THE ASSIGNMENT

The primary objective is to provide a comprehensive analysis of the postal and courier (postal) market, focusing on:

- Market structure, key players, and dynamics.
- Competition levels, pricing trends, and barriers to entry.
- Customer satisfaction and access, including underserved populations.
- Regulatory Framework.
- Strategic recommendations to foster innovation, universal service, and sectoral growth.

3. SCOPE OF THE ASSIGNMENT

The Consultant will be expected to:

- Conduct desk research, stakeholder interviews, and field surveys.
- Map out service coverage and delivery efficiency.
- Analyse data on traffic volumes, revenues, employment, and market segmentation.
- Review legal and institutional frameworks.
- Provide comparative analysis with regional and international benchmarks.
- Deliver a final report with actionable recommendations.

Detailed Terms of Reference (ToR) will be provided to shortlisted firms

4. REQUIREMENT OVERVIEW

Consultants are invited to present to the Authority their respective solutions to address the Postal and Courier sector needs outlined in the **Detailed Scope of Work**. Consultants are encouraged to provide *detailed proposals* that include methodologies for conducting the market assessment, timelines, and deliverables that will support the following key areas within the postal sector:

- Market Mapping & Stakeholder Analysis
- Definition of Relevant Markets
- Assessment of Market Structure & Competitive Dynamics
- Regulatory Frameworks
- Data Collection & Gap Analysis
- Recommendations for Reform & Innovation

Key among the requirements is the total cost of conducting the study that will meet the above key areas.

The EOI should list all costs associated with the assignment, taking into consideration the **Detailed Scope Of Work** outlined as follows:

4.1. MARKET LANDSCAPE AND DEMAND-SUPPLY ASSESSMENT	
In carrying out the tasks to address the objectives stated above, in determining the condition and level of development of the market, the Consultant shall inter alia:	
4.1.1	Conduct a situational analysis of the postal and courier sector in Lesotho, including the level of development, historical evolution, and diversity of services offered
4.1.2	Evaluate market size, structure, and segmentation using Universal Postal Union (UPU) definitions.
4.1.3	Map market players, both formal and informal, and assess their geographic coverage and operational models.
4.1.4	Analyse current and latent demand, satisfied and unsatisfied needs, and determine service uptake patterns across urban and rural populations.

4.1.5 Identify underserved areas and service delivery challenges, including technological, socio-economic, and regulatory constraints.
4.2. COMPETITION ANALYSIS AND MARKET DEFINITION
4.2.1 Propose a methodology for defining relevant markets in line with global best practices.
4.2.2 Identify operators with Significant Market Power (SMP) and develop appropriate remedies or obligations for each relevant market.
4.2.3 Assess the impact of substitution between traditional and electronic postal services, and its implications for demand and regulation.
4.3. PRICING AND COST MODELLING
4.3.1 Review the current tariff structures and pricing practices across operators and benchmark them against regional and international comparators.
4.3.2 Propose pricing frameworks that are cost-oriented and aligned with the principles of fair competition and consumer protection.
4.3.3 Develop a bespoke cost model that accounts for delivery, infrastructure, technology, and human resource components.
4.4. INVESTMENT AND ECONOMIC ANALYSIS
4.4.1 Assess the level of private and public investment in the postal and courier sector.
4.4.2 Determine the price elasticity of demand for various postal services and related economic indicators affecting sector growth and sustainability.
4.5. REGULATORY FRAMEWORK REVIEW
4.5.1 Review the existing regulatory frameworks governing the postal and courier market, including licensing obligations.
4.5.2 Identify gaps, overlaps, or constraints in current frameworks affecting market performance and competition management.
4.5.3 Propose recommendations for regulatory reforms based on international and regional best practices (Standards,

Guidelines and Strategies), with draft amendments where applicable.	
4.6. DATA INFRASTRUCTURE AND MARKET MONITORING	
4.6.1	Develop a user-friendly Tool to capture and monitor postal sector indicators. The database should include:
4.6.1.1	Input/output functionality.
4.6.1.2	Report-generation mechanisms,
4.6.1.3	Editable fields for future updates.
4.6.2	Identify and recommend key postal indicators relevant to Lesotho, aligned with UPU reporting frameworks, for ongoing market analysis and forecasting.
4.7. STAKEHOLDER ENGAGEMENT AND VALIDATION	
4.7.1	Conduct structured stakeholder consultations involving public and private postal operators, informal service providers, consumers, government departments, and regulators.
4.7.2	The Consultant shall engage stakeholders throughout the consultancy and carry out Stakeholders' Workshops to ensure that their views are taken on board.
4.7.3	Facilitate workshops to validate methodology, preliminary findings, and proposed reforms.
4.7.4	Incorporate stakeholder feedback into revised deliverables.
4.7.5	Any other issues which they consider to be relevant and necessary in carrying out the market study and developing the regulatory framework of the postal sector, and advise the Authority accordingly.

5. CAPABILITY AND QUALIFICATIONS

Consulting firms that wish to participate must unequivocally demonstrate their significant capabilities within the postal sector across the specified areas mentioned below:

- Market research and analytics
- Regulatory and policy analysis
- Stakeholder engagement
- Postal/logistics sector knowledge

6. ENCOURAGEMENT OF LOCAL AND INCLUSIVE PARTICIPATION

Firms are strongly encouraged to partner with **local consultants**.

7. TIMEFRAMES

Submission: EOIs are to be submitted by **Tuesday, 16 September 2025 at 1100Hrs**, Lesotho time. Late submissions will not be accepted, and incomplete submissions will be disqualified.

Presentations: Vendors may be invited to make presentations on the date to be communicated by the Authority.

8. REFERENCES

Interested firms must submit:

- A cover letter expressing interest.
- A company profile, including a summary of relevant assignments.
- CVs of key experts.
- Contactable references from previous clients.

Valid business registration, tax clearance certificate, VAT registration certificate, where applicable or equivalent documentation.

9. FINANCIAL INFORMATION

Consulting firms are requested to provide detailed budgetary information for the assignment. This information is crucial for understanding the financial implications of the study.

10. ENQUIRIES

Enquiries should be sent by email to the Chief Financial Officer at: admin@lca.org.ls. The period for submitting inquiries and requests for clarification will remain open until seven days prior to the closing date.

11. SUBMISSION FORMAT & ADDRESS

Interested Consultants must send their submissions in a zipped folder on the link below:

https://lscomcsirt-my.sharepoint.com/:f/g/personal/admin_comcsirt_ls/Eiwlo7lKeAdMnJ1zCMLIC-sBKoYh-UaaVh_DrGKB910TRQ

Or the submission can be hand delivered to Lesotho Communications Authority offices in the tender box located on the first floor and addressed to

**The Chief Financial Officer
Lesotho Communications Authority
30 Princess Margaret Road, Old Europa
P.O. Box 15896, Maseru 100
LESOTHO.**

12. EVALUATION AND SHORTLISTING

EOIs will be evaluated based on:

- Relevant experience of the firm
- Qualifications of key personnel
- Understanding of the assignment
- Track record and references

Only shortlisted firms will be invited to submit full Technical and Financial Proposals in accordance with the LCA procurement guidelines.

13. DISCLAIMER

- This EOI is solely for information and budgeting purposes; it does not constitute a request for proposal (RFP) and does not place the Lesotho Communications Authority under any obligation to procure the services from any of the suppliers who responded.
- All costs associated with the response to this EOI will be solely at the expense of the interested Consultant.
- The Authority reserves the right to cancel or withdraw this EOI as a whole or in part without furnishing any reasons and without attracting any liability