

Open call for tenders

USPS/UPU tied funding supply chain enhancements: design, development and translation of standardized security training packages

12 September 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 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.

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 2.14 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 open call for tenders concerns the engagement of an e-learning and classroom-based training designer/developer to create training content for the UPU's Postal Operations Directorate (DOP) in partial fulfilment of Outcomes 17.1 and 23.4 of the USPS/UPU tied funding supply chain enhancements.

The DOP seeks an e-learning and classroom-based training designer/developer to create a complete package of e-learning and classroom-based training content on specific postal security topics. The services are to include all planning, execution and implementation, as well as instructor training for UPU staff.

The selected Vendor will be responsible for designing at least 20 e-learning modules in SCORM² or HTML format, in English, with complementary classroom-based training courses, based on UPU staff feedback and documentation. The Vendor will also translate all components of the 20 e-learning and classroom-based training courses into the other UPU languages, namely Arabic, French, Portuguese, Russian and Spanish. The Vendor will also be responsible for ensuring the accurate and complete transmission of each translated e-learning course to the UPU Trainpost platform.

2.4 Background

The UPU Postal Security Group, with external funding, has been working diligently to create a sustainable and up-to-date e-learning and instructor-led training (ILT) course to advance all designated operators' security experts' understanding of threats to the postal supply chain and to increase the mitigation of these threats.

This is in line with the objectives of the UPU security strategy, which 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.

² Shareable content object reference model.

In order to reinforce compliance with the minimum security standards and build a comprehensive worldwide understanding of ongoing threats, the UPU requires a consolidated, interactive and structured training package, to be delivered as online training with a complementary ILT/classroom-based training course. A turnkey “train the trainer” package should also be provided to complement the training course and ensure consistency and sustainability.

2.5 Objectives

The UPU wishes to provide training in order to develop a robust pool of security experts among designated operator staff, in order to ensure sustainability in this area among designated operators.

Therefore, the UPU seeks an experienced consultant with the necessary specialized skills to implement structured online training and a complementary ILT/classroom-based training course for security experts, as well as a “train the trainer” package for instructors.

The training to be developed must cover a series of specific supply chain security topics for the postal sector, and is aimed at the security staff of the designated operators of UPU member countries. The purpose of the training is to develop the capabilities of security staff so that they better understand the dangers within the postal supply chain, and how to identify and mitigate those dangers. The 20 training courses shall cover topics such as UPU rules and regulations, dangerous goods, alarm resolution, mail theft, revenue protection, misuse of the postal supply chain, road safety and liaison activities. A structured “train the trainer” component must also be provided for each topic, to ensure that UPU staff are able to provide ILT/classroom-based training as a complement to the online course, as needed.

Bidders must ensure that they have adequate resources for the design, building, testing and implementation of the training packages in English, for the translation of the completed training packages into Arabic, French, Portuguese, Russian and Spanish, and for the electronic transmission of all materials to the UPU Trainpost platform.

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 Contact persons

Secretary of the Tenders and Procurements Committee
 Universal Postal Union
 International Bureau
 Weltpoststrasse 4
 3015 BERNE
 SWITZERLAND

E-mail: caa@upu.int

2.15 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 2.14 **by 5 October 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.

2.16 Delivery of tenders and deadline

All tenders must be submitted to the UPU by e-mail only at RFP-2023-20@upu.int with “RFP-2023-20 – “USPS/UPU tied funding supply chain enhancements: design, development and translation of standardized security training packages” as the subject line.

The deadline for the submission of tenders is **12 October 2023 at 16.00 CEST**.

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.

2.17 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.

2.18 *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.

2.19 *Tentative schedule*

Publication of call for tenders	12 September 2023
Deadline for submission of queries	5 October 2023
Deadline for provision of responses to queries	9 October 2023
Deadline for submission of tenders to the UPU	12 October 2023 at 16.00 CEST
Estimated start of engagement	13 November 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:

- Qualifications;
- Detailed description of the proposed consultancy work;
- E-learning portfolio;
- ILT/classroom-based training portfolio;
- "Train the trainer" portfolio.

3.4 *Subcontractor information*

N/A

3.5 *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 the objectives of this call for tenders.

3.6 *Pricing structure*

Bidders shall provide a detailed pricing structure for the services proposed, including a detailed phase-by-phase budget based on daily rates and time allocations for their relevant training providers, as well as a daily rate for additional training.

Bidders shall not include VAT in their pricing structure (see section 2.11 above). All pricing information shall be set out exclusively in United States dollars (USD).

3.7 *Delivery and payment schedule*

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

Start date: 13 November 2023

End date: 12 May 2024

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 (Annex 1).

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

The Vendor will be expected to provide the following training services:

- Prepare and produce training materials for designated operators;
- 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;
- Develop easy-to-use templates, as required, for the designated operators of UPU member countries;
- 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 to increase interaction and learning;
- Ensure all learning and development principles and processes are adhered to, while 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 classroom-based courses are built to the highest standards;
- Keep 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.

The e-learning training modules should cover the following topics, within the approximate duration indicated:

- UPU rules and regulations: one module of 15 minutes;
- Dangerous goods: three modules of 30 minutes each;
- Alarm resolution: one module of 15 minutes;
- Mail theft: two modules of 15 minutes each;
- Revenue protection: four modules of 15 minutes each;
- Misuse of the postal supply chain: seven modules of 15 minutes each;
- Road safety: one module of 30 minutes;
- Liaison activities: one module of 15 minutes.

ILT packages must be provided for all eight training topics.

The working language of this project is English, and the training materials must be created in English. The Vendor will also provide complete and accurate translations of all components of the e-learning and classroom-based training into all other UPU languages, i.e. Arabic, French, Portuguese, Russian and Spanish.

The Vendor will also be responsible for accurate and complete transmission of each translated e-learning course to the UPU Trainpost platform.

Further information on the UPU Postal Security Group is available on the UPU website at www.upu.int/en/Postal-Solutions/Programmes-Services/Postal-Supply-Chain/Security.

4.2 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 English, and of translation into the required languages;
- An understanding of national, regional and international postal security strategies and policies;
- Experience of developing security-related training and curricula;
- 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, including MS Teams, Word, Excel and PowerPoint.

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

N/A

4.4 Assessment criteria

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

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

<i>Criteria</i>		<i>Points obtainable</i>
1	Capability of developer(s) (i.e. experience, qualifications)	20
2	Experience of delivering similar training	15
3	Experience of other postal security-related projects	15
4	Experience and understanding of security and its application in the postal sector	10
5	Experience of providing translation services in all required languages	10

/ For criteria 1 to 4, please complete the form in Annex 2.

For criterion 5, please submit a separate document.

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 November 2023 with an estimated duration of six months.

Bidders shall outline a detailed project plan and timeline, broken down into phases and deliverables, for delivery of the training. This shall include an appropriate project management mechanism to ensure that the training is completed and available on the UPU Trainpost platform within the six-month period.

The Vendor must obtain approval for each stage of the project from the UPU focal point before moving on to the subsequent stage.

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 weekly reports setting out the relevant services performed by the Vendor during that time frame. Such reports shall be prepared in accordance with a structure and format defined by the UPU (i.e. time sheets).

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.