REQUEST FOR PROPOSAL (RFP)
EXTERNAL EVALUATION OF SIDA-FUNDED ISO CAPACITY BUILDING ACTIVITIES

We are ISO, the International Organization for Standardization, the world’s largest developer of voluntary International Standards. Through its 162 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.

We are currently looking for a Supplier to conduct an external evaluation of the capacity building activities implemented by ISO and financially supported by the Swedish International Development Cooperation Agency (Sida).

ISO’s capacity building programme is delivered under the *ISO Action Plan for developing countries* (hereafter referred to as the “Action Plan”), which describes the overall framework of technical assistance that ISO expects to deliver over a five-year period. The 2016-2020 Action Plan, which builds on the results of the previous two editions, aims at supporting the national standards bodies (NSBs) in developing countries to develop and use international standards more effectively, and therefore contribute to the strengthening of their national quality infrastructure (NQI), and through a more solid NQI, to the country’s sustainable development. The main outcomes of the Action Plan are:

- **Outcome 1:** Standardization has a recognized, effective role in support of public policies
- **Outcome 2:** National standards bodies’ (NSBs’) strategic capabilities strengthened
- **Outcome 3:** National standards bodies’ capacity strengthened at the operational and technical levels
- **Outcome 4:** Increased involvement of developing country members in international standardization
- **Outcome 5:** Coordination and synergies with other organizations and among projects implemented

In June 2016, Sida signed a five-year agreement with ISO to support the implementation of the Action Plan 2016-2020. The beneficiaries of the programme are the ISO members in developing countries.

Within the framework of the Action Plan, and also with the support of Sida, ISO has carried out a *regional project* entitled *Project to strengthen the institutional infrastructure on standards and regulations to support business and industry in the Middle East and North Africa* (MENA STAR) during 2013-2018. The project targets 11 countries, namely Algeria, Egypt, Iraq, Jordan, Lebanon, Libya, Morocco, Palestine, Syrian Arab Republic, Tunisia and Yemen. The implementation of the MENA STAR project involves delivery of various forms of technical assistance and training activities to achieve the following three objectives:

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1 The list of ISO members in developing countries could be accessed via this link ([https://www.iso.org/developing-countries-in-iso-by-region.html](https://www.iso.org/developing-countries-in-iso-by-region.html)).

2 Changes in number of beneficiary countries during the implementation period of the MENA STAR project reflect ISO membership suspension and reinstatements.
Objective 1: Standardization pillar in the MENA region is strengthened – aims to strengthen the capacity of selected industry support institutions, such as the NSB and regulators as well as trade promotion organizations, to enhance the country’s participation in international trade, while increasing international competitiveness and export performance through quality.

Objective 2: Promote good practices for sustainable development with a focus on aspects related to climate change – aims to contribute to the development of a sound business enabling environment by encouraging the private sector and other stakeholders to use international standards to demonstrate their commitment to sustainable development.

Objective 3: Coordination and synergies with other related organizations and among projects and countries are implemented – aims to enhance the cooperation with regional and sub-regional organizations, involved in standardization or standards related activities.

ISO is required to present Sida with an external evaluation of its capacity building activities undertaken under the Action Plan (mid-term evaluation) and the MENA STAR project (final evaluation). The purpose of the evaluation is to assess the performance and results achieved and serve as a learning process by answering specific questions associated with the planning, implementation and monitoring of the activities. In particular, since the MENA STAR project comes to an end and the needs expressed in the region are largely similar to those at the global level, it is expected that the evaluation presents recommendations regarding the design, delivery and achievements, as well as the long-term sustainability of future activities under the Action Plan based on lessons learnt from the regional project. The evaluation is to be completed by the end of May 2019.

Qualified Suppliers are invited to participate in this Request for Proposal (RFP). The purpose of this RFP is to allow several qualified Suppliers to submit their best proposals for this service. Proposals from independent consultants will not be considered given the complexity of the evaluation work to be carried out.

Responses to this RFP are due by 18:00 CET, 2018-12-06 after which time proposals will not be considered without prior written agreement.

Yours sincerely,

Erich Kieck
Director, Capacity building
ISO Central Secretariat
TABLE OF CONTENTS

1. RFP PROCESS, TERMS AND CONDITIONS.................................................................................. 5
   1.1 Enquiries ........................................................................................................................ 5
   1.2 Modifications .................................................................................................................. 5
   1.3 Schedule and deadlines ................................................................................................. 5
   1.4 Format of submission ..................................................................................................... 6
   1.5 Response deadline ......................................................................................................... 6
   1.6 Partial responses ............................................................................................................ 6
   1.7 Clarification on RFP ....................................................................................................... 6
   1.8 Validity ............................................................................................................................ 6
   1.9 Evaluation of submission ................................................................................................ 6
   1.10 Health and safety ........................................................................................................... 9
   1.11 General conditions ......................................................................................................... 9
   1.12 Disclaimer ....................................................................................................................... 9
   1.13 Confidentiality ............................................................................................................... 10

2. BACKGROUND INFORMATION ......................................................................................... 10
   2.1 ISO ............................................................................................................................... 10
   2.2 Capacity building unit at ISO/CS .................................................................................. 11

3. PROJECT DESCRIPTION AND REQUIREMENTS ................................................................ 11
   3.1 Evaluation scope .......................................................................................................... 11
   3.2 Overall purpose of the evaluation and intended users ................................................. 12
   3.3 Evaluation questions and objectives ............................................................................ 13
   3.4 Evaluation approach and methods for data collection and analysis ............................. 16
   3.5 Organization of evaluation management ...................................................................... 17
   3.6 Evaluation quality ......................................................................................................... 17
   3.7 Time schedule and deliverables ................................................................................... 17
   3.8 Evaluation team qualifications ...................................................................................... 17
   3.9 Financial and human resources ................................................................................... 18

4. MANAGING THE EVALUATION DURING ITS IMPLEMENTATION ..................................... 18
   4.1 The inception phase ..................................................................................................... 18
   4.2 The data collection and analysis phase ....................................................................... 18
   4.3 The reporting and dissemination phase ....................................................................... 19
       4.3.1 Commenting on evaluation report ......................................................................... 19
       4.3.2 Disseminating evaluation results .......................................................................... 19
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>PREPARING THE MANAGEMENT RESPONSE TO THE EVALUATION</td>
<td>19</td>
</tr>
<tr>
<td>6.</td>
<td>SUPPLIER’S PROPOSAL</td>
<td>20</td>
</tr>
<tr>
<td>6.1</td>
<td>Proposal description</td>
<td>20</td>
</tr>
<tr>
<td>6.2</td>
<td>Supplier’s profile</td>
<td>20</td>
</tr>
<tr>
<td>6.3</td>
<td>Experience and resources within project area</td>
<td>20</td>
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<tr>
<td>6.4</td>
<td>Experience in other areas</td>
<td>20</td>
</tr>
<tr>
<td>6.5</td>
<td>References</td>
<td>21</td>
</tr>
<tr>
<td>6.6</td>
<td>Additional relevant information</td>
<td>21</td>
</tr>
<tr>
<td>6.7</td>
<td>Project specific questions</td>
<td>21</td>
</tr>
<tr>
<td>6.8</td>
<td>Legal documents</td>
<td>21</td>
</tr>
<tr>
<td><strong>Annex 1</strong></td>
<td>ISO Action Plan for Developing Countries 2016-2020</td>
<td>22</td>
</tr>
<tr>
<td><strong>Annex 2</strong></td>
<td>MENA STAR 2013-2018 - Project proposal</td>
<td>23</td>
</tr>
</tbody>
</table>
1. RFP PROCESS, TERMS AND CONDITIONS

1.1 Enquiries

Any query regarding the preparation of the proposal must be addressed in writing by e-mail to the ISO Procurement Manager at tenders@iso.org and copying the relevant Programme Managers as indicated below.

<table>
<thead>
<tr>
<th>Sari Rajakoski</th>
<th>Nesreen Al-Khammash</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programme Manager</td>
<td>Programme Manager</td>
</tr>
<tr>
<td>Capacity building at ISO/CS</td>
<td>Capacity building at ISO/CS</td>
</tr>
<tr>
<td>E-mail: <a href="mailto:rajakoski@iso.org">rajakoski@iso.org</a></td>
<td>E-mail: <a href="mailto:khammash@iso.org">khammash@iso.org</a></td>
</tr>
</tbody>
</table>

1.2 Modifications

No officer, agent or employee of ISO is authorized 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 a 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 Programme Managers in a written form.

1.3 Schedule and Deadlines

<table>
<thead>
<tr>
<th>Activity</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP released to potential Suppliers</td>
<td>2018-11-02</td>
</tr>
<tr>
<td>Clarification calls with Suppliers (upon request)</td>
<td>Between 2018-11-02 to 2018-11-29</td>
</tr>
<tr>
<td>Deadline for Suppliers to submit proposal</td>
<td>2018-12-06</td>
</tr>
<tr>
<td>Expected evaluation of proposals</td>
<td>Week of 2018-12-10</td>
</tr>
<tr>
<td>Virtual interview with short-listed Suppliers and contacting customers referenced in the proposals</td>
<td>Week of 2019-01-07</td>
</tr>
<tr>
<td>Validation of the selection</td>
<td>Week of 2019-01-21</td>
</tr>
<tr>
<td>Award of contract to selected Supplier</td>
<td>End of January 2019</td>
</tr>
<tr>
<td>Submission of final evaluation report</td>
<td>2019-05-31</td>
</tr>
</tbody>
</table>

These dates are a guide to the time frame expected for this evaluation project. Dates may change and the ISO Procurement Manager will advise of any changes.

Proposals must be submitted in an electronic format by 18:00 CET on 2018-12-06 to tenders@iso.org. Proposals received after this without prior written agreement will be disqualified.
1.4 **FORMAT OF SUBMISSION**

Your proposal should be structured in accordance with the requirements contained in the RFP and should align with each requirement of the RFP by cross-reference to the relevant section number.

Suppliers are encouraged to supply innovative solutions in responding to this RFP. However, Suppliers must strictly adhere, at all times, to the requirements of this RFP. You should include any additional supporting information or alternative proposals as a separate section titled “Alternative Options”.

1.5 **RESPONSE DEADLINE**

Submissions are due as set out in paragraph 1.3 above, provided that, if the deadline set for submission is extended, ISO will also specify the new date and hour for submission which will replace the above deadline on the ISO website.

Any submission received by ISO after expiry of the initial or extended deadline, as the case may be, will not be considered.

1.6 **PARTIAL RESPONSES**

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

1.7 **CLARIFICATION ON RFP**

The Supplier should direct any questions arising during the preparation of the proposal, or requests for clarification, in writing by e-mail to the ISO Procurement Manager at tenders@iso.org and copying the ISO Programme Managers mentioned above (see paragraph 1.1).

Provision will be made for clarification calls (see paragraph 1.3 for schedule and deadlines). Please contact the ISO Programme Managers to arrange an appointment. Where appropriate, ISO reserves the right to circulate questions and the answers thereto to all other Suppliers without disclosing the source of the questions or revealing the substance of a proposal.

1.8 **VALIDITY**

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

1.9 **EVALUATION OF SUBMISSION**

In evaluating proposals for the next stage of the process, ISO will seek the most appropriate offer based on an evaluation of the Supplier, the fitness for purpose, the expertise and the cost as per the following criteria (see tables 1 and 2 below).

Proposals from individual consultants (wishing to contract under their personal capacity) will not be considered given the complexity of the evaluation work to be carried out.
Table 1: Rating in points

<table>
<thead>
<tr>
<th>Evaluation</th>
<th>Does not meet</th>
<th>Poor</th>
<th>Weak</th>
<th>Satisfactory</th>
<th>Good</th>
<th>Strong</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rating scale</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Table 2: Criteria of bids evaluation³

<table>
<thead>
<tr>
<th>Category Weight</th>
<th>Relative Weight</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>40%</td>
<td></td>
<td><strong>a) Proposal completeness (see section 6)</strong></td>
</tr>
<tr>
<td>25</td>
<td></td>
<td>• The proposal completely responds to the objectives indicated in the RFP and addresses all the requirements stated in it</td>
</tr>
<tr>
<td>35</td>
<td></td>
<td>• The proposed evaluation methodology (including sources of information, selection of samples, analysis of data and assessment of results) is logical, tailored to this specific assignment, flexible and easy to modify if needed (see 3.3 and 3.4)</td>
</tr>
<tr>
<td>20</td>
<td></td>
<td>• The proposal ensures that diverse viewpoints of the intended users of the evaluation are taken into account and that results are as complete and unbiased as possible (see 3.2)</td>
</tr>
<tr>
<td>20</td>
<td></td>
<td>• The organizational arrangements for the implementation of this project is well defined and explained including the roles of donor, implementing organization and beneficiaries.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>20%</td>
<td></td>
<td><strong>b) Experience in the type of work required: the extent to which the Supplier has the necessary experience in a similar context</strong></td>
</tr>
<tr>
<td>25</td>
<td></td>
<td>• Evaluation of development assistance programmes / projects funded by Sida</td>
</tr>
<tr>
<td>25</td>
<td></td>
<td>• Evaluation of development assistance programmes / projects undertaken in areas similar to those covered in this RFP (such as quality infrastructure, standardization, sustainable development) (at least three examples)</td>
</tr>
<tr>
<td>20</td>
<td></td>
<td>• The qualifications and competence of the Team Leader proposed for the evaluation (see 3.8)</td>
</tr>
<tr>
<td>15</td>
<td></td>
<td>• The qualifications and competence of the personnel proposed for the evaluation (see 3.8)</td>
</tr>
<tr>
<td>15</td>
<td></td>
<td>• Customer references (at least three references)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>100</td>
</tr>
</tbody>
</table>

³ These criteria are intended to help guide the evaluation of proposals submitted.
<table>
<thead>
<tr>
<th>Category Weight</th>
<th>Relative Weight</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>15%</td>
<td></td>
<td>c) Company profile and geographical coverage of evaluation projects</td>
</tr>
<tr>
<td>15</td>
<td></td>
<td>• Number of years the company has been involved in evaluation of development assistance programmes / projects funded by donors</td>
</tr>
<tr>
<td>20</td>
<td></td>
<td>• Previous working experience with ISO, ISO members or Sida</td>
</tr>
<tr>
<td>25</td>
<td></td>
<td>• Percentage of evaluations undertaken by the Supplier for development assistance programmes / projects at international, regional and national levels</td>
</tr>
<tr>
<td>25</td>
<td></td>
<td>• Percentage of evaluations undertaken by the Supplier for development assistance programmes / projects in developing countries</td>
</tr>
<tr>
<td>15</td>
<td></td>
<td>• Independence of the Supplier from the policy, operations and management function of Sida, ISO and beneficiaries. Possible conflicts of interest are addressed openly and honestly.</td>
</tr>
<tr>
<td>100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10%</td>
<td></td>
<td>d) Ease of implementation</td>
</tr>
<tr>
<td>50</td>
<td></td>
<td>• Number of people proposed in the evaluation team that matches with the proposed evaluation methodology</td>
</tr>
<tr>
<td>25</td>
<td></td>
<td>• Complementarity of evaluation team experiences and skills (including language skills)</td>
</tr>
<tr>
<td>25</td>
<td></td>
<td>• The proposal shows clear distribution of reasonable work load without compromising timing</td>
</tr>
<tr>
<td>100</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15%</td>
<td></td>
<td>e) Financial proposal</td>
</tr>
<tr>
<td>50</td>
<td></td>
<td>• Clarity and completeness of the financial proposal</td>
</tr>
<tr>
<td>50</td>
<td></td>
<td>• Cost competitiveness (i.e. the most financially advantageous for ISO will be awarded the maximum mark of 5 points. The other offers will then be marked proportionally to the best offer)</td>
</tr>
<tr>
<td>100</td>
<td></td>
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</tbody>
</table>

Submissions will be reviewed for compliance with this Request for Proposal and reviewed in relation to the pre-determined criteria listed above.

The highest (i.e. three) scored Suppliers will be short-listed and invited to virtually present their proposals in front of a panel from ISO/CS. The Suppliers' respective Team Leaders shall attend the virtual meeting. To help structure the presentation, a list of questions as well as this second stage evaluation criteria will be sent to the short-listed Suppliers. Overall, the scores from the
first and second stage will determine the selection of the successful Supplier. The second stage will account for 30 percent of the overall score (the first stage, accounting for 70%).

1.10 HEALTH AND SAFETY

The Supplier is expected to follow legislative Health & Safety directives, as dictated by the appropriate country.

1.11 GENERAL CONDITIONS

By submitting a proposal, the Supplier is agreeing to all conditions and terms stated in this RFP. If the Supplier does not agree with particular terms, such terms must be discussed in detail with the ISO Programme Managers before a proposal is submitted.

The working language for all communications is English.

Information relating to this document may not be released without the express written consent of ISO.

By responding to this RFP, bidders agree that the decision of the evaluation team is final and binding.

ISO shall not in any way be responsible for any costs incurred in the preparation and presentation of the Supplier’s proposal.

ISO reserves the right to negotiate all terms and conditions in order to enter a formal contract with the selected Supplier. This RFP document, the Supplier’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 during the RFP process to obtain proposal status information are prohibited and may result in the Supplier being disqualified from the bidding 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 provincial and federal laws, municipal ordinances, regulations, applicable building leases, and directions of inspectors appointed by proper authorities having jurisdiction. Where certification of material is required by ISO, the Supplier shall make all such certificates available for inspection.

1.12 DISCLAIMER

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

The Supplier is advised that if confirmation or clarification of the contents or any further information is required, it should contact the ISO Programme Managers in this RFP in the first instance.
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 Supplier is deemed to specifically acknowledge the followings:

- 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 Supplier (now or in the future) ISO shall be under no obligation to purchase any particular quantity of products or services.
- The Supplier 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 contract.
- ISO shall have no liability to the Supplier whether in contract, tort or otherwise with respect to the giving of any such representation or estimate.

1.13 CONFIDENTIALITY

All information disclosed in connection with this RFP is confidential (where so indicated) and the property of ISO. This information must only be released to the Supplier’s personnel to whom release is required in order to prepare a response to this RFP.

Any information obtained through related 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.

2. BACKGROUND INFORMATION

2.1 ISO

a) History

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 22 000 International Standards and standard-type documents covering almost all aspects of technology and business. From food safety to computers, and agriculture to healthcare, ISO International Standards impact all our lives.

b) Today

Today, ISO is a not-for profit Membership organization with Members from 162 countries and thousands of technical bodies to take care of standards development. For more detailed information on our organization, including a description of our key projects and an organization chart, please visit our website: www.ISO.org.

c) Membership structure of ISO

Through its Members, ISO brings together experts to share knowledge and develop voluntary, consensus-based, market relevant International Standards that support innovation and provide solutions to global challenges.

Our Members are the foremost National Standards Bodies (NSBs) in their countries and there is
only one Member per country. Each NSB represents ISO in its country. Individuals or companies cannot become ISO Members. The list of ISO Members can be found on our website: www.iso.org/Members.

2.2 CAPACITY BUILDING UNIT AT ISO/CS

The ISO Strategy 2016-2020 calls for a significant strengthening of the competencies of ISO and its members (including the NSBs' staff and the stakeholders that they engage), in a variety of areas. This demand has to be met by making the best use of resources from the ISO member network and of services from the ISO Central Secretariat. The capacity building unit is the ISO/CS unit primarily concerned with this task.

Currently, the capacity building unit manages mainly the following areas:

a) Implementing the ISO Action Plan for developing countries 2016-2020 (Action Plan). The activities carried out under the Action Plan are funded by Sida, ISO Council allocations and member contributions to the ISO Funds-in-Trust. The implementation of the Plan is monitored by DEVCO and its Chair's Advisory Group (CAG).

b) Implementing a regional technical assistance project to strengthen institutional infrastructure on standards and regulations to support business and industry in the Middle East and North Africa during 2013-2018 (MENA STAR), funded by Sida.

c) Undertaking significant efforts to develop a proactive and professional approach to raising funds to support the successful implementation of the Action Plan and other proposed technical assistance activities.

d) Supporting the ISO Committee on developing country matters (DEVCO) by providing:
   - Secretariat services – i.e. development and circulation of documents, communication with and notifications to DEVCO members, exchange of information, response to enquiries, etc.
   - Organization of the annual DEVCO meeting.
   - Organization and management of the DEVCO CAG activities.

e) Developing and disseminating high-quality education and training materials that ISO Members can re-use to support their training and consulting activities.

f) Organizing courses of interest to ISO members (at ISO/CS or at ISO members’ premises).

g) Supporting ISO activities to promote education about standardization in academic institutions to build awareness, especially among younger generations, of the importance of standards for markets and society.

h) Supporting ISO research studies to demonstrate the benefits of standards to help businesses, learning institutions and individuals to get the most from standards.

3. PROJECT DESCRIPTION AND REQUIREMENTS

3.1 EVALUATION SCOPE

The external evaluation will consist of:


b) A final evaluation of the regional project to strengthen institutional infrastructure on standards and regulations to support business and industry in the Middle East and North Africa during 2013-2018 (MENA STAR). The MENA STAR project proposal is attached as Annex 2. It is important to note that the logical framework of the MENA STAR project was revised in 2016 to align it, to the extent possible, with the logical framework of the Action Plan and the project implementation period was extended to end of 2018.
3.2 **OVERALL PURPOSE OF THE EVALUATION AND INTENDED USERS**

The overall purpose of the evaluation is to assess the performance and results achieved (activities, outputs, outcomes) and serve as a learning process by answering specific questions associated with the planning, implementation and monitoring of the activities. Since the MENA STAR project comes to an end and the needs expressed in the region are largely similar to those at the global level, it is expected that the evaluation presents recommendations regarding the design, delivery and achievements, as well as the long-term sustainability of future activities under the Action Plan based on lessons learnt from the regional project.

The external evaluation will address the following key priority aspects for ISO, with particular focus on the reasons and factors that have contributed to the implementation and achievement of the specific outcomes:

a) **For the Action Plan**

- Review the quality of the main outcomes and outputs and pertinence of the theory of change;
- Assess the progress of the ongoing programme and develop proposals on how it could be adjusted to better achieve its objectives;
- Provide recommendations based on the lessons learnt and experience gained from the MENA STAR project focusing on the following core initiatives (both tools and processes):
  a. Development of national standardization strategy.
  b. Good Standardization Practices (GSP).
  c. Stakeholder engagement.
  d. Role of standards in support of public policy.
  e. Participation in the development of international standards.
- Assess and advise how the national expertise developed under the MENA STAR project for the core initiatives can support the implementation of the Action Plan and sustainability of its results;
- Contribute to strengthening the planning, implementation, monitoring and evaluation capacity of ISO.

The intended users of this evaluation are Sida, ISO and the DEVCO CAG that also monitors the implementation of the Action Plan.

b) **For the MENA STAR project**

- Assess the overall performance of the project;
- Evaluate the implementation approach;
- Provide evidence of results achieved; and
- Identify lessons learned and recommendations for improvements for the Action Plan and any possible follow-up phase or future projects.

The intended users of this evaluation are Sida, ISO and the members of the project Joint Coordination Committee (JCC) that monitors the implementation of the MENA STAR project.

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4 This implies that the intended users have been involved in defining purpose, scope and objectives of the evaluation.
The evaluation of the Action Plan and the MENA STAR project shall also consider the signed agreements between ISO and Sida.

c) For the modalities of implementation

The Supplier should assess the benefits and challenges of different modalities for the implementation of capacity building activities (i.e. global, regional and in-country projects) and provide recommendations as a result of the evaluation, in particular lessons learnt from the delivery of the on-going national level support under the MENA STAR project for the Action Plan.

3.3 EVALUATION QUESTIONS AND OBJECTIVES

The suggested evaluation questions, to be further defined during the inception phase, refer to the most critical aspects of the planning, implementation and monitoring identified under the Action Plan and the MENA STAR project. ISO is open to consider recommendations by the Supplier for revising the evaluation questions to be addressed.

a) For the Action Plan

The objective of the mid-term evaluation of the Action Plan is to evaluate its relevance, and effectiveness as an input for improving the implementation of interventions and resources allocation.

Due consideration shall be given to the fact that the programme consists of complex interventions at a global level with target groups and final beneficiaries from a wide cross-section of interests. Some of the activities delivered also are characterized as being one-off events, while the benefits arising from each one is expected to be further multiplied by the direct beneficiaries at the national levels. The evaluation methodology shall therefore be adapted to take this specificity into account to provide meaningful results.

The intent of each of the evaluation criteria mentioned above is summarized below and translated into relevant and specific evaluation questions and how they apply to the Action Plan.

I. Relevance

The extent to which the objectives of a development intervention are consistent with beneficiaries’ requirements, country needs, global priorities and partners’ and donors’ policies.

a) To what extent the programme meets the needs and priorities of the beneficiaries? What lessons could be learnt from the MENA STAR project in terms of tools and processes used to identify the countries’ needs?

b) To what extent is the implementation of the programme consistent with the outputs and outcomes of the Action Plan?

c) What activities mostly directly led to the expected outcomes and what activities did this to a lesser extent?

5 The objective of the evaluation clarifies what the evaluation aims to find out and it is formulated in terms of the agreed OECD/DAC criteria for evaluating development assistance – relevance, efficiency, effectiveness, impact and sustainability.
d) To what extent is the implementation of the programme in line with the priorities of the donor and the beneficiaries?

II. Effectiveness

The extent to which a development intervention’s objectives were achieved, or are expected to be achieved, taking into account their relative importance.

a) To what extent is the programme likely to contribute to its intended outcomes? If so, why? If not, why not?

b) Are the results framework (including the measurement indicators) and programme design effective for achieving the outputs, outcomes and impact? What improvements can be made?

c) To what extent are the beneficiaries satisfied with the outcomes?

d) Did the regional approach of delivering the activities provide a good forum for exchange of knowledge and experience in the most cost-efficient manner?

e) What are the major factors influencing the achievement or non-achievement of the outcomes of the programme?

III. Gender

a) How could the gender perspective be introduced and targeted in the planning and implementation of activities?

b) What lessons could be applied from the MENA STAR project?

b) For the MENA STAR project

The objective of the final evaluation of the MENA STAR project is to evaluate its relevance, efficiency, effectiveness, impact and potential sustainability as an input to improve future policy, programmes and projects through feedback of lessons learned and to serve as a tool for accountability by providing information about performance and results.

The intent of each of the evaluation criteria mentioned above is summarized below and translated into relevant and specific evaluation questions and how they apply to the MENA STAR project. The evaluation questions also address gender issues.

I. Relevance

The extent to which the objectives of a development intervention are consistent with beneficiaries’ requirements, country needs, global priorities and partners’ and donors’ policies.

a) To which extent were the results of the baseline survey (at the beginning of the project) considered during the planning and implementation of the project activities?

b) To what extent was the revised logical framework of the project coherent and realistic?

c) How crucial were the risks and assumptions for the success of the project? How realistic were they? How far did the project control them?

d) To which extent the project met the national needs and priorities of the beneficiaries?

II. Efficiency

The extent to which the costs of a development intervention can be justified by its results, taking alternatives into account.
a) Were the planned project activities and outputs delivered according to plan and budget? Were they adjusted, where necessary, to evolving needs from beneficiaries?
b) Could more results have been produced with the same resources?
c) To what extent did the design and planning phases of the project consider the absorption capacity of the beneficiaries? What are the lessons learnt?
d) Did the combination of national and regional approaches provide a good forum for exchange of knowledge and experience in the most efficient manner?

III. Effectiveness

The extent to which a development intervention’s objectives were achieved, or is expected to be achieved, taking into account their relative importance.

a) To what extent have the beneficiaries been satisfied with the outcomes?
b) How appropriate and useful are the indicators in assessing the project’s progress? Are the means of verification for the indicators appropriate?
c) Did the project governance facilitate good results and efficient delivery? Was there a clear understanding of the roles and responsibilities by all parties involved?
d) What could have been done to make the project more effective in meeting its objectives and outcomes?
e) What lessons could be learnt around measures to ensure national follow-up on the recommended actions?
f) To what extent did the project ensure that there was coordination, coherence and complementarity between its interventions and the programmes of other donors?

IV. Impact

The positive and negative changes produced by a development intervention, directly or indirectly, intended or unintended.

a) Can observed changes be linked to the project’s interventions?
b) What real difference has the project made to the beneficiaries?

V. Sustainability

The continuation of benefits from a development intervention after major development assistance has been completed. The probability of long-term benefits from a development intervention.

a) To what extent are the beneficiaries capable and prepared to maintain the positive effects of the project without support in the long term? What specific elements could be recommended to sustain similar results under the Action Plan?
b) What risks and potentials are visible regarding the sustainable effectiveness of the project and how likely are their occurrence?

VI. Gender

a) Did the project have any gender-specific impacts? Are there any recommendations that could be drawn for the Action Plan?

The Supplier is expected to address the proposed evaluation questions mentioned above and, in the interest of clarity, develop them further during the inception phase of the evaluation. The final set of evaluation questions should be approved by Sida and ISO to ensure that the stated
evaluation objectives of the development assistance programme and project are duly taken into account.

3.4 EVALUATION APPROACH AND METHODS FOR DATA COLLECTION AND ANALYSIS

The evaluation approach should be based on the utilization-focused principle which means that the Supplier should facilitate the entire evaluation process with careful consideration of how the evaluation findings will affect the intended use by intended users. It is therefore expected that the Supplier, in their proposal, present: i) how intended users are to participate in and contribute to the evaluation process, and ii) methodology and methods for data collection that create space for reflection, discussion and learning between the intended users of the evaluation.

The scope, purpose and evaluation objectives determine the most appropriate approach and methodology for the evaluation. The Supplier shall propose an appropriate methodology to answer the evaluation questions in the RFP. However, as the Supplier will not have an opportunity to discuss the methodology with the intended users during this phase, it is important to have an inception phase where the evaluation design, methodology and methods for data collection and analysis are expected to be further developed. The final evaluation approach (including the format of the evaluation report) shall be documented in the inception report.

Prior to starting the evaluation assignment, the Supplier shall present an inception report, that include elaboration on the scope of the evaluation, evaluability issues, evaluation questions, application of evaluation criteria, approach, methodology for data collection and analysis (including an analysis of the limitations of the chosen methodology) and the evaluation work plan and timeline.

In preparing the evaluation methodology for data collection and analysis for the Action Plan and the MENA STAR project, the Supplier should consider at least the following items:

- Suitable methods of data and information collection;
- Selection criteria of proposed activities or case studies to be sampled, e.g. a combination of national and regional activities, a combination of technical areas, activities representing different geographical target groups, ... etc.;
- Basis and justification of the choices for field visits and the focus of the evaluation in each country considering that field visits to ISO members in developing countries is envisaged; and
- Appropriate methods of analysis of information and basis for making judgments and recommendations.

ISO in consultation with the intended users will review and give (as appropriate) their comments and/or formal approval including any modifications needed on the inception report. ISO will use, to review the inception report, the checklist that Sida has developed for assessing inception reports which is based on the OECD/DAC criteria for development evaluation.
3.5 **ORGANIZATION OF EVALUATION MANAGEMENT**

The evaluation shall be organized in a way that contributes to the purpose and objective of the evaluation and in a spirit of partnership.

a) **For the Action Plan**

A steering group consisting of Sida and ISO will be responsible to manage the evaluation by reviewing the RFP, provide recommendations in relation to the evaluation process and reviewing the evaluation deliverables (see 3.7). The members of the DEVCO CAG will have an advisory role in the evaluation process.

b) **For the MENA STAR project**

A steering group consisting of the donor (Sida) and the implementing organization (ISO) will be responsible to manage the evaluation by developing the RFP, taking decisions in relation to the evaluation process and reviewing the evaluation deliverables (see 3.7). The members of the project Joint Coordination Committee (JCC) will have an advisory role regarding the evaluation process.

3.6 **EVALUATION QUALITY**

The evaluation shall conform to OECD/DAC’s Quality Standards for Development Evaluation. The Supplier shall use the OECD/DAC Glossary of Key Terms in Evaluation and shall specify how quality assurance, in accordance with DAC’s quality standards, shall be handled by the Supplier during the evaluation process.

3.7 **TIME SCHEDULE AND DELIVERABLES**

The evaluation assignment is targeted to commence as soon as the contract is signed and be completed with the presentation of the final evaluation report by **2019-05-31** at the latest. The Supplier in his/her submission to this RFP shall propose an overall time schedule and work plan for the **milestones and key deliverables** regarding the following main phases:

<table>
<thead>
<tr>
<th>Phase</th>
<th>Key deliverable</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inception phase (see 3.4 above)</td>
<td>Inception report</td>
<td>1 month after signing the contract</td>
</tr>
<tr>
<td>Data collection and analysis phase including practical preparatory work (see 4.2 below)</td>
<td>Desk and field work report</td>
<td>-</td>
</tr>
<tr>
<td>Reporting and dissemination phase including time for consultation, debriefings and turn-around time for drafts to be read, commented on and revised (see 4.3 below)</td>
<td>Final evaluation report</td>
<td>2019-05-31</td>
</tr>
</tbody>
</table>

3.8 **EVALUATION TEAM QUALIFICATIONS**

The Supplier should assign a qualified evaluation team to undertake the project (see 3.1 above) and is requested to motivate its proposal.

A **Team Leader** with extensive evaluation expertise should oversee the overall evaluation work and act as a focal point with ISO. The Supplier shall submit CVs of the evaluation team and the
Team Leader that highlight at least their academic background, number of years of working experience (in particular in developing countries), expertise on capacity development and gender as well as language skills. It is important that the competencies of the individual team members are complimentary.

Also, the Supplier in his/her submission to this RFP shall describe how the evaluation team will undertake the evaluation considering the similarities and differences in the intended results and implementation mechanisms of the Action Plan and the MENA STAR project.

The evaluators shall be independent from the evaluation object and evaluated activities and have no stake in the outcome of the evaluation. The Supplier shall make ISO aware of any potential problems in this regard.

3.9 Financial and Human Resources

ISO will use its own contract template to prepare the Service Level Agreement with the selected Supplier.

All prices should be expressed in Swiss francs. The proposed contract payment modalities shall be as follows: 30% at the acceptance of the inception report; 50% at the acceptance of the draft desk and field work report; and 20% at the acceptance of the final report. 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 Supplier to propose in his/her submission to this RFP the most suitable pricing structure that gives ISO a full picture of all detailed expenses or costs. ISO will assume that all provided costs are exhaustive and thus will not allow further costs to be introduced during contract negotiations, should the Supplier be selected.

4. Managing the Evaluation During Its Implementation

4.1 The Inception Phase

ISO and the Supplier will use the inception report as a basis for negotiating the final scope of the evaluation. The combined RFP and inception report define what is to be evaluated and why and how it is going to be evaluated. The scope and focus of the inception report is described in 3.4 above.

ISO will communicate with and support the evaluation team, e.g. by providing background documents and letters of introduction, arranging site visits, booking interviews etc.

4.2 The Data Collection and Analysis Phase

During this phase, the evaluation team collect data through document analysis, interviews, field visits, meetings and other methods.

The evaluation team should be responsible for organizing the practicalities and could request assistance (when needed) from ISO.

The Supplier should take into consideration appropriate measures for collecting data in cases where sensitive or confidential issues are addressed and avoid presenting information that may be harmful to some stakeholder groups.
4.3 THE REPORTING AND DISSEMINATION PHASE

4.3.1 COMMENTING ON EVALUATION REPORT

The evaluation team should present the draft evaluation report either on-site or via video conferencing and ensure that the evaluation report for the Action Plan and the MENA STAR project:

- can readily be understood by the intended users of the evaluation and contains an executive summary;
- provides answers to the evaluation questions agreed upon in the inception phase report;
- describes and explains the evaluation methodology and acknowledges any constraints encountered and how these have affected the evaluation; and
- presents findings, conclusions, recommendations and lessons learned separately and with a clear logical distinction between them.

ISO shall ensure that intended users of the evaluation are given the opportunity to comment on findings, conclusions and recommendations, which are normally included in the draft evaluation report.

The final evaluation report shall reflect the comments of the intended users and acknowledge any substantive disagreements. In disputes about facts that can be verified, the Supplier should investigate and change the draft where necessary. In case of difference of opinion or interpretation between the Supplier and the intended users, comments may be reproduced verbatim, in an annex or footnote to the report.

The final evaluation report should not be longer than 40-50 pages (including the executive summary). Additional information that are necessary should be added to annexes.

ISO will use, to review the draft evaluation report, the checklist that Sida has developed for assessing evaluation reports which is based on the OECD/DAC’s quality standards for development evaluation.

4.3.2 DISSEMINATING EVALUATION RESULTS

ISO in consultation with Sida will decide on how to disseminate the evaluation results for the ISO Members and general public.

5. PREPARING THE MANAGEMENT RESPONSE TO THE EVALUATION

The management response to the evaluation aims to ensure that evaluation findings are used to strengthen the effects of development cooperation and to contribute to transparency among intended users and beneficiaries.

The management response provides an assessment of the quality of the evaluation report, a management position and statement in response to the evaluation conclusions and recommendations as well as an implementation plan (if needed). An implementation plan specifies what is to be done, by whom, when and how the plan is to be followed up.

ISO will be responsible to prepare a management response in consultation with the intended users of the evaluation.
6. Supplier’s Proposal

The Supplier shall provide comprehensive responses to all the questions listed below.

6.1 Proposal Description

The Supplier shall describe in a maximum of three pages the understanding of his/her company of this project and what should be delivered.

6.2 Supplier’s Profile

a) History
   - Date and place founded
   - Short history of the company and general presentation
   - Location of headquarters
   - Other key locations

b) Strengths
   - Specific competencies and skills
   - Competitive advantage

6.3 Experience and Resources within Project Area

a) Previous projects

The Supplier shall describe three previous similar projects in the scope of this RFP that his/her company has delivered for other customers including:
   - Why those projects are relevant to the scope of this RFP.
   - Major issues or problems that may have occurred and how they were resolved.
   - When those projects were delivered.

b) Specific technical knowledge and skills

The Supplier shall list specific technical knowledge and skills that his/her company has in the area relative to the scope of this RFP.

6.4 Experience in Other Areas

a) ISO
   - The Supplier shall describe any previous experience with ISO (including ISO contact person(s) and location).
   - The Supplier shall mention if any employee in his/her company is related, either personally or professionally, to a person currently employed by ISO.
   - The Supplier shall mention if any ISO employee was previously employed by his/her company.
b) **Other organizations**

The Supplier shall describe his/her previous experience with other organizations working in the field of quality infrastructure or standardization.

### 6.5 References

The Supplier shall provide three relevant current customers references including:

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

The references provided above may be directly contacted by ISO during the evaluation phase of the Supplier’s proposal.

### 6.6 Additional Relevant Information

The Supplier shall provide any additional information on his/her company, which he/she believes is useful for ISO to know in the context of this RFP.

### 6.7 Project Specific Questions

a) **Evaluation approach and methodology**

The Supplier shall describe the evaluation approach and methodology for the Action Plan and MENA STAR project.

b) **In scope items, deliverables**

The Supplier shall describe the services that his/her company intends to provide as part of this project and match with the RFP requirements.

c) **Out of scope items**

The Supplier shall describe all items or requirements of this RFP that his/her company won’t address.

d) **ISO involvement**

The Supplier shall describe what he/she needs from ISO in order to perform successfully.

### 6.8 Legal Documents

ISO will provide its general project agreement for any ultimately chosen proposal.
Annex 2

MENA STAR 2013-2018 - Project proposal