

Open call for tenders

USPS/UPU tied funding supply chain enhancements: development and translation of UPU S58/S59 security standards introductory course and translation of advanced course

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1 Introduction

1.1 Profile of the UPU

The Universal Postal Union (UPU) was founded in 1874 in Berne, Switzerland, with the main goals of establishing a single postal territory for the reciprocal exchange of letter-post items and adopting common principles for the international postal service in a non-discriminatory manner. Currently comprising 192 member countries, the UPU became a specialized agency of the United Nations in 1948.

The main mission of the UPU is to stimulate the lasting development of efficient and accessible universal postal services of quality, in order to facilitate communication between the inhabitants of the world. It does this by guaranteeing the free circulation of items over a single postal territory composed of interconnected networks, encouraging the adoption of fair common standards and the use of technology, ensuring cooperation and interaction among stakeholders, promoting effective technical cooperation, and ensuring the satisfaction of customers' changing needs. The UPU is thus expected to play a major role in the continued revitalization of postal services.

Furthermore, the UPU facilitates the development of worldwide postal services by providing an information and communication technology framework that allows the designated operators¹ of UPU member countries to concentrate on the delivery of postal services to their customers. In this context, the UPU provides a global network with value-added services, as well as computerized applications for the management of international mail and international postal money orders.

2 Terms and conditions

Unless otherwise indicated in this call for tenders, the term "Bidder" shall refer to any person, company or legal entity submitting a proposal in response to this call for tenders. The term "Vendor" shall refer to any selected bidder.

2.1 Confidentiality

Bidders shall treat in strict confidence all information contained in this call for tenders and its attached documents that is not already publicly known or generally accessible, particularly any documentation marked as confidential and distributed by the UPU to Bidders as additional confidential tender documentation. Bidders shall prevent the disclosure or distribution of all such information to third parties and other entities and persons not expressly authorized herein. In case of doubt, these confidentiality provisions shall nevertheless be observed. All Bidders are obliged to observe these confidentiality provisions before, during and after the tender process. These provisions shall not affect the legal obligations of the UPU and Bidders to disclose information.

Bidders shall not use such information for any purposes other than those associated with this call for tenders. The call for tenders and all attached documents may be distributed or made available only to persons directly involved in the tender process on behalf of Bidders. If external agents or subcontractors are involved in the preparation of the tender documents, this must be indicated and their names provided in the participation notification (see section 2.14).

Bidders shall assume full responsibility for the compliance of their agents, consultants, employees and subcontractors, as well as any third parties involved on their behalf in this tender process, with these rules of confidentiality, and shall be liable for any damages resulting from misconduct or unauthorized disclosure.

If a Bidder violates the confidentiality provisions contained herein, it shall be liable to pay a penalty to the UPU unless it can prove that no fault is attributable to it. This penalty shall not exceed 50,000 CHF per infringement. Payment of any such penalties shall not release Bidders from their obligation to observe these confidentiality requirements.

Bidders wishing to submit a proposal in response to this call for tenders must contact the persons specified in section 2.15 below and may, if necessary, request additional information from the UPU in relation to this call for tenders.

¹ In accordance with article 2.1.6 of the UPU Constitution, a designated operator is any governmental or non-governmental entity officially designated by the member country to operate postal services and to fulfil the related obligations arising out of the Acts of the Union on its territory.

Without prejudice to the confidentiality provisions set out above, Bidders agree that the receipt of any such information may be subject to the prior signature of a non-disclosure agreement between the Bidder and the UPU, under conditions to be determined and communicated by the latter.

2.2 Legal status of the Vendor

The Vendor shall be regarded as having, in law, the legal status of independent contractor. The Vendor and its agents, consultants, employees and subcontractors (as authorized by the UPU) shall in no way be regarded as employees of the UPU. Such agents, consultants, employees and subcontractors of the Vendor shall not be entitled to any employment benefits from the UPU. The Vendor alone shall be responsible for due payment of all compensation owed to such agents, consultants, employees and subcontractors, including payment of any employment taxes, benefits, compensation and insurance. The Vendor shall represent and warrant that it will comply with all laws, rules and regulations required by the relevant authorities, including the appropriate withholding, reporting and payment of all necessary taxes.

The Vendor shall be liable for all work performed, including any acts or omissions, by its agents, consultants, employees and subcontractors.

2.3 Scope of the call for tenders

This call for tenders concerns the provision of an interactive introductory training course focusing on the UPU's S58 and S59 security standards, as well as the translation of this newly developed course and an existing security certification advanced course. The aim of the training is to develop a robust pool of security reviewers.

The UPU therefore seeks an experienced e-learning/classroom-based training designer and translation consultant with the necessary specialized skills to create a structured e-learning training module and complementary classroom-based training package for reviewers and instructors. This includes all planning, execution, implementation and instructor training for UPU staff.

2.4 Background

In 2010, explosive materials sent via courier air transport gave rise to international concerns as to the need to develop postal security standards consistent with the established guidelines of other cargo transportation agencies, in order to protect the international supply chain.

As a result, the UPU's Postal Security Group (PSG) developed a general set of security standards in cooperation with UPU member countries and other external stakeholders, such as the International Civil Aviation Organization (ICAO), International Air Transport Association (IATA), European Union (EU), Transportation Security Administration (TSA) and World Customs Organization (WCO).

The objectives of the UPU security strategy are to educate, raise awareness and increase security within all postal sector operations, through compliance with UPU security standards S58 (General security measures) and S59 (Office of exchange and international airmail security).

This security strategy is designed to proactively create a process whereby restricted unions and cooperative agreements between designated operators can contribute to ensuring secure universal service for the benefit of Union member countries, employees and the international mailing public. The protection of the international postal supply chain to guarantee the safe and secure exchange of mail among all member countries is critical for the continued viability of Posts. To enhance security among designated operators, there is significant value in the concepts of peer support, sharing of best practices, and mutual cooperation among Posts that face similar security challenges.

The security certification process is intended to (i) provide a means to assist member countries in identifying opportunities to improve security, (ii) measure the degree of compliance with UPU security standards and (iii) formally recognize the successful implementation of the standards. The revised certification process, which includes a virtual review component, was presented and endorsed during the POC C 1 PSG 2020.1 meeting. In order to reinforce compliance with the minimum security standards and build a comprehensive worldwide pool of security reviewers, the UPU requires an interactive and structured introductory training package on the S58 and S59 security standards, to be delivered as online training with a complementary classroom-based training course. This introductory training package will complement the existing interactive security certification advanced course. A turnkey "train the trainer" package should also be provided to complement the advanced security training packages and ensure consistency and sustainability.

The existing online security certification advanced course was developed over an eleven-month period by a select group of PSG subject-matter experts, with the assistance of an external contractor, to increase the knowledge base of all member countries and designated postal operators. It highlights the UPU's security strategy of educating, raising awareness and increasing security within all postal sector operations through compliance with UPU security standards S58 and S59.

The course currently exists in English only. In order to reinforce compliance with the minimum security standards and build a comprehensive worldwide pool of security reviewers, the UPU now requires translation of the full course content into all other UPU languages.

2.5 Objectives

The purpose of this call for tenders is to engage a consultant to provide an introductory training course on the UPU S58/S59 security standards, comprising both online and classroom-based training packages, aimed at the security staff of designated operators in UPU member countries. A structured "train the trainer" component should also be included to ensure that UPU staff are able to deliver this training as needed. The training should also include a standardized and sustainable security reviewer engagement methodology centralized at the UPU.

The Vendor will be responsible for designing at least one e-learning course and complementary classroom-based training course, based on existing materials and feedback from UPU staff. The Vendor must obtain approval for each stage of the project from the UPU focal point before moving on to the next stage.

This call for tender also concerns the translation of all components of the S58/S59 introductory training module that the Vendor is to create, as well as the materials for an existing security certification advanced course. This existing course, which exists as both an online and instructor-led training (ILT) course, consists of the following:

- Module 1 – Security certification review process (one SCORM² package);
- Module 2 – Certification assessment workbook (one SCORM package);
- Interactive reference (HTML document);
- Assessing a facility (one SCORM package);
- Feedback (one questionnaire);
- Bank of questions (30 questions);
- End-of-course questionnaire (one page and one URL);
- Certificate (one course certificate);
- ILT PowerPoint presentations (five).

The two interactive online training modules have been developed using Articulate Storyline 360, the facility assessment 360° practice walk-through was developed in 3D Vista, and the interactive reference has been developed in Articulate Rise 360. These elements, along with the feedback, quizzes, tests and associated ILT materials, are all in English.

The Vendor will be responsible for translating all components of the new and existing course materials/SCORM packages from English into all other UPU languages, i.e. Arabic, French, Portuguese, Russian and Spanish, and for ensuring the accurate and complete transmission of each translated online course to the UPU Trainpost platform.

The Vendor must ensure that it has adequate resources for the design, building, testing and implementation of the training packages, for the translation of the completed training packages into Arabic, French, Portuguese, Russian and Spanish, and for the electronic transmission thereof to the UPU Trainpost platform. The Vendor must have experience of and the necessary specialized skills in Articulate Storyline 360, Articulate Rise 360 and 3D Vista.

² Shareable content object reference model.

2.6 *Use of subcontractors*

The Vendor shall not assign, sublicense, subcontract, pledge or otherwise transfer or dispose of its tender, or any of the rights and obligations contained therein or in an associated contract with the UPU, without the prior written consent of the UPU.

The approval by the UPU of the engagement of any subcontractor shall not relieve the Vendor of any of its obligations or responsibilities concerning the work performed by such subcontractors.

2.7 *Use of the emblem, name and initials of the UPU*

Bidders shall not advertise or otherwise make public the fact that they intend to provide, are providing or have provided services to the UPU, or use the emblem, name or initials of the UPU in connection with their business for purposes of commercial advantage or goodwill without prior and explicit permission from the UPU. Bidders shall take all reasonable measures to ensure compliance with this provision by their agents, consultants, employees and subcontractors.

2.8 *Collusive bidding, anti-competitive practices and any other similar conduct*

Without prejudice to the provisions in sections 3 and 4 below, Bidders (including their agents, consultants, employees and subcontractors) shall not engage in any collusive bidding, anti-competitive practices or any other similar conduct, in relation to:

- the preparation and submission of tenders;
- the clarification of tenders;
- the conduct and content of any negotiations, including final contract negotiations.

For the purposes of this call for tenders, collusive bidding, anti-competitive practices and any other similar conduct may include the disclosure to, or exchange or clarification with, any other Bidder of information (in any form), whether or not such information is confidential to the UPU or to any other Bidder, in order to alter the results of the call for tenders in such a way that would lead to an outcome other than that which would have been obtained through a competitive process. In addition to any other remedies available to it, the UPU may, at its sole discretion, immediately reject any tender submitted by a Bidder that, in the UPU's opinion, has engaged in any collusive bidding, anti-competitive practices or any other similar conduct with any other Bidder in relation to the preparation or submission of tenders, whether with respect to this call for tenders or other procurement processes conducted by the UPU.

2.9 *Intellectual property*

This call for tenders and all its attached documents, including any content, forms, statements, concepts, projects and procedures explicitly or implicitly forming part of the call for tenders, constitute the exclusive intellectual property of the UPU. This call for tenders is communicated to the various Bidders with the sole purpose of assisting them in the preparation of their respective tenders. Any hard copies of this call for tenders shall be destroyed or returned to the UPU by unsuccessful Bidders at the request of the UPU.

2.10 *Privileges and immunities*

Nothing in or relating to this call for tenders, the activities described herein or any potential agreements related thereto shall be deemed as a waiver, expressed or implied, of any of the privileges, immunities and facilities that the UPU enjoys as a specialized agency of the United Nations system, pursuant to the Swiss Host State Act and the Agreement on Privileges and Immunities of the United Nations (on Swiss territory), the Convention on the Privileges and Immunities of the Specialized Agencies (outside Switzerland), and any other conventions and laws recognizing and/or granting such privileges, immunities and facilities to the UPU and its officials (such as the International Organizations Immunities Act in the case of the United States of America).

Accordingly, the Vendor shall expressly acknowledge and agree that the property and assets of the UPU, including any archives, data, documents and funds belonging to the UPU or held by it (including, without limitation, the data/hosting environments and servers pertaining to or associated with the provision of the services, as well as any data or documents in any form belonging to or held by the UPU on behalf of UPU member countries and their designated operators), are inviolable and shall be immune from search, requisition, confiscation, expropriation and any other form of interference, whether through executive, administrative, judicial or legislative action. The Vendor shall immediately contact the UPU in the event of any attempt to violate or any

violation of the UPU's privileges and immunities, and shall take all reasonable measures to prevent such violations.

In the light of the UPU's status as a specialized agency of the United Nations (and without prejudice to the observance, by the UPU, of any sanctions established by the United Nations Security Council), Bidders shall expressly certify their legal and operational willingness and ability to provide the services on a non-discriminatory basis for the benefit of all eligible entities established and/or situated in the territory of any UPU member country, irrespective of the existence of diplomatic relations between a Bidder's country of incorporation and/or operation and any UPU member country (including its designated operators).

2.11 Tax exemption

Pursuant to article III, section 9, of the Convention on the Privileges and Immunities of the Specialized Agencies, the UPU is exempt from all direct taxes and from customs restrictions, duties and charges of a similar nature in respect of articles imported or exported for its official use.

Furthermore, as an intergovernmental organization and a specialized agency of the United Nations, the UPU is exempt from value added tax (VAT) in Switzerland (OLTVA, article 22; *Instructions 2001 sur la TVA*, articles 574, 816 and others), as well as in other countries. Therefore, all prices shall be indicated in "net" form, without VAT or similar taxes.

2.12 Language

Bidders must submit all tender documents entirely in English.

2.13 Signature

Tender documents shall be signed by a representative (or representatives) duly designated and authorized to act on the Bidder's behalf and with the authority to legally bind the Bidder and accept the terms and conditions of this call for tenders.

2.14 Participation notification

Upon receipt of this call for tenders, Bidders shall send confirmation of participation to the contact person(s) listed in section 2.15 by the deadline indicated in section 2.20.

2.15 Contact persons

Secretary of the Tenders and Procurements Committee
Universal Postal Union
International Bureau
Weltpoststrasse 4
3015 BERNE
SWITZERLAND
E-mail: caa@upu.int

2.16 Further inquiries and questions

Bidders must send any questions regarding the content of this call for tenders or any requests for clarification by e-mail to the contact person(s) listed in section 2.15 by 4 November 2022.

2.17 Delivery of tenders and deadline

All tenders must be submitted to the UPU by e-mail ONLY at RFP-2022-019@upu.int with "RFP-2022-019 – USPS/UPU tied funding supply chain enhancements: development and translation of UPU S58/S59 security standards introductory course and translation of advanced course" as the subject line.

The deadline for the submission of tenders is **30 November 2022 at 16.00 CET.**

The UPU shall not take into consideration any tenders received after this date and time. Furthermore, it shall not accept any tenders sent to any e-mail address other than that specified above or sent by any other means.

There shall be no charge to the UPU for the preparation and submission of tender documents by Bidders.

2.18 Evaluation procedure

The objective of the UPU's evaluation process is to ensure the selection of a qualified, reliable and experienced Vendor capable of delivering the services and fulfilling the objectives set out in section 2.5 above.

The UPU shall conduct its evaluation procedure with a view to determining as objectively as possible the tender that best meets its specific requirements. All tenders submitted shall be subject to an in-depth assessment, at the UPU's sole discretion, in order to enable the UPU to engage the most appropriate service provider.

The prescribed structure of tenders, as set out in section 3, is mandatory for all Bidders. The UPU shall not take into consideration any tenders that do not fulfil the mandatory criteria.

Tenders received by the UPU must address all aspects of this call for tenders, and Bidders should identify any aspects where they envisage modifications being necessary or consider elements to be missing.

The winning tender will be selected based on a non-exhaustive list of criteria as set out in section 4. Bidders should therefore consider how their tender corresponds with the criteria listed and to clearly indicate this in their response document.

The deliberations of the UPU Tenders and Procurements Committee (TPC) are strictly confidential. The TPC shall submit a report on its evaluation of the tenders received to the Director General of the UPU International Bureau, together with its final recommendation, for his assessment and authorization.

The UPU is not bound to accept the lowest tender and reserves the right to accept all or part of a tender. In awarding the contract, account will be taken of both the overall costs of the work and of the nature and quality of the services to be provided. The UPU reserves the right to negotiate prices and terms and conditions of contract after receipt of tenders.

Bidders will be informed of the outcome of their tender as soon as possible after the UPU has made its final selection.

2.19 Modification, suspension or cancellation of the call for tenders

The UPU reserves the right, at its sole discretion and at any time before the conclusion of the tender process (i.e. at any time prior to the signature of the relevant contract with the Vendor), to modify, suspend or cancel all or part of this call for tenders.

2.20 Tentative schedule

Publication of call for tenders	19 October 2022
Deadline for submission of queries	4 November 2022
Deadline for provision of responses to queries	11 November 2022
Deadline for submission of tenders to the UPU	30 November 2022 at 16.00 CET
Estimated start of engagement	4 January 2023

3 Tender structure – Response format

All information provided by Bidders must be fully compliant with the terms and conditions set out in section 2 above, as well as the provisions of this section and the service requirements listed in section 4 below.

Moreover, the requirements stipulated in this call for tenders must be met in their entirety, according to the structure defined below and following the sequence and numbering provided in this section. The UPU shall evaluate all Bidder responses in accordance with the structure defined herein and shall have the right to reject any tenders that do not fulfil the requirements of this call for tenders.

3.1 *Cover letter*

Bidders shall submit a cover letter including:

- A statement that the Bidder has read, understands and accepts all provisions of this call for tenders;
- The Bidder's name, telephone number, postal address and e-mail address, and the name(s) of its representative(s);
- A statement that the Bidder's tender documents are valid for a minimum period of 120 days.

The cover letter shall be signed by a representative (or representatives) duly designated and authorized to act on the Bidder's behalf and with the authority to legally bind the Bidder and accept the terms and conditions of this call for tenders, and shall also include a confirmation of such authorization by the Bidder.

3.2 *Executive summary*

Bidders shall provide an executive summary highlighting the most important aspects of their tender.

3.3 *Bidder information*

Bidders must provide the following information:

- Qualifications;
- Detailed description of the proposed consultancy work;
- E-learning portfolio;
- Translation portfolio;
- Costs to provide complete translation into each of the UPU languages.

3.4 *Technical proposal*

Bidders shall submit a technical proposal addressing all of the requirements set out in section 4 (Service requirements). This proposal should outline the methodology, processes and timelines, as appropriate, that Bidders intend to implement in order to fulfil all the objectives of this call for tenders.

The technical proposal will be assessed according to the criteria set out in section 4.

3.5 *Pricing structure*

Bidders shall provide a detailed pricing structure, with a breakdown of the budget for the training course and for full course translation into each language. Bidders shall not include VAT in their pricing structure (see section 2.11 above). All pricing information shall be provided exclusively in Swiss francs (CHF).

3.6 *Delivery and payment schedule*

Delivery and payment schedules should be proposed by Bidders in their financial proposals and will be agreed with the UPU.

3.7 *UPU General Terms and Conditions*

Bidders shall include in their tender a statement of acceptance of the UPU General Terms and Conditions for the Provision of Services, attached hereto for reference.

The final terms of any contract arising from this call for tenders shall be defined by the UPU and accepted by the Vendor. Contract negotiations shall commence only after the final selection of a Vendor by the UPU.

4 Service requirements

4.1 Description of the training requirements

In relation to training course development, the Vendor shall provide the following services:

- Prepare and produce training materials for designated operators in accordance with UPU security standards S58 and S59. The necessary information is available on the UPU website at www.upu.int/en/Postal-Solutions/Programmes-Services/Postal-Supply-Chain;
- Design and develop high-quality customized e-learning and classroom-based content and digital learning experiences for stakeholders;
- Organize the course content into logical and instructional patterns appropriate to the cultures and levels of expertise of the learners;
- Design and develop materials for e-learning and classroom-based training, including lesson plans, lesson content, learning objectives and assessment tools, to ensure comprehension and high levels of interaction;
- Help to troubleshoot technical problems and address issues reported by users;
- Create new e-learning and digital learning materials suitable for desktop and mobile devices, taking into account existing solutions and business practicalities;
- Pilot, trial and test e-learning and classroom-based content and platforms with end users, iterating and redeveloping as necessary to ensure that they are fit for purpose and work as intended;
- Develop and create tailored animations, video productions, films, graphics and new artwork for all digital learning content, as needed;
- Ensure all learning and development principles and processes are adhered to, whilst managing the workload to ensure that the project is delivered on time and in line with the project plans;
- Review and check the quality of all work delivered to ensure that the e-learning and physical courses are built to the highest standards;
- Remain abreast of new learning developments, technologies and standards;
- Oversee the implementation of online learning programmes;
- Train UPU staff to become instructors for the courses designed.

4.2 Description of the translation requirements

With regard to the translation of the training courses, the Vendor shall provide the following services:

- Provide complete and accurate translations of all S58 and S59 security standard introductory and advanced course materials from the original English version, using Articulate Storyline 360, Articulate Rise 360 and 3D Vista, into all other UPU languages, i.e. Arabic, French, Portuguese, Russian and Spanish;
- Provide accurate and complete transmission of each translated e-learning course to the UPU Trainpost platform;
- Help to troubleshoot technical problems and address issues reported by users.

4.3 Bidder requirements

Bidders shall be companies of international repute in the areas of activity defined herein.

Moreover, Bidders are expected to demonstrate:

- Proven experience in the successful delivery of e-learning and classroom-based training in all UPU languages;
- An understanding of national, regional and international postal security strategies and policies;
- Experience of evaluating or measuring the effectiveness of training;
- Experience of working with United Nations entities, including the UPU and/or other intergovernmental organizations;

- Experience of working in the postal sector;
- Computer literacy and experience of Articulate Storyline 360, Articulate Rise 360 and 3D Vista, as well as MS Teams, Word, Excel and PowerPoint.

4.4 *Assessment criteria*

Bidders will be assessed based on a scoring system of up to 60 points for their technical proposal and 40 points for their pricing structure.

The technical proposal shall be assessed based on the following criteria:

<i>Evaluation criteria</i>		<i>Points obtainable</i>
1	Capability of trainer(s) (i.e. experience, qualifications)	20
2	Capability of translator(s) (i.e. experience, qualifications)	20
3	Experience in providing translation for existing courses	10
4	Experience of other postal security-related projects	10

4.5 *Estimated duration of the services*

The services are scheduled to commence in January 2023, with an estimated duration of four months.

4.6 *Other requirements*

Bidders shall outline a detailed project plan and timeline, broken down into phases and deliverables, for delivery of the translation into each of the required languages. This shall also include an appropriate project management mechanism and a description of any relevant procedures pertaining to communication.

Bidders shall also confirm that their tender covers all costs expected to be incurred in the provision of the services referred to herein. Any other costs to be incurred by the Vendor shall be subject to the prior written consent of the UPU. No other fees shall be paid, with the exception of reimbursement of other unavoidable costs incurred for successful delivery of the services, which shall also be subject to the prior written consent of the UPU.

4.7 *Additional information*

Bidders may include any additional information that they deem necessary or relevant in order for the UPU to gain a clear and detailed understanding of the services being offered.