



UPU | UNIVERSAL
POSTAL
UNION

Call for tenders

Analytical study on ETOEs, ETOE-related policy and the designation of multiple operators

16 February 2023

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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 (DOs) 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.

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.

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

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 consultancy services to the UPU from May to November 2023 to conduct an analytical study on extraterritorial offices of exchange (ETOE), ETOE-related policy and the designation of multiple operators in UPU member countries.

2.4 *Background*

a Extraterritorial offices of exchange

The UPU's legal framework with regard to ETOEs is enshrined in article 13 (Use of the Union's forms) of the Universal Postal Convention and Congress resolution C 6/2012 (Continuation of the study on extraterritorial offices of exchange, international mail processing centres, and issues surrounding the designation of multiple operators in a single country), which in turn refers to the conditions previously laid down in Congress resolutions C 44/2004 and C 63/2008.

The latest information on UPU member countries' most recent replies concerning their national policies with regard to the establishment of ETOEs within their respective territories, as well as the applicable procedure to be followed by potential applicants, can be found on the UPU website.

At present, the establishment of ETOEs gives rise to certain regulatory and operational concerns. From an operational perspective, there can be problems in the handling of items received from ETOEs, in relation to aspects such as:

- identification of the operator sending the mail;
- handling of returned mail;
- return of verification notes;
- undeliverable items;
- correct and fair remuneration for the delivery of items received.

From a regulatory perspective, current market practices suggest lacunae in the current UPU rules in relation to the operation of ETOEs and remailing², resulting in cases of non-compliance. There are concerns as to the appropriateness of member countries and/or DOs determining the applicability of the UPU Acts for ETOE mails. Consideration might be given to the need for the UPU Council of Administration (CA), in the context of increasingly liberalized markets, to reflect on UPU policy and to produce sound, clear and non-arbitrary rules

² As specified in article 12 (Posting abroad of letter-post items) of the Universal Postal Convention.

regarding the definition and operation of ETOEs, including their nexus with other UPU regulatory regimes such as that relating to remailing.

According to work proposal (WP) 1.2.13 of the Abidjan Business Plan (PPR 1 – Treaty obligations for universal service, regulation and postal policy), the CA is to identify current practices and potential issues surrounding ETOEs and international mail processing centres (IMPCs) from the policy and regulatory perspectives, based on Congress decisions and the latest developments regarding ETOEs and IMPCs (in particular, the impacts of ETOEs on treaty obligations, postal regulation and operations), in order to develop theories and advisory conclusions for member countries.

The CA will also examine whether the current UPU regulatory framework regarding ETOEs meets the needs of UPU member countries and their regulators and DOs in the context of market developments, which may lead to changes to the current UPU policy.

b Multiple designated operators

Article 2 (Designation of the entities responsible for fulfilling the obligations arising from adherence to the Convention) of the Universal Postal Convention does not preclude the possibility of designating multiple operators within a single member country to fulfil the obligations arising from adherence to the UPU Acts, and provides a clear timeframe for notification of any change:

- “Any changes with regard to the officially designated *operators* shall also be notified to the International Bureau as soon as possible, and preferably *at least three months prior* to the entry into force of the change. (§1)
- “When a member country officially designates a new operator, it shall indicate the scope of the postal services that the latter will provide under the Acts of the Union, as well as the operator’s geographical coverage on its territory.” (§2)

The designation of multiple operators within a member country has given rise to a number of operational, technical and logistical concerns in postal operations, particularly in relation to the difficulties posed to other DOs in the identification of the sending operators, handling of undeliverable items, measurement of quality of service, and accounting and remuneration issues. Depending on the manner in which the member countries concerned have divided responsibilities (e.g. by geographical coverage, by product, etc.), there may be an overlap in responsibilities, which can create difficulties in determining relations between the multiple DOs of one country and the DOs of other UPU member countries.

Under work proposal 1.2.13, the CA is to identify current practices and potential issues surrounding multiple DOs from the policy and regulatory perspectives, based on Congress decisions and recent developments, and make recommendations to member countries as to amendments to the UPU rules on the designation of governmental entities, regulators and DOs, including multiple operators, if required, based on the results of an in-depth study.

2.5 Objectives

The UPU seeks the services of an external consultant to conduct a study to ascertain the situation in the market place (in terms of both national and international exchanges) with regard to ETOEs and multiple DOs, including the following:

- Identify the operational and regulatory concerns arising from the current practices regarding ETOEs and multiple DOs, and the lacunae in the UPU’s current regulatory and operational frameworks that leave these concerns unaddressed; and
- Develop recommendations as to what needs to be done to address these concerns.

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 10 March 2023**.

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 in writing to the contact person(s) listed in section 2.15 **by 24 February 2023**.

Answers to questions submitted by Bidders, as well as any additional information and updates relevant to this call for tenders, shall be published on the UPU website at www.upu.int/en/Universal-Postal-Union/Procurement.

2.17 Delivery of tenders and deadline

All tenders must be submitted to the UPU by e-mail only at RFP-2023-004@upu.int with "RFP-2023-004 – Analytical study on ETOEs, ETOE-related policy and the designation of multiple operators" as the subject line.

The deadline for the submission of tenders is **17 March 2023 at 18.00 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 providing the specialized services and fulfilling the objectives set out in this call for tenders.

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. Due consideration will be given to Bidders' specific backgrounds, qualifications and experience in relation to the required services.

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.

Tenders shall be evaluated on the basis of the following criteria, in descending order of importance:

- Quality of the tender (according to the specifications herein);
- Knowledge and experience of the Bidder and its team and/or consultant(s), as applicable to the subject matter;
- Price.

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 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

Deadline for submission of queries	24 February 2023
Deadline for provision of responses to queries	3 March 2023
Deadline for submission of participation notification	10 March 2023
Deadline for submission of tenders to the UPU	17 March 2023 at 18.00 CET
Estimated start of engagement	15 May 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.

For each of the requirements listed in this call for tenders, Bidders shall answer with one of the following statements:

- Covered;
- Covered with limitations (explaining relevant limitations);
- Not covered.

Where the answer is “covered” or “covered with limitations”, Bidders shall provide further details and/or examples of existing implementations of their solution in the field (existing use cases).

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:

- Company structure, locations/subsidiaries;
- Financial data (turnover, profit, etc.);
- Partners and equity holders of the company;
- Company history;
- Market position and share in relevant markets.

3.4 Subcontractor information

Bidders shall provide a list of any subcontractors to be directly involved in this call for tenders and must specify the exact degree of these subcontractors’ involvement in the provision of the services.

3.5 Proposal

Bidders shall submit a 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 the objectives of this call for tenders.

3.6 Pricing structure

Bidders shall provide an all-inclusive pricing structure applicable throughout the contract period. The term “all-inclusive” shall be understood to mean that all costs that may be incurred by the consultants in their completion of the assignment are taken into account in the price stated in the proposal.

Bidders shall not include VAT in their pricing structure (see section 2.11 above). All pricing information shall be set out exclusively in Swiss Francs (CHF).

The budgetary ceiling is 40,000 CHF inclusive of all costs (including support, communications and travel) and any applicable taxes. Proposals that fail to deliver all objectives within this budgetary ceiling or that exceed the budget will not be considered.

3.7 Delivery and payment schedule

The target dates for provision of the services are as follows:

Start date: 15 May 2023

End date: 30 November 2023

The delivery and payment schedules should be proposed by Bidders in their pricing structures, and must be agreed with the UPU.

The services provided by the Vendor shall be invoiced in arrears on a monthly basis. The UPU will make payment within 30 business days of receipt of invoice, subject to its acceptance of the services provided and the Vendor’s transmission to the UPU of any and all documentation clearly detailing the services to which the invoice pertains (in a format to be established by the UPU).

3.8 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 services

The Vendor will be expected to provide the services set out below.

4.1.1 Study content and methodology

- Conduct surveys on:
 - the UPU’s fundamental rules and principles on ETOEs and multiple DOs;
 - the policies of member countries and their DOs regarding the establishment of ETOEs and acceptance of items tendered by ETOEs;
 - the issue of multiple DOs from both the regulatory and operational perspectives;
- Review existing UPU documents and studies, as well as data collected and managed by the International Bureau;
- Conduct interviews with International Bureau experts (Policy, Regulation and Markets Directorate (DPRM), Postal Operations Directorate (DOP) and other directorates) to inform the study;

- Ascertain:
 - problems encountered by member countries with regard to ETOEs and multiple DOs, from both the regulatory and operational perspectives;
 - the appropriateness of member countries and/or designated operators determining the applicability of the UPU Acts for ETOE mails;
- Develop:
 - recommendations for member countries for the development of national policy on ETOEs and multiple DOs;
 - proposals for amendments to the UPU rules in relation to the definition, designation and operations of ETOEs and multiple DOs, if needed, based on the study results.

4.1.2 Deliverables

<i>Phase</i>	<i>Deliverables</i>	<i>Deadline (launch date 15 May)</i>
1 Review	Review of current policy on ETOEs and multiple DOs	26 May
2 Structuring	Definition of the structure of the basic and/or essential elements for all chapters	9 June
3 Drafting	Drafting of the chapters of the study on ETOEs	18 August
	Drafting of the chapters of the study on multiple DOs	29 September
4 Presentation and finalization	Presentation to the CA during the November session	Early November
	Publication of the results of the study	30 November

4.1.3 Structure of the study

Please refer to Annex 1.

4.2 Bidder requirements

Bidders shall demonstrate a record of satisfactory performance in similar activities (i.e. reference letters and/or work completion certificates). The business transactions and activities carried out by the Bidder must be compliant with the mandates and principles of the UPU.

4.3 Consultant requirements

Bidders not operating as an independent consultant should propose at least three individual consultants in accordance with the requirements specified in this call for tenders for the performance of the services and activities described herein. Bidders are required to provide the CVs and diplomas of the said consultants, as well as a letter of motivation and a brief write-up (maximum 1,000 words) of the consultants' approach and methodology with regard to the project, for further verification and evaluation by the UPU. The UPU shall have the right to reject a proposed consultant if the individual does not fulfil the UPU's requirements as defined in this call for tenders.

Bidders not operating as an independent consultant should describe any relevant procedures concerning the replacement of individual consultants if so requested by the UPU.

4.4 Assessment criteria

Bidders will be assessed on the basis of a scoring system of up to 70 points for their proposal and 30 points for their pricing structure.

The proposal shall be assessed on the basis of the following criteria:

<i>Criteria</i>	<i>Points obtainable</i>
Experience of conducting similar actionable projects	25
Experience and knowledge of postal policy, regulation and markets	25
Proposed methodology	10
Composition of the team and experience of the team leader	10

Bidders shall provide evidence of their ability to meet these requirements by means of a list of references.

4.5 *Duration of services*

The services are scheduled to commence in May 2023 for a total contract term of six months. The initial results of the study are to be presented to CA Committee 2 in November 2023. The final results (deliverables) are then to be completed and published by the end of November 2023.

4.6 *Location of the services*

The Vendor or its assigned consultant shall in principle work from its own premises or his/her home office.

The Vendor or its assigned consultant shall liaise and work closely with the UPU (as instructed by the latter) and may be required from time to time to carry out certain tasks from the headquarters of the UPU in Berne, Switzerland.

4.7 *Reporting*

The Vendor shall provide the UPU with a structure outlining the basic and/or essential elements for all chapters (phase 2) and completed drafts of the chapters for the studies on ETOEs and multiple DOs (phase 3). The Vendor shall also provide the UPU with the final study, taking into consideration any comments and feedback provided by the International Bureau (phase 4). Furthermore, the Vendor shall participate in the CA session of November 2023, either remotely or in person, to present the study results (phase 4 – exact dates to be determined). The deadlines are indicated in section 4.1.2.

The Vendor shall carry out the activities set out herein in collaboration with the International Bureau and shall provide regular progress reports to the International Bureau on these activities, with the associated time sheets. Specific modalities for periodic reporting by the Vendor to the UPU shall be jointly defined.

The UPU may contest the Vendor's time sheets within 10 business days of receipt thereof. If the time sheets are not contested by the UPU within the said time frame, the services detailed therein may be deemed as duly provided by the Vendor and accepted by the UPU.

4.8 *Other requirements*

Bidders shall describe any relevant procedures for ensuring the continuity of the services provided and for appropriate backup and retraining, as well as any relevant procedures pertaining to project management and communication.

Bidders shall also confirm that their tender covers all costs associated with the provision of the services referred to herein. Any other costs to be incurred by the Vendor, including any travel and subsistence costs incurred in the provision of the services at locations other than its own premises and specifically designated by the UPU, 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.

4.9 *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.

Structure of the analytical study on ETOEs, ETOE-related policy and the designation of multiple operators

I. Study on ETOEs

Chapter 1 – Introduction

- 1.1 Background to the study
- 1.2 Terms of reference for the study
- 1.3 Study methodology

Chapter 2 – Situation and policies with regard to ETOEs in member countries

- 2.1 Evolution and current situation with regard to ETOEs in member countries
 - 2.1.1 Definition and types of ETOE and IMPC
 - 2.1.2 Historical background
- 2.2 Current status of ETOEs operated in member countries
 - ETOEs operated by DOs or in cooperation with a DO
 - Types, volumes and flows of postal items operated by ETOEs
 - Proportion of ETOE consignments in the total number of shipments sent by DOs
- 2.3 Current status of ETOE-related policies in member countries
 - 2.3.1 Member countries' policies on the establishment of ETOEs
 - 2.3.2 Member countries' policies on the acceptance of items tendered by ETOEs

Chapter 3 – Impact of environmental changes on ETOEs

- 3.1 Challenges facing member countries with regard to ETOEs
 - 3.1.1 Legal issues
 - 3.1.2 Regulatory issues
 - 3.1.3 Operational issues
- 3.2 Market developments
 - 3.2.1 International trade

Chapter 4 – Analysis of the regulatory perspective

- 4.1 Treaty obligations
 - 4.1.1 IMPC codes and UPU standards
 - 4.1.2 Use of UPU documentation
 - 4.1.3 Remuneration
 - 4.1.4 Postal customs procedures
- 4.2 Universal service obligation
- 4.3 Impact of ETOE activity in the internal postal market
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II. Study on multiple designated operators

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 - 3.1.1 Definition of multiple DOs
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¹ As specified in article 12 (Posting abroad of letter-post items) of the Universal Postal Convention.

² Dispatch of items from ETOEs as “cargo” and receipt at destination DO as “postal items”.

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