REQUEST FOR QUOTE

Supporting ISO’s new Strategic Advisory Group, by mapping ISO standards to ESG frameworks

Version 2 / Date 2021.10.22

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

We are looking to crystalize ISO’s value in the environmental, social and corporate governance (ESG) ecosystem and drive forward strategic and operational activities. To do this we are seeking help to map ISO standards against key ESG frameworks.

Therefore, we would like to invite you to respond to this Request for Quote (RFQ). The purpose of this RFQ is to allow several qualified suppliers to submit their best quote 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 2021.11.05, after which time further proposals may 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,

Ben Carson
Title: Technical Group Manager
Address: Chemin de Blandonnet 8, 1214 Vernier (GE, Switzerland)
Email: carson@iso.org
1 Background

Sustainability is at the top of governments, corporations, and NGO’s agendas: this wide spectrum of stakeholders needs globally relevant standards with international harmonization, addressing key issues such as double materiality, transparency, and trustworthiness.

ISO’s Technical Management Board has taken a timely stance on sustainability with the creation of a new ISO Strategic Advisory Group (SAG) on the environmental, social, governance (ESG) ecosystem, with a mandate to crystalize ISO’s value in the ESG ecosystem and drive forward strategic and operational activities.

SAG’s mandate:
1. Articulate the value proposition that ISO brings to the ESG ecosystem
2. Drive forward strategic and operational objectives/activities, by:
   - analysing the landscape
     o Identify alignment, gaps, and opportunities for ISO, utilizing the mapping of the current ESG disclosure frameworks, standards, and indicators to ISO standards
     o Develop recommendations and guidance on how to strengthen the linkage between ISO standards and ESG disclosure frameworks for ESG reporting
   - developing a stakeholder engagement strategy
   - developing tools for users

Additional resources are needed to help the SAG in deliver on its mandate. Specifically, the gathering of quality data is necessary to have a clear baseline of where ISO standards are currently supporting ESG frameworks, thereby allowing the SAG to identify opportunities and strengthen the links between ISO standards and ESG frameworks.

2 Request

The purpose of this request is to create a mapping of ISO standards to specified ESG disclosure frameworks and their indicators.

2.1 Scope

- Identify and map relevant ISO standards to the following ESG disclosure frameworks and their indicators:
  o Task Force on Climate-related Financial Disclosures (TCFD)
  o Global Reporting Initiative (GRI)
  o Value Reporting Foundation (VRF)

- The mapping must include a scalable database, with open market file formats, to enable mapping of both additional ISO standards and additional frameworks.
3 Objectives and Benefits

Using the mapping, the SAG will be able to:

- Identify the relevant ISO standards that will respond and support the achievement of indicators in the various ESG frameworks.
- Identify alignment, gaps, and opportunities for ISO
  - e.g. specific standards that could be developed, and areas where standards could be modified
- Develop recommendations based on the map and guidance on how to strengthen the linkages between ISO standards and ESG frameworks
  - e.g. provide input to the work on stakeholder engagement

4 Timeline

<table>
<thead>
<tr>
<th>Milestone/Steps</th>
<th>End Date</th>
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</thead>
<tbody>
<tr>
<td>RFQ released to potential Consultants</td>
<td>2021-10-15</td>
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<tr>
<td>Clarification calls with Consultants/Suppliers (as requested)</td>
<td>2021-11-01</td>
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<tr>
<td><strong>Consultants/Suppliers return proposal</strong></td>
<td>2021-11-05</td>
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<tr>
<td>Expected evaluation of proposals and selection</td>
<td>2021-11-12/19</td>
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These dates are a guide to the time frame expected for this project. Significant changes will be communicated accordingly.

5 Requirements

In evaluating responses, ISO will seek the most appropriate offer based on the evaluation of the supplier, the solutions fitness for purpose, the risks, the timeline for delivery, and the total cost.

- The mapping will include the identification of ISO standards that currently or potentially could help companies meet the disclosure indicators.

For each indicator, the consultant will highlight the following (See Appendix I for examples):

- By complying with the standard, the organization will track the same indicator as in the ESG disclosure framework (e.g. *ISO 45000 Family: Occupational Health and Safety and GRI 403-1* )
- By complying with the ISO standard, companies can demonstrate arriving to the disclosure indicator in a systematic way (e.g. *ISO 14064 series on Greenhouse gases and GHG Emissions disclosures* )
- The standard addresses the outcome represented by the indicator in the ESG disclosure framework but do not track or address the specific data point required by the ESG Framework (e.g. *ISO 30415:2021 Human resource management — Diversity and inclusion and GRI 405*)
- There is no ISO standard that complements the indicator
- There is a conformity assessment/verification scheme to support the ISO standard.
Call for bids

ISO ESG mapping

Note: The supplier may suggest other categories that will help to add value to the SAG’s analysis of the gaps and opportunities.

- The mapping report will include a technical appendix describing the methodology and approach used to complete the mapping.
- Submission of all the working files to ISO at the end of the project.

The consultant may suggest other categories that will add value to the analysis of gaps and opportunities in consultation with the project team.

A number of ISO members have gone through various mapping exercises, matching standards to frameworks. The current exercise will focus on the indicator-level of selected ESG Frameworks identified in the Scope and compare them to ISO standards.

Timeline for delivery: The SAG will be operational from the 25th October 2021 and this data is critical to it being able to deliver its mandate therefore the sooner it is available the better and responses will be evaluated accordingly. Ideally data and analysis should become available one month after the contract is signed.

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Importance</th>
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<tr>
<td>Solution</td>
<td>20</td>
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<tr>
<td>Timeline for delivery</td>
<td>30</td>
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<tr>
<td>Cost</td>
<td>20</td>
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<tr>
<td>Experience and qualification of the contractors completing the work</td>
<td>15</td>
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<tr>
<td>Quality of the project management approach</td>
<td>15</td>
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</table>

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.

For the purpose of this project ISO can provide an online read-only access to its standards.

All prices should be expressed in CHF.

6 General Conditions

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

ISO reserves the right to negotiate all terms and conditions to enter a formal contract with the Consultants/Suppliers, including regarding ultimate pricing. This RFQ document, the Consultant/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.

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/Suppliers shall make all such certificates available for inspection.
Call for bids

ISO ESG mapping

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Proposer shall submit in one of the following formats: Adobe Acrobat (pdf), Microsoft Word (docx), or Microsoft Excel (xlsx). The total combined file size of all documents should be compressed so it does not exceed 10 megabytes. Proposal should not include extensive artwork, unusual printing or other materials not essential to the utility and clarity of the Proposal. Do not include marketing or advertising material in the Proposal, unless requested. Proposal should be straightforward and address the requests of the RFQ. Proposal containing unsolicited marketing or advertising material may receive a lower evaluation score if required information is difficult to locate. Proposal is limited to 10 pages, in 12-point font (either Cambria, Calibri, or Arial). Any pages exceeding this limit will not be provided to the evaluation committee or considered in the evaluation. The following items do not count toward the page limit:

- Price Proposal
- Annexes (Maximum 3 Annexes, maximum 5 pages per annex, in 12-point font. Please note that Annexes may not be considered in the evaluation)

6.3 Modifications
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 Manager in written form.

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

6.5 Disclaimer
The acceptance of a submission to this RFQ 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 RFQ, the Consultant/Supplier 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 RFQ or otherwise given to the Consultant/Supplier (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/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 and signed contractual agreement.

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

6.6 Confidentiality
Unless otherwise public, all information disclosed in connection with this RFQ 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 to prepare a response to this RFQ.

6.7 ISO Logo
Please note that applicants are not permitted to use or display the trademarked ISO logo, during or after the RFQ process without express permission from ISO.

6.8 Intellectual Property
All materials produced under this project are the property of ISO. The consultant may request a written permission from ISO to use the materials for other purposes.
Appendix I: Examples of the linkages between ISO standards and indicators in ESG frameworks:

- Following ISO 14064 series on Greenhouse gases, can help companies to consistently disclose information about GhG emissions. Additionally, there is a certification program component that includes a third-party assessment to verify the appropriate application of the standard.

- ISO 30415:2021 Human resource management — Diversity and inclusion (D&I). is designed to help companies manage their diversity and inclusion processes, from governance, accountabilities, and responsibilities through to measures, and potential outcomes. In the context of GRI 405: Diversity and Equal Opportunity “addresses the topic of an organization’s approach to diversity and equal opportunity at work.” By applying ISO 30415: 2021, organizations can demonstrate applying systematic approach based on recognized internationally recognized standards to addressing D&I. This work is complementary to the disclosure required in GRI 405.

- GRI Disclosure 403-1 Occupational health and safety management system disclosure requirement can be complemented by ISO 45000 Family: Occupational Health and Safety. A family of standards that can help organizations to implement such management system.

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