REQUEST FOR PROPOSAL

Conducting benchmarking analysis on standardization processes and deliverables.

We are ISO, the International Organization for Standardization, the world’s largest developer of voluntary International Standards.

New technologies, changing customer expectations and the need to develop solutions to address urgent global challenges are putting pressure on ISO to adapt and accelerate its processes.

Timeliness is key – ISO must get standards deliverables to market quickly, and without compromising the quality of its standards, the rigour of its consensus-based processes or the engagement of the experts from across stakeholder groups that develop standards.

The existing set of ISO deliverables has remained unchanged since 1998, presenting a significant opportunity for optimizing their effectiveness in the current global landscape. In this regard, ISO is actively seeking a Consultant to conduct a benchmarking analysis on standardization processes and deliverables.

The objective is to gain a deeper understanding of the diverse range of deliverables and the development processes proposed by various Standards Developing Organizations. This benchmarking analysis will complement a comprehensive assessment, laying the groundwork for enhancing ISO’s portfolio of deliverables.

Unless otherwise public, any information obtained through sanctioned discussions with ISO personnel pursuant to the preparation of your response must be treated as confidential and proprietary information of ISO. No contact should be made by your company to any of our suppliers.

Please provide comprehensive information to the attached questions by 2023-08-07 11:59 AM CEST after which time further proposals will not be accepted without prior written agreement.

Should you have any questions, do not hesitate to contact me on the e-mail address provided in this document.

Yours sincerely,

Charles-Pierre Bazin de Caix
Programme Manager, Technical Policy
REQUEST FOR PROPOSAL

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1 Purpose of the request for proposal

The primary objective of the Request for Proposals (RFP) is to choose a qualified Consultant who will be responsible for carrying out the benchmarking analysis (referred to as the “Assignment”) within the Optimized Deliverables project. The details of this analysis are outlined comprehensively below.

2 Benchmarking analysis scope and service requirements

2.1 Benchmarking analysis scope

The benchmarking analysis encompasses an extensive scope, which includes the various types of deliverables, published both by ISO Members and selected external Standards Developing Organizations (SDOs), their associated processes, and their performance in meeting market needs.

2.2 Benchmarking analysis service requirements

Under the supervision of the ISO Project Manager, the appointed Consultant will be responsible for defining the benchmarking methodology, conducting the benchmarking analysis, and presenting a comprehensive report on the findings.

2.3 Benchmarking analysis expected outputs

The expected outputs of the benchmarking analysis include valuable insights and recommendations regarding deliverables, processes, and performance. These insights will be derived from ISO’s members and other Standards Developing Organizations, who are engaged in developing their own deliverables to meet specific market requirements. The analysis will also assess how these deliverables and processes compare to ISO’s own deliverables and processes. These outputs will serve as key inputs for identifying potential optimizations within ISO’s set of deliverables.

By examining the approaches of organizations operating in similar contexts, constraints, and aspirations, we hope to gain valuable perspectives that will contribute to the successful implementation of potential optimizations on ISO’s deliverables and processes. These outside practices will strengthen the in-depth analysis and enrich the ideation and proposal phase.

2.4 Benchmarking analysis specificities

2.4.1 Benchmarking analysis canvas

A predefined set of characteristics has been established to enable the efficient comparison of deliverables and processes among various Standards Developing Organizations, outlining the inherent attributes of each deliverable (refer to Annex A). These characteristics primarily focus on aspects of a deliverable that are influenced by its processes. They can be compared to “ingredients” in a recipe for a deliverable, where a variation in one ingredient can result in a distinct flavour or even an entirely different outcome.

During the Assignment’s implementation, the Consultant may also propose additional characteristics that would be worth comparing in order to achieve the objectives of the Assignment.
It is crucial to recognize the significant role played by the World Trade Organization (WTO) Principles for the Development of International Standards, Guides and Recommendations. These principles provide guidance and establish boundaries within which the deliverables can be utilized and considered relevant to specific market needs. By adhering to these principles, the development processes remain consistent and aligned with international standards practices.

2.4.2 Benchmarking analysis engagements

Conducting interviews and questionnaires will play a crucial role in gathering essential information from ISO Members and external Standards Developing Organizations.

Additionally, conducting desk research and analysing publicly available information will complement these activities, aiding in the gathering of secondary information.

Together, these activities are expected to provide a comprehensive approach to collecting the necessary data for the benchmarking analysis.

The Consultant is kindly requested to provide a clear explanation of the intended benchmarking methodology that will be employed to fulfil this Assignment.

2.4.2.1 ISO Members

ISO comprises 169 Members, and the coordination of outreach activities will be determined in collaboration with the ISO Project Manager. Contact details will be shared as necessary to facilitate effective communication.

In the event that questionnaires are deemed appropriate for gathering relevant information, the ISO Project Manager will provide the necessary tools and resources to support this data collection process.

Interviews with a selected group of ISO Members will be essential to further analyse national initiatives that are relevant to the Optimized Deliverables project. The interviews will offer valuable insights into the perspectives and contributions of the Members towards achieving the objectives of the project, enhancing our understanding of their viewpoints.

2.4.2.2 External Standards Developing Organizations

External Standards Developing Organizations refer to organizations that are not ISO Members.

Before conducting the benchmarking analysis, the ISO Project Manager will compile a list of relevant external Standards Developing Organizations.

The Consultant is required to coordinate with the ISO Project Manager prior to engaging with any of the identified Standards Developing Organizations. The ISO Project Manager will ensure that all necessary conditions are met before proceeding with the engagement.

For the benchmarking analysis, online interviews are expected to be the primary mode of engagement, following preliminary research conducted by the Consultant using publicly available information.

In case there is a suggestion to involve an additional Standards Developing Organization not included in the list provided, the Consultant should discuss it with the ISO Project Manager before taking any action.
## 2.5 Benchmarking phases and timeline

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
<th>Timeframe</th>
<th>Details</th>
</tr>
</thead>
</table>
| 1     | Onboarding                         | Within 1 week after the contract signature| By completing the onboarding activities, the Consultant will establish a solid foundation of knowledge and understanding, setting the stage for a successful execution of the Assignment, this includes for example:  
  • Onboarding meeting with the ISO Project Manager,  
  • Reading input material,  
  • Getting familiar with the canvas, the external Standards Developing Organizations,  
  • Clarifying which applications and support would be needed from ISO etc. |
| 2     | Planning and scheduling            | Within 1 weeks after the contract signature| By validating the methodology and workplan with the ISO Project Manager, the Consultant will ensure that all aspects of the benchmarking analysis are well-defined, achievable, and in line with the project's objectives and constraints. This collaborative process will set the stage for a successful implementation of the analysis.  
  • Reviewing the methodology  
  • Finalizing the workplan, including timelines  
  • Etc. |
| 3     | Conducting the benchmarking analysis| Start within 2 weeks after the contract signature| The Consultant will proceed with conducting the benchmarking analysis and all the agreed-upon activities as outlined in the validated methodology and workplan. This includes gathering data, analysing information, and comparing deliverables and processes across relevant ISO Members and Standards Developing Organizations.  
  The Consultant will maintain an open line of communication with the ISO Project Manager to address any questions, seek clarification, and discuss any issues that arise during the benchmarking analysis. Regular check-ins and progress updates will enable collaborative problem-solving and ensure that the analysis remains on track. |
Within 3 weeks after the start of the benchmarking and at least every 3 weeks during the benchmarking analysis, the Consultant will actively update the ISO Project Manager on the preliminary key findings as they emerge. This will provide the ISO Project Manager with timely insights and allow for early awareness of significant trends or issues identified during the analysis process.

In addition to sharing the findings, the Consultant will also be responsible for identifying any trends or issues that may require adjustments to the benchmarking methodology. By closely monitoring the data and analysis, the Consultant may recognize patterns or discrepancies that may impact the validity or effectiveness of the methodology. Bringing these observations to the attention of the ISO Project Manager will enable a collaborative effort to address and resolve any potential issues promptly.

The Consultant will deliver the final report to ISO, adhering to the agreed scope, methodology, and format. This comprehensive report will encompass all the findings, insights, and recommendations resulting from the benchmarking analysis.

The report will be structured in a logical and organized manner, ensuring that the information is presented clearly and effectively. The Consultant can determine the most effective way to convey the findings, ensuring that the reports are informative, visually appealing, and aligned with the project’s objectives.

The Consultant will also be called to present the findings to a group of selected board Members.

### 2.6 Benchmarking analysis delivery

The Consultant will prepare a comprehensive benchmark report that analyzes the collected data and findings. Exploring trends, patterns, performance indicators and innovations outside of ISO, the insights of benchmark report will serve to assist ISO in optimizing its deliverables and the processes associated with them.

The Consultant will ensure that the final report meets the agreed-upon format, which may include visual representations, charts, and tables to enhance the clarity and accessibility of the information. The report will be designed to effectively communicate the findings to the relevant stakeholders within ISO, facilitating informed decision-making and driving potential changes and optimizations.
By delivering the final report within the agreed scope, methodology, and format, the Consultant will provide ISO with a valuable document that serves as a roadmap for optimizing deliverables and enhancing their responsiveness to market needs.

2.7 Location

The location of the work is Geneva, Switzerland. While the work may be undertaken on a remote basis, the Consultant shall be available for consultations with ISO staff during normal Geneva business hours.

3 Instructions, terms and criteria for proposal

3.1 Preparatory material

In considering the benchmarking analysis the Consultant is invited to review the following in preparation of the bid:

- The benchmarking analysis background, Annex B of this RFP.
- **ISO 2030 strategy** – for ISO's vision, mission goals and priorities in which the Optimized Deliverables project takes place;
- **Good Standardization practices** – for the essentials and key concepts related to standardization;
- **ISO deliverables** – for an overview of the different types of ISO deliverables;
- **ISO/IEC Directives Part 1, Procedures for the technical work, with ISO supplement** – for the core rules driving ISO's deliverables development;
- **WTO – Principles for the development of international standards, Guides and Recommendations** – for a reminder of what guides the development of international standards;
- **WTO – Conference on TBT agreements and 6 principles related to what are relevant international standards** – for essential insights related to the 6 principles influence over the last 20 years on international standardization activities and perspectives for the future;
- **Optimized Deliverables** – an overview of the project in relation with the benchmarking analysis.

3.2 Format of the proposal

All proposals shall be submitted in English and be set out in three main parts:

- Part A: Response to the benchmarking analysis scope and service requirements (see clause 2)
- Part B: Completed Consultant profile (Annex C)
- Part C: Financial Proposal (Annex D)

3.3 Response to the benchmarking analysis scope and service requirements

The response submission shall contain the following in responding to the benchmarking analysis scope and service requirements.

3.3.1.1 Summary description

Summary description of:
- the proposed benchmarking methodology,
- the Consultant’s qualifications, experience and technical skills with special focus on the knowledge and motivation on the subject matter,
- the financial proposal to complete this Assignment.

3.3.1.2 Your proposal to the Assignment

The proposal for the Assignment shall contain the following in relation to the evaluation matrix (see 3.3 below):

- Proposed methodology for the benchmarking analysis contextualized to the benchmarking analysis scope and service requirements;
- Subject matter expertise such as for instance: International Standards and their relation to WTO Technical Barriers to Trade agreement, technical regulation, certification needs or International Standards Bodies, Standards Development Organizations, etc.;
- Skills and competences related to benchmarking analysis;
- Proposed workplan with associated timelines;
- Company profile and personnel;
- Financial proposal including key variables determining the anticipated costs (e.g.: number of workdays per external Standards Developing Organization, etc.)

3.3.1.3 Completed Consultant profile

This part of the proposal submission should include a completed individual Consultant form given in Annex C – Consultant’s profile.

The Consultant shall confirm and indicate their availability to work on this project until the Assignment is completed.

3.3.1.4 Financial proposal

The Consultant must submit a financial proposal for the Assignment. All prices should be expressed in Swiss Francs (CHF). The invoices shall be sent to ISO only after confirmation given in writing of acceptance of the deliverables and payment can be expected within 30 days of the receipt of the correctly detailed invoice.

We are requesting the Consultant to submit a financial proposal based on the estimated working days (see Annex D – Financial proposal). ISO will assume that all provided costs are exhaustive and thus will not allow further costs to be introduced during contract negotiations.

During the execution of the Assignment, the costs could be adapted along the identified variables and only after having the proposed additional costs validated with the ISO Project Manager.

3.4 Evaluation criteria

Partial proposals not meeting the requirements specified in this RFP will not be considered.

In evaluating the complete proposals received, ISO will seek the most appropriate offer based on the following weighted criteria. The evaluation will be based on a scoring system as shown in the table below. Each criterion is scored according the following scale:
Based on these criteria below, the 3 proposals with the highest scoring will be short-listed and the Consultants will be invited to present their proposal during a virtual interview with the ISO Project Manager and members of the evaluation committee.

The evaluation of the virtual interview will be considered as part of the final scoring.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Max. Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Proposal</td>
<td>30</td>
</tr>
<tr>
<td>Relevance of the proposed methodology to meet the objectives of the benchmarking.</td>
<td>15</td>
</tr>
<tr>
<td>Understanding the role of the benchmarking analysis and its overall contribution to the Optimized Deliverables project.</td>
<td>10</td>
</tr>
<tr>
<td>Clarity of the proposal description related to evaluation criteria.</td>
<td>5</td>
</tr>
<tr>
<td>2. Relevant experience with benchmarking and/or expertise related to the subject</td>
<td>30</td>
</tr>
<tr>
<td>Relevance of the experience or expertise with related to the subject.</td>
<td>15</td>
</tr>
<tr>
<td>Relevance of the experience or expertise with benchmarking.</td>
<td>10</td>
</tr>
<tr>
<td>Described skills indicating ability to gather relevant information for the purpose of the benchmarking analysis.</td>
<td>5</td>
</tr>
<tr>
<td>3. Workplan</td>
<td>21</td>
</tr>
<tr>
<td>Relevance of the workplan in relation to the objectives of the benchmarking analysis.</td>
<td>7</td>
</tr>
<tr>
<td>Timeline for the benchmarking analysis.</td>
<td>7</td>
</tr>
<tr>
<td>Resource availability for conducting the benchmarking analysis.</td>
<td>7</td>
</tr>
<tr>
<td>4. Company profile</td>
<td>9</td>
</tr>
<tr>
<td>References.</td>
<td>6</td>
</tr>
<tr>
<td>Company profile.</td>
<td>3</td>
</tr>
<tr>
<td>5. Financial proposal</td>
<td>10</td>
</tr>
<tr>
<td>Clarity on the financial mechanisms and consistency with the benchmarking methodology and workplan plan.</td>
<td>5</td>
</tr>
<tr>
<td>Overall costs of the proposal.</td>
<td>5</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
</tr>
</tbody>
</table>
The evaluation committee as led by the ISO Project Manager will score each complete proposal. The ISO Procurement Manager shall ensure the validation of compliance to the ISO Procurement Policy in this RFP process leading to the selection of the successful Consultant.

3.5 Clarifications, amendments and point of contact

Any query necessary for the preparation of the response must be addressed in writing by e-mail to the ISO Procurement Manager at tenders@iso.org and copying the ISO Project Manager at the contact details below, or as otherwise directly notified by the ISO Procurement Manager.

**ISO Project Manager:** Charles-Pierre BAZIN DE CAIX  
**Title:** Programme Manager, Technical Policy  
**Email:** bazindecaix@iso.org  
**Phone:** +41795657222

The Consultant should direct any questions arising during the preparation of the response to this RFP, or requests for clarification, in writing by e-mail to the ISO Project Manager and copying the ISO Procurement Manager.

We have planned for clarification calls during the week of 2023-07-17. Please contact the ISO Project Manager by 2023-07-14 to arrange timing.

Where appropriate, ISO reserves the right to circulate questions and the answers thereto to all other Consultants or post these publicly at www.iso.org, without disclosing the source of the questions or revealing the substance of a proposal.

3.6 Submission of the proposals

No officer, agent or employee of ISO is authorised to alter orally, any portion of these documents. During the period prior to the submission of information, any clarification or additions will be issued in the form of written addenda distributed by ISO. Information submitted shall be final and may not be altered by subsequent offers, discussions or commitments unless the respondent is requested to do so by the ISO Procurement Manager in written form.

Electronic format of all proposals must be received by **2023-08-07 11:59 AM CEST** by the Procurement Manager at tenders@iso.org, as one file attachment in Portable Document Format (PDF). The PDF file shall be named appropriately and must not exceed 10MB in size. Proposals not received by this time without prior written agreement will be disqualified.

To facilitate handling process, the “subject line” of the email must contain the following: “ISO/SD/2023 (Consultant’s name)”

The content and pricing of the submission must remain valid for 6 months from the date of submission.

3.7 Interviews

The top three Consultants who have the top scoring preliminary criteria, will be required to attend an interview. During the interview, the Consultant will be required to give a short presentation of their
proposal, and to answer any questions or provide clarification to the Procurement Team for the purpose of scoring against the evaluation criteria.

3.8 Pre-award review and validation

The evaluation committee as led by the ISO Project Manager will score each proposal. The ISO Procurement Manager shall ensure the validation of compliance to the ISO Procurement Policy in this RFP process leading to the selection of the successful Consultant.

3.9 Timeline overview

<table>
<thead>
<tr>
<th>Activity</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP published</td>
<td>2023-06-30</td>
</tr>
<tr>
<td>Clarification calls with Consultants (as requested)</td>
<td>Up to 2023-07-20</td>
</tr>
<tr>
<td><strong>Consultants return proposal</strong></td>
<td><strong>2023-08-07 11:59 AM CEST</strong></td>
</tr>
<tr>
<td>Expected evaluation of proposals (including references)</td>
<td>2023-08-18</td>
</tr>
<tr>
<td>Interviews of shortlisted candidates</td>
<td>From 2023-08-21</td>
</tr>
<tr>
<td>Expected selection of proposal</td>
<td>2023-08-31</td>
</tr>
</tbody>
</table>

These dates are a guide to the time frame expected for this project. Significant changes will be communicated accordingly.

3.10 Other general conditions

Other general conditions are provided in Annex E.
Annex A – Canvas overview for the benchmarking of deliverables and their related processes

A more detailed canvas will be provided to the selected Consultant.

<table>
<thead>
<tr>
<th>#</th>
<th>Aspect</th>
<th>Elements of comparison</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Decision making</strong></td>
<td>Consensus mechanisms (as opposed or combined to voting)</td>
</tr>
<tr>
<td>2</td>
<td>Voting mechanisms</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Approval criteria, quorum</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td><strong>Participation</strong></td>
<td>What structure develops the project deliverable</td>
</tr>
<tr>
<td>5</td>
<td>Participation</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Contribution</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td><strong>Content</strong></td>
<td>Requirements*</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td>Possibility for the deliverable compete or conflict with another deliverable</td>
</tr>
<tr>
<td>9</td>
<td><strong>Usage</strong></td>
<td>Possible reference in technical regulation (meeting WTO-TBT principle)**</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>Possible use for conformity assessment</td>
</tr>
<tr>
<td>11</td>
<td><strong>Process durations</strong></td>
<td>Timeframes</td>
</tr>
<tr>
<td>12</td>
<td></td>
<td>Commitment to meeting specific development times</td>
</tr>
<tr>
<td>13</td>
<td><strong>Proposal</strong></td>
<td>Proposer</td>
</tr>
<tr>
<td>14</td>
<td></td>
<td>New proposal approving entity</td>
</tr>
<tr>
<td>15</td>
<td></td>
<td>New proposal approval criteria</td>
</tr>
<tr>
<td>16</td>
<td></td>
<td>New proposal duration</td>
</tr>
<tr>
<td>17</td>
<td><strong>Maintenance &amp; life-time</strong></td>
<td>Maintenance mechanism</td>
</tr>
<tr>
<td>18</td>
<td></td>
<td>Life-time</td>
</tr>
<tr>
<td>19</td>
<td><strong>Drafting &amp; formatting</strong></td>
<td>Drafting rules</td>
</tr>
<tr>
<td>20</td>
<td></td>
<td>Possible formats/structures</td>
</tr>
<tr>
<td>21</td>
<td></td>
<td>Author’s appreciation</td>
</tr>
<tr>
<td>22</td>
<td><strong>Practices</strong></td>
<td>Any noticeable practices related to the implementations of the processes</td>
</tr>
</tbody>
</table>

*See ISO/IEC Directives Part 2, clause 3. requirement expression, in the content of a document 3.1.1, that conveys objectively verifiable criteria to be fulfilled and from which no deviation is permitted if conformance with the document is to be claimed

** World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) https://www.iso.org/foreword-supplementary-information.html
Annex B - Benchmarking analysis background – Optimized Deliverables project.

B.1 Better response to market needs

New technologies, changing customer expectations and the need to develop solutions to address urgent global challenges are putting pressure on ISO to adapt and accelerate its processes. Timeliness is key – ISO must get standards deliverables to market quickly, but without compromising the quality of its standards, the rigour of its consensus-based processes or the engagement of the experts from across stakeholder groups that develop standards.

The average time for developing and publishing an International Standard is approximately 32 months. This duration encompasses various stages, such as technical discussions, expert consultations, consensus building activities, approval processes, including public inquiries, and the approval phase involving all ISO members under the one country-one vote rule.

We recently witnessed real instances of prompt response to market needs that upholds quality standards, even when addressing urgent responses to emergency situations:

- **ISO PAS 45005** Occupational health and safety management — General guidelines for safe working during the COVID-19 pandemic: 12 weeks to publication;
- **ISO IWA 42** Net zero guidelines: 20 weeks to publication;
- **ISO 80601-2-90** Medical electrical equipment — Part 2-90: Particular requirements for basic safety and essential performance of respiratory high-flow therapy equipment: 12 months to publication.

Despite these tangible examples of swift responsiveness to market demands, it is important to note that the current set of deliverables has remained unchanged since 1998. This presents a significant opportunity to capitalize on the experience accumulated over the years.

B.2 Optimized Deliverables project

In the given context, the Optimized Deliverables (OD) project endeavours to optimize the set of deliverables (IS, TS, PAS, TR, IWA) and their associated processes, while ensuring their optimal utilization to meet market needs. The project is divided into four key components:

**Component 1 – In-depth analysis**

This component involves conducting a comprehensive diagnostic of the existing set of deliverables. The objective is to establish a contextual framework that enables evidence-based proposals for optimization, aligning with our performance objectives.

The benchmarking analysis related to this RFP will occur within this specific project component.
Component 2 – Ideation and proposal phase
During this phase, potential proposals for optimizations are identified and prioritized based on the findings of the in-depth analysis. Recommendations are then developed for the approval of the Technical Management Board (TMB).

Component 3 – Testing and implementation phase
This phase involves executing the proposed changes while ensuring a smooth transition within the community. Selected innovations may be piloted and further feedback sought from a limited number of committees before implementing the changes across the full range of committees.

Component 4 – Change management phase
In this phase, the focus shifts to facilitating the successful and sustainable implementation of the project's outcomes. Special attention is given to supporting the targeted community in adopting new practices and habits that align with the optimized deliverables.

By following these four components, the OD project aims to enhance the effectiveness and applicability of the deliverables, streamlining processes and promoting market responsiveness. It fully contributes to reaching the ISO 2030 Strategy Goal 2 "Meeting global needs" and Priority 2.1 "Deliver ISO standards when the market needs them".

For more information see the project’s page: Optimized Deliverables.

B.3 Benchmarking: A key contribution to the in-depth analysis phase
The primary goal of the in-depth analysis phase is to equip the project with essential insights. These insights will serve as the foundation for developing optimization proposals in the deliverables, their processes, and their utilization.

The in-depth analysis phase is divided into three components including the benchmarking analysis:

Data analysis - This involves conducting a comprehensive diagnosis of all the essential parameters related to our deliverables. Through thorough data analysis, we will gain a deep understanding of the current state and performance of the deliverables.

Benchmarking analysis - Here, we will gather valuable insights on deliverable innovations from ISO Members as well as external Standards Developing Organizations. By comparing our...
practices with those of others, we can identify areas for improvement outside ISO and gather ideas for enhancing our set of deliverables.

**Gap analysis** - This component focuses on identifying the gaps between our desired performance and the actual results in meeting market needs. By identifying these gaps, we will develop strategies to bridge them and ensure that our deliverables align more effectively with market requirements.

These three components work together to provide a comprehensive assessment of our deliverables, helping us to identify our strengths as well as areas that need improvement.

The benchmarking analysis plays a crucial role in the in-depth analysis phase. By examining and comparing our practices with those of other organizations, the benchmarking analysis will provide valuable insights and perspectives and will support us to “think outside the box”.

**B.4 In-depth analysis – Overall expected outcomes**

The in-depth analysis aims to produce a comprehensive report that will form the basis for the ideation and proposal phase (Component 2) of the Optimized Deliverables project. This report will encompass the following key elements:

- A detailed assessment of ISO deliverables and their associated processes: This assessment goes beyond conventional perceptions or assumptions, providing a comprehensive understanding of the current state and performance of the deliverables.
- An overview of existing relevant initiatives outside ISO: The report will provide an overview of initiatives related to deliverables and processes from ISO Members and external Standards Developing Organizations. This broader perspective allows us to gather insights and learn from best practices.
- A summary of performance gaps: Based on a comprehensive analysis of real-world use cases, the report will highlight the gaps between the desired performance and the actual outcomes. This identification of performance gaps serves as a foundation for proposing improvements and optimizations.

Overall, the in-depth analysis report will serve as a valuable resource, providing a thorough assessment of deliverables, insights from relevant initiatives, and a clear understanding of performance gaps. It will guide the subsequent phases of the Optimized Deliverables project, facilitating the development of impactful proposals for enhancing ISO’s deliverables and processes.
B.5 ISO

ISO (International Organization for Standardization) is the world’s largest developer of voluntary International Standards. International Standards give state of the art specifications for products, services and good practice, helping to make industry more efficient and effective. Developed through global consensus, they help to break down barriers to international trade.

ISO was founded in 1947, and since then have published more than 24 000 International Standards covering almost all aspects of technology and business. From food safety to computers, and agriculture to healthcare, ISO International Standards impact all our lives.

Today ISO is a non-profit membership organization with members from 167 countries and thousands of technical bodies to take care of standard development.

For more detailed information on our organisation, including a description of our key projects and an organisation chart, please visit our website: www.iso.org.

B.6 Governance related to this RFP – the ISO Technical Management Board

The technical work is carried out under the overall management of the Technical Management Board (TMB). The Technical Management Board reports to the ISO Council and its role is defined in the statutes of the organization.

Specifically, it is responsible for tasks such as setting up the various technical committees (TC), appointing TC chairs and monitoring the progress of the technical work. It is also responsible for the Directives, which are essentially the rules for the development of International Standards, and it deals with all matters of strategic planning, coordination, performance and monitoring of technical committee activities.

The Optimized Deliverables project scope is the ISO deliverables and their related processes which are described in the above-mentioned ISO/IEC Directives, in direct relation with the ISO TMB’s responsibilities.

The TMB oversees the project “Optimized Deliverables” which is the framework of this RFP and maintains the ultimate approval authority over the outcomes associated with this RFP.

For more detailed information on the Technical Management Board including the terms of Reference for the TMB, please visit our website: ISO - Governance of technical work
Annex C – Consultant profile form

Please provide comprehensive responses to all questions in this section.

C.1 Consultant’s Profile

C.1.1 History (Not to exceed 1 page)
- Date and place founded
- Short history of your company, general presentation
- Headquarters and other key locations
- Brief description of any corporate policies or initiatives in place addressing corporate social responsibility (ethics, environment, sustainability, anti-corruption, diversity, or gender equality)

C.1.3 Company Ownership (Not to exceed 1 page)
Is your company publicly traded? If privately held, list the name(s) of all significant stakeholder(s)/owner(s). Is your company women-owned, operated, or managed? Please provide key organizational figures, disaggregated by gender and position.

C.1.4 Conflict of interest
Please state that you have no conflict of interest or indicate conflict of interest that can arise due to your relationships or ongoing activities.

C.2 Experience and Resources within Project Area

C.2.1 Major projects (not to exceed two pages per project)
The Consultant shall describe three previous projects similar to the scope of this RFP that the company has delivered for other customers including:
- Explain why those projects are relevant to the scope of this RFP
- Detail major issues or problems that may have occurred and how they were resolved
- Detail when those projects were delivered

C.2.2 Specific skills and Technical Know How
List any specific skills you have in the area relative to the scope of this RFP.

C.2.3 Knowledge of ISO and ISO Members (Not to exceed 1 page)
- Describe any previous experience with ISO and ISO Members. Provide contact person(s) and location
- Are any of the employees in your organization related, either personally or professionally, to a person currently employed by ISO or its members?
- To the best of your knowledge, was any ISO employee or contractor previously employed by your organization?
C.2.4 References (Not to exceed 1 page total)

Provide 3 relevant current or past client references with:

- Project short description
- Company name
- Location
- Contact person, position, and email or phone

Please note that references provided above may be directly contacted by ISO before and during the evaluation phase of this proposal.

ISO reserves the right to contact any persons listed in your past performance document in order to gain a better understanding of the Consultant's past performance in delivering similar services to former clients.

C.2.5 Additional relevant information

Provide any additional information on your company, which you believe is useful for ISO to know in the context of this project.

C.3 Proposal Description & Project Specific Questions

Please describe in a maximum of ten pages your understanding of this project and what you will be delivering (Not to exceed 10 pages).

- In scope items, deliverables: describe the services you intend to provide as part of this project and match with our requirements;
- Out of scope items: describe all items or requirements of this RFP that you will not address;
- ISO involvement, deliverables: describe what you need from ISO in order to perform successfully;
- Project management approach: describe how you will manage this engagement and the project management approach used;
- Implementation plan: describe your implementation plan and timeline for this project;
- Resources, roles and responsibilities;
- Overall lead-times;
- Services Performance Metrics: If applicable, describe some performance metrics that will be used to measure performance of the contract in the future. If this will include a performance scorecard, provide details;
- List electronic systems you will grant ISO access to, if applicable, and on what terms.
Annex D – Financial proposal

The proposed charging mechanism must:

- incentivize the Consultant both to reduce costs and to improve performance;
- be simple to administer and monitor;
- reduce processing costs involved.

All prices should be expressed in Swiss Francs. Recurring expenses should be shown monthly. The Financial Proposal must be submitted using the below template.

<table>
<thead>
<tr>
<th>Item</th>
<th>Rate per Day (CHF)</th>
<th># of Working Days</th>
<th>Total (CHF)</th>
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<tbody>
<tr>
<td>1- Onboarding activities</td>
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<td>Provide details</td>
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<td>Sub-total</td>
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<td>2- Planning and scheduling</td>
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<td>Provide details</td>
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<tr>
<td>Sub-total</td>
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<td>3- Conducting the benchmarking analysis</td>
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<td>Provide details</td>
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<td>Sub-total</td>
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<td>4- Preliminary findings</td>
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<td>5- Reporting</td>
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<td>Sub total</td>
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</tbody>
</table>
The all-inclusive daily rate must include all cost components of the Assignment, including professional fees, insurances (medical, life), communication costs, electronics, taxes, etc.

ISO will assume that all provided costs are exhaustive and thus will not allow further costs to be introduced during contract negotiations, should you be selected.

The payment will be paid in the following instalments:

- Payment 1: 20% upon completion, and approval by ISO, of Phase 1 Onboarding;
- Payment 2: 40% upon completion, and approval by ISO, of 50% of Phase 3 Conducting the benchmarking analysis;
- Payment 3: the remaining 40% upon completion, and approval by ISO, of Phase 5 Reporting.

Invoice will be paid only upon ISO confirmation in writing of acceptance of the invoice and deliverables, and payment can be expected within 30 days of the receipt of the correctly detailed invoice.

**Please confirm your agreement with those terms in your financial proposal.**
Annex E – General conditions

E.1 Health and Safety

The service providers are expected to follow legislative health and safety directives, as dictated by the appropriate country.

E.2 Other General Conditions

By submitting a proposal, the service provider agrees to all conditions and terms stated in this RFP. If the service provider does not agree with particular terms, such terms must be discussed in detail with the ISO Project Manager before a proposal is submitted.

The working language for all communications is English.

Except for this RFP and otherwise public information, information or communications obtained in relation to this RFP (including clarification calls) may not be released without the express written consent of ISO.

By responding to this RFP, applicants agree that the decision of ISO is final and binding, including any decision to withdraw this RFP or disqualify any proposal. ISO shall not in any way be responsible for any costs incurred in the preparation and presentation of the service providers’ information.

ISO reserves the right to negotiate all terms and conditions in order to enter a formal contract with the service providers, including regarding ultimate pricing. The ultimate decision regarding the awarding of a bid is subject to said negotiation. Inability to accept any required contractual term from ISO can result in disqualification of a proposal, without regard to any prior communication, shortlisting or process. This RFP document, the service provider’s response and, written addenda may form part of the contract.

ISO is not bound to give any reason for rejecting any responses or part thereof.

Unsolicited telephone calls or visits to ISO or ISO staff during the RFP process to obtain proposal status information are prohibited and may result in the service provider being disqualified from the application process. News releases pertaining to this RFP or the award of any contract related to this RFP may not be made without the prior written permission of ISO.

All work and materials shall comply with all applicable provincial and federal laws, municipal ordinances, regulations, applicable building leases, and directions of inspectors appointed by proper authorities having jurisdiction. Where proof of certifications are required by ISO, the service providers shall make all such certificates available for inspection.

The service providers shall at all times act impartially and shall refrain from any relationship which would compromise its independence or that of its personnel. If the service providers fails to maintain independence, ISO on the basis of its sole discretion reserves the right immediately disqualify the application. The service providers shall include a conflict of interest statement in its proposal.
E.3 Disclaimer

This RFP and its attachments contain all information the service provider may require preparing a proposal as requested by ISO.

The service provider is advised that if confirmation or clarification of the contents or any further information is required, it should contact the ISO Project Manager, copying the ISO Procurement Manager by e-mail at tenders@iso.org.

The acceptance of a submission to this RFP is not to be construed as representing or creating any binding obligation on ISO to enter into any legal commitment whatsoever. Furthermore, in responding to this RFP, the service provider is deemed to specifically acknowledge the following:

Notwithstanding any representation by or on behalf of ISO or any estimate of quantities by ISO shown in this RFP or otherwise given to the service provider (now or in the future) ISO shall be under no obligation to purchase any particular quantity of products or services, except as otherwise formally agreed in with written and signed contractual agreement.

The service provider places no reliance on any such representation or estimates and will place no reliance upon any future representation or estimate that may be provided unless that representation or estimate is noted in the written and signed contractual agreement.

ISO shall have no liability to the service provider whether in contract, tort or otherwise with respect to the giving of any such representation or estimate.

E.4 Confidentiality

Unless otherwise public, all information disclosed in connection with this RFP is confidential and the property of ISO. This information must only be released to the personnel of the service provider to whom release is required in order to prepare a response to this RFP.

E.5 Legal and Logo

Please note that applicants are not permitted to use or display the trademarked ISO logo, during or after the RFP process without express permission from ISO. Consultants will be expected to demonstrate their compliance with Swiss data protection laws.