



REQUEST FOR PROPOSALS

Piloting the ISO 'Methodological Guidance on the economic impact of standards' in developing countries

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

We have developed a methodology to measure the economic benefits of standards as well as a guidance document on how to apply the methodology. This methodology is based on one that has been used by several ISO members in the past, however, this kind of analysis has seldom been carried out by developing countries. With this pilot, we are aiming to test the new ISO 'Methodological guidance on the economic impact of standards' in developing economies and are seeking the services of economic consultants to carry out these analyses.

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

ISO/CS intends to select at least three (3) developing countries from different regions to participate in the pilot project. Applicants may bid to conduct one or more studies.

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 PM CEST 10 August 2022** after which time further proposals will not be accepted without prior written agreement.

Should you have any questions, do not hesitate to contact the ISO Project Manager 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 (see 1.7), 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, copying the ISO Project Manager, Sarah Parker, 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:

Activity	Due Date
RFP released to potential Consultants	20 July 2022
Clarification calls with Consultants (as requested)	Until 18:00 CEST 08 August 2022
Consultants return proposal	10 August 2022 12:00 CEST
Expected evaluation of proposals (including references)	25 August 2022
Presentations/Follow-up/Short-List Phase	29 August - 07 September 2022
Expected selection of proposal	16 September 2022

Electronic format of all proposals must be received by **10 August 2022 12:00 PM CEST** by the Procurement Manager at tenders@iso.org, copying the ISO Project Manager, parker@iso.org. 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 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 Project Manager will also specify the new date and hour for submission which will replace the above-mentioned 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 CEST, 08 August 2022. 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 Consultants or to 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 Consultants 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 they 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 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 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.

Domain	Criteria	Weight	Section #
Proposal Description	Demonstrates clear understanding of the project objectives including what the project will achieve and why it is needed	10%	4.1
	Demonstrates clear understanding of the project deliverables, including a description of the information the Consultant will include in the final report and how it will approach the presentation to the NSB		4.1
Consultant's Profile and General Experience	Relevant previous work including recent projects similar to the scope of this RFP	40%	4.2
	Experience working in developing countries and relevant regions		4.2
	Experience working and collaborating with a variety of stakeholders, particularly governments and governmental institutions in developing countries		4.2
	Ability to conduct business or to source relevant expertise to communicate in international contexts and/or in multiple languages		4.2
	Demonstrated ability in delivering complex information in a format understandable by lay audiences		4.2
	Written communication skills: clarity of message, structure and logical flow of proposal materials and demonstrated ability in analytical report-writing		4.2
Specific experience within Project Area	Experience in conducting macro-economic based research at the national, regional, and international levels, including in developing countries	20%	4.3
	Experience in the application of regression analysis		4.3
Client communication	Willingness to work collaboratively with ISO project team and other stakeholders especially NSBs, including undertaking to report regularly on project progress and timely responses to ISO during the RFP process	5%	4.4
Implementation plan	Demonstrates a clear understanding of the activities needed to complete the project, including the steps to be taken to obtain the information and documentation needed to complete the analysis	15%	4.5
	Provides logical sequencing of activities likely to result in timely completion of the project		4.5
Financial proposal	Pricing outline is cost-effective and reasonable	10%	4.6

	Total	100%	
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1.9.3 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 [\[link\]](#) in this RFP process leading to the selection of the successful Consultants.

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 Consultants agree to all conditions and terms stated in this RFP. If the Consultants do 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 Consultants' information and related responses.

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 the disqualification of a proposal, without regard to any prior communication, shortlisting or process. This RFP document, the Consultants' 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 their independence or that of their personnel. If the Consultants fail to maintain independence, ISO on the basis of its sole discretion reserves the right to immediately disqualify

the related proposals. The Consultants shall include a conflict of interest statement in their proposal.

1.12 Disclaimer

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

The Consultants are advised that if confirmation or clarification of the contents or any further information is required, they 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 Consultants are 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 Consultants (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 Consultants place 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 Consultants 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 Consultants 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 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 167 [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.

2.3 Business unit owning this RFP

The project will be overseen and jointly managed by the Research and Innovation Unit and the Capacity Building Unit at ISO/CS.

About the ISO Research and Innovation Unit (R&I)

ISO has set an ambitious goal to see [international standards used everywhere](#). To realize this goal, the organization must work to demonstrate the [benefits that international standards bring](#). The ISO Research and Innovation unit leads ISO's research activities, which aim to understand and communicate how standards support economic growth, social progress, and environmental sustainability.

The R&I unit promotes and conducts research to better understand the impacts of standards and to maximize their benefits. From the results of this research, materials are produced to help communicate key findings to businesses, learning institutions and the wider public. The goal is not only to foster a better understanding of the advantages that standards bring to both organizations and society, but also to build interest in using standards and [taking part in international standardization](#).

About the ISO Capacity Building Unit (CBU)

ISO's most important resource is its member organizations and their networks of experts. This is the reason why ISO invests in strengthening the skills of its members, both at the human and the organizational level, through extensive training and technical assistance programmes. These programmes support members in achieving the [United Nations Sustainable Development Goals](#) (SDGs) by maximizing the benefits of international standardization and ensuring the uptake of ISO standards.

Technical assistance is delivered under the [ISO Action Plan for developing countries](#). Specific programmes help ISO members get the most out of International Standards so they may fully participate in global trade and achieve sustainable development.

Training courses covering a wide range of subjects related to the international standardization process aim to help members participate effectively in the development of international standards.

3 Project Description and Requirements

3.1 Situation today

The notion that standards are beneficial to economies is taken as a given. Although it is relatively simple to understand the efficiencies created by standards at the company level or in trade relationships, these assumptions can be difficult to "prove" when scaled up to the level of a national economy.

In 2021, the ISO Research & Innovation (R&I) Unit published a paper entitled: ["Standards & economic growth: ISO members' research on the impact of standards on their national economies"](#), bringing together the results of research conducted by ISO members to explore

these questions in a selection of countries. Using economic modelling, researchers were able to suggest the amount of economic growth that could be explained by the increase in the stock of standards.

In 2022, the R&I Unit published a companion document entitled: "[Economic impact of standards - Methodological guidance](#)". The document provides guidance to standards organizations on how to apply the methodology, which involves building a model of how changes in a stock of standards over time cause an increase in total factor productivity.

The methodology has been successfully employed by a number of ISO members to estimate the economic benefits of standards. So far, the methodology has predominantly been employed in developed countries, and there is a lack of data on its applicability and utility in and for developing countries.

3.2 Future Situation

3.2.1 Purpose and Objectives

In the context of the [ISO Action Plan for developing countries 2021-2025 \(APDC\)](#), ISO R&I and CBU are sponsoring a pilot project to determine if the methodological guidance document is effective in providing evidence of the economic benefits of standards in developing economies.

To assist with this, through this RFP the ISO Central Secretariat (ISO/CS) will appoint one or more Consultants to apply the methodological guidance document in several developing countries. A call for interested developing countries has been issued and ISO/CS will evaluate applications and select countries from different regions to participate in the pilot. The selected countries will be notified to the successful Consultants, and the Consultants are not expected to participate in the selection process.

ISO/CS intends to select at least three (3) developing countries to participate in the pilot project. Subject to the estimated cost of applying the methodological guidance document in *one* developing country as indicated by the applicant Consultants through the RFP process (see section 4.6 Project Financials), ISO/CS may increase the total number of developing countries covered by the project.

Consultants are invited to apply to implement the methodological guidance document in one or more developing countries. Multiple country studies may be undertaken sequentially or in parallel. Consultants wishing to cover more than one country, must indicate:

- The maximum number of country studies they could complete in the desired timeframe (see section 3.2.5).
- The region or regions they are able to work in.
- The length of time each country study will take.
- The impact of multiple country studies on the project financials (see section 4.6).

3.2.2 Expected Deliverables

For each country study, the Consultants are expected to deliver the following:

1. A draft report on the results of the application and effectiveness of the methodology in the selected country.
2. A full report on the results of the application and effectiveness of the methodology in the selected country, including conclusions, lessons learned and recommendations for future application.

3. A 'plain-English' executive summary of the full report, featuring all high-level results as well as conclusions, lessons learned and recommendations.
4. A presentation of the results of the analysis that the Consultants will deliver to the NSB along with a Q&A session, to ensure that NSB staff understand the methodology, the results, and how to interpret and communicate them.

3.2.3 Expected outcomes

This project is expected to achieve the following:

- Illustrate that the new methodology is applicable in developing countries.
- Provide quantifiable evidence of the economic contribution of standards in developing countries.
- Increase availability of evidence-based information on the benefits of standards in outreach and stakeholder engagement materials in developing countries.

3.2.4 Approach and Methodology

The application of this methodology involves conducting an econometric analysis by accessing national statistical and industry data, as well as information on the stock of standards¹ in each selected country. The project involves exclusively desk-based research (no travel to the selected countries is foreseen and should not be contemplated in the budget). The Consultants will need to work closely (on a remote/virtual basis) with the NSB in each selected country to understand the national standardization system, to access national data, and to be put in contact with relevant stakeholders in the country, as and where necessary.

Countries applying to participate in the pilot project have been informed that they will need to support the work of the Consultants by helping them to understand the national standardization system, to access national data, and to contact relevant stakeholders in the country, as and where necessary and that they will need to nominate a staff member to be a project focal point to liaise with the Consultants on all matters relating to the project.

3.2.5 Timeline for implementation

The selected Consultants will be expected to begin work on the signing of the contract, no later than 31 October 2022 and provide the final report on the implementation of the methodology in the selected country or countries by **30 June 2023**.

The estimated schedule of work should be as follows:

Task	Deliverable	Due date
Apply the methodological	1. A draft report on the results of the application and effectiveness of the methodology in each selected country	Within 6 months from the signature of the contract

¹ The "stock of standards" can be considered as the sum of all published standards up to the end of a specific year minus the sum of standards that has been withdrawn up to the end of that year. This refers to standards published nationally or to regional/international standards adopted at the national level as in the case of European harmonized standards (see footnote 1 of the paper: [Standards & economic growth: ISO members' research on the impact of standards on their national economies](#)).

guidance in selected country	2. A full report on the results of the application and effectiveness of the methodology in each selected country, including conclusions, lessons learned and recommendations for future application.	Within 8 months from the signature of the contract
	3. A 'plain-English' executive summary of the full report, featuring all high-level results as well as conclusions, lessons learned and recommendations.	Within 8 months from the signature of the contract
	4. A presentation of the results of the analysis that the Consultants will deliver to the NSB along with a Q&A session, to ensure that NSB staff understand the methodology, the results, and how to interpret and communicate them.	Within 8 months from the signature of the contract

3.3 Legal

The selected Consultants will be expected to begin work on the signing of the contract, no later than 31 October 2022 and provide the final report on the implementation of the methodology in the selected country or countries by **30 June 2023**.

The selected Consultants will be expected to sign the ISO Consultancy contract. 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 questions in this section, for your proposal to be considered valid.

4.1 Proposal Description [10%]

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

4.2 Consultant's Profile and General Experience [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

- Industry and organization types (aggregate information is acceptable) of your largest 10 recent clients (in terms of volume of work contracted to you)
- Number of projects similar to the scope of this RFP delivered in the last three (3) years
- Examples of countries (especially developing countries) and regions the organization has worked in, highlighting those where the organization has conducted projects similar to the scope of this RFP (if any)
- Experience working and collaborating with a variety of stakeholders, particularly governments and governmental institutions in developing countries.
- List of languages the organization can operate in; ability to conduct business or to source relevant expertise to communicate in multiple languages as needed.
- Demonstrated ability in analytical report-writing.
- Demonstrated ability in delivering complex information in a format understandable by lay audiences.

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.

4.3 Specific Experience within Project Area [20%]

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

Please confirm you have the following required expertise and experience required:

- Experience in conducting macro-economic based research at the national, regional, and international levels, including in developing countries.
- Experience in the application regression analysis.

Indicate what proportion (percentage) of your company's work involves work of this nature.

Please list any other specific skills you have in the area relative to the scope of this RFP.

4.3.3 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 also provide a thorough outline of the roles and responsibilities of your team and of what is expected from ISO/CS.

4.3.4 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?

4.3.5 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.

4.3.6 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.

Please include referees who can discuss a project specifically involving conducting macro-economic based research at the national.

4.4 Client communication [5%]

Please describe how you will communicate and manage relationships with the ISO Project Team and other stakeholders to ensure smooth running of the project.

4.4.1 Reporting

The selected Consultants will be expected to report on a bimonthly basis (i.e., every two (2) months) from project initiation to ensure ISO/CS is regularly informed of progress.

4.5 Implementation Plan [15%]

Please describe your implementation plan and timeline for this project, including a clear indication of the different phases of the project from information gathering to report writing, and the estimated duration of the project phases.

4.6 Financial Proposal [10%]

Please provide comprehensive responses to all questions in this section.

Please provide a breakdown of the costs associated with applying the methodological guidance document in one developing country. If you are bidding to conduct studies in more than one developing country, please indicate how this will affect the proposed pricing.

The breakdown of costs should include the daily rate(s) for each member of your team identified in section 4.3.3 as well as the anticipated number of days each team member will work on the project.

The proposed charging mechanism 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 to be incurred 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 Consultants 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.

4.7 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