

Questions RFP-2025-022 - Postal Insurance Technical Assistance Facility (PITAF)

1. Program Concept and Scope: Could UPU release or share a brief concept note or summary outlining the overall PITAF program duration, objectives, intended outcomes, and the number of countries targeted for pilot implementation in Phase I?

UPU Response: Please refer to the tender document following sections.

2.3 Scope of the call for tenders

2.4 Background

2.5 Objectives

4.1 Description of the services

2. Research Study Access: Is it possible to access the 2024 study report titled “Zooming into innovative postal inclusive insurance models & identifying best practices”, developed as the first phase of PITAF and would provide relevant context for proposal development?

UPU Response: The research study has not been launched for public use as of yet and is expected to be launched in the next few weeks and will be placed on the UPU website.

3. Extension Framework: In the event of a possible extension beyond the initial 12-month period, could UPU clarify the expected procedure —will this be managed through an amendment, re-competition, or a new tender?

UPU Response: The process will be determined before the end of Phase I.

4. Consultant Involvement Across Phases: Is the consultant selected for program management also eligible to be engaged in subsequent phases of implementation, including supporting pilot deployment, or are those functions expected to remain separate?

UPU Response: The process will be determined before the end of Phase I.

5. Target Countries: Can you confirm the list of countries (having mentioned 5) being considered for pilot implementation in Phase I, or the criteria UPU will use to finalize them? If not, will the selection process form part of the vendor’s responsibility? Are there any preferences regarding linguistic or regional diversity (e.g., francophone vs. anglophone Africa, Asia vs. Latin America) in the 5 pilots?

UPU Response: UPU Response: The final selection of the target markets will be determined at a later stage and as part of the program design. However, it is expected that the target markets will be located in at least 2 different regions and potentially in 3 regions covering either of Latin America, Africa and Asia as examples.

6. Existing Data: Does UPU or its partners already have baseline studies, digital readiness diagnostics, customer segmentation data, or prior assessments for the shortlisted countries that we can access?

UPU Response: The methodology for individual countries assessment will form part of the program deployment design which may vary for each individual country project. UPU is open to receive recommendations from the bidder on this point. UPU will make available the previously conducted base research when available as previously stated.

7. Role of UPU vs. Vendor: Could you clarify the division of responsibilities between UPU and the selected vendor, particularly in country engagement, government liaison (will it support in making connections with stakeholders) , and regulatory coordination?

UPU Response: Individual deliverables and KPIs will be determined at a country project level collaboratively as part of projects deployment.

8. Travel Requirements and Duration: Will the vendor be expected to conduct in-person visits to all five pilot countries? If so, is a 3-day mission per country sufficient to meet expectations, or should the budget and planning reflect a longer field engagement?

UPU Response: In person visits will be expected for each country. The duration of each visit is expected to be for 3 days on average and it is up to the bidder to propose alternatively as they deem appropriate and within the defined budget ceiling.

9. UPU Headquarters Visit Support Given the high cost of travel and stay in Switzerland, would UPU consider offering logistical support (e.g., boarding/lodging assistance) during visits to its headquarters in Bern for planning or coordination purposes?

UPU Response: The budget ceiling is set as per the RFT. UPU will be open to receive bidder recommendations. However, minimum physical presence is expected for the kick off, quarterly progress and for final project deployment plans.

10. What will be the level of involvement with PITAF's strategic partners of AXA and CNP? Will they co-lead in certain markets or provide only strategic inputs across the program?

UPU Response: Both AXA & CNP are the UPU enabling inclusive insurance partners and close collaboration by the successful bidder will be required with all stakeholders to determine deliverables and KPIs collectively.

11. Will UPU directly facilitate introductions and engagements with national Designated Operators and relevant regulatory bodies (e.g., insurance supervisors, central banks), especially where pilot activities require regulatory coordination?

UPU Response: All the projects will be deployed in close partnership and collaborations with the postal network members. The national engagements will be determined by the wider program stakeholders and the bidder is expected to take the lead on certain request for engagements in coordination with the project stakeholders.

12. Definition of Success for Pilots: How will success be defined for pilot projects—e.g., product rollout, customer uptake, regulatory approval, revenue metrics, or others?

UPU Response: Please refer to section 2.3 Scope of the call for the PITAF tender. Individual deliverables and KPIs will be determined at a country project level collaboratively as part of projects deployment.

13. Post-Pilot Ownership: Will the vendor be responsible for the handover and institutionalization of tools/processes and capacity within the DOs after the pilots, or will UPU manage the post-pilot transition and scale-up phase?

UPU Response: The developed methodology in the scope of work is to determine the go to market plans. UPU is open to recommendations from the bidder.

14. Would the UPU allow for a separate cost provision or budget line to cover essential research activities (e.g., 5 short closed-end surveys and 2 key informant interviews or sample size expectations per pilot country with postal operators, insurers, or regulators)? Or should these activities be absorbed within the overall ceiling of USD 112,000?

UPU Response: UPU could be open to review such additional expenses linked to critical business requirements and this will with prior approvals by the UPU before any engagements.

15. Project Management Tools Are there specific project management or reporting platforms (e.g., Teams, UPU templates) that UPU recommends or requires for documentation and real-time collaboration?

UPU Response: Yes, particular guidelines, project tools and templates will be provided for the RFT winner. UPU will be open to recommendations from the bidders.

16. Within the USD 112,000 ceiling, is there any recommended or expected split between remuneration, travel, research, and overheads? Or are vendors free to propose their breakdown?

UPU Response: The vendor is free to propose the breakdown.

17. Tax Clarifications: As UPU is tax-exempt, do any local withholding taxes in the pilot countries need to be considered by the vendor?

UPU Response: Please refer to Tax exemption section 2.11 in the RFT

18. Consultant Replacement Protocol: In case a key team member becomes unavailable mid-project, what is UPU's protocol for replacing the individual?

UPU Response: Bidder should provide their recommendations in such circumstances as this may be perceived to be a project resources risk.

19. Eligibility of Third-Party Costs Will UPU consider reimbursing third-party costs such as local data collectors, translators, survey tools, and platform subscriptions, or should all such costs be embedded within the overall ceiling?

UPU Response: The budget ceiling is listed in the RFT. Please refer to responses on question 14.

20. Tax Treatment in Host Countries Given UPU's tax-exempt status, should vendors anticipate any withholding tax or local tax obligations in the countries where pilot work will be conducted?

UPU Response: Please refer to Tax exemption guidelines on section 2.11 in the RFT

21. Replacement of Key Personnel What is UPU's policy and approval process in case a proposed key expert becomes unavailable during the assignment and needs to be replaced?

UPU Response: Please see responses to question 18 above. Bidder should provide their recommendations in such circumstances as this may be perceived to be a project resources risk.