REQUEST FOR PROPOSALS
STANDARDS AND REGULATION

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

ISO standards can be referenced in national public policy and used to achieve various policy objectives. Incorporating ISO standards into national regulations – either wholesale or by way of reference – can save policymakers time and money drafting technical guidelines from scratch and ensure consistency across industries in different countries. Yet many policy makers are not aware of the benefits, or sometimes even the possibility, of incorporating standards into their national regulations or, more specifically, may not be aware of the different options for incorporating standards into regulations in practice.

The latest publication aiming to assist policymakers dates back to 2014 (“Using and referencing ISO and IEC standards to support public policy”). There is a need to provide policymakers with up-to-date information, and to demonstrate the benefits of international standards with reliable data and a robust methodology. This is also an opportunity to collect and analyse data that showcases the widespread use of standards around the world.

The purpose of this project is to develop a compendium of approaches to incorporating standards in national regulations to serve as a guide to policymakers on the different options available and recommendations on what to use when.

Therefore, we would like to invite you to participate and respond to this Request for Proposal (RFP). The purpose of this RFP is to allow several qualified suppliers to submit their best proposals for this service.

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/consultants.

Please provide comprehensive information to the attached questions by 23:59 PM CET 30 October 2023 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,

Sarah Parker
Project Manager
# Table of Contents

REQUEST FOR PROPOSALS .................................................................................................. 1

## 1 RFP Process, Criteria, Terms and Conditions ............................................................... 3

- 1.1 Enquiries .................................................................................................................. 3
- 1.2 Modifications .......................................................................................................... 3
- 1.3 Schedule and Deadlines .......................................................................................... 3
- 1.4 Format of Submission ............................................................................................. 3
- 1.5 Response Deadline .................................................................................................. 4
- 1.6 Partial Responses .................................................................................................... 4
- 1.7 Clarification on RFP .................................................................................................. 4
- 1.8 Validity ...................................................................................................................... 4
- 1.9 Evaluation Process and Criteria ............................................................................. 4
  - 1.9.1 Preliminary screening and requirements ............................................................. 4
  - 1.9.2 Selection process ................................................................................................ 5
  - 1.9.3 Evaluation criteria .............................................................................................. 5
  - 1.9.4 Pre-award Review and Validation ........................................................................ 6
- 1.10 Health and Safety .................................................................................................. 6
- 1.11 General Conditions ............................................................................................... 6
- 1.12 Disclaimer .............................................................................................................. 7
- 1.13 Confidentiality ........................................................................................................ 7

## 2 Background Information ............................................................................................. 8

- 2.1 ISO – History .......................................................................................................... 8
- 2.2 ISO – Today ............................................................................................................... 8

## 3 Project Description and Requirements ......................................................................... 8

- 3.1 Situation today ......................................................................................................... 8
- 3.2 Future Situation ....................................................................................................... 8
  - 3.2.1 Purpose and Objectives ...................................................................................... 8
  - 3.2.2 Expected Benefits .............................................................................................. 9
  - 3.2.3 Critical Success Factor ...................................................................................... 9
  - 3.2.4 Approach and Methodology .............................................................................. 9
  - 3.2.5 Timeline for implementation ............................................................................. 11
- 3.3 Legal ........................................................................................................................ 12

## 4 Consultant Proposal - RFP Questions ......................................................................... 12

- 4.1 Proposal Description and Project Implementation [50%] ....................................... 12
  - 4.1.1 Implementation Plan ......................................................................................... 12
- 4.2 Consultant’s Profile [40%] ........................................................................................ 12
  - 4.2.1 History ............................................................................................................... 12
  - 4.2.2 Company Profile ............................................................................................... 13
  - 4.2.3 Business Continuity .......................................................................................... 13
  - 4.2.4 Company Ownership ....................................................................................... 13
  - 4.2.5 Bankruptcy ........................................................................................................ 13
  - 4.2.6 Experience within Major Projects ..................................................................... 13
  - 4.2.7 Team composition, Roles and Responsibilities (R&R) ................................... 13
  - 4.2.8 Knowledge of ISO and ISO Members .............................................................. 13
  - 4.2.9 Industry experience .......................................................................................... 14
  - 4.2.10 References ...................................................................................................... 14
- 4.3 Financial Proposal [10%] ........................................................................................ 14
1 RFP Process, Criteria, Terms and Conditions

1.1 Enquiries

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

Contact: Sarah Parker
Title: Project Manager
Address: Chemin de Blandonnet 8, 1214 VERNIER
Email: parker@iso.org

1.2 Modifications

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.

1.3 Schedule and Deadlines

The project will follow the dates below:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP released to potential Consultants</td>
<td>29 September 2023</td>
</tr>
<tr>
<td>Clarification calls with Consultants (as requested)</td>
<td>16-20 October 2023</td>
</tr>
<tr>
<td>Consultants return proposal</td>
<td>30 October 2023 23:59 CET</td>
</tr>
<tr>
<td>Expected evaluation of proposals (including references)</td>
<td>31 October – 10 November 2023</td>
</tr>
<tr>
<td>Short-List Phase</td>
<td>10-17 November 2023</td>
</tr>
<tr>
<td>Expected selection of proposal</td>
<td>30 November 2023</td>
</tr>
</tbody>
</table>

Electronic format of all proposals must be received by 30 October 2023 23:59 CET by the Procurement Manager at tenders@iso.org, copying the ISO Project Manager. Proposals not received by this time without prior written agreement will be disqualified.

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

1.4 Format of Submission

Your response should be structured in accordance with the requirements contained in the RFP and should align with each requirements of the RFP by cross-reference to the relevant section number.
Consultants are encouraged to supply innovative solutions in responding to this RFP, however, Consultants 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 in the paragraph 1.3 above, provided however that, if the deadline set for submission is extended, the ISO Project Manager will also specify the new date and hour for submission which will replace the above deadline.

Any submission received by ISO after expiry of the deadline referred above 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

We have planned for clarification calls and will accept requests for clarification until 18:00 CET, 16 October 2023. Please contact the ISO Project Manager by email (parker@iso.org) to schedule a call, copying the ISO Procurement Manager at tenders@iso.org.

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.

1.8 Validity

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

1.9 Evaluation Process and Criteria

1.9.1 Preliminary screening and requirements

The initial stage will examine whether the proposal submitters have provided all the required information and/or associated documents on a prima facie basis.

In addition, the preliminary examination of the following elements shall be on a pass/fail basis:

- The Consultants must confirm that it accepts full responsibility for arranging, such life, health, accident and other forms of insurance covering the performance of any agreement granted under this RFP. The Consultants (including any personnel) are not eligible to participate in life or health insurance schemes available to ISO employees.

- The Consultants are also required to confirm that they are solely responsible for their tax status, paying any taxes and statutory contributions applicable in respect of fees and reimbursements received. 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 proposal documentation.
1.9.2 Selection process

Stage 1: Proposals deemed to have sufficiently responded to this RFP will be thoroughly reviewed by an evaluation committee. Any necessary clarification or further information required to inform a selection decision will be requested from the Consultants by the Project Manager. A shortlist of possible providers will be prepared.

Stage 2: Shortlisted providers will be invited to present their proposal to the ISO evaluation committee. The presentations will take place via videoconferencing. The presentation sessions will include time for the Consultants to present their proposed solution and time for discussion and questions from the evaluation committee.

No new information should be introduced in the presentation sessions – all information about the Consultant’s proposal is to be included in the proposal submitted in response to this RFP. The purpose of the presentation sessions will be to discuss the proposal.

1.9.3 Evaluation criteria

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.

<table>
<thead>
<tr>
<th>Domain</th>
<th>Criteria</th>
<th>Weight</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal description and project implementation</td>
<td>Clear understanding of the purpose, required outputs and strategic value of the project</td>
<td>50%</td>
<td>4.1</td>
</tr>
<tr>
<td></td>
<td>Academic and methodological soundness of proposal</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provided list of 8 selected countries for data analysis, including selection criteria and rational for selection</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Detailed realistic timeline and allocation of roles and responsibilities for the project implementation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Demonstrated willingness to work collaboratively with ISO, including regular reporting on intermediary progress</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Profile and experience of the Consultants</td>
<td>Experience in projects similar in scope/purpose to this RFP, such as policy review or research of use of standards</td>
<td>40%</td>
<td>4.2</td>
</tr>
<tr>
<td></td>
<td>Experience in desk research via qualitative data collection methods, such as search of legal databases</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Request for Proposals

#### Ability to deliver complex information in an understandable, accessible format (including communication materials such as summaries, graphs, social media posts), preferably demonstrated in previous large-scale projects

<table>
<thead>
<tr>
<th>Financial proposal</th>
<th>Clear, detailed budget allocation</th>
<th>10%</th>
<th>4.3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cost-effective and competitive proposal</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

#### 1.9.4 Pre-award Review and Validation

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

#### 1.10 Health and Safety

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

#### 1.11 General Conditions

By submitting a proposal, the Consultant agrees to all conditions and terms stated in this RFP. If the Consultant 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 Consultant information.

ISO reserves the right to negotiate all terms and conditions in order to enter a formal contract with the Consultants, including regarding ultimate pricing. The ultimate decision regarding the awarding of a bid is subject to said negotiation. It is also to be noted that if the Consultants have to process personal data in the course of the Project, necessary for the delivery of the Project Deliverables, the Consultants shall have the capacity to do so in compliance with the applicable...
data protection regulations, notably the Swiss New Federal Act on Data Protection ("nFADP"), effective as per 1st September 2023, and be ready to sign a Data Processing Agreement if required, which may include EU Standard Contractual Clauses in case there is an access to personal data from a country with no adequate level of data protection. 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 Consultant 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 Consultant 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 Consultants shall make all such certificates available for inspection.

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

1.12 Disclaimer

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

The Consultant 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 Consultant 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 Consultant (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 Consultant 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 Consultant whether in contract, tort or otherwise with respect to the giving of any such representation or estimate.

1.13 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 Consultant/Supplier to whom release is required in order to prepare a response to this RFP.

2 Background Information

2.1 ISO – 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 24 400 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.

2.2 ISO – Today

Today ISO is a non-profit membership organization with a membership of 169 national standards bodies (NSBs) 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.

3 Project Description and Requirements

3.1 Situation today

We know from previous research that international standards are referenced in national technical regulations, laws and acts. However, there is lack of data on how often, in what ways, and in what countries or regions it is done. The relevant studies that do exist are very narrow, in the sense that they only target incorporation of specific international standards into specific types of national regulations (e.g. federal regulations adopted by specific national bodies). There is an opportunity to collect and analyse a large amount of such data, showcasing the use of standards around the world and refining the research methodology for future studies.

Since policymakers are undeniably one of the categories of standards’ users, this project will also allow us to better meet their needs by providing guidance on how to use ISO standards as ready-made policy solutions. At the moment, the latest publication aiming to assist them dates back to 2014 (“Using and referencing ISO and IEC standards to support public policy”). This project gives us an opportunity to provide more up-to-date guidance.

3.2 Future Situation

3.2.1 Purpose and Objectives
The purpose of this project is to develop a compendium of approaches to incorporating standards in national regulations to serve as a guide to policy makers on the different options available and recommendations on what to use when. Ultimately, we want to make the use of ISO standards easier, showcasing how they can help advance policy objectives.

Objectives of the project include:
- **Aggregating and analysing data** on references to international standards in selected national regulations, via legal databases and/or WTO TBT/SPS notifications, from a selected diverse set of countries.
- **Choosing a limited number of countries for case studies** on their approaches, based on the data quality and availability, as well as methodological relevance; undertaking the case studies and potentially interviewing lawmakers on their approaches, policy objectives and the challenges of standards’ use.
- **Creating a compendium of approaches of how international standards are referenced in select national regulation** (can be based on existing taxonomy) and formulating recommendations for policymakers on how to incorporate standards into regulation for different purposes.
- **Refining the methodology** for future research on standards and national regulations.
- **Writing a research report and various other materials** based on the analysis of the results and case studies.
- **Communicating the findings** to Members and ISO/CS staff.

### 3.2.2 Expected Benefits

This will benefit ISO/CS on its various missions where ISO delegation engages with policymakers, as well as NSBs when collaborating with government agencies in their respective countries. Developing a compendium of approaches could provide necessary guidance to Members and ISO/CS staff on how to promote the use of international standards and how to tailor the messaging to various circumstances and regions. The goal is to make the use of ISO standards easier, showcasing how they can help advance policy objectives.

This goal is to be achieved with the following expected list of deliverables:
- Cleaned up, formatted data on 8 countries’ use of international standards in regulation;
- Draft research report;
- Final research report with APA7-formatted references and executive summary;
- Research digest summarizing and illustrating the key findings;
- FAQ for policymakers based on key findings;
- Oral presentation of key findings accompanied by a PowerPoint presentation.

### 3.2.3 Critical Success Factor

ISO gained valuable information on the use of international standards in national regulation. Research outputs are of practical value for NSBs and policymakers and are used to base effective and understandable communication materials, including specific step-by-step guidelines on citing international standards in national regulation.

### 3.2.4 Approach and Methodology
The research will examine how international standards (ISO standards and other international standards referenced by target countries) are referenced within the texts of national regulation (laws, acts of Parliament, technical regulation; regulation here implies the federal/highest level and not municipal or local acts).

The essence of the project consists of three parts:

(a) The consultants will collect quantitative and qualitative data about the current use of standards in regulation and analyse the trends within the data (approaches, number of references, types of legislation, sectors etc.). Data sources can include WTO notification database, WTO trade reports, and national databases of legal texts. For data collection, it is expected that consultants choose 8 countries (2 out of each ISO region: Asia and the Pacific, Europe and Central Asia, Americas and the Caribbeans, Africa and Arab states). The countries’ NSBs have to be ISO Members in order for the project to be of most relevance to the ISO community. At least 2 countries out of 8 need to be developing countries in order to examine diverse perspectives. Since we limited the number of countries to 8, we expect the data to be comprehensive. Consultants should focus on federal/highest level of regulation. The broad analysis of the collected data should include categorizing them by sector and by type of reference and any other suitable analysis of trends.

(b) Based on the data collected, 4 countries will be selected for in-depth case studies on their approaches to incorporating standards, challenges they face, and how standards contribute to their nation-specific policy objectives. Interviews with policymakers might be undertaken (the interviewees will be selected by consultants; the questions are to be approved by ISO). At least one out of four countries has to be a developing country in order to ensure their needs such as capacity building are taken into account.

(c) Based on the data and case studies, consultants will compile a compendium of approaches of how to reference standards in regulation. It will include updated taxonomy, examples and, most importantly, step-by-step explanatory guidance for policymakers for different use cases of international standards. The guidance should include ways that policymakers can approach the question of access due to cost of international standards based on their national circumstances.

The consultants will be responsible for finding and accessing the data, performing the search and data analysis, completing the case studies, drawing conclusions and delivering the intermediary and final outputs. The consultants may propose innovative solutions and refine the scope and methodology (subject to Project Manager’s approval). Consultants should regularly report on their progress throughout the project.

We expect Consultants to include in the proposal the 8 countries they suggest for data collection along with an explanation of the selection criteria used (see Section 4.1).

Project manager(s) at ISO/CS will choose the Consultants through the evaluation process, monitor progress and possibly provide directions to them throughout the project. The outputs will be evaluated by ISO and given feedback that the final versions should incorporate. The Project Manager will also assess the need to perform detailed factchecking and/or peer-review based on intermediary outputs. ISO reserves the right to use the final results as it sees fit, including putting it in the R&I library, including it in communication materials, social media posts and email
newsletters, or presenting it at internal or external meetings (see more legal considerations and disclaimer above).

Please note the following:
- The report should not be intended to be an introduction to standards for policymakers or a list of key standards to implement. Rather, it is focused on data and trends on use of standards in regulation;
- This project does not intend to collect statistics of all global use of ISO standards. It focuses on one specific type of use – in regulation;
- The project does not intend to measure the impact of incorporating international standards, though it may draw some general conclusions about it based on collected data (more or less effective and impactful ways to reference them);
- National and regional standards, as well as standards written by private or civil society organizations, are out of scope. Comparative analysis (up to ISO’s approval) with other models of standardization such as by ILO might be in scope if considered valuable information. The study should focus on international standards as per definition of the WTO TBT agreement criteria.

### 3.2.5 Timeline for implementation

The estimated schedule of work should be as follow:

<table>
<thead>
<tr>
<th>Task</th>
<th>Deliverable</th>
<th>Due date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial scoping and finalizing the methodology and research questions; approve the selection of 8 countries, collect and analyse the data on their references to standards in regulations</td>
<td>Final methodology and research questions; well-formatted accurate data</td>
<td>Within 3 months from the signature of the contract</td>
</tr>
<tr>
<td>Selection of 4 countries based on the methodological relevance and perform detailed case studies; describing in detail the data analysis methodology, discovered trends and patterns, and case studies' findings in the research report</td>
<td>Draft research report (with anonymized interview transcripts in the Annex if needed)</td>
<td>Within 7 months from the signature of the contract</td>
</tr>
<tr>
<td>Incorporate ISO’s feedback and ensure accurate formatting and references of the report</td>
<td>Final report with APA7-formatted accurate references and executive summary</td>
<td>Within 9 months from the signature of the contract</td>
</tr>
<tr>
<td>Write a short, easy-to-read brochure with graphs/other visuals that showcase the results</td>
<td>Research digest</td>
<td>Within 10 months from the signature of the contract</td>
</tr>
<tr>
<td>Based on the findings and interviews with policymakers, write an FAQ on approaches, common challenges and</td>
<td>FAQ for policymakers for policy.iso.org</td>
<td>Within 10 months from the signature of the contract</td>
</tr>
</tbody>
</table>
3.3 Legal

The selected Consultants will be expected to begin work on the signing of the contract, no later than 15 December 2023, provide all final deliverables by **30 November 2024**.

The selected Consultants will be expected to sign the ISO Consultancy contract and potentially a Data Processing Agreement ("DPA") to cover the processing of personal data, as applicable. ISO will require a contract term stipulating that copyright in the Deliverables created by the Consultants with ISO will be owned by ISO.

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.

4 Consultant Proposal - RFP Questions

Please provide comprehensive responses to all elements in this section, for your proposal to be considered valid.

4.1 Proposal Description and Project Implementation [50%]

Please describe in a maximum of one page your understanding of this project, your vision of the research methodology, and what you will be delivering.

Specifically, please list which **8 countries** you suggest as candidates for data collection and analysis, together with selection criteria you used (note that the final selection of countries is subject to ISO’s approval).

Your proposal must be methodologically sound and be able to withstand academic scrutiny.

4.1.1 Implementation Plan

Please describe the step-by-step implementation plan and timeline for this project, based on your understanding of its purpose and deliverables. Including a clear indication of the different phases of the project, and their estimated duration.

You can base it on our general description of the timeline (Section 3.2.5) with specified actionable steps and, if applicable, potential challenges.

4.2 Consultant’s Profile [40%]

4.2.1 History

- Short history of your company, general presentation
• Location and time zone of your company’s headquarters and any other locations where work on this project will be conducted
• Detail your presence in Geneva, if any

4.2.2 Company Profile

- Demonstrated ability in desk research, based on qualitative methods such as search of legal databases. Please provide at least two (2) examples of reports, articles or other research publications that demonstrate your skills in applying methodology similar to this RFP.
- Demonstrated ability in delivering complex information in a format understandable by lay audiences. Please provide at least two (2) examples of written work or data visualization that demonstrates your ability to communicate complex information or ideas to lay persons (non-experts) in an accessible way.
- Demonstrated commitment to sustainability as well as diversity and inclusion.

4.2.3 Business Continuity

Please provide details of the Business Continuity Planning process you have in place. You may wish to include corporately developed documentation and brochures on the subject. Indicate whether you have ever invoked the Business Continuity Plan.

4.2.4 Company Ownership

Is your company publicly traded? If privately held, list the name(s) of all significant stakeholder(s)/owner(s).

4.2.5 Bankruptcy

Has the company ever filed for bankruptcy? If yes, explain in detail the reasons why, the filing date and the current status.

4.2.6 Experience within Major Projects

Describe at least 2 previous similar projects in scope/purpose of this RFP you have delivered for other customers:
• Explain why those projects are relevant to the scope/purpose of this RFP (e.g. comparative policy or legal research, enquiry into challenges faced by lawmakers etc.)
• Detail major issues or problems that may have occurred and how they were resolved.
• Detail when those projects were delivered.

4.2.7 Team composition, Roles and Responsibilities (R&R)

Please provide a thorough outline of everyone in the team that will collaborate with ISO/CS. Include CVs and a team organizational chart. If you intend to involve subject matter experts for specific components of the work, ensure that these people are included in your description of your project team. Please include which languages the employees/experts can perform research in if applicable.

Please also provide a thorough outline of what is expected from ISO/CS.

4.2.8 Knowledge of ISO and ISO Members
• 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?

4.2.9 Industry experience

Describe your previous experience and number of customers within the standardization and international non-governmental work fields, if any.

4.2.10 References

Provide 3 relevant current or past client references with:
• Project short description
• Company name
• Location
• Contact person, position
• Email or phone

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

4.3 Financial Proposal [10%]

Please take note of and address all elements of this section in your financial proposal.

The financial proposal must:
• be simple to administer and monitor
• reduce processing costs involved
• show clearly which costs are mandatory and which are optional
• comprehensive split of the budget by phases

All prices should be expressed in Swiss Francs, excluding VAT. Recurring expenses should be shown monthly.

Please propose the most suitable pricing structure matching the above criteria. The prices supplied must give ISO a full picture of all expenses or costs and 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.

ISO will expect any selected Supplier to provide consolidated invoices on completion of each project phase.

ISO payment terms are 30 days from the date a correctly detailed invoice is received. Please confirm your agreement with those terms.

Using the below form to provide this information is not mandatory, but it is recommended.
### Financial Proposal

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Initial Deliverable Description</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Extended Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Data collection and analysis</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Case studies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Interviews with policymakers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Final deliverables</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Any other relevant costs</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total in CHF Excluding VAT:**

---

### 4.4 Additional relevant information

Provide any additional information, which you believe is useful for ISO to know in the context of this project, with specific focus on:
- What you need from ISO in order to perform successfully
- The "out of scope" items or requirements of this RFP that you will not address
- List electronic systems you will grant ISO access to, if applicable