<table>
<thead>
<tr>
<th>PROJECT TITLE</th>
<th>ISO ACTION PLAN FOR DEVELOPING COUNTRIES 2016 – 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>OUTCOME</td>
<td>Outcome 1: Contribute to NSBs applying good standardization practices</td>
</tr>
<tr>
<td>RELATED OUTPUTS</td>
<td>Output 1.3: NSBs acquired the knowledge and tools to manage the participation of stakeholders in standards development</td>
</tr>
<tr>
<td>ACTIVITY</td>
<td>COPOLCO Mentorship Programme</td>
</tr>
<tr>
<td>REFERENCE NUMBER</td>
<td>ISO/CB/2020-004</td>
</tr>
<tr>
<td>ISSUE DATE</td>
<td>7 August 2020 (Amendment 1) / 17 July 2020 (Original)</td>
</tr>
<tr>
<td>CLOSING DATE</td>
<td>31 August 2020 (Amendment 1) / 14 August 2020 (Original)</td>
</tr>
<tr>
<td>SUBMISSION ADDRESS</td>
<td>To: <a href="mailto:garcianebra@iso.org">garcianebra@iso.org</a>, <a href="mailto:miller@iso.org">miller@iso.org</a></td>
</tr>
<tr>
<td></td>
<td>CC: <a href="mailto:tenders@iso.org">tenders@iso.org</a></td>
</tr>
<tr>
<td>CONTACT FOR CLARIFICATIONS</td>
<td><a href="mailto:garcianebra@iso.org">garcianebra@iso.org</a></td>
</tr>
<tr>
<td></td>
<td><a href="mailto:kissinger@iso.org">kissinger@iso.org</a></td>
</tr>
</tbody>
</table>
The International Organization for Standardization (ISO) invites proposals for the above mentioned Project.

This competitive bidding (CB) is designed to help you produce a proposal that is acceptable to ISO as well as ensuring that submitters are given equal consideration; it contains the following parts:

- Part A “Instructions and terms for submitting proposals” gives an informative guidance and instructions for submission of a proposal.
- Part B “Terms of Reference” states the scope of work. Please note, that submitting a proposal in response to this CB constitutes an acceptance of the terms indicated herein.
- Part C “Evaluation process and criteria” contains information on how ISO will evaluate all proposals received in response to this CB in accordance with the evaluation criteria. ISO reserves the right to reject any proposal.

This CB shall not be construed as a contract. The CB in no way obligates ISO to award a contract, nor does it commit ISO to pay any costs or expenses incurred in the preparation or submission of proposals.

For the purpose of this CB, all communications shall be in writing and sent to the appropriate ISO contact email address provided above (see, summary Information table above).

All proposals must be received by ISO before the CB closing date through the email address provided above.

Any proposal(s) submitted must be valid for 30 calendar days from the deadline for submission.

Nothing in this CB, nor ISO’s receipt of a submission of candidature, represents or creates any binding obligation for either ISO or the consultant to enter into any legal commitment whatsoever.
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PART A – INSTRUCTIONS AND TERMS FOR SUBMITTING PROPOSALS

1. Format of your proposal

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

- Part 1: Technical response to the terms of reference (see Annex 1)
- Part 2: Completed consultant(s) profile form – one form for each qualified expert (see Annex 2)
- Part 3: CV of the consultant

For a joint venture or consortium submitting a proposal, a signed “Statement of Intent” shall be included (see Part B - clause 3.3) in addition to the above documentation.

1.1 Part 1: Technical response to the terms of reference

The technical response submission shall contain the following in responding to the terms of reference. Please complete Annex 1 - Consultant’s technical response to the terms of reference.

1. Summary description of your qualification, experience and technical skills with special focus on the knowledge and motivation on the subject matter;
2. Organization profile and activities in areas related to the project, if relevant;
3. Highlight general or specific experiences with similar initiatives;
4. Any comments on the terms of reference;
5. Signed statement of intent for joint-venture submission, if applicable;
6. Conflict of Interest disclosure statement; and
7. Attachments of max. three most relevant references (summaries, letters or attestation).

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

1.2 Part 2: Completed consultant(s) profile – one form for each qualified expert

This part of the proposal submission should include a completed individual consultant form given in Annex 2 – Consultant’s profile form.

All consultant(s) must confirm and indicate their availability to work on this project until the assignment is completed.

1.3 Part 3: Consultant CV

In addition to the consultant profile form, each consultant must also include his/her CV (2 pages max).
2. CB schedule and deadlines

<table>
<thead>
<tr>
<th>Activity</th>
<th>Original dates</th>
<th>Amendment 1 dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Circulate the Competitive Bidding (CB)</td>
<td>17 July 2020</td>
<td>7 August 2020</td>
</tr>
<tr>
<td>Deadline for receipt of Proposals</td>
<td>14 August 2020</td>
<td>31 August 2020</td>
</tr>
<tr>
<td>Evaluation and review of proposals and final selection</td>
<td>28 August 2020</td>
<td>11 September 2020</td>
</tr>
<tr>
<td>Notification to all proposal submitters</td>
<td>4 September 2020</td>
<td>18 September 2020</td>
</tr>
</tbody>
</table>

Note: Any submission received by ISO after expiry of the deadline, as well as partial proposals not meeting the requirements specified in this CB, may not be considered.

3. Submission of Proposals

All proposals must be submitted electronically by email to Noelia Garcia Nebra, ISO Central Secretariat, garcianebra@iso.org, and Rachel Miller Prada, miller@iso.org, with CC to 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.

To facilitate handling process, the “subject line” of the email must contain the following: the CB number indicated in the invitation notice and the submitter’s name:

e.g. “ISO/CB/2020-004 (Consultant’s or Organization’s name)”

4. CB clarifications, amendments and point of contact

Any query necessary for the preparation of the proposal must be addressed in writing by e-mail to Noelia Garcia Nebra, ISO Central Secretariat, garcianebra@iso.org or Dana Kissinger-Matray, kissinger@iso.org before 31 August 2020.

ISO at its discretion reserves the right to extend the CB closing deadline or to issue an amendment to the CB.
PART B – TERMS OF REFERENCE

1. Background

1.1 ISO International Organization for Standardization

ISO is an independent, non-governmental international organization which holds membership from 164 countries from all regions of the world. Each ISO member is the recognized and representative national standards body (NSB) in its country. Through its members, it brings together experts to share knowledge and develop voluntary, consensus-based, market-relevant International Standards that support innovation and provide solutions to global challenges. The ISO Central Secretariat (ISO/CS) is based in Geneva, Switzerland.

ISO recognizes that increased and effective participation of developing countries in international standardization is of fundamental importance and that its developing country members need specific assistance to fully exploit the value of standards in support of their countries’ development.

1.2 Development and Training

In the last two decades, the number of developing country members in ISO has significantly increased and, today, over three-quarters of ISO members are from developing countries.

This is an important achievement, yet significant gaps still have to be addressed. ISO members from developing countries need assistance to build their capacity, increase their participation in international standardization and fully exploit the value of standards.

Participation of developing countries in international standardization is also essential to ensure the global relevance of ISO standards and contribute to the access of developing countries to world markets, technical progress and sustainable development.


The implementation of the APDC is managed by the Capacity Building Unit at ISO/CS.

1.3 ISO Action Plan for Developing Countries (APDC 3)

1.3.1 Overview

The APDC 3, which complements the ISO Strategy 2016-2020, describes the overall framework of development and technical assistance that ISO expects to deliver over this five-year period. Table 1 and Figure 1 below respectively provide key facts and the results framework of the APDC 3 programme.
**Table 1 – Basic facts on the APDC**

<table>
<thead>
<tr>
<th>Funding</th>
<th>External donors and internal funds from ISO/CS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implementing agency</td>
<td>ISO Central Secretariat</td>
</tr>
<tr>
<td>Project duration</td>
<td>5 years (2016-2020)</td>
</tr>
<tr>
<td>Developing countries in ISO</td>
<td>The ISO list of developing countries is approved by ISO Council. The list is based on the UN list of Member States of the Group of 77 (G77) plus ISO members in the UN Eastern European Group of countries that asked to be added. ISO groups developing countries by region for practical reasons when carrying out training programmes. To access the list of ISO developing countries per region please see: <a href="http://www.iso.org/iso/home/about/iso-and-developing-countries/developing-countries-in-iso-by-region.htm">http://www.iso.org/iso/home/about/iso-and-developing-countries/developing-countries-in-iso-by-region.htm</a></td>
</tr>
</tbody>
</table>

**Overall goal**
Contribute to economic development, social progress and the protection of the environment in line with the UN Sustainable Development Goals

**Impact**
Contribute to strengthening the standardization pillar of the national quality infrastructure (NQI) in developing countries

**Outcome 1**
NSBs applying good standardization practices

**Outcome 2**
NSBs developing a national standardization strategy (NSS)

**Outcome 3**
NSBs promoting the use of standards among key policy makers, businesses and other stakeholders

**Outcome 4**
Effective developing country participation in the development of ISO standards

*Figure 1* illustrates the causal linkages between the activities/outputs, the expected outcomes, impact and overall goal of the ISO Action Plan. It shows the logical sequence by which change is expected to happen.
1.3.2 Outcome 1: Contribute to NSBs applying good standardization practices

Outcome 1 of the ISO Action Plan seeks to strengthen and increase NSS’s applying good standardization practices.

NSBs do not apply internationally recognized good practices in developing standards. This is due to the lack of knowledge and skills on standards development processes, project management and effective stakeholder engagement mechanisms. This problem is a key obstacle for NSBs to support national standardization needs and fulfil their international commitments under the WTO.

The strategies put in place to strengthen the operational capabilities of the NSBs focus on the transfer of skills and knowledge to apply good standardization practices (GSP), conduct self-assessments of the standardization systems in place (using the GSP diagnostic tool) and adopt a project management approach to carry out standards development work.

The activities carried out under Outcome 1 also involve building the capacity of developing country NSBs to design and implement effective stakeholder engagement strategies and implement Annex 3 of the TBT Agreement of the WTO.
2. Terms of Reference

2.1 Background

The ISO/COPOLCO (Committee on Consumer Policy) Capacity Building mentorship programme is designed to follow up the training workshop that took place in Harare, Zimbabwe in May 2019, directly preceding the COPOLCO Plenary meeting.

The following countries have developed and submitted national action plans: Botswana, Democratic Republic of the Congo, Ghana, Malawi, Mauritius, Mozambique, Nigeria, Seychelles, Uganda, Zambia and Zimbabwe. The pool of mentors is currently limited and does not yet reflect a wide representation of COPOLCO members.

2.2 Purpose and Scope

The purpose of this Competitive Bidding is for ISO to select a minimum of twelve (12) consultants who can act as mentors (hereinafter referred to as “consultants”), with workshop participants (“mentees”) – one NSB representative, one consumer representative and, if applicable, one representative from a governmental consumer protection agency – from each mentored country. Consultants should be experienced National Standards Body staff or consumer representatives who are actively working with National Standard Bodies in their country. Consultants may be responsible for a maximum of three (3) mentees.

The programme aims to enable the mentees to attain concrete standards-related consumer protection objectives in their countries through the development and implementation of national action plans, based on issues previously identified in country case studies submitted in advance and practical exercises done during the workshop.

Scope: The role of the consultant is to help their mentee(s) build up their national action plans for consumer engagement: help them organize needed inputs for the plan, answer questions; and give ideas, insights and experience to help find pathways forward.

2.3 Role of Consultants and expected deliverables

2.3.1 Role of Consultants

The consultant should enter into an ongoing dialogue with their mentee(s), with the NSB representative as primary contact, and first agree on the time allocation and dates of discussions.

The consultant should consider the national action plans while being careful to guide their mentee(s) through the thought process and not to anticipate their thinking- or do it in their place- as each national situation is unique. The consultant should also strongly encourage teamwork in building the action plans (a joint effort between the NSBs and representatives of consumer groups and/or consumer protection agencies).

The consultant will guide the mentee(s) through their action plans, which should contain, at minimum:

- Specific actions and activities which are measurable, achievable, realistic, and time-based.
- Clearly define responsibilities and deadlines for actions
- Show the "who" "what" "when" "where" "why" and if possible "how much" (of resources required).
- Differentiate the overall objectives from the actions/activities that support objectives

1 Located in e-Committees under "projects" in the WG3 workspace:
Below is a potential list of things the consultant should consider when discussing their mentee’s action plan:

- Talk through current issues and priorities in their home countries based on their country reports, case studies and workshop content, national action plans, etc.
- What issues have the greatest impact for consumers that standards can influence?
- Who are the important stakeholders and potential partners?
- Have potential partners been contacted and do they support the idea of the action plan? If not, is there a schedule for making these contacts?
- Is a consumer organization/association and/or government agency involved with the plan’s development and implementation?
- What resources are available and what are the constraints (time, funding, infrastructure, manpower)?
- Consider how existing (or lack of) consumer protection laws will impact the plan.

2.3.2 Expected Deliverables

The Consultant’s work will be broken into three phases:

**Phase I:** The Consultant and mentee(s) interact at agreed time and dates to revise action plans (maximum two (2) days per country). Mentee(s) will send the Consultant the revised plan.

*Deliverable:* Consultant submits a report of activity and final revised action plans (one per country) to ISO/CS and COPOLCO WG3 convenors. The activity report will detail dates and times of meetings with the mentee(s), subjects covered and discussed, and time spent reviewing action plans. Consultant will debrief ISO/CS and WG3 convenors on report.

**Phase II:** The Consultant will provide ongoing advice to mentee(s) on an as-needed basis and check on the level of implementation while the mentee(s) are implementing their action plans.

*Deliverable:* Consultant submits a mid-activity report (one per country) to ISO/CS and COPOLCO WG3 convenors.

**Phase III:** The Consultant will provide constant advice to mentee(s) on an as-needed basis and check on the level of implementation while the mentee(s) are implementing their action plans.

*Deliverable:* Consultant submits a final activity report (one per country) to ISO/CS and COPOLCO WG3 convenors.
3. Roles and responsibilities of ISO/CS and consultants

The Consultancy contract will run during 2020 and into 2021.

The table below gives an overview of the main tasks to be carried out by the consultant who will work with the support and guidance of internal ISO/CS resources. The final set of tasks and responsibilities of the consultants will be defined in the individual consultancy agreement.

Table 2 – Roles and responsibilities of ISO/CS and consultant per mentee

<table>
<thead>
<tr>
<th>TASK-SET</th>
<th>CONSULTANT(S)</th>
<th>ISO/CS</th>
<th>INDICATIVE TIMELINE/DEADLINE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Task and responsibilities</td>
<td>Days</td>
<td></td>
</tr>
<tr>
<td>Phase 1: Introduction and revisions</td>
<td>- Consultant and mentee interact at agreed times and dates to revise plans. - Consultant sends 1st activity report to ISO/CS - Debrief sessions take place with ISO/CS, convenors and Consultants</td>
<td>2</td>
<td>- Match the Consultant with the mentee - Ensure the coordination between internal ISO/CS resource person and mentors - Ensure timely submission of deliverables from the consultant</td>
</tr>
<tr>
<td>Phase 2: Action Plan implementation</td>
<td>- Consultant provides advice to the mentee as needed and checks on the level of implementation. - Consultant sends mid-activity report to ISO/CS</td>
<td>0.5</td>
<td>ISO/CS and convenors conduct a final debrief and assessment for sharing with ISO/COPOLCO and ISO Capacity building and basis for lessons learned and replication.</td>
</tr>
<tr>
<td>Phase 3: Final Reporting</td>
<td>- Consultant provides advice to mentees as needed and checks on the level of implementation. - Consultant sends final activity report to ISO/CS</td>
<td>0.5</td>
<td></td>
</tr>
</tbody>
</table>
3.1 Project financials/honoraria and expenses

For carrying out the assignments, ISO will compensate the consultant, based on a rate of CHF 850 (Swiss Francs Eight Hundred Fifty) per working day. The total amount of working days will depend on the number of mentees allocated to the Consultant.

No travel missions are expected to take place.

3.2 Conflict of interest and disclosures

Bidders must disclose in their Proposals details of any circumstances (known), including personal, financial and business activities that will, or might, give rise to a conflict of interest, if they were awarded this contract. Where bidders identify any potential conflicts they should state how they intend to avoid such conflicts. ISO reserves the right to reject any Proposal which, in ISO’s opinion, gives rise, or could potentially give rise to, a conflict of interest.

All bidders must disclose:

a. If they are subject of any proceedings or other arrangements relating to bankruptcy, insolvency or financial standing.

b. If they are subject of any proceedings, relating to: corruption including the offence of bribery fraud including theft, and not fulfilling any obligations relating to payment of taxes; and/or money laundering.

3.3 Joint venture or consortium (or other form of association)

For the performance of this project, subcontracting is prohibited.

Where the Proposal is submitted as a joint bid in conjunction with one or more consultants coming together (i.e. joint venture or other form of association) then, in the absence of a joint venture agreement the “associated consultant(s)” shall be deemed to be a sub-contractor to the bidder and shall not be a party to the contract.

Proposals submitted by a potential joint venture must include in the proposal submission documents a signed “Statement of Intent” to form a joint venture with a description of the composition or constitution of the joint venture in the event of being successful.

3.4 Consultant(s) residing in Switzerland

For individual consultants residing in Switzerland who seek to be engaged directly, you must provide a copy of your AVS (social insurance) certificate demonstrating your independent contractor status in your bid documentation.
PART C - EVALUATION PROCESS AND CRITERIA

The evaluation of the proposals received will be performed by an evaluation committee composed of ISO/CS staff and COPOLCO WG3 Convenors. The following three-stage process will be used based on the methodology and criteria summarized below:

1. Preliminary examination

The initial stage will examine whether the proposal submitters have provided all the required information and/or associated documents. The preliminary examination shall be on a pass/fail basis.

2. Evaluation criteria

In evaluating the complete proposals received, ISO will seek the most appropriate offers based on the following criteria. The evaluation will be based on a scoring system.

2.1 Qualification and technical experience (45%)

- Knowledge and working experience with consumer engagement and standardization
- Knowledge and working experience with the ISO System
- Publications and professional attainment as relevant.

2.2 Experience in the type of work required (30%)

- Knowledge and working experience with the work of COPOLCO
- Experience in working with different systems of stakeholder engagement
- Knowledge and working experience with individual coaching, teaching, or consulting
- Experience in proposing solutions through dialogue and consensus building

2.3 Compliance to terms of reference (15%)

- Consultant is part of an eligibility criteria group (i.e. member from an ISO National Standards Body, volunteer from NSB-affiliated consumer or public interest committees or agencies, or member of other types of consumer organizations or advocacy groups involved with COPOLCO or Consumers International)
- Technical response to the terms of reference
- Ability to meet timeframes
- Absence of possible conflict of interest (related to personal, financial and business issues).

2.4 Additional skills (10%)

- Ability to communicate clearly in English, particularly through virtual platforms (such as Zoom, Webex, etc.).

3. Pre-award review and approval

The recommendation of the evaluation committee will be validated by the Director of the ISO Capacity Building Unit.