

REQUEST FOR PROPOSAL

SUBMISSION DEADLINE

12:00 PM CST, June 24, 2019

RFP TITLE: SUPPLY CHAIN OPPORTUNITY AND GAP ANALYSIS ASIC SUBCONTENENT, SEA, NIGERIA, THE AMERICAS REGION

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INTRODUCTION:

Through a global network of international offices and strong support in the USA, the United States Soybean Export Council (USSEC) helps build a preference for U.S. soybeans and soybean products, advocate for the use of soy in feed, aquaculture and human consumption, and promotes the benefits of soy use through education and connect industry leaders through a robust membership program. As a result of the Chinese tariffs that went into effect in 2018, the market pressured U.S. soy products to find markets elsewhere, by growing existing markets while also establishing new markets. To this end, USSEC has received support from USDA's Agricultural Trade Promotion Program (ATP) whose mandate is to help U.S. agricultural exporters develop new markets.

Markets in the Asia Sub-Continent, the Americas, in Sub Saharan Africa, and South East Asia offer tremendous future growth opportunities for U.S. soy. Within these regions, there are several existing markets that have great potential for expansion. Additionally, there are several markets to be developed, particularly in the Africa region. USSEC, in partnership with ATP, will undertake a series of complimentary initiatives that will serve to increase demand for U.S. soy in all four regions. As a first step, there is a need to conduct region-specific supply chain opportunity and gap analyses to identify issues within the value chain that restrict trade of U.S. soy and soy products.

PURPOSE OF RFP:

The purpose of this RFP is to seek proposals to conduct a series of supply chain opportunity and gap analysis to identify gaps, needs, decision drivers and opportunities for growth in overall soy utilization in in the Asia Subcontinent (Bangladesh, India, Pakistan, Nepal, and Sri Lanka), the Americas (Mexico and Colombia, in Sub Sahara=n Africa (Nigeria), and in South East Asia (Thailand, Vietnam and Indonesia).

It is USSEC's preference to engage one company to perform all gap analyses for the regional markets described above. Therefore, special consideration will be given to companies who can demonstrate an ability to conduct across all regions

BACKGROUND & PURPOSE OF PROJECT:

Asia Subcontinent (ASC)

U.S. exports of soy and soy products to the ASC grew more than 47% in 2017/18 compared to the prior year. The majority of the growth stems from an increase of imports of whole beans by Pakistan, who has capitalized on the availability of whole beans that would have typically been sold to China. Historically, Bangladesh had been the leading regional importer, but sales there are actually down by 7.4% and accounted for just shy of 35% of the regional volume compared to 59% for Pakistan.

Based on current market share and trade flows, the ASC region offers additional potential export sales of 1 MMT in 2019 and reaching upwards of 93 MMT by 2030.¹ The primary short-term opportunities are in Bangladesh and Pakistan, which offer additional potential sales of 400,000 MT and 300,000 MT, respectively, while long-term prospects lie primarily in India. India alone accounts for 72 MMT of opportunity, more than four times the next largest long-term market opportunity (Indonesia). The following provides additional conditions in key markets in the Asia Subcontinent.

Bangladesh is growing rapidly in terms of GDP (7.10% in 2017) as well as in population (166 million), positioning it to be a significant soy market for the U.S. in the near future. Bangladesh is the fifth largest fresh water fish producer in the world and poultry meat production stands at 890,000 MT per year. Despite its large and growing middle class, Bangladesh consumes only 14 kg/person per year of soy and soy related products compared to an average of 55 kg/person per year in expansion markets. Bangladesh's population is projected to reach 186 million people by 2030. This means that bridging the gap in soy and soy product consumption between Bangladesh and the average of expansion markets would create an additional 8 MMT of demand for soy and soy products. Some of this gap could be bridged through further increases in protein consumption as Bangladesh consumes 1 gram/person per day of protein from poultry and eggs compared to an average of 16 grams/person per day in expansion markets. Government policies are trade friendly and the U.S. currently commands 85 percent market share.

Pakistan is a growing middle eastern economy (\$283 billion; growing at 5.7% per year). Pakistan consumes 11 kg/person per year of soy and soy related products compared to an average of 55 kg/person per year in expansion markets. Pakistan has a population of 193 million people, making it the sixth most populous nation in the world, and it is projected to reach 244 million people by 2030. This means that bridging the gap in soy and soy product consumption between Pakistan and the average of expansion markets would create an additional 10.7 MMT of demand for soy and soy products. Some of this gap could be bridged through further increases in protein consumption as Pakistan consumes 3 grams/person per day of protein from poultry and eggs compared to an average of 16 grams/person per day in expansion markets. This is particularly true given Pakistan's growing poultry sector, which is increasingly using modern production methods and relies heavily on soybean meal. There have been no imports of Indian soybean meal since 2015 and Pakistan has begun to turn to the U.S. for its soybean needs.

India's economy is the third largest in the world in terms of purchasing power parity and averaged 6.3 percent GDP growth in 2017. With just over 1.3 billion people, India is one of the world's most populous countries with a large protein gap to bridge. India consumes 8 kg/person per year of soy and soy related products compared to an average of 55 kg/person per year in expansion markets. That said, animal agriculture is starting to grow rapidly in India. Farmed shrimp are growing at 20 percent per year, while poultry and farmed freshwater fish are growing at 10 percent and 8 percent, respectively. Bridging the

¹ Market opportunity estimate prepared by CONTEXT by calculating the difference between the total versus U.S. share of current imports of soy, soy products, and the soy product equivalents in imported pork and poultry products. This difference is the opportunity that U.S. soy would have if it expanded its current market share.

gap in soy and soy product consumption between India and the average of expansion markets would create an additional 72 MMT of demand for soy and soy products by 2030. The primary obstacle to overcome in India has to do with market access, such as sanitary and phytosanitary issues. If those areas can be addressed, then much of the soy consumption gap could be bridged through further increases in protein consumption as India consumes 1.5 grams/person per day of protein from poultry and eggs compared to an average of 16 grams/person per day in expansion markets. This is especially true considering the Government of India's keen interest in addressing protein malnutrition problems in the country.

The Americas

U.S. exports of soy products to the Americas region grew 9% to \$4.7 billion, from the same 11-month window the prior year. By volume, exports of all soy products were up 14% to almost 11.8 MMT. Mexico and Colombia accounted for most of the region's increase. Soybeans and soybean meal exports to Mexico were up by 8% and 39%, respectively, and up by 19% and 13% in Columbia. Other notable increases in exports include 130,000 MT more soybeans sold to Peru (+141%) and 121,000 MT more soybean meal sold to Ecuador. Soybean oil exports, by contrast, have been relatively flat. It is also worth noting that over the same period, soybean meal exports to Venezuela dropped by more than a third and exports to Cuba dropped to zero.

The Americas region comprises a dozen expansion markets, along with a few basic and mature markets. The Expansion markets of Mexico and Colombia, along with Peru, Venezuela, Costa Rica, and Ecuador represent the bulk of both the short term and longer term (2030) export growth. The following provides additional conditions in key markets in the Americas.

Mexico consumes 66 kg/person per year of soy and soy related products compared to an average of 77 kg/person per year in Mature markets. Mexico has a population of 131 million people and it is projected to reach 148 million people by 2030. Bridging the gap in soy and soy product consumption between Mexico and the average of mature markets would create an additional 1.6 million metric tons of demand for soy and soy products. Some of this gap could be bridged through further increases in protein consumption as Mexico consumes 18 grams/person per day of pork, poultry and eggs compared to an average of 22 grams/person per day in Mature markets. Additional room to grow can be bridged through efforts to increase the use of soybeans, soybean meal and soybean oil in the food chain.

Colombia is a growing economy with a rising per-capita GDP. Colombia consumes 46 kg/person per year of soy and soy related products compared to an average of 77kg/person per year in mature markets. Colombia has a population of 49 million people and it is projected to reach 53 million by the year 2030 based on the latest UN projections. This means that bridging the gap in soy and soy product consumption between Colombia and the average of mature markets would create an additional 1.6 million metric tons of demand for soy and soy products. Some of this gap could be bridged through further increases in protein consumption as Columbia consumes 13 grams/person per day of protein from pork, poultry and eggs compared to an average of 22 grams/person per day in Mature markets. Additional room to grow can be bridged through efforts to increase the use of soybeans, soybean meal and soybean oil in the food chain.

Venezuela, Peru, Costa Rica, and Ecuador combined represent opportunities for incremental sales potential of 625,000 MT. Venezuela was once a top-five buyer of U.S. soybean meal, but the market's political chaos has severely reduced U.S. exports. Nevertheless, over the next year, U.S. soy can play an important role in alleviating the country's increasing food scarcity issues.

Sub-Saharan Africa (SSA)

There are several Sub-Sahara African countries that are targeted by World Initiative for Soy in Human Health (WISHH) programs including Cote d'Ivoire, Ghana, Kenya, Nigeria, and Uganda. WISHH has been the key organization working in these markets in which there is a long-term strategy to build a strong pipeline of demand for U.S. soy and soy-related products.

USSEC will undertake programming in Nigeria where growth opportunities are expected to be 27 MMT by 2030. With a population of 186 million people expected to reach 264 million by 2030, encouraging soybean and soybean-related product consumption in Nigeria could turn the country into one of U.S. soy's top three growth markets by 2030.

Nigeria is a basic market that represents a substantial growth opportunity for U.S. soy given its large population and very low consumption of soy and soy-related products compared to Expansion markets. There are significant opportunities to drive growth in protein consumption, improvements in the overall efficiency and functionality of the food chain and increases in the utilization of soy within the supply chain. In 2016, Nigerian consumption of soy and soy-related products was 1 kg/person per year compared to an average of 55 kg/person per year in expansion markets. Fully bridging this gap would create more than 14 MMT in additional annual demand for soy and soy-related products by 2030.

South East Asia (SEA)

In the first 11 months of the 2017/18 crop year exports to SEA rose more than 25% compared to the same period last year to reach just shy of 9 MMT, setting an export record. Most of these increased exports found their way to Vietnam and Thailand. The Southeast Asia region comprises several Expansion markets (Vietnam, Indonesia, Thailand, Philippines, Malaysia), the Basic market Myanmar, and a few Mature markets as well (Australia, Singapore, New Zealand). The Expansion markets of Thailand and Vietnam offer the key the short-term (2019) incremental opportunities, In the long run, the bulk of the increased export potential lies in Indonesia, the Philippines, and Myanmar.

In total, the SEA region offers additional potential export sales of 3.8 MMT in 2019 and 30.4 MMT in incremental volume potential by 2030. The primary short-term opportunities are Thailand and Vietnam, which offer additional potential sales of 2 MMT and 1.1 MMT, respectively. Long term opportunity resides in Indonesia which has the potential for reaching nearly 18 MMT tons more in demand annually by 2030. The following provides additional information for three main target markets.

Thailand consumes 66 kg/person per year of soy and soy related products compared to an average of 77 kg/person per year in Mature markets. Thailand has a population of 69 million people and it is projected to reach 70 million people by 2030. This means that bridging the gap in soy and soy product consumption between Thailand and the average of mature markets would create an additional 0.8 million metric tons of demand for soy and soy products. Some of this gap could be bridged through

further increases in protein consumption as Thailand consumes 12 grams/person per day of pork, poultry and eggs compared to an average of 22 grams/person per day in Mature markets. Additional growth opportunities include efforts to increase the utilization of soybeans, soybean meal and soybean oil in the food chain in Thailand.

Vietnam is the region's second-largest purchaser of U.S. soy products, after the Philippines. Vietnam has a population of 96 million people and it is projected to reach 106 million people by 2030. This means that bridging the gap in soy and soy product consumption between Vietnam and the average of mature markets would create an additional 0.9 million metric ton of demand for soy and soy products.

Indonesia consumes 17 kg/person per year of soy and soy related products compared to an average of 77 kg/person per year in mature markets. Indonesia has a population of 261 million people and it is projected to reach 296 million people by 2030. Bridging the gap in soy and soy product consumption between Indonesia and the average of mature markets would create an additional 17.9 million metric tons of demand for soy and soy products. Some of this gap could be bridged through further increases in protein consumption as Indonesia consumes 5 grams/person per day of pork, poultry and eggs compared to an average of 22 grams/person per day in Mature markets. Additional growth opportunities include efforts to increase the utilization of soybeans, soybean meal and soybean oil in the food chain in Indonesia.

Approach

USSEC has designed several initiatives which are designed to realize both short term- and long-term growth opportunities in the three regions described above. Through a combination of short-term efforts USSEC will extend the reach of planned activities, leveraging planning and preparation that has already taken place. These efforts, which vary across regions, include:

- Feed Demand (Livestock/Poultry)
- Global Aquaculture
- Use of Soy for Human Protein
- *Human Oil Consumption*
- Animal Protein Consumption Campaigns
- Biodiesel/Bioheat
- Value Chain Sustainability
- Gap Analysis and Food Chain Enablement:
- Increase Market Access

Diversify and Expand Global Demand for Meal from U.S. Soybeans

This project will focus on the identification of supply chain and market access challenges in the Asia Sub-Continent, the Americas, Sub-Saharan Africa and South East Asia that restrict the free flow of U.S. soy trade through a supply chain opportunity and gap analysis.

TARGET AUDIENCE

This project will target value chain actors and related infrastructure on which the value chain depends.

SCOPE (SERVICES) OF WORK:

Goal

To identify market access issues restrict the free flow of U.S. soy trade in the Asia Subcontinent, the Americas, Sub Saharan Africa, and the South East Asia regions.

Objectives

This project will analyze soy, animal agriculture, and aquaculture value chains to identify gaps, needs, decision drivers and opportunities for growth with a focus on seven countries within four regions as follows:

- Asia Sub-Continent: Bangladesh, India, Pakistan and Nepal
- The Americas: Columbia and Mexico
- Sub Saharan Africa: Nigeria
- South East Asia: Thailand, Vietnam, Indonesia

The information gathered from the supply chain opportunity and gap analyses conducted will guide where support is needed to support future demand needs for U.S. soy.

Activities:

This is a single year project which will carry out the following activities, in each of the regions described above

- Conduct situation assessments in the region through a combination of secondary and primary market research including in-depth interviews with market participants on the ground and others interested in entering the market;
- Evaluate similarities and differences across markets to inform activities and areas of focus in broader food chain enablement efforts;
- Conduct consistent and comprehensive supply chain assessments in the region for each dimension;
- Evaluate similarities and differences across target markets to inform future efforts; and,
- Prepare a final report outlining an actionable series of supply chain needs or gaps that can be addressed through broader food chain enablement efforts.

The proposed analysis will be conducted in two parts:

In-depth Long-Term Opportunity Assessment: The project will conduct expert-driven secondary research and analysis to quantify the long-term supply and demand potential of each target market. This will include an evaluation of the long-term demand prospects of the markets, their ability to meet those demands through domestic production and the resulting long-term demand prospects for imported soybeans and soy-related products. This analysis will be done assuming an efficient supply chain without significant constraints. This analysis will serve as our baseline for understanding the overall magnitude of the opportunity in each market and set the baseline for the steps that follow.

Supply Chain Gap Analysis: This analysis will build from the Long-Term Opportunity Assessment to identify supply chain constraints that represent bottlenecks for the opportunity identified. This analysis will also

incorporate an assessment of the long-term customer needs across the supply chain including key decision drivers and opportunities. This analysis will be done at a sub-regional level within the target countries across each of the eight dimensions outlined. The work will be accomplished through a combination of primary and secondary research including secondary research and in-depth interviews with value chain participants on-the-ground in the target market and others who might be interested in investing or entering the market. The specific constraints will be validated and confirmed in the early stages of this work but are expected to include a combination of elements including:

- Infrastructure and capacity gaps;
- Food safety standards and enforcement mechanisms;
- Consumer and stakeholder awareness of the importance of food safety and the need for food safety standards; and
- Mechanisms and business models for the operational management and cooperation across supply chain participants | segments (i.e., how to coordinate between value chain participants to ensure an unbroken cold chain).

The supply chain gap analysis will include eight key dimensions.

1. **Import | Export Infrastructure:** Ports, storage, testing equipment and other needs to realize short-term opportunities and needs for loading, unloading and storing U.S. soy.
2. **Intermodal Transportation:** Efficiency and cost-effectiveness of transportation mechanisms to get soy and soy-related products into the target countries at an appropriate scale to serve the market need
3. **Storage and Distribution of Soy | Meal | Oil:** Efficiency and scale of storage capacity and distribution infrastructure to move product from the port to the end-user.
4. **Soybean and Feed Processing:** Capacity and efficiency for processing whole soybeans, soybean meal and soybean oil
5. **Feed Practices:** Current practices and short-term opportunities for U.S. soy demand growth in animal feeding operations
6. **Meat | Food Processing:** Capacity and needs for meat and food processing including those related to equipment and food safety
7. **Storage and Distribution of Meat and Soy-Food Products:** Infrastructure to store and distribute meat and soy-food products including consumer retail options
8. **Food Safety Standards:** Food safety standards including Sanitation Performance Standards (SPS) including standards for imported food, food processing, food storage and distribution.
9. **Consumer perceptions of soy and products produced from soy.**

Performance Measures

This project will contribute to the following performance measures:

Performance Measure
% of target who would say they strongly agree (five on a five-point scale) that USSEC’s efforts are helping to mitigate market access issues in the region.
Market accessibility rated by key target audiences on a scale of 1 to 5 (5 being most accessible)

ADDITIONAL CONSIDERATION (if applicable)

DELIVERABLES:

The following deliverables are envisioned for each of the three regions: Exact deliverables dates will be mutually established by the contractor and USSEC shortly after the award is announced.

Completion Date	Description of Deliverables
	In-depth Long-Term Opportunity Assessment
	Supply Chain Gap Analysis
	Final Report

PROJECT TIMELINE:

Our expectation is for the ASC Supply Chain and Gap Analysis project to last approximately from **July 2019-December 2019**. We are asking that the Project Proposal include details about what the proposed timeline and scope would look like.

RFP TIMELINE:

- **RFP Distribution:** June 6, 2019
- **Last Day to Submit Questions:** June 13, 2019 by 5:00PM Central Time
- **Project Proposals Due:** June 24, 2019 by 5:00PM Central Time
- **Selections Made by:** July 1, 2019
- **Prospective Contractors Notified by:** July 5, 2019

INSTRUCTIONS:

Proposals must contain at a minimum the specific criteria listed below:

1. Please email the proposal to RFP@USSEC.ORG by **5:00PM Central Time on June 24, 2019**
2. A description of Prospective Contractor’s capabilities, resources and experience. Emphasis should be placed on experience related to this RFP.
3. A thorough proposal outlining Prospective Contractors planned work, deliverables and timeline to complete the work.

3. Resumes for each of the Prospective Contractor's personnel assigned to work directly on the implementation of the contract.
4. Provide a minimum of two names and contact information for other similarly sized clients for reference purposes.
5. Detailed Budget
 - All bids for services must provide a breakout of how the fee was derived including but not limited to a breakdown of hourly rate and the amount of effort they anticipate to do the work.
6. Proposals should be no longer than **10 pages** (8 ½" x 11").
7. Preference may be given to the bidder with the capacity to work in all of the regions/countries called out in this RFP.

NOTES:

- Prospective Contractors are hereby notified that proposals will be duplicated for internal review only. Every effort will be made to maintain confidentiality of all information presented. The appropriate representatives from staff and legal counsel will review proposals. Proposals will not be returned.
- USSEC reserves the right to retain all proposals submitted. Submission of a proposal indicates acceptance by the submitter of the conditions contained in the request for proposal, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between USSEC and the contractor selected.
- Confidentiality - Without USSEC's prior written consent, Prospective Contractors and its officers, employees, agents, representatives, affiliates, and subcontractors shall not disclose to any third party any documents, materials or information that the Prospective Contractors learns from or is provided in relation to the RFP request.
- During the evaluation process, USSEC reserves the right to request additional information or clarifications from proposers, or to allow corrections of errors and omissions.
- USSEC reserves the right to reject any proposal that is in any way inconsistent or irregular. USSEC also reserves the right to waive proposal defects or deficiencies, to request additional information, and/or to negotiate with the Prospective Contractor regarding the proposal.
- Prospective Contractor agrees that Fees are in lieu of any and all other benefits, including, but not limited to, repayment of any and all taxes related to contractor service fees, health and life insurance, administrative costs and vacation.
- Prospective Contractor agrees that any income taxes, value added taxes or any other form of direct or indirect taxes on compensation paid under the contract shall be paid by Contractor and not by USSEC or Funding Sources.

- Prior to any payment to a Contractor, a contractor must provide a W-9, W-8, or W-8BEN upon agreement signature
- Non-Competition. Contractor shall not act as agent or representative for any product or service directly or indirectly competitive with U.S. soybeans or soybean products for the length of the contract.
- USSEC and Prospective Contractor agrees to comply with the provisions of Equal Employment Opportunity (EEO). USSEC provides EEO to all employees and applicants for employment without regard to race, color, religion, gender, sexual orientation, gender identity or expression, national origin, age, disability, genetic information, marital status, amnesty, or status as a covered veteran in accordance with applicable federal, state and local laws.

SUPPLEMENTAL INFORMATION AND BACKGROUND

BUILDING A PREFERENCE FOR U.S. SOY

USSEC's strategy can be found here: <http://ussec.org/about-ussec/vision-mission/>

USB's Long Range Strategic Plan can be found here: <http://unitedsoybean.org/about-usb/strategic-planning/>

We are a dynamic partnership of key stakeholders representing soybean producers, commodity shippers, merchandisers, allied agribusiness and agricultural organizations.

Through a global network of international offices and strong support in the U.S., we help build a preference for U.S. soybeans and soybean products, advocate for the use of soy in feed, aquaculture and human consumption, promote the benefits of soy use through education and connect industry leaders through a robust membership program.

Our 15-member board of directors is comprised of four members from the American Soybean Association (ASA), four members from the United Soybean Board (USB), and seven members representing trade, allied industry, and state organizations.

New board members are seated annually. We are receiving funding from a variety of sources including soy producer checkoff dollars invested by the USB and various state soybean councils; cooperating industry; and the American Soybean Association's investment of cost-share funding provided by the United States Department of Agriculture's (USDA) Foreign Agriculture Service.

The United Soybean Board, created by the 1990 Farm Bill to manage and direct the National Soybean Checkoff, is dedicated to marketing and research for the soybean industry. USB is comprised of 73 volunteer soybean farmers representing the interests of fellow growers nationwide. Each board member is nominated by Qualified State Soybean Boards (QSSBs) and appointed by the U.S. Secretary of Agriculture.

Because of the limitations on administrative and salary costs established in the Act, USB outsources the majority of its program management responsibilities to USB's three primary contractors:

- SmithBucklin-St. Louis for domestic marketing, new uses, production research and Board initiative activities;
- Osborn & Barr Communications for communications/public relations activities and;
- United States Soybean Export Council (USSEC) for international marketing and global opportunities activities.

As one of these three primary contractors USSEC may also undertake initiative activities on behalf of USB. USB considers primary contractor staff (approximately 60 people) as core USB staff. These three primary contractors use a number of subcontractors and, together, these entities carry out approximately 450 projects each year for USB. USB also manages approximately 10 subcontractors.

Non-Discrimination Statement

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotope, American Sign Language, etc.) should contact the responsible Agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint](#) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov.

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