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Universal Postal Union

Request for Proposal

Project management services

Direct Marketing Platform

Classification: Confidential



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1 Introduction

The Universal Postal Union (UPU) was founded in 1874 in Berne, Switzerland, with the main goal 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. This encompasses the commitment towards free circulation of postal items over a single postal territory composed of interconnected networks, adoption of fair common standards and use of technology, cooperation and interaction among stakeholders, promotion of effective technical cooperation, and satisfaction of customers' changing needs. The UPU is thus expected to play a major role in the constant revitalization of postal services.

Furthermore, the UPU facilitates the development of worldwide postal services by providing an information and communication technology environment which allows designated operators (DOs)¹ 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 RFP terms and conditions

Unless otherwise stated in this request for proposal (RFP), the term "Bidder" shall refer to any person, company or legal entity submitting a proposal in response to this RFP. The term "Vendor" shall refer to a successful Bidder, as the case may be.

2.1 Confidentiality

Bidders shall treat in strict confidence all information contained in this RFP and its attached documents which is not already publicly known or generally accessible, particularly any documentation marked as confidential and distributed by the UPU to Bidders as additional confidential RFP documentation.

Bidders shall prevent 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 tendering process. These provisions shall not affect the UPU's and the Bidder's legal obligations to disclose information.

Bidders shall not use such information for any purpose other than the purposes associated with this RFP. This RFP and all attached documents may only be distributed or made available to persons directly involved in the tendering process on behalf of Bidders. In case external agents or subcontractors are involved in the preparation of the tender documents, they have to be named and indicated in the participation notification (see section 2.13).

Bidders assume full responsibility for compliance of their agents, employees and subcontractors, as well as any third parties involved on their behalf in this tendering 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 the Bidder can prove that no fault is attributable to it. This penalty shall amount to no more than 50,000 CHF per infringement. Payment of any such penalty shall not release Bidders from their obligation to observe confidentiality.

Bidders willing to submit proposals in response to this RFP shall contact the persons specified below in this document and request receipt of additional RFP documentation from the UPU, as the case may be.

Without prejudice to the confidentiality provisions set out above, Bidders hereby agree that the receipt of such additional RFP documentation 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.

¹ In accordance with article 1.7 of the Constitution of the UPU, 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.

2.2 *Legal status of the Vendor*

The Vendor shall be regarded in law as having the legal status of independent contractor. The Vendor and its consultants, employees and subcontractors shall in no way be regarded as employees of the UPU. Such consultants, employees and subcontractors of the Vendor shall not be entitled to any employment benefits of the UPU.

The Vendor shall be solely responsible for due payment of all compensation owed to such consultants, employees and subcontractors, including payment of any employment taxes, benefits, compensation and insurance. The Vendor represents and warrants that it shall 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 by its employees, consultants and subcontractors, as well as for any act or omission by such employees, consultants and subcontractors.

2.3 *Scope of the RFP*

This RFP concerns the procurement of a project manager in connection with the Direct Marketing Platform (DIMAP) Phase 2 – Operational and business plan for the UPU Direct Marketing Advisory Board. For more on DIMAP, see Annex 1.

Deliverables and outputs

The project manager will deliver the following:

- A finalized and detailed DIMAP project plan;
- A finalized workflow and IT environment;
- Marketing materials (brochure, leaflet, etc.);
- A participation level sufficient to start Phase 3;
- One workshop, including the relevant workshop documentation, for DIMAP participants;
- A final report package for the DMAB meeting in October 2019.

Tasks

The project manager will perform the following tasks:

- Secure commitments from eligible designated operators through marketing activities; contacts and dedicated meetings (virtual or onsite);
- Identify other sources of funding to ensure the pre-financing of the DIMAP project;
- Analyse local markets and estimate the market potential for cross-border direct marketing services;
- Organize a kick-off workshop with all committed participants in order to:
 - review the market analysis for each participating designated operator
 - review the needs for DIMAP IT
 - define the workflow for collaboration
 - define the operational measures to be taken
 - confirm additional sponsors, if needed

The project aims to develop a technical and operational solution to facilitate customized offers and services for cross-border direct mail.

Project background

The main purpose of DIMAP is to act as an online marketplace where requests and offers for cross-border direct marketing campaigns can converge and cross-border transactions can be carried out between the platform's participants. The objective is to stimulate new demands for direct marketing on a global scale, from

physical business communications to omnichannel solutions. Thus creating opportunities for the inbound (client side) and outbound postal operators (delivery of the direct marketing products and campaigns), and open up cross-border business offerings for postal clients with targeted, personal, fast, cost-effective and omnichannel marketing campaigns.

The project is divided into three phases. At the end of each phase, a decision is made. Phase 1 consisted of a study, the final version of which was approved by the DMAB Assembly in April. Phase 2 is now under way and consists of hiring a project manager. Phase 3, the technical component, will begin following the completion of phase 2.

2.4 Objectives

The objective of this RFP is to select a project manager for the implementation of Phase 2 of the project: secure participation and financing, finalization of the operational and business plan, and establishing the workflow of the IT environment.

2.5 Expected benefits

- New product offering by the UPU Direct Marketing Advisory Board through creation of a UPU direct marketing platform;
- Stimulate the cross-border direct marketing offer;
- Offer new revenue streams to Posts.

2.6 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, employees and subcontractors.

2.7 Collusive bidding, anti-competitive conduct or any other similar conduct

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

- The preparation or submission of offers;
- the clarification of offers;
- the conduct and content of negotiations, including final contract negotiations.

For the purposes of this RFP, collusive bidding, anti-competitive conduct or any other similar conduct may include disclosure to, or exchange or clarification with, any other Bidder of information (in any form), regardless of whether such information is confidential to the UPU or to any other Bidder, in order to alter the results of the RFP 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 offer submitted by a Bidder that, in the UPU's opinion, has engaged in any collusive bidding, anti-competitive conduct or other similar conduct with any other Bidder in relation to the preparation or submission of offers, whether in respect of this RFP or other procurement processes conducted by the UPU.

2.8 Intellectual property

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

2.9 Privileges and immunities

Nothing in or relating to this RFP, 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 which 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 Specialised Agencies (outside Switzerland), as well as 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, Bidders 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 document in any form belonging to or held by the UPU on behalf of UPU member countries and their DOs), are inviolable and shall be immune from search, requisition, confiscation, expropriation and any other form of interference, whether by executive, administrative, judicial or legislative action. The Vendor shall immediately contact the UPU in case of any attempt to violate or any violation of the UPU's privileges and immunities and take any reasonable measures to prevent such a violation.

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 DOs).

2.10 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, 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 other countries; therefore, any prices shall be indicated "net", without VAT or similar taxes.

2.11 Language

Tender documents shall, in their entirety, be formulated by Bidders in English or French.

2.12 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 RFP.

2.13 Participation notification

Upon receipt of this RFP, the Bidder shall send a confirmation of participation to all contact persons listed in section 2.14, in line with the deadline indicated in section 2.15 below.

2.14 Contact persons

Mr Olivier BOUSSARD
 Coordinator
 Resource Mobilization and Stakeholder Engagement
 Universal Postal Union
 International Bureau
 Weltpoststrasse 4
 3015 BERNE
 SWITZERLAND

E-mail: olivier.BOUSSARD@upu.int

Ms Abby BOSSART
 Direct Marketing
 Programme Assistant
 Universal Postal Union
 International Bureau
 Weltpoststrasse 4
 3015 BERNE
 SWITZERLAND

E-mail: abby.BOSSART@upu.int

2.15 Further inquiries and questions

Questions regarding the content of this RFP or any requests for clarification from Bidders shall be sent in written form to the contact persons listed in section 2.14. Answers to questions submitted by Bidders or additional information relevant to this RFP shall be forwarded by the UPU to all Bidders by 26 July 2019 at the latest.

2.16 Delivery of offers and deadline

Offers (including all of the Bidder's tender documents) shall be presented as **four printed originals** in a sealed envelope and delivered **exclusively to the following address:**

Universal Postal Union
 International Bureau
 Attention: Secretary of the Tenders and Procurements Committee
 Re: Project management services - Direct Marketing Advisory Board
 Weltpoststrasse 4
 3015 BERNE
 SWITZERLAND

Offers shall reach the UPU at the above address **no later than 23 August 2019, at 16:00h Central European Time (CET)**. Offers received after this date shall not be considered by the UPU. Moreover, offers sent by electronic mail or any means other than the sealed printed format specified above shall not be accepted by the UPU. The preparation and submission of tender documents by Bidders shall be free of charge for the UPU.

2.17 Evaluation procedure

The evaluation procedure serves to determine as objectively as possible the best solution from the UPU's perspective, based on the received tender documents. The described structure of the tender documents, i.e. the response format (see sections 3 and 4), is therefore mandatory for all Bidders.

Bidders not fulfilling the mandatory criteria as indicated in sections 3 and 4 below shall not be taken into further consideration by the UPU.

The non-exhaustive list of selection criteria is as follows:

- Bidders background in the field of direct marketing and reference for similar projects
- Experience in project management
- Knowledge of UN languages especially a strong background in English
- Price
- Availability in accordance with the project timeline;
- Reference list with description of similar projects, if any.

The deliberations of the UPU Tenders and Procurements Committee (TPC) are not public. The TPC shall submit a report to the Director General of the UPU International Bureau, together with its final recommendation for his assessment and confirmation. Bidders shall be informed immediately after the relevant decision is taken by the UPU.

The UPU General Terms and Conditions for the Provision of Goods and Services shall be accepted by the Bidder (attached as reference). The final terms of any resulting contract shall be defined by the UPU and accepted by the Vendor. **Contract negotiations shall only start after final selection of the Vendor.**

2.18 Modification, suspension or cancellation of the RFP

The UPU reserves the right, **at its sole discretion and at any time** before conclusion of the RFP (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 RFP.

2.19 Tentative schedule

Publication of RFP announcement	26 July 2019
Pre-offer inquiries and questions	23 August 2019
Receipt of offers by the UPU (deadline)	30 August 2019 at 16:00h Central European Time (CET)
Estimated date for selection of the Consultant	1 October 2019

3 Offer structure – Response format

All information provided shall be delivered by the Bidder in full conformity with the terms and conditions set out in section 2. Moreover, the requirements stipulated in this RFP shall be covered in their entirety, according to the structure defined below and following the sequence and numbering provided in this section. The UPU shall evaluate the responses according to this same structure.

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

- a Covered;
- b Covered, with limitations (explaining the limitations);
- c Not covered.

When 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

The Bidder shall submit a cover letter including:

- A statement that the Bidder has read, understands and agrees to all provisions of this RFP;
- Its name, telephone number, address and e-mail address, and the name of its representatives.

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 RFP, and shall also include a confirmation of such authorization by the Bidder, as well as a statement that the Bidder's proposed tender documents are valid for a minimum period of 90 days.

3.2 Executive summary

The Bidder shall provide an executive summary highlighting the most important aspects of its offer.

3.3 Bidder information

The Bidder shall provide the following information:

- Full legal status of the Bidder;

3.4 Subcontractor information

The Bidder shall provide a list of all of its directly involved subcontractors (if any), and specify their exact degree of involvement with the Bidder.

3.5 *Functional structure*

The Bidder shall provide answers, including a full description (if possible adding some illustrations), to all the requirements set out in section 4 (General requirements). The UPU shall evaluate such answers according to the same structure.

3.6 *Pricing structure*

The Bidder shall provide detailed quotation and costs.

3.7 *Remuneration*

The Vendor shall be remunerated in accordance with the UPU Financial Rules and Regulations, as per the financial offer submitted to the UPU and accepted by the latter; under no circumstances shall such remuneration exceed 40,000 CHF. All price information shall be exclusively in CHF.

3.8 *UPU General Terms and Conditions*

Include a statement of acceptance of the UPU General Terms and Conditions for the Provision of Goods and Services, attached hereto for reference.

3.9 *Delivery and payment schedule*

Proposed delivery and payment schedule (to be agreed with the UPU).

Other elements:

No Bidder shall be allowed to withdraw and resubmit its proposal, for any reason whatsoever, after proposals have been opened by the UPU Tenders and Procurements Committee.

N.B. – Bidders shall not include VAT in any price information (see section 2.10). All price information shall be exclusively in CHF.

UPU Direct Marketing Platform – DIMAP

I. What is the Direct Marketing Platform (DIMAP)?

With the rapid growth of international e-commerce, an increasing number of postal direct marketing (DM) customers want to follow their own cross-border clients or reach new ones with omni-channel (physical and electronic) DM campaigns.

To respond to this need, the UPU has launched a new project: the Direct Marketing Platform (DIMAP).

DIMAP is a ground-breaking initiative aimed at providing postal stakeholders with a global DM marketplace. It offers one-stop-shopping for global DM services, from address list management to physical and electronic production and delivery, including return/response services.

UPU designated operators (DOs) are best placed to provide such an offer because of their long history of cross-border collaboration and their position as key stakeholders in the DM value chain.

To ensure efficient collaboration, the UPU will act as a hub for cross-border DM requests made by one DO and fulfilled by the DOs in the target countries.

The workflow for cross-border DM services will be defined as part of the project, and a DIMAP IT system will need to be created to facilitate this international workflow. In addition, the experience gained in the DIMAP project will help DOs that do not yet or do not fully offer DM services create, improve or extend this service.

This document summarizes the business, operational, financial and technical plans for the establishment of DIMAP based on the report of the consultant hired by the International Bureau.

II. DIMAP: a global broker for cross-border direct marketing services with a unique selling proposition

According to the results of a short online survey, the DM service market is mainly a national activity. Any cross-border DM services offered are most often limited to neighbouring countries or stay within the same language group.

The offering is divided between providers who focus on production, delivery and sometimes return/response management (DOs are part of this group) and those who offer address list sales, campaign consulting/preparation and e-mail marketing. The latter are often DO partners in the national DM service. Most offer multi-channel (physical/electronic) marketing. Cross-border DM services are mainly marketed using a cost-reduction argument – achieved by using the hybrid mail service of direct entry. “Internationality” or the large number of international partners is not (yet) a marketing argument.

In this market context, and with a growing demand for cross-border e-commerce, DIMAP will act as a business facilitator and as an incubator for cross-border DM development. Moreover, the strength of the one-stop-shopping approach lies in the fact that the cross-border DM service will have only one business partner (DO) for each country. The national DO knows best the other partners needed for fulfilment in its country – a knowledge that would be very difficult to obtain abroad when dealing with a multitude of countries and their markets.

III. Postal offering

DOs have a strong national presence in the traditional physical DM service. Cross-border DM services exist, but account for an average volume of approximately 0.5% to 1.0% of the national DM volume. For services such as electronic DM delivery, consumer mailing list management, and customer DM consulting, most DOs refer to their national partners. Those DOs that have a full service offering already in place will find it easier to extend the service internationally. It is these DOs who will most likely be among the initial DIMAP project participants.

IV. Business plan

DIMAP initial participants

In the beginning, DIMAP will require the participation of a minimum of four to eight DOs who expect that their customers will be interested in a cross-border DM service.

To identify the potential initial participants, the following criteria were used:

- Answered the 2017 Direct Marketing Advisory Board (DMAB) survey;
- Expressed interest in a cross-border project;
- Already have the capability and experience to deliver domestically;
- Already have international DM volumes with other potential DIMAP participants.

The analysis of the 2017 DMAB survey identified 10 to 13 potential initial DIMAP participating DOs (PDOs). They form a group with strong existing e-commerce ties between them: Europe/CIS, West Africa and Southeast Asia.

DIMAP volume and revenue

The additional volumes for cross-border DM services have to be estimated conservatively. It is estimated that national volume can be increased by another 0.5% within five years. It is assumed that this will include only physical DM services and does not take into account electronic DM services.

The national DM volume of the potential countries identified totals approximately 19 billion items (according to UPU statistics). With the 0.5% estimated increase, these countries could see an increase in cross-border DM volume of approximately 95 million advertising items.

Given that not all of the DOs above will be among the DIMAP PDOs, it is estimated that DIMAP will generate an increase of 20 million advertising items within five years.

The estimated revenue for DIMAP is calculated using a full revenue (requesting and fulfilling DOs) per item of 0.76 USD (address 0.15, print and envelope 0.345, delivery 0.265).

DIMAP revenue forecast over five years in USD

	Year 1	Year 2	Year 3	Year 4	Year 5	Total years 1 to 5
Estimated total volume for DOs	0	3,000,000	7,000,000	13,000,000	20,000,000	43,000,000
Estimated total revenue for DOs	0	2,280,000	5,320,000	9,880,000	15,200,000	32,680,000
Requesting DOs	0	300,000	700,000	1,300,000	2,000,000	4,300,000
Fulfilling DOs	0	1,980,000	4,620,000	8,580,000	13,200,000	28,380,000

Cost of DIMAP

The cost of DIMAP is estimated as follows (in USD):

One-time DIMAP project cost:	256,000	(project management and IT development)
Minus DMAB budget sponsoring:	<u>40,000</u>	
Remaining one-time cost:	216,000	
Operational cost starting year 2:	45,000	(administration and IT hosting)

DIMAP financing: an innovative approach and a sustainable source of revenue for DOs and UPU DM activities

Most of the DOs who responded to the 2017 DMAB survey stated that the cost of DIMAP should be covered by using a percentage of the revenue coming from the volume generated by DIMAP.

Therefore, in order to be able to cover the one-time project cost, it is proposed that an innovative loan-based financing mechanism be set up through which a small number of PDOs would make a loan to the platform. The loan would be reimbursed as shown in the business case table below. This is one of the resource mobilization options to be examined, along with the one-time sponsoring by DOs.

DIMAP business case

- UPU DIMAP fee in % of DO revenue: 2.00%
- DO revenue per item: 0.76 USD

	Year 1	Year 2	Year 3	Year 4	Year 5	Total years 1 to 5
Estimated total revenue for DOs	0	2,280,000	5,320,000	9,880,000	15,200,000	32,680,000
Income for the UPU (2%)	0	45,600	106,400	197,600	304,000	653,600
Project cost	256,000	45,000	45,000	45,000	45,000	436,000
DMAB sponsoring	40,000					
Cumulative result	-216,000	-215,400	-154,000	-1,400	257,600	257,600
Loan and re-payment (example: 3 pre-financing PDOs)						
Pre-financer 1	-75,000		20,467	50,867	3,667	0
Pre-financer 2	-75,000		20,467	50,867	3,667	0
Pre-financer 3	-75,000		20,467	50,867	3,667	0
Repayment	0	0	61,400	152,600	11,000	225,000
Loan remaining	-225,000*	-225,000	-163,600	-11,000	0	0

* Includes a 9,000 USD margin for unforeseen costs.

N.B. – All figures are in USD.

A sustainable source of revenue for DM activities

DIMAP will need to use 2% of the estimated five-year revenue in order to ensure sustainability.

V. Participants and roles

The DIMAP project will start with the selected PDOs. Membership in the DMAB would be a pre-requisite to join DIMAP.

Non-DO members of the DMAB could take part in DIMAP at a later stage as:

- DO fulfilment partners (easier handover of electronic DM materials from the requesting DO);
- delegated service providers (by DO, for parts of or for the entire cross-border DM service);
- cross-border service providers (if the DO does not want to offer the cross-border DM service).

Once the DIMAP project is completed, the process will constitute normal operations in the PDOs. This means that cross-border DM services will be offered to all DO customers and prospects in the same manner as domestic services. PDOs will regularly provide feedback on the DIMAP IT system to the UPU and request enhancements where necessary.

The UPU will administer DIMAP and organize any necessary updates to the IT system.

In addition, the UPU will provide templates for cross-border DM services (general examples from the DIMAP project) and standard legal/contractual texts to facilitate contracting between the PDOs. All templates will be stored in a DIMAP repository.

A UPU DIMAP project manager will manage DIMAP set-up, participation, financing and piloting until the roll-out to full production at the end of the pilot phase.

Each PDO will designate a DIMAP focal point responsible for (market) analysis, implementation of the DIMAP offering in their DO, and the selection of pilot customers. They should come from the national DM units and know their market and customers well.

The DIMAP workflow will be established with the PDOs. The workflow will be followed by the PDOs until the successful delivery of cross-border DM services with dedicated PDO pilot customers. After that, normal operations will begin and the project will close.

VI. Data privacy: no data exchange through DIMAP

As expressed in the UPU DMAB survey, the main concern in relation to cross-border DM services is the legal requirements for data privacy protection, whether in the country of the requesting operator or the country of destination of the DM campaign.

With the DIMAP acting only as a broker hub for DM services, there is no need to exchange consumer address lists or other personal data between DIMAP participants. The delivering DO will share only the aggregated characteristics of the requested target group with the requesting DO. No data will be exchanged through the DIMAP platform.

Data privacy is therefore not a concern in using DIMAP.

VII. DIMAP: a tool for global direct marketing development

Once the DIMAP pilot has been successfully set up, there will be examples, templates and use cases from the initial PDOs. These can be used as a basis for training and capacity building to extend the service to other DOs that do not yet or do not fully offer this service.

Extending the cross-border DM service to all countries is key for DIMAP, as this will reinforce DIMAP's unique selling proposition.

VIII. Technology and process: how does DIMAP work?

The DIMAP IT system will contain the characteristics of the DIMAP participants' DM service, the templates and the handover repositories, and will support the following workflow:

Definition of needs



- ✓ Countries, target groups, geography, etc.

Browse DIMAP database of partner DOs



Offer request



- ✓ Create and design campaign
- ✓ Upload DM materials for handover
- ✓ Submit request to selected DOs

Agreement



- ✓ Negotiate fulfilment with partner DOs
- ✓ Settle contract (based on standard UPU templates)

Fulfilment

- ✓ Mailing lists remain with fulfilling DO/partner (data protection)
- ✓ Download material from DIMAP, produce and deliver mailing (physical and/or electronic)
- ✓ Send invoice to requesting DO

DIMAP could be hosted under the .POST top-level domain, either on the UPU cloud (if the IT system is developed by the UPU Postal Technology Centre (PTC)) or a PDO's cloud (if an existing system is used). PDOs will have an account to access the platform and to generate users. Security (DNSSEC) is guaranteed by the UPU (.POST) and access is provided through secure connections. If the system runs on the UPU cloud, the UPU will guarantee the remaining security issues.

IX. DIMAP project

The DIMAP project has three phases – motivation, preparation and pilot production – with a decision point after each phase. This report marks the completion of phase 1.

Phase 2 will involve the hiring of a specific project manager to establish the detailed planning, identify and contact the initial PDOs, establish the final business plan, secure financing, and design and develop the specific technical requirements and processes.

Pilots and tests will be conducted under phase 3, after which full production will start.

The technical part will only start in phase 3, after a successful phase 2. The project timeline is expected to cover a period of 21 months.

DIMAP has a unique value proposition

- DIMAP responds to a market trend of global e-commerce that is creating the need for a global DM service offering.
- DIMAP is an opportunity to create a unique postal cross-border DM service that could be unrivalled on a global scale owing to the UPU's excellent worldwide network of partners.
- The existing domestic services of DOs ensure the capacity and ability to extend those services internationally.
- The DIMAP project can start small and with little financial risk, forming the basis for a future fully global postal DM service offering.
- External stakeholders and private-sector members of the DMAB could eventually join DIMAP.

DIMAP fills a market gap

- With the pilot PDOs, establish and market a postal cross-border one-stop-shop offering.
- Expand to include as many DOs as possible to provide a truly global offering.

DIMAP is a tool to further develop electronic DM and list management

- Continue the path from physical to electronic – do it yourself or use national partners.
- Combine physical and electronic services.
- Work with well-established partners for electronic DM campaigns.
- Increase capabilities in the areas of addressing and address list management.

DIMAP is an incubator for DM development

- Create UPU standards and templates based on the experiences of DOs.
- Create a UPU standard legal text database to facilitate negotiations and contracting between DIMAP participants.
- Use the documentation developed to train DOs that do not yet or do not fully offer DM services.
- Use the experiences of DIMAP participants to create DM and/or consulting services for DOs that do not have the required knowledge or capacity.

DIMAP income can be used for various purposes

- Fund subsequent DM development projects for developing and least developed countries and extend DIMAP participation.
- Enhance the DIMAP IT system.

DIMAP can use existing UPU services

- Prepare invoices/payments (UPU*Clearing, IFS).
- Engage in capacity building – integrate activities into the Development and Cooperation Directorate's regional development plans.
- Engage in IT development (PTC).