Virtual Session

Hiring of Consultancy Firm for Digital Economy Sector Assessment Study
Date: 9th April 2025   **Time:** 12:30 PM

A virtual meeting was convened to discuss the proposed consultancy assignment under the Digital Economy Enhancement Project (DEEP). The session began with a presentation that introduced the DEEP initiative and the Expression of Interest (EOI), outlining its objective to support digital transformation in Pakistan. The consultancy aims to assess the current status of the digital economy in the country to establish benchmarks. These baselines will help monitor progress in the coming years as Pakistan expands its digital infrastructure and services. The study is intended to provide measurable indicators to evaluate the country's transformation and guide future planning. After this the floor was opened for questions from interested firms.

Mr. Nur from Visa Middle East asked how the outcomes of the study would connect to broader initiatives such as citizen and business super apps, and whether the assessment would include consumer digital behavior such as fashion and online shopping.
Response: It was clarified that while the study may not directly feed into the portals, it contributes to the wider ecosystem by setting a digital baseline. The scope includes fintech, e-commerce, and digital habits across consumer sectors.

Mr. Jaffer Askari (McKinsey & Company) inquired about submission requirements, specifically whether a prescribed format is required and if the financial turnover must be quoted in rupees.
Response: It was confirmed that there is no mandatory format under the CQS method; bidders may choose the most suitable format for their submissions. Financial amounts must be stated in Pakistani rupees. For international bidders, financials in other currencies will be internally converted for evaluation.

Mr. Usman Nasir (Independent Consultants Ltd.) asked whether the ministry had predetermined end goals or if it expects the consultant to define those goals and provide a roadmap and also requested a two-week extension in the submission deadline.
Response: It was explained that while there is an overall direction, the ministry expects the consultant to propose both the end goals and the strategy to achieve them. It was also made clear that there is currently no plan for an extension, and the deadline will remain firm if a sufficient number of responses are received in time.

Ms. Nasha Tengra from PWC asked if she could submit a list of scope-related questions after the meeting, The list of questions along with MoITT response is as follows:

S#	EOI Reference	Extracts from the EOI	Clarifications Required	Response
1	Section 3, Scope of Work, (i) Sector Overview, Page 5	Benchmark Pakistan's IT & Telecom sector	How many and which markets do you expect to see coverage of?	We would like the consultant to suggest from amongst the leading markets.

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		against leading markets		
2	Section 3, Scope of Work, (ii) Market Analysis, Page 5	Analyze the market size, growth trends, and major players within the digital economy. Identify key segments and their performance. Provide insights into consumer behavior and market dynamics	Please confirm if this requirement is only in relation to the 'IT and telecommunication sector' or applies to other sectors of the digital economy (e-commerce, fintech) – since sub-bullets in this section (ii) appear to only relate to the IT and telecom sector	It will cover IT and Telecom including E-commerce, Fintech, Digital Platforms and Digital Infrastructure.
3	Section 3, Scope of Work, (ii) Market Analysis, Page 5	Compare these aspects with the strategies and outcomes observed in leading digital economies.	Clarifications requested on what the expectations from the consultant are in relation to 'comparing strategies and outcomes. Is the expectation that National IT strategies of leading digital economies be considered? Please note that company strategies are confidential information and remain undisclosed.	It doesn't refer to company strategy. It refers to the National level strategies and outcomes which are accessible.
4			Please clarify what is being referred to by "leading digital economies". These could be the likes of the US and China, which are too far ahead of us; or the likes of Malaysia and India, which are	We would like the consultant to suggest from amongst the leading digital economies. It could be both an example of an advanced digital economy and one that is comparable.

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			more akin to Pakistan.	
5	Section 3, Scope of Work, (ii) Market Analysis, Page 5	Collect and integrate technical data from public sources and government agencies	Please clarify if the project management office at MoITT will assist in getting, in a timely manner, whatever data is required. If data provision takes longer than expected, will the consultant be given additional time?	It will be the consultant's responsibility to gather data, however the DEEP team will facilitate in case of any challenges within the public sector.
6	Section 3, Scope of Work, (iii) Technological Landscape, Page 5	Evaluate the adoption level of emerging technologies such as AI, blockchain, and IoT within the sector	The adoption level of technologies varies hugely among the countries. Could we limit ourselves to some criteria while selecting the countries?	The adoption level of the sector refers to Pakistan only.
7	Section 3, Scope of Work, (v) Connectivity and Infrastructure, Page 6	Identify the underserved and unserved areas with respect to internet connectivity, telecom coverage.	Accurate identification of underserved and unserved areas requires detailed study of every telecom operator's footprint. Such information is not generally shared by telcos. However, this information may be available with USF Pakistan. Would MoITT assist the consultant in timely provision of required information from USF?	It will be the consultant's responsibility to gather data, however the DEEP team will facilitate in case of any challenges within the public sector.
8	Section 3, Scope of Work, (v) Connectivity and	Assess the extent and quality of fiber optic network coverage	Such information is generally not shared by fiber optic operators. Would MoITT assist	It will be the consultant's responsibility to gather data, however the DEEP team will

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	Infrastructure, Page 6		the consultant in timely provision of required information from fiber optic operators?	facilitate in case of any challenges within the public sector.
9	Section 3, Scope of Work, (vi) Economic Impact, Page 7	Analyze the impact of global and regional trade agreements, such as the WTO, SAARC, and CPEC, on Pakistan's digital economy.	The impact of global and regional trade agreements on Pakistan's digital economy can be multifaceted, affecting various aspects such as market access, regulatory standards, investment flows, and technological collaboration. What is the extent of analysis that is expected?	This may cover what will be the impact of such agreements on Digital Economy including, but not limited to, market access, regulatory standards, FDI, and technological collaboration.
10	Section 3, Scope of Work, (vii) Regulatory Environment, Page 7	Review the regulatory framework governing the IT and Telecom sector, including policies, laws, and regulations.	There appears to be an overlap with "review of the current telecom licensing regime" under Section 3 (v) Connectivity and Infrastructure. If not, please clarify how is this different?	Connectivity and infrastructure point is related to the Current Telecom Licensing Regime whereas the other point is related to the policies, laws and regulations of IT and Telecom Sector.
11	Section 3, Scope of Work, (viii) Digital Transformation in Key Sectors, Page 7	Examine how digital technologies are transforming key sectors	Please clarify if this is only required within the Pakistan context or globally too.	This is related to Pakistan however, best practices adopted by other countries can be benchmarked.
12	Section 3, Scope of Work, (x) Restructuring Plan Development, Page 7	Develop a roadmap for implementing the assessment recommendations, including timelines, resource allocation, and stakeholder communication strategies.	Please confirm if the restructuring plan (mentioned under scope of work) and implementation roadmap (mentioned under	Both can be considered the same but in deliverables, it has to be submitted in the form of a report.

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			deliverables) are the same? If not, please clarify what the restructuring plan is for?	
13	Section 4, Deliverables, Page 8	Inception Report: Summarizing the initial assessment of the digital economy sector, including a SWOT analysis, proposed methodology, and a detailed work plan for the assessment.	Inception reports are generally delivered upon project commencement, covering project methodology and the detailed workplan. However, the REOI also requires an 'initial assessment of the digital economy sector including a SWOT analysis'. Please clarify at which stage/ timeline is the inception report expected. If upon project commencement then why is an initial assessment and SWOT analysis required at this stage when a detailed process is to follow on current state assessments which will result in an Interim Assessment Report.	Inception report requires an initial assessment and SWOT which may evolve as study progresses, however the inception report would require a preliminary inclusion of both. The timelines will be decided at the negotiation stage.
14	Section 7, Duration of the Assignment, Page 9	The consultancy is expected to be completed within [06] Months, with the possibility of extension based on mutual agreement.	We believe that the duration of the assignment is expected to be at least 9 - 12 months considering: - Extent of scope,	We would like the assignment to be completed within the published time frame.

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			particularly cutting across policy reviews for IT and telecom sectors, benchmarking with leading digital economies - Extensive engagements with multiple stakeholder groups throughout all stages of the project	
15	Page 2	Expressions of interest must be delivered (in person, or by mail, or by e-mail) not later than 1500 Hours on April 17, 2025	We have reviewed the scope of work together with the required expertise mentioned in the EOI and are collaborating with subject matter experts in Pakistan and within the global PwC network to ensure we offer the best of experiences and solutions against EOI requirements. Putting together a comprehensive proposition entailing value delivery at each step requires reasonable time, and an extension in the submission date is kindly requested more so considering the Eid holidays and time it takes to collate	As of this instance there is no plan to extend the submission deadline. We would appreciate if proposals are submitted within the published deadline.

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			global credentials, resourcing information from relevant offices, requirement to obtain necessary territorial and regional approvals (considering the nature and size of this project). In view of the above, it is requested to please extend the EOI submission timeline by at least ten (10) working days.	
16	Section 4, Deliverables, Page 8	-	There are nine (9) deliverables. What are the expected timelines for these deliverables? (a slide during the presentation session mentioned the timelines but the same are not included in the REOI)	The timelines for deliverables will be negotiated at the contract stage, however the assignment would need to be completed within the stipulated deadline.
17	Section 4, Deliverables	-	What are the parameters for acceptance of deliverables?	It has to be acceptable to the Program Director and the Project Steering Committee.
18	Section 3, Scope of Work, (v) Connectivity and Infrastructure, Page 6	Develop National Goal for Telecom Industry Expansion in Pakistan over the next 10 years, outlining a phased approach to achieve this objective…	Our understanding is that the objectives of the engagement are to identify gaps and provide actionable recommendations, and not to develop 10 year goals/ strategies. In view of the same, clarification is requested on what the expectations	In this regard National Goal is also required along with identification of gaps and actionable recommendations.

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			are in relation to 'develop national goal for telecom industry expansion over next 10 years'	
19	Section 3, Scope of Work, (vi) Economic Impact, Page 6	Analyze Pakistan's participation in cross-border digital trade, focusing on e-commerce exports and data flow regulations. Benchmark Pakistan's performance against global best practices and recommend strategies to enhance its competitiveness in the global digital economy.	Our understanding is that the objectives of the engagement are to identify gaps and provide actionable recommendations, and not to develop strategies. In view of the same, clarification is requested on what the expectations are in relation to 'recommending strategies to enhance its competitiveness in the global digital economy'	In this regard strategy is also required along with identification of gaps and actionable recommendations.
20	Shortlisting criteria, page 2	Presentation by Firm (Mandatory) Presentation of all proposed aspects of the project outlined in Evaluation Criteria as mentioned Sections (I – IV) above.	Please confirm that the presentation is required separately and not at the time of EOI submission	Presentation will be required separately and the DEEP team will call for presentations after initial evaluation of the proposal.

The session concluded with a request for participants to enable their cameras for a group photo, followed by formal closure of the meeting.