



REQUEST FOR PROPOSALS

Standards panorama study

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

One of ISO's strategic goals is "ISO Standards used everywhere," which means that ISO and its members must be able to demonstrate the benefits of standards and ensure that we innovate to meet the needs of users. In the context of this goal, it is important for ISO/CS to understand how the standards market is evolving and who the key players are in the industry.

Currently, there is very little information on the international standards market. The most comprehensive market report published shows that ISO/CS accounts for less than 2% of the global standards market. The report focuses on revenue from the sale of standards, but does not take into account SDOs (Standards Developing Organizations) that distribute their standards for free (or through some other business model).

The standards market is constantly evolving, and multiple standards developers compete for market recognition and relevance. ISO/CS is reaching out to research organizations to conduct a study to better understand the trends, activities, positioning, and value proposition of standards developers focused on standards dissemination, relevance, and promotion.

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 PM CET 16 September 2022** 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,

A handwritten signature in black ink, appearing to read 'Tharun', with a long, sweeping underline.

Tharun Thomas
Marketing manager

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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 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: Tharun Thomas
 Title: Marketing manager
 Address: Chemin de Blandonnet 8, 1214 VERNIER
 Email: marketing@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 Service providers	30 August 2022
Clarification calls with Service providers (as requested)	09 September 2022
Service providers return proposal	16 September 2022 12:00 CET
Expected evaluation of proposals (including references)	23 September 2022
Interviews of shortlisted candidates	30 September 2022
Expected selection of proposal	07 October 2022

Electronic format of all proposals must be received by **16 September 2022 12:00 PM 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 requirement of the RFP by cross-reference to the relevant section number.

Service providers are encouraged to supply innovative solutions in responding to this RFP, however, Service providers 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

The Service providers 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 Manager, and copying the ISO Procurement Manager.

We have planned for clarification calls. Please contact the ISO Project Manager to arrange timing.

Where appropriate, ISO reserves the right to circulate questions and the answers thereto to all other Service provider 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 Service provider must confirm that it accepts full responsibility for arranging, such life, health, accident and other forms of insurance covering the performance any agreement granted under this RFP. The Service provider (including any personnel) is not eligible to participate in life or health insurance schemes available to ISO employees.

- The Service provider is 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 Service Providers 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.

Criteria	Weight	Section #
Proposal description, including virtual interviews with shortlisted proposers	30%	4.1
Experience with similar studies	20%	4.2
Implementation plan	20%	4.3
Company profile and personnel	20%	4.4
Financial proposal	10%	4.5
Total	100%	

Based on these criteria, the 3 proposals with the highest scoring will be short-listed and the submitters will be invited to present their proposal during a virtual interview with the ISO Project Manager and members of the evaluation committee. The evaluation of the virtual interview will be considered as part of the final scoring.

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](#) in this RFP process leading to the selection of the successful Service provider.

1.10 Health and Safety

The Service provider is expected to follow legislative health and safety directives, as dictated by the appropriate country.

1.11 General Conditions

By submitting a proposal, the Service provider agrees to all conditions and terms stated in this RFP. If the Service provider 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 Service provider's information and proposal.

ISO reserves the right to negotiate all terms and conditions in order to enter a formal contract with the Service provider, 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 Service provider's response and, written addenda may form part of the contract.

ISO is not bound to give any reason for rejecting any responses or part thereof.

Unsolicited telephone calls or visits to ISO or ISO staff during the RFP process to obtain proposal status information are prohibited and may result in the Service provider 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 laws, notably but not restricted to antitrust and other laws regulating competition that protect fair competition by prohibiting anti-competitive behaviour, of provincial and federal nature, municipal ordinances, regulations, and directions of inspectors appointed by proper authorities having jurisdiction, as the case may be. Where proof of certifications is required by ISO, the Service provider shall make all such certificates available for inspection.

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

1.12 Disclaimer

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

The Service provider 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 Service provider 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 Service provider (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 Service provider 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 Service provider 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 Service provider 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 24 000 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 167 countries 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

Presently, there is very limited market intelligence information on international standards. The most comprehensive competitive market report, which focuses on revenue and indicates that ISO/CS represents less than 2% of the global standards market.

As the report focuses on sales revenue from standards, it does not consider several other globally relevant standards developers, such as:

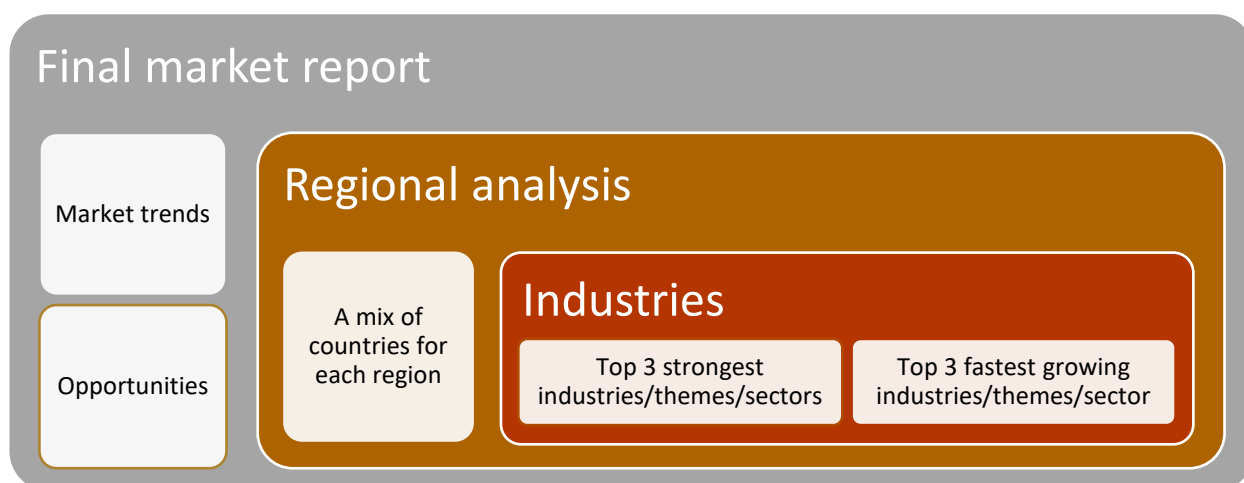
- Organizations that have a different business model, for ex, [Fairtrade](#), [Oasis](#), [GOTS](#)
- International and regional organizations that develop standards, for ex, [UNECE](#), [ITU](#)
- Large companies that develop standards, for ex, [Apple](#), [NASA](#)
- Organizations focusing on reporting standards, for ex, [GRI](#), [IFRS/ISSB](#)
- Other types of standards consortia, for ex, [HDMI](#), [W3C](#), [industry standards \(e.g., beauty, mining, aviation, O&G, etc\)](#)

Moreover, standard sales are only one approach to assessing the relative sectoral strengths of each player, the distribution and use of standards. This type of information may not be entirely accurate, especially given how many standards are available for free (or through a different business model).

3.2 Scope and output

To ensure ISO meets its strategic vision, it's crucial to have a comprehensive view of the standards market. The final output of the study will need to contain information on how ISO is performing in specific industries in selected geographic regions. The study will also require identifying the main competitors for ISO Standards per market segment (a segmentation criteria will be jointly defined with ISO/CS) and their business models.

The final market report is expected to contain the following elements:



Based on the above output, the study is divided into 3 phases:

Phase 1: Deciding on the methodology and parties to be studied:

Based on the desired outcome, the service provider must determine the scope of the study and recommend ISO/CS the appropriate methodology. At this stage, the service provider, in consultation with ISO/CS, suggests regions, countries, industries, sectors, topics, and standards developers to be included in the study. It is important that the study include a positioning of the leading players in standards development by sector, as well as an overview of the leading players in terms of their relative strengths, governance structure, and business model (e.g., source of standards funding/revenue, subscriptions, services such as conformity assessment and membership). A basic framework for the expected final report (for Phase 2 and Phase 3) will also be presented at the end of this phase.

Deliverable: a report describing a step-by-step approach to conducting the study, along with the various regions, sectors, topics, and Standard Development Organizations (SDOs) that will be analysed. In addition, a framework template for what is expected at the end of Phase 2 and Phase 3.

Phase 2: Conducting the market study:

After determining the scope and methodology, the service provider must conduct the study for each region and regularly update ISO/CS. The study must include both quantitative (e.g., secondary research) and qualitative methods (e.g., interviews) with relevant stakeholders.

Deliverable: a report of findings from each of the identified regions, countries, sectors, themes, and/or SDOs. The report should be available in a document format along with an analysable database.

Phase 3: Reporting on market trends and opportunities for ISO:

Based on the findings from Phase 2, the service provider needs to explore the possible approaches to increase the recognition and dissemination of ISO Standards in specific regions and sectors/themes/industries and share the findings with ISO/CS. The report should also identify the different areas of high risk for ISO and its members.

Outcome: a summary report of actions that ISO should take to increase the relevance and dissemination of ISO Standards. The report should also include areas of risk.

3.3 Timeline for implementation

The study is timebound and we require the researchers to adhere to the timeline to the best of their abilities:

Task	Deliverable	Indicative timeline (calendar days)
Phase 1	A report describing a step-by-step approach on conducting the study along with the different regions, sectors, themes and SDOs being analysed. In addition, a skeleton template of what is expected by the end of Phase 2 and Phase 3.	Within 1 month from signature of the contract.
Phase 2	A report on the findings from each of the regions, countries, sector, theme and/or SDO identified. The report should be available in a document format along with an analysable database.	Within 3 months from the end of Phase 1.
Phase 3	A summary report on actions ISO should take to increase relevance and increase dissemination of ISO Standards. The report should also contain areas of risk.	Within 1 month from the end of Phase 3

3.4 Legal

The Selected Service Provider will be expected to sign the ISO Consultancy contract for any ultimately chosen proposals. It will contain an addendum addressing the specific obligations in relation to the Consultants' access to ISO content and data. 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 Service provider Proposal - RFP Questions

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

4.1 Proposal Description [30%]

Please describe in a maximum of three page your understanding of this project and what you will be delivering. Note, a template is available in the Annex.

- 4.1.1 Research methodology suggested to select regions, countries, sectors/themes/industries and competing standards developers (Phase 1).
- 4.1.2 Research methodology suggested to conduct the study within the stipulated timeline (Phase 2).
- 4.1.3 Expected structure of the final outputs for each phase.

4.2 Experience with similar studies [20%]

In a maximum of three pages describe 3 similar projects within the scope of the RFP that you have carried out previously. Note, a template is available in the Annex. For each of these projects, please use the following headings:

- 4.2.1 A brief description of the project.
- 4.2.2 Scope of the project (Note: Objective should be similar to this RFP).
- 4.2.3 Timeline and steps taken for the study.
- 4.2.4 Challenges experienced in the study and steps taken to resolve them.

4.3 Implementation plan [20%]

In a maximum of 2 pages please describe the implementation plan for the project in relation to the project description (section 4.1). The following heading should be considered:

- 4.3.1 Timeline for the study (Note: Please prepare the plan bearing in mind section 3.3)
- 4.3.2 Coordination: (Note: Description on how you will communicate and manage relationship with ISO/CS to ensure the smooth running of the project)
- 4.3.3 Resource: (Note: The number of people and tools being used for the different phases of the project)

4.4 Company profile and personnel [20%]

Please complete the company profile using the template shared as an Annex.

4.4.1 Profile

- About the organization.
- Team composition.
- Locations.
- Number of studies and project conducted by sector in the last 5 years.
- Competitive advantage/main value proposition.

4.4.2 Personnel – team members expected to conduct the study

- Qualification, experience, technical skills relevant to the project.
- Experience with working in similar projects.
- Relevant publications and professional attainments.
- English written communication skills.

4.4.3 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.

4.4.4 Conflict of interest and disclosures

Bidders must disclose the details of any circumstances (known), including personal financial and business activities that will, or might, give rise to a conflict of interest, if they were awarded this contract. Where bidders identify any potential conflicts, they should state how they intend to avoid such conflicts. ISO reserves the right to reject any proposals which, in ISO's opinions, gives rise, or could potentially give rise to, a conflict of interest.

All bidders must disclose:

- If they are subject to any proceedings or other arrangements relating to bankruptcy, insolvency or financial standing.
- If they are subject to any proceedings, relating to: corruption including the offence of bribery fraud including theft, and not fulfilling any obligations relating to payment of taxes; and/or money laundering.

4.5 Financial Proposal [10%]

The Service provide must submit a financial proposal for the study. The total value of carrying out the three phases should not exceed CHF 130 000 including expenses. Proposals that exceed this amount – by not more than 5% - might be considered on an exceptional basis where the proposal provides a clear justification, taking into account the impact of this additional cost on the overall score relating to financial criteria.

Note: No reimbursement of expenses related to the preparation of any proposal will be made by ISO/CS.

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. The price must include all cost components of the study, including professional fees, insurances (medical, life etc), communication costs, electronics, taxes etc.

Please propose the most suitable pricing structure matching the above criteria.

The prices supplied must give ISO a full picture of all expenses and/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 Service Provider to provide consolidated invoices on completion of each project task and after completion given in writing of acceptance of the deliverables.

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		
Item No.	Initial deliverables description	Price (CHF)
1	Phase 1	
2	Phase 2	
3	Phase 3	
4	Any other relevant costs	
Total in CHF Excluding VAT:		

4.6 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).



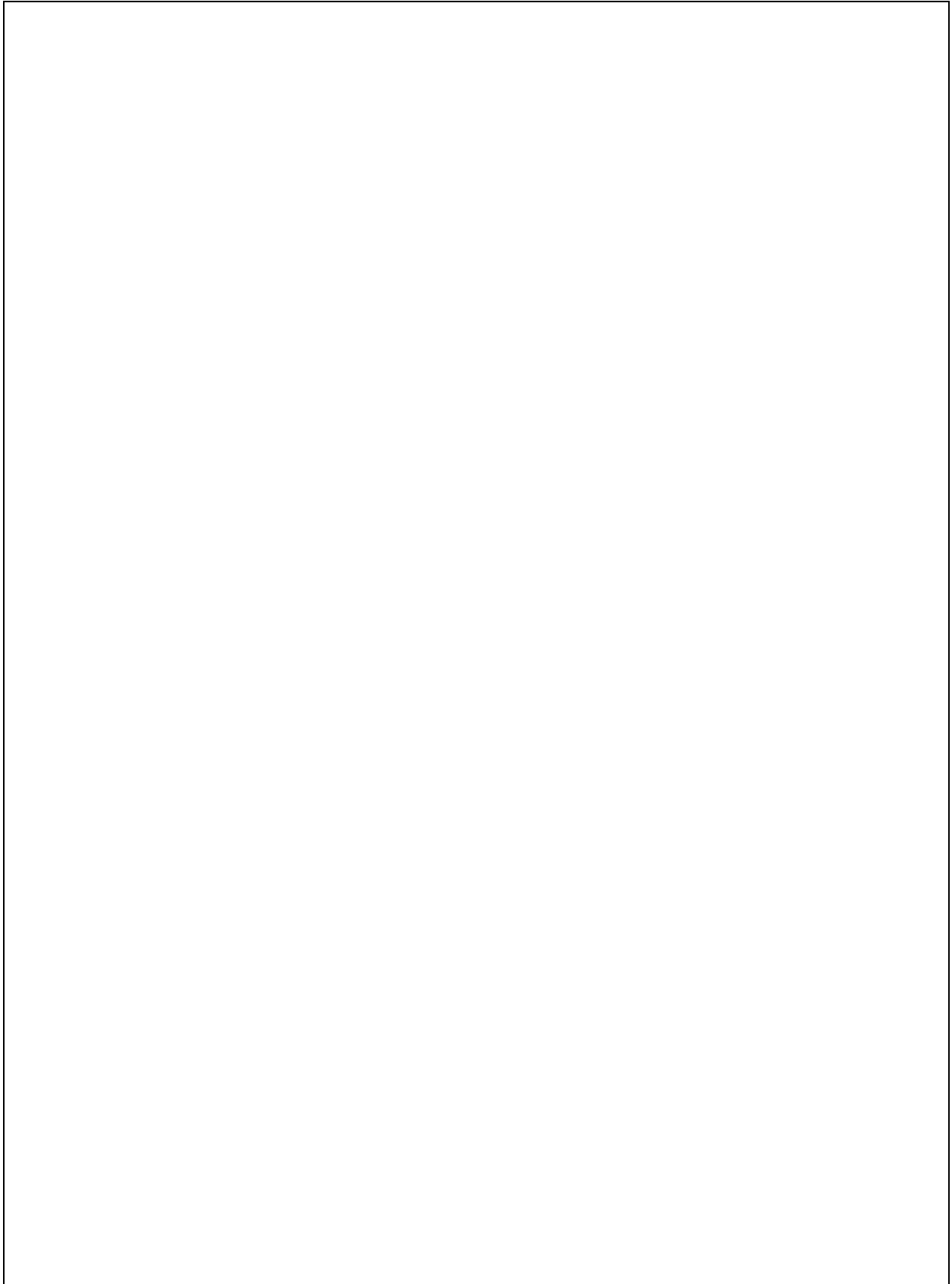
SECTION 4.1 PROPOSAL DESCRIPTION

Item for information

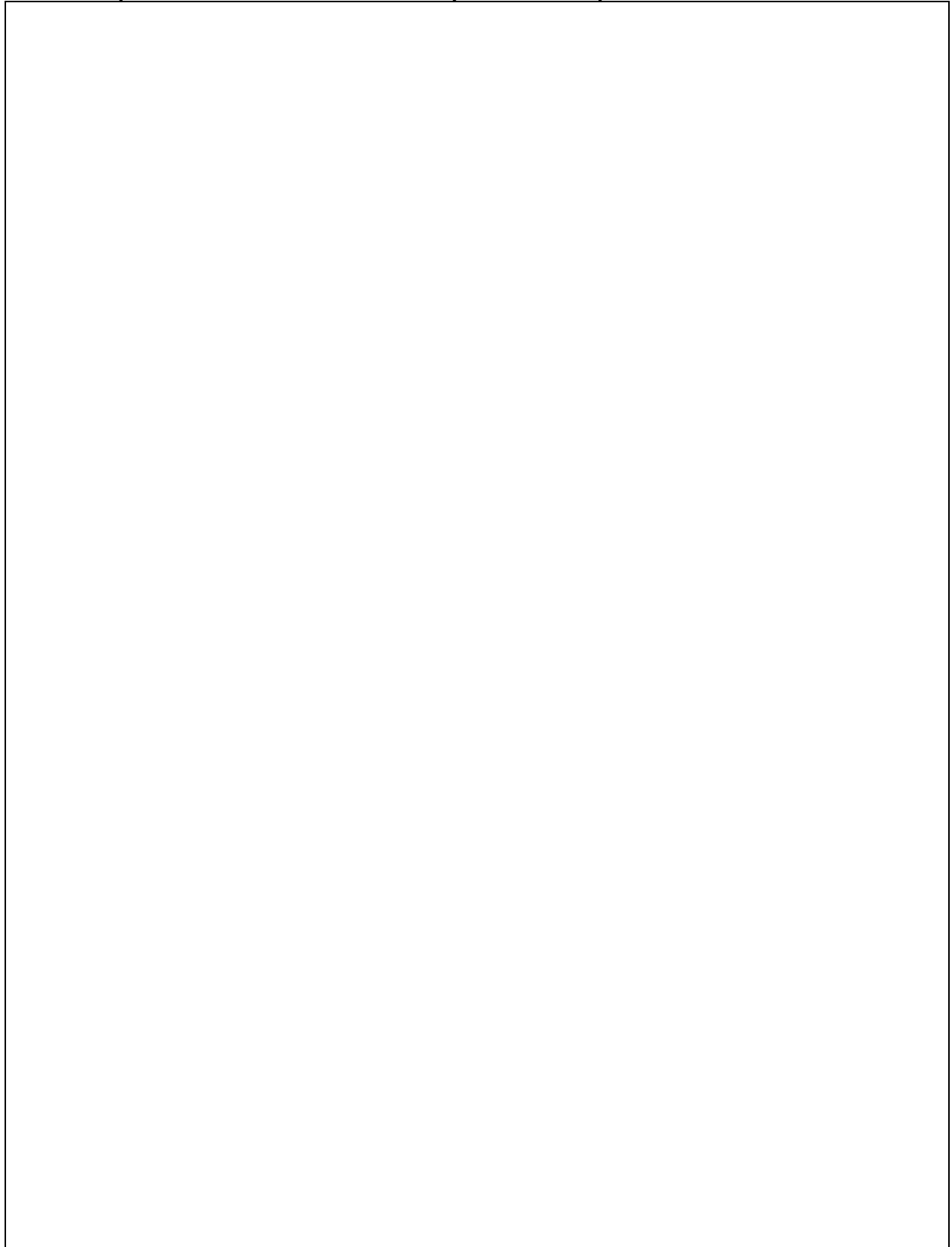
Please describe in a maximum of three pages your understanding of the project and what you will be delivering.

4.1.1 Research methodology suggested to select regions, countries, sectors/themes/industries and competing standards developers (Phase 1).

4.1.2 Research methodology suggested to conduct the study within the stipulated timeline (Phase 2).

A large, empty rectangular box with a thin black border, occupying most of the page below the section header. It is intended for the user to provide the research methodology suggested to conduct the study within the stipulated timeline for Phase 2.

4.1.3 Expected structure of the final outputs for each phase.





SECTION 4.2 EXPERIENCE WITH SIMILAR STUDIES

Item for information

In a maximum of three pages describe 3 similar projects within the scope of the RFP that you have carried out previously.

Project 1

4.2.1 A brief description of the project

4.2.2 Scope of the project (Note: objective should be similar to this RFP)

4.2.3 Timeline and steps taken for the study

4.2.4 Challenges experienced in the study and steps taken to resolve them

Project 2

4.2.1 A brief description of the project

4.2.2 Scope of the project (Note: objective should be similar to this RFP)

4.2.3 Timeline and steps taken for the study

4.2.4 Challenges experienced in the study and steps taken to resolve them

Project 3

4.2.1 A brief description of the project

4.2.2 Scope of the project (Note: objective should be similar to this RFP)

4.2.3 Timeline and steps taken for the study

4.2.4 Challenges experienced in the study and steps taken to resolve them



SECTION 4.3 IMPLEMENTATION PLAN

Item for information

In a maximum of 2 pages please describe the implementation plan for the project in relation to the project description (section 4.1).

4.3.1 Timeline for the study (Note: Please prepare the plan bearing in mind section 3.3)

4.3.2 Coordination: (Note: Description on the how you will communicate and manage relationship with ISO/CS to ensure the smooth running of the project)

4.3.3 Resource: (Note: The number of people and tools being used for the different phases of the project)



ANNEX 4 COMPANY PROFILE AND PERSONNEL

4.4.1 Profile

(About the organization, team composition, locations, number of studies and projects conducted in the last 5 years, competitive advantage)

4.4.2 Personnel – team members expected to conduct the study

Please share the following details for each team members expected to be assigned for the study:

- Qualification, experience, technical skills relevant to the project.
- Experience with working in syndicated studies.
- Relevant publications and professional attainments.
- English written communication skills.

4.4.3 References

Reference 1

Short project description:
Company name:
Location:
Contact person, position:
Email or phone:

Reference 2

Short project description:
Company name:
Location:
Contact person, position:
Email or phone:

Reference 1

Short project description:
Company name:
Location:
Contact person, position:
Email or phone: