

Questions RFP-2025-023 - Global Postal Digital Inclusive Finance Program (GPDIFP)

1. Please suggest the pilot countries identified and their selection criteria, or is the design of these parts of the project scope?

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

2. Can countries that applied for FITAF be considered?

The program will be open to all UPU network members.

3. How do you envision the bidder's role in supporting the DFS customer assessment study?

UPU looks forward to the response of the bidder on their plans for customer DFS assessments. The goal is to reach a solid understanding on the Postal Customer DFS needs and requirements aligned with market capabilities and standards.

4. Has the UPU already identified a data collection partner and specified the target geographies? Is there an opportunity for the bidder to collaboratively design the study approach?

UPU will welcome bidder recommendations. No particular data collection partner has been identified at this point.

5. As the project is designed to guide and collaborate with the selected implementing organizations, would the customer assessments be primarily conducted by the partners themselves, with us providing advisory support and methodological guidance as needed?

The customer assessment is expected to be carried out by the bidder in close collaboration with the enabling partners and local postal network entities.

6. Are there defined deliverables or KPIs per country, or will these be developed collaboratively?

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

7. Can you share previous reports or documentation related to similar initiatives, if available?

Internal country/project objectives will be shared collaboratively with the successful bidder. UPU has published a number of public research reports posted on the UPU website that could be consulted for reference.

8. Will the bidder select for Phase I be given preference for the subsequent GPDIFP program- Phase II and Phase III?

Yes, this is the proposed direction and it is linked to results and performance of the selected bidder in Phase I.

9. Will UPU support travel and stay (boarding/lodging) for required trips to Bern and Latin America?

It is expected that the bidder will arrange their own mission related travel on both administration and expenses. Using the UPU travel supplier could be reviewed for discussed and consideration which will need to be at the expense of the bidder as per the RFT terms.

10. Will the UPU consider reimbursing specific third-party costs (e.g., local translators, technology platform subscriptions, survey incentives), beyond the project ceiling of USD 110,000?

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

11. To better understand the project, would it be possible for UPU to share the concept note, or alternatively, a summary of the “Global Postal Digital Inclusive Finance Program” outlining its duration, objectives, expected results, intended impact, and the number of countries envisaged for pilot implementation?

Please refer to the tender document following sections.

2.3 scope

2.3 Scope of the call for tenders

2.4 Background

2.5 Objectives

4.1 Description of the services

12. Please specify the six countries included in the pilot programs. Additionally, please confirm if there are any other countries, apart from these six, that are to be covered in Phase 1

Travel missions are expected to take place to 5 or 6 UPU member countries for a minimum duration of 3 days travel in each country. The final selection of the target markets for travel missions will be determined at a later stage. However, it is expected that the target travel markets will be located in at least 2 different regions and potentially in 3 regions covering either of Latin America, Africa and Asia as examples. The RFT travel missions will be for 6 countries for 6 pilots as per the RFT.

13. Please provide a high-level overview of the number of projects undertaken, along with the nature of these projects—such as system implementation, capacity building, advocacy, and other related initiatives

There will be potentially 6 projects for the 6 pilot markets. Projects may include but not limited to DFS needs assessments, solution design, technical partner integrations, capacity building, financial literacy and regulatory assessments all in collaboration with the postal network participating members.

14. Please share the initial plan outlining the number of workstreams, projects, and countries that will be running concurrently

There will be potentially 6 projects for the 6 pilot markets that may be running concurrently. Projects may include but not limited to governance, DFS needs assessments, solution design, technical partner integrations, capacity building, financial literacy and regulatory assessments all in collaboration with the postal network participating members.

15. Please specify if there are any limitations on the size of the proposal document that should be considered when submitting the response via email

Up to the RFT responder

16. "We understand that the proposed budget for this engagement is USD 110,000 for one year. Could you please confirm if this is the final allocation, or if there is any flexibility based on the proposed scope, countries in scope, effort, and resource mix? Your confirmation will help us align our proposal accordingly"

The budget ceiling is as confirmed in the RFT

17. Is there a specific duration for which the vendor is required to be present at the UPU headquarters in Berne?

UPU will be open to receive bidder recommendations on this point and based on individual circumstances. However, minimum physical presence is expected for the kick off, quarterly progress and for final project deployment plans. UPU is open to discussion on this point.

18. Please specify any particular skill sets and experience level requirements for the team to be deployed. Additionally, please indicate the expected team size to be provided by the vendor

UPU will welcome proposals from the vendor on team composition as they deem best to fit the scope of work. With regards to the qualifications please see the attached as per the RFT.

Essential qualifications

- Proven experience in project management, stakeholder management, and risk mitigation for multi-workstream projects;
- Proven digital payments experience and knowledge of digital financial solutions;
- Prior engagements working across public and private sector;
- Prior experience with the DOs' networks or postal network partners particularly on postal financial services products, solutions, and postal customer segment engagements;
- Experience in project reporting, research and impact capturing and qualifications;
- Strong influencing and communication skills and being a team player;
- Proficiency in English is required.

Desired qualifications

- Prior engagements on digital financial services assessments, research or project deployments;
- Prior engagements on financial inclusion initiatives and projects;
- Previous experience with international organizations, United Nations system organizations, non-governmental organizations or other multilateral organizations is preferred;
- Prior experiences in conducting training and participating in capacity building initiatives;
- Knowledge of French is considered as asset. "

19. Are there any existing tools, templates, or platforms that the UPU expects the vendor to utilize for project management and reporting purposes?

Yes, particular guidelines, project tools and templates will be provided for the RFT winner.

20. To effectively scope the effort and define the best project management approach, could you confirm whether the UPU will provide existing project management templates or frameworks or is the vendor expected to propose and define these (e.g. based on PMI standards)?

Yes, particular guidelines, project tools and templates will be provided for the RFT winner. UPUU will also welcome proposals from the RFT respondent on the project management tools they propose to employ.

21. For the six pilot countries in Phase I, could the UPU share if these countries will have similar digital financial services needs and levels of development? Or should the vendor prepare for a wide range of different starting points and challenges in these countries?

UPU will welcome the input from RFT respondents. The countries in focus by UPU are not expected to have the same DFS needs and level of development as they may be in different regions and geographies.

22. Could the UPU clarify whether the vendor's role is limited to project management and coordination, or if it also includes responsibility for technical decisions?

Additionally, what is the envisioned structure and key roles of the UPU's internal GPDIFP project team?

UPU: The vendor's role will focus on the project execution and management which will come along with responsibilities for technical recommendations and collaboration with the team to reach viable project decisions. The successful RFT respondent will work close with the project team composed of UPU and VISA representatives. Team work will be critical for the success of the program and its associated projects.