REQUEST FOR PROPOSALS
STANDARDIZATION FORESIGHT FRAMEWORK

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

We are seeking to understand and apply foresight practices in our work in order to anticipate future needs for international standards.

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.

Please provide comprehensive information to the attached questions by 12:00 CET 4 September 2019 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,

Belinda Cleeland
Head, Research and Innovation
ISO Central Secretariat
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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 Procurement Manager at tenders@iso.org [and copying the ISO Project Team at the contact details below], or as otherwise directly notified by the ISO Procurement Manager.

Project Team: ISO Central Secretariat Research and Innovation Unit
Address: Chemin de Blandonnet 8, Vernier, Switzerland 1204
Email: research@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 to ISO 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>6 August 2019</td>
</tr>
<tr>
<td>Clarification calls with Consultants (as requested)</td>
<td>Until 18:00 CET 21 August 2019</td>
</tr>
<tr>
<td><strong>Consultants return proposal</strong></td>
<td><strong>12:00 4 September 2019 CET</strong></td>
</tr>
<tr>
<td>Expected evaluation of proposals (including references)</td>
<td>13 September 2019</td>
</tr>
<tr>
<td>Presentations/Follow-up/Short-List Phase</td>
<td>20 September 2019</td>
</tr>
<tr>
<td>Expected selection of proposal</td>
<td>4 October 2019</td>
</tr>
</tbody>
</table>

Electronic format of all proposals must be received by **4 September 2019 12:00 CET** by the Procurement Manager:

Procurement Manager: Sandy Gros-Louis
Title: Head of Legal Services
Email: gros-louis@iso.org

Proposals not received by this time without prior written agreement will be disqualified.

These dates are a guide to the timeframe expected for this project. Dates may change and the ISO Procurement 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 requirement 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 Procurement 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

The Consultants should direct any questions arising during the preparation of the response to this RFP, or requests for clarification, in writing by e-mail to the ISO Project Team (research@iso.org).

We have planned for clarification calls and will accept requests for clarification until 18:00 CET, 21 August. Please contact the ISO Project Team by email (research@iso.org) to arrange timing.

Where appropriate, ISO reserves the right to circulate questions and the answers thereto to all other Consultants or post these publicly at www.iso.org, without disclosing the source of the questions or revealing the substance of a proposal. Consultants should check the RFP listing on the ISO website to receive any updates arising from these clarification calls.

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 Requirements

The Consultants must accept full responsibility for arranging, such life, health, accident and other forms of insurance covering the performance 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 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 Screening and selection process

Screening: the ISO Project Team will examine whether the proposal submitters have provided all the required information and/or associated documents on a prima facie basis. The preliminary examination shall be on a pass/fail basis.

Stage 1: Proposals deemed to have sufficiently responded to this RFP will be thoroughly reviewed by an evaluation panel. 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 drafted.

The evaluation panel may include a reviewer external to ISO with relevant subject matter expertise. For the purposes of commercial confidentiality, Consultants are invited to include in their proposal a de-identified, text only (if relevant, include graphics provided they do not contain a logo) version of their proposal for this external review. If a text only version is not provided, the main proposal document may be shared with the external reviewer.

Stage 2: Shortlisted providers will be invited to present their solution to the ISO Project Team. 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 ISO Project Team.

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 criteria.

The winning proposal will be the proposal with the highest score across the two evaluation stages.

<table>
<thead>
<tr>
<th>Domain</th>
<th>Criteria</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stage 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experience and expertise</td>
<td>breadth and depth of expertise re: foresight methodologies and practice</td>
<td>35%</td>
</tr>
<tr>
<td></td>
<td>Experience applying foresight/futures methodologies in a range of contexts, including contexts other than commercial strategic foresight.</td>
<td></td>
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<tr>
<td></td>
<td>Experience in education and training on foresight principles, tools and methods.</td>
<td></td>
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<tr>
<td></td>
<td>Experience in designing and delivering collaborative scanning platforms and procedures</td>
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</tbody>
</table>
Understanding of developing country contexts and ability to apply foresight methodologies in these contexts
Experience in applying foresight methodologies in non-profit and/or public sector organizations
Experience developing bespoke approaches to foresight practice
Experience implementing effective bespoke approaches to foresight practice
Demonstrated understanding of international standardization

<table>
<thead>
<tr>
<th>Communication and relationship management</th>
<th>Written communication skills: clarity of message, structure and logical flow of proposal materials</th>
<th>12%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Willingness to work collaboratively with ISO project team</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Suitability of proposal</th>
<th>Consistency of proposed solution with the needs outlined in the RfP</th>
<th>35%</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Proposal demonstrates commitment to an integrated approach (not a menu of methods)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Proposal demonstrates understanding of project needs re: continuous/ongoing activities and coordination by the ISO Central Secretariat (ISO/CS)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Proposed approach reflects a flexible, bespoke framework that can be owned, used and adapted by ISO over time.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Demonstrated understanding of ISO activities, role of ISO/CS and overall project needs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Relevance of expertise of all project team members</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Professionalism of presentation materials and overall approach</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Organizational issues</th>
<th>Overall viability of the Consultant organization (financial and otherwise)</th>
<th>8%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Contribution to broader understanding of subject matter</td>
<td></td>
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</tbody>
</table>

| Project cost                             | Pricing outline is cost-effective                                                               | 10% |

**Stage 2**

<table>
<thead>
<tr>
<th>Communication and relationship management</th>
<th>Verbal communication skills</th>
<th>40%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Consistency between written proposal material and proposal presentation (content, tone, project outline, etc)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Clarity of information provided to ISO in any communication beyond the proposal</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Willingness to work effectively with the ISO Project Team</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quality and suitability of proposal</th>
<th>Quality of approach to project management</th>
<th>20%</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Project team</th>
<th>Quality and suitability of project team</th>
<th>20%</th>
</tr>
</thead>
</table>

| Organizational issues                    | Practical convenience of working with provider – accessibility, communication options, etc.       | 20% |

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 [link] 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 Procurement 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’s 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. 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’s response and any 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 their independence or that of their personnel. If the Consultants fails 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 their 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 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. As indicated in section 1.9.2, proposals may be shared with an external adviser who has appropriate subject matter expertise. For the purposes of commercial confidentiality, Consultants may provide a de-identified copy of their proposal materials to be shared with the external adviser.

This information must only be released to the personnel of the Consultant 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 has published more than 22,400 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 members from 164 countries and thousands of technical bodies to take care of standard 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.
2.3 Business unit owning this RFP

The Research and Innovation Unit was established in 2019 to meet the needs of ISO members in relation to research on the impacts of standardization and International Standards, and the identification and understanding of opportunities for future standardization.

The Unit sits within the ISO Central Secretariat and works directly with ISO members and other standardization research practitioners to apply and promote research within the ISO system.

The Project Manager responsible for this RFP is:

Name: Belinda Cleeland
Title: Head, Research and Innovation
Email: cleeland@iso.org

3 Project Description and Requirements

3.1 Situation today

The ISO system works collaboratively, through established structures and processes, to develop International Standards for products, services and processes. New opportunities for future standardization enter the ISO system in several ways:

1. Where the proposal is for a new standard that would fall within an existing area of work for ISO, the topic is considered and worked on by the relevant technical committee. (For reference, the development of a new ISO Standard generally takes 3-5 years).
2. Where the proposal is for a new standard that does not fit within the scope of an existing technical committee, it is considered first by the ISO members and, if approved by the members, it is considered by the ISO Technical Management Board, which may decide to create a new project committee to develop the document. The project committee is disbanded once the document is published.
3. Where the proposal is for a new field of work with a defined scope and programme of potential standards to be developed, it is considered first by the ISO members and, if approved by the members, it is considered by the ISO Technical Management Board, which may decide to create a new technical committee.
4. Where the proposal is for a new standardization area (a subject area that is less well defined and needs further investigation before standardization work can begin), it is considered by the ISO Technical Management Board in conjunction with the Council Standing Committee on Strategy and Policy (CSC/SP). They may decide to set up an ad-hoc group to further investigate the subject.

Currently, opportunities for new international standardization work are identified by National Standards Bodies (NSBs) and other stakeholders and submitted to ISO for review by the relevant members or ISO governance bodies.

The identification of opportunities for future standardization generally relies on the work of individual ISO members or other stakeholders in relation to foresight, understanding user demand and monitoring market changes. The current system is reactive, rather than proactive, and the resources and systems the ISO members have in place to gather information on new trends and emerging needs varies greatly between members. The majority of members have very limited capabilities in this regard.
3.2 Purpose and Deliverables

ISO has identified that, in order for international standardization to have the best possible impact, the process of developing ISO standards should be as responsive as possible to market changes and emerging technologies. One way to do this is to facilitate early identification of opportunities for new standardization work in a more organized, proactive and centralized manner (though still privileging member engagement and utilizing member resources as much as possible). This would allow the ISO system to commence work on new standardization deliverables more quickly than is currently the case. By more quickly identifying and commencing work on new areas for standardization, we could respond to market demand more quickly, for the benefit of all stakeholders.

To assist with this, ISO has determined that a coordinated framework of foresight activities across the ISO system would increase the exchange of information leading to identification of new areas for standardization. This framework should:

- work within the existing ISO structure
- draw on the expertise, ideas and analytical capacity of ISO members (National Standards Bodies)
- impose minimal burden on ISO members
- consider needs and perspectives from both developed and developing country contexts
- facilitate ongoing scanning, analysis and strategic interpretation

3.2.1 Goal and Objectives

Consultants should consider the following goal and objectives underpinning this project:

Goal: to have a well-established system and ongoing process through which a proactive, engaged group of ISO members identifies and discusses new areas for standardization and emerging standardization needs.

Objectives:
- Design and implement a framework of integrated foresight methodologies designed for ISO’s specific needs
- Engage ISO members in ongoing collaborative work on standardization foresight
- Integrate a bespoke foresight methodology with the ISO/CS strategy implementation plan to ensure organizational commitment and consistency in foresight activities.
- Build a foresight culture in the ISO system

3.2.2 Activities and Outputs

Consultants should respond to the following required deliverables in their proposal:

a) Capacity development for ISO/CS and ISO governance structures

The Consultant will work collaboratively with the ISO Project Team to understand the activities carried out by ISO and the roles within the ISO system. This work may include briefings from ISO/CS colleagues (either remotely or at our offices in Geneva) and discussions with ISO member representatives.

The Consultant will design and deliver capacity development for the ISO Project Team to equip the Team to facilitate implementation of foresight activities in the ISO system.
The Consultant will design and develop high-level introductory content to equip the ISO Leadership Team and relevant governance structures to integrate foresight activity into the ISO strategy implementation plan.

**Deliverable:** capacity-building activities

**b) Framework of foresight activities for the ISO system**

The Consultant will work collaboratively with the ISO Project Team to develop and implement a foresight framework that will facilitate early identification of, and response to, new areas for international standardization. We expect this framework to involve (but not be limited to) some distributed scanning/information-gathering activities and some periodic collaborative processes for analysis and interpretation. The framework should also offer guidance on how information and insights arising from foresight activities should be disseminated and discussed with relevant stakeholders (ISO members and ISO/CS and governance stakeholders).

This work should consider:

- Identification of priorities within the broad range of topics addressed by ISO standards
- The respective roles, responsibilities and activities of each part of the ISO system
- Approaches to collaboration within the ISO system given the geographical spread of ISO activities
- The need for effective foresight in both developed and developing country contexts
- The need to integrate foresight activities into existing work programs with minimal resourcing
- How to avoid bias when working with expert groups and specialist practitioners
- Understanding of relevant timeframes for foresight practice in standardization work

The framework should include:

- An integrated suite of foresight methodologies with a clear rationale for the design (not a menu of possible activities)
- Clear instructions for all foresight activities
- Costing estimates for each activity

The Consultant will work with the ISO Project Team on initial implementation of the framework. Initial implementation is expected to include establishment of any platforms or tools, testing and adjustment of methodologies with key users, piloting or early iterations of foresight activities and ensuring all relevant stakeholders are equipped to participate actively in framework activities. The Consultant should outline how they intend to support implementation of the framework.

Beyond the implementation activities included in the project work, the framework must be able to be maintained by the ISO Project Team without ongoing input from the Consultant.

The role of the ISO Project Team in this work will be to inform the Consultant of relevant information about ISO’s areas of work, ways of working, stakeholder roles and expectations, etc. The ISO Project Team will work closely with the Consultant in order to develop a deep understanding of the framework and its development. The ISO Project Team will provide input on the relevance and workability of proposed approaches to ensure the final product is optimally viable and fully reflects ISO’s needs.

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1 The majority of ISO’s members are developing countries and ISO is strongly invested in strengthening the capabilities of these members through its Committee to support Developing Countries (DEVCO) and its Action Plan for Developing Countries 2016-2020. The list of developing country members of ISO is available on ISO’s website.
**Deliverables:**
- Framework for continuous standardization foresight
- Any platforms or tools required to conduct framework activities
- Clear process instructions for all framework activities

c) **Communication and implementation of foresight framework**
The Consultant will assist the ISO Project Team and ISO/CS colleagues to develop communications materials related to the framework. The nature of this assistance will be defined in accordance with the final contract and the Consultant should propose parameters for this aspect of the work. Critically, this assistance should result in the ISO Project Team and any relevant ISO colleagues (for example, colleagues in corporate communications) having a sufficiently clear understanding of the framework to produce effective communications materials. This assistance should also include advising on communications approaches specific to foresight, based on the Consultant’s expertise.

The audience for these communication materials will be ISO members and ISO/CS colleagues. The communication materials will:
- convey the purpose and objectives of the foresight framework
- outline the components of the framework
- describe the foresight activities in sufficient detail to allow stakeholders to understand what will be involved and what they can expect as outcomes.

The role of ISO will be to develop and produce the materials with input from the Consultant.

The Consultant will deliver one workshop to ISO/CS leadership and member representatives to introduce the framework and assist ISO to integrate the foresight framework with the ISO/CS strategy implementation plan and the work of the ISO/CS Research and Innovation Unit.

The Consultant will assist the ISO Project Team to prepare a workshop to launch the framework, and introduce it to members, and demonstrate its operation by conducting collaborative foresight activities. The specific tasks involved will be defined in accordance with the final contract and the Consultant should propose parameters for this aspect of the work. This assistance should provide input on the workshop design and activities. A general outcome should be that the ISO Project Team has sufficient understanding of both the framework (including design, rationale and component activities) and of the practical aspects of conducting foresight activities to facilitate collaborative foresight activities as part of the launch workshop.

The role of the ISO Project Team will be to plan the workshop and arrange all logistics. The role of the Consultant will be to provide input on the content and design of the workshop. The ISO Project Team will deliver the workshop.

**Deliverables:**
- Advice on content of communications materials, review of draft materials and discussion of design and presentation of information.
- Workshop with ISO/CS leadership and member representatives
- Input to content and design of launch workshop

Consultants should be aware that effective communication and appropriately targeted solutions will be the critical success factors for this project.

Project activities can be conducted at any location, but in-person meetings with the ISO Project Team and other ISO/CS colleagues will be at ISO’s offices in Geneva, Switzerland.
3.3 Legal

The contract is to be divided into phases as follows:

**Phase 1 – design and capacity building:** no longer than eight weeks, with work completed no later than 31 December 2019. Deliverables for phase one will be the draft framework and upskilling of the ISO Project team re: foresight practice.

**Phase 2 – testing and implementation:** work to be completed by 31 March 2020. Deliverables for phase two will be assistance with comms materials related to the framework, delivery of an internal ISO workshop to integrate the framework and any initial implementation activities required to have the framework functioning.

**Phase 3 – framework launch:** work to be completed by 31 May 2020. Deliverable for phase three will be input on the design of a launch event and practical workshop to introduce the framework to ISO members and commence collaborative foresight activities.

The Consultant should provide a proposed payment schedule reflecting payment on acceptance of deliverables for each phase.

ISO will require a contract term stipulating that copyright in the Deliverables created by the Consultant 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

Please provide comprehensive responses to all questions in this section.

4.1 Proposal Description

Please describe in a maximum of one page your understanding of this project and what you will be delivering.

4.2 Consultant's Profile

4.2.1 History and company information

- Date founded
- 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

4.2.2 Company Profile (if applicable)

- Industry and organization types (aggregate information is acceptable) of your largest ten recent clients (in terms of volume of work contracted to you)
- Number of consulting projects on foresight delivered in the last three years.
- Number and types of contributions to public understanding of foresight through publishing or public speaking.
4.2.3 **Expertise and Experience Required**

- Comprehensive knowledge of foresight methodologies
- Experience applying foresight/futures methodologies in a range of contexts, including contexts other than commercial strategic foresight.
- Experience in education and training on foresight principles, tools and methods.
- Experience in designing and delivering collaborative scanning platforms and procedures
- Understanding of developing country contexts and ability to apply foresight methodologies in these contexts
- Experience in applying foresight methodologies in non-profit and/or public sector organisations
- Experience developing bespoke approaches to foresight practice
- Experience implementing effective bespoke approaches to foresight practice
- Understanding of international standardization would be an asset but is not required
- The working language for this contract will be English.

4.2.4 **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.

4.2.5 **Company Ownership**

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

4.2.6 **Bankruptcy**

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

4.3 **Experience and Resources within Project Area**

4.3.1 **Major projects**

Describe 3 previous similar projects in the scope of this RFP you have delivered for other customers:

- Explain why those projects are relevant to the scope of this RFP
- Detail major issues or problems that may have occurred and how they were resolved.
- Detail when those projects were delivered.

4.3.2 **Specific skills and Technical Know How**

List here any specific skills you have in the area relative to the scope of this RFP. Refer to clause 1.9.3 Evaluation Criteria of this RFP.

Indicate the % of your sales on Services relevant to this RFP only. Include consulting work that has involved:

- designing and implementing organizational foresight frameworks
- developing approaches to foresight for novel use cases
• foresight work across international contexts, including developing country contexts
• capacity development and training in foresight

4.3.3 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?

4.3.4 Industry experience

Describe your previous experience and number of customers within the standardization, publication, and international non-governmental work fields, especially in the context of funding, budgeting and revenue flows of all sort.

4.3.5 References

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

Please include referees who can discuss a scanning platform and/or procedure you developed and implemented.

Please include referees who can discuss a bespoke foresight framework you developed and implemented.

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

ISO may request additional referee details to discuss project work outlined in your proposal.

4.4 Additional relevant information

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

4.5 Project Specific Questions

4.5.1 Project Proposal Deliverables

• Describe the services and products you intend to provide as per our required deliverables, outlined in section 3.2
• Outline your underlying philosophy of foresight practice – explain how you understand complex change and how you approach translating observed trends into actionable projections.
• ISO involvement, deliverables: describe what you need from ISO in order to perform successfully
• Project management, approach: describe how you will manage this engagement and the project management methodology used.
• Client communication: describe how you will communicate and manage relationships with the ISO Project Team and other stakeholders to ensure smooth running of the project.
• Implementation plan: describe your implementation plan and timeline for this project
• Resources, roles and responsibilities: provide a thorough outline of the roles and responsibilities of everyone in your team. 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.
• Provide a text only (include images if they do not contain your logo), de-identified version of the complete proposal for external evaluation.
• Additional services: describe additional services or improvement you might provide in the future related to this project.
• Additional Services: provide a separate draft outline of possible training products to be made available to ISO members to support implementation of the framework. This information should be indicative only and would be costed and contracted separately on completion of this project.

4.5.2 Project Financials

The proposed charging mechanism must:
• be simple to administer and monitor
• reduce processing costs involved

All prices should be expressed in Swiss Francs. 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 Consultant to provide consolidated invoices on completion of each project phase. Payment will be contingent upon ISO’s acceptance of the final deliverables for each phase.

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