



## **REQUEST FOR PROPOSALS: ADVISORY SERVICES IN SUPPORT OF IMPROVED STRATEGIC PLANNING IN ISO TECHNICAL COMMITTEES**

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

We believe that our success depends on high-quality standards that meet ongoing, emergent and urgent market needs. We publish more than 1500 International Standards every year and believe that with improved strategic planning capacities, we can achieve a substantial improvement in delivering market-relevant standards, while maintaining the decentralized and consensus-based underpinnings of the ISO system.

The RFP contributes to the implementation of the ISO 2030 Strategy as part of the Improved Development Processes Strategic Programme, and specifically to the Committee Strategy Management project within that Programme. It is intended to support the development of an ISO-specific strategic planning approach for ISO technical committees designed to leverage global best practice in strategic planning, including but not limited to themes of foresight, strategic thinking and effective stakeholder engagement. More specifically, under the direction of the ISO Technical Management Board (TMB), the RFP envisions several inter-related deliverables, including:

- Independent proposals for revisions to the strategic planning purpose, approach and outcomes at the ISO technical committee level
- An ISO-specific tool / template and generic methodology to support ISO committees in fulfilling the proposed strategic planning purpose
- Supporting guidance to aid committees to support the agreed approach

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 Consultants 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 3 February 2023** after which time further proposals will not be accepted without prior written agreement.

Should you have any questions, do not hesitate to contact me on the e-mail address provided in this document.

Yours sincerely,

Marco Rossi  
Director, Standards Development  
ISO Central Secretariat

## Table of Contents

1	RFP Process, Criteria, Terms and Conditions .....	4
1.1	Enquiries .....	4
1.2	Modifications .....	4
1.3	Schedule and Deadlines .....	4
1.4	Format of Submission .....	4
1.5	Response Deadline .....	4
1.6	Partial Responses .....	5
1.7	Clarification on RFP .....	5
1.8	Validity .....	5
1.9	Evaluation Process and Criteria .....	5
1.9.1	<i>Preliminary screening and requirements</i> .....	5
1.9.2	<i>Evaluation criteria</i> .....	5
1.9.3	<i>Pre-award Review and Validation</i> .....	7
1.10	Health and Safety .....	7
1.11	General Conditions .....	7
1.12	Disclaimer .....	8
1.13	Confidentiality .....	8
2	Background Information .....	8
2.1	ISO - History .....	8
2.2	ISO – Today .....	8
2.3	Business unit owning this RFP .....	9
2.3.1	<i>ISO Technical Management Board (TMB)</i> .....	9
2.3.2	<i>ISO Directives Maintenance Team (DMT)</i> .....	9
2.3.3	<i>Strategic Planning Task Force (SPTF)</i> .....	9
2.3.4	<i>Council Standing Committee on Strategic Planning (CSC/SP)</i> .....	9
2.3.5	<i>Technical Committees</i> .....	9
2.3.6	<i>ISO Central Secretariat (ISO/CS)</i> .....	9
3	Project Description and Requirements .....	9
3.1	Situation today .....	10
3.2	Future Situation .....	11
3.2.1	<i>Goal and Objectives</i> .....	11
3.2.2	<i>Expected Benefits</i> .....	12
3.2.3	<i>Critical Success Factors</i> .....	12
3.3	Purpose of the RFP .....	12
3.3.1	<i>Scope and Service Requirements</i> .....	12
3.3.2	<i>Expected outcomes</i> .....	13
3.3.3	<i>Approach and methodology</i> .....	13
3.3.4	<i>Timeline for implementation</i> .....	13
3.3.5	<i>Critical success factors relating to the execution of the assignment</i> .....	14
3.3.6	<i>Target audience</i> .....	14
3.3.7	<i>Assignment coordination</i> .....	14
3.3.8	<i>Supporting documents</i> .....	14

3.3.9	<i>Location</i> .....	15
3.4	Legal .....	15
4	Consultant Proposal .....	15
4.1	Proposal Description.....	15
4.2	Consultant's Profile.....	15
4.2.1	<i>History</i> .....	15
4.2.2	<i>Company Profile (if applicable)</i> .....	15
4.2.3	<i>Key strengths</i> .....	15
4.2.4	<i>Business Continuity</i> .....	15
4.2.5	<i>Company Ownership</i> .....	16
4.2.6	<i>Bankruptcy</i> .....	16
4.3	Experience and Resources within Project Area .....	16
4.3.1	<i>Major projects</i> .....	16
4.3.2	<i>Specific skills and Technical Know How</i> .....	16
4.3.3	<i>Knowledge of ISO and ISO Members</i> .....	16
4.3.4	<i>Industry experience</i> .....	16
4.3.5	<i>References</i> .....	16
4.4	Additional relevant information .....	17
4.5	Project Specific Questions.....	17
4.5.1	<i>Deliverables</i> .....	17
4.6	Project Financials .....	17

## 1 RFP Process, Criteria, Terms and Conditions

### 1.1 Enquiries

---

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](mailto:tenders@iso.org) and copying the Project Manager at the contact details below, or as otherwise directly notified by the ISO Procurement Manager.

Project Manager: Nathan Taylor  
 Title: Programme Manager, Technical Policy  
 Address: Chemin du Blandonnet 8, Vernier, Geneva 1214 Switzerland  
 Email: TAYLOR@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	14 December 2022
Clarification calls with Consultants (as requested)	Week of 16 January 2023
<b>Consultants return proposal</b>	<b>3 February 2023 12:00 CET</b>
Expected evaluation of proposals (including references)	Week of 13 February 2022
Expected selection of proposal	15 March 2023

Electronic format of all proposals must be received by **3 February 2023 12:00 CET** by the Procurement Manager at [tenders@iso.org](mailto:tenders@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 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 Consultant 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 Project Manager and copying the ISO Procurement Manager.

We have planned for clarification calls the week of 16 January 2023. Please contact the Project Manager by 10 January 2023 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](http://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. The preliminary examination shall be on a pass/fail basis.

The Consultant 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 Consultant (including any personnel) are not eligible to participate in life or health insurance schemes available to ISO employees.

The Consultant is 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 Evaluation criteria*

In evaluating the complete proposals received, ISO will seek the most appropriate offer based on the following weighted criteria. The evaluation will be based on a scoring system as shown in the table below.

Table 1: rating in points:

Evaluation →	Does not meet	Marginal	Passible	Satisfactory	Good	Exceptional
Percentage of the maximum score of the related criteria	0%	25%	40%	60%	75%	100%

Table 2: evaluation criteria:

EVALUATION OF BIDS - CRITERIA: <i>The elements listed below are intended to help guide the evaluation of bids submitted.</i>	Maximum score
<b>a) Qualification and technical expertise: <i>the extent to which the Consultant has the necessary education, training and technical knowledge and expertise</i></b>	<b>30</b>
<ul style="list-style-type: none"> <li>• Excellent knowledge of strategic planning theory and best practice, emphasizing international, multi-stakeholder and multi-sectoral perspectives</li> </ul>	15
<ul style="list-style-type: none"> <li>• History of publication of papers, articles and / or training materials related to strategic planning, particularly with an international, multi-stakeholder and / or multi-sectoral perspective</li> </ul>	10
<ul style="list-style-type: none"> <li>• Excellent written and oral communication skills, ability to work with a remote team in an international cross-cultural context and deal with people of different cultures.</li> </ul>	5
<b>b) Experience in the type of work required: <i>the extent to which the Consultant has the necessary experience in similar context</i></b>	<b>25</b>
<ul style="list-style-type: none"> <li>• Proven experience in advising international private, public and / or non-government organizations on strategic planning</li> </ul>	10
<ul style="list-style-type: none"> <li>• Knowledge and work experience related to strategic planning within an international private, public and / or non-government organization context</li> </ul>	5
<ul style="list-style-type: none"> <li>• Experience in working with international member-based organizations. Knowledge and work experience in standardization activities would be a plus.</li> </ul>	5
<ul style="list-style-type: none"> <li>• References of previous successful advisory projects highly desired, including a minimum of 2 client references that may be contacted</li> </ul>	5
<b>c) Compliance to requirements/adequacy of proposed approach: <i>the extent to which the proposal demonstrates a clear understanding of, and responsiveness to, the nature of the work being undertaken and the environment in which work must be performed</i></b>	<b>35</b>
<ul style="list-style-type: none"> <li>• The quality of the overall proposal, including the comprehensive proposed methodology and the extent to which ISO's requirements and expectations have been addressed</li> </ul>	15
<ul style="list-style-type: none"> <li>• The proposed timeframe and recommended person-days for the assignment (see timeline in section 3.2)</li> </ul>	5
<ul style="list-style-type: none"> <li>• The qualifications, and competence of the personnel proposed for the assignment</li> </ul>	15
<b>d) Financial proposal:</b>	<b>10</b>

<ul style="list-style-type: none"> <li>Overall cost of the proposal, including the clarity and completeness of the pricing mechanism</li> </ul>	10
<b>TOTAL</b>	<b>100</b>

### 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 Consultant.

## 1.10 Health and Safety

---

The Consultant is 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 Consultant, 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 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 Consultant shall make all such certificates available for inspection.

The Consultant shall at all times act impartially and shall refrain from any relationship which would compromise its independence or that of its personnel. If the Consultant fails to maintain

independence, ISO on the basis of its sole discretion reserves the right immediately disqualify the application. The Consultant shall include a conflict of interest statement in its proposal.

### **1.12 Disclaimer**

---

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

The Consultant is advised that if confirmation or clarification of the contents or any further information is required, it should contact the ISO Procurement Manager by e-mail at [tenders@iso.org](mailto:tenders@iso.org).

The acceptance of a submission to this RFP is not to be construed as representing or creating any binding obligation on ISO to enter into any legal commitment whatsoever. Furthermore, in responding to this RFP, the Consultant is deemed to specifically acknowledge the following:

Notwithstanding any representation by or on behalf of ISO or any estimate of quantities by ISO shown in this RFP or otherwise given to the Consultant (now or in the future) ISO shall be under no obligation to purchase any particular quantity of products or services, except as otherwise formally agreed in with written and signed contractual agreement.

The Consultant places no reliance on any such representation or estimates and will place no reliance upon any future representation or estimate that may be provided unless that representation or estimate is noted in the written and signed contractual agreement.

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

### **1.13 Confidentiality**

---

Unless otherwise public, all information disclosed in connection with this RFP is confidential and the property of ISO. This information must only be released to the personnel of the Consultant 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 24 600 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](http://www.iso.org)



## **2.3 Business unit owning this RFP**

---

### *2.3.1 ISO Technical Management Board (TMB)*

The management of the technical work at ISO is overseen by the Technical Management Board (TMB), which is part of ISO's governance structure (reporting to the ISO Council). The TMB is also responsible for the oversight of the technical committees that lead standards development and any strategic advisory boards created on technical matters. Additional information on our governance and structure can be found on our website: [www.iso.org/structure](http://www.iso.org/structure). The TMB also ensures the oversight of the Committee Strategy Management project and this RFP and maintains the ultimate approval authority over the recommendations and deliverables associated with this RFP.

### *2.3.2 ISO Directives Maintenance Team (DMT)*

The IEC Directives Maintenance Team (DMT) is an advisory group to the TMB. The objective of the DMT is to maintain the ISO/IEC Directives for the technical work. All changes to the ISO/IEC Directives are routed through this group.

### *2.3.3 Strategic Planning Task Force (SPTF)*

Constituted following the approval of the subject project, the Strategic Planning Task Force will include representatives from the TMB, including those who participated in the development of the project, alongside representatives from the ISO technical community with a demonstrated interest and leading best practice in matters related to strategic planning.

### *2.3.4 Council Standing Committee on Strategic Planning (CSC/SP)*

The CSC/SP coordinates ISO strategy development and its implementation and monitors current trends and emerging issues affecting the development and implementation of international standards.

### *2.3.5 Technical Committees*

ISO standards are developed within technical committees (TCs, hereinafter referred to as "committees"). ISO committees work within a defined scope of activity defined by the TMB and each TC maintains a secretariat within an ISO national member. Each committee is led by a Chair – an individual nominated by the secretariat with an existing role, reputation and professional experience within the field of activity. The Chair of a technical committee is responsible for the overall management of that technical committee, including any subcommittees and working groups. The day-to-day work of a committee is led by the Committee Manager who ensures ongoing project management and adherence to the ISO/IEC Directives. Committees are established and dissolved by the TMB.

Given the diversity of fields of activity across ISO's committees, the individuals filling the roles of Chair and Committee Manager are highly diverse in terms of their professional backgrounds, academic credentials and exposure to international standardization. A strategic planning engagement targeting this stakeholder group must be adaptable to this wide range of sectoral and individual perspectives and experiences.

### *2.3.6 ISO Central Secretariat (ISO/CS)*

The Consultant will be overseen by a programme manager within the Technical Policy (TECHPOL) group of the Standards Development unit at ISO/CS. ISO/CS ensures the coordination between the different groups described above.

## **3 Project Description and Requirements**

### 3.1 Situation today

---

New technologies, changing customer expectations and the need to develop solutions to address urgent global challenges are putting pressure on ISO to adapt and accelerate its processes. Timeliness is key – ISO must get standards to market quickly, but without compromising the quality of its standards, the rigor of its consensus-based processes or the engagement of the experts from across stakeholder groups that develop standards.

Effectively capturing and incorporating user needs and defining the corresponding standardization work programme will be a vital part of this transformation, to understand exactly when the market needs a standard, the content it must contain and the most efficient development approaches and be aligned to an overarching strategic plan. We will need to become more agile, strengthen cooperation with other standards developers and partner with stakeholders to prioritize the most critical needs.

We believe that our success depends on high quality, market-relevant standards that are delivered on time to users. ISO publishes more than 1500 International Standards every year. These standards are produced in more than 200 technical committees, each of which is required to publish a Strategic Business Plan (SBP) and to update it every three years at minimum. Better and more market-relevant ISO responses require better strategy. Strategy helps ISO committees to define the business environment, identifying trends and emergent issues. Strategy is needed to effectively allocate limited resources and set priorities. Strategy demonstrates the value-added benefits of standardization within the wider market / development context. Finally, strategy provides a medium- to long-term framework for active and interested stakeholders to participate effectively in standardization work.

The definition of any standardization project must fit within the context of the wider market, including its scope, justification, stakeholders and relationship with other standardization activity. At its core this is how International Standards and alternative deliverables respond effectively to market needs – both in terms of content and time / urgency to deliver the content. The clear definition of problems within the market sector and the means by which different international standardization solutions can add value in addressing defined problems is central to the effective definition of strategy. At the committee level, this definition is best undertaken within the framework of a well-crafted Strategic Business Plan (SBP) in keeping with the [ISO/IEC Directives, Part 1, Annex SC](#), as well as through specific committee structures, such as Chairs' Advisory Groups (CAG).

Presently, the use of SBPs is sub-optimal. The current guidance for SBPs has been in place since 2005, with mixed results. Almost half of SBPs are more than five years out-of-date, the quality and analytical value-added of the reviewed documents is mixed with a majority providing limited strategic insights into the committee's field of activity, thus limiting the effective use of the SBPs as a priority-setting tool and as a medium- to long-term framework for the standardization work programme. There is a strong minority view within the technical community that SBPs represent an administrative burden, with 25% of respondents in a December 2020 survey agreeing with this statement. On the other hand, there are examples of excellent SBPs among a minority of ISO committees. These documents are actively used by committee leadership teams to vet new projects and establish priorities and accountabilities.

A December 2020 survey of the ISO technical community suggested that only 35% of ISO committees view the existing template and approach for TC strategic planning to be effective and fit-for-purpose. As such, the Committee Strategy Management project envisions the identification of a Consultant to undertake an in-depth diagnostic of strategic planning in a standardization context against global best practices, and to provide objective recommendations on the form and process for enhanced strategic planning in the ISO technical community and system.

## 3.2 Future Situation

### 3.2.1 Goal and Objectives

Among its six strategic priorities, the ISO 2030 Strategy prioritizes **delivering ISO standards when the market needs them** and **strengthening ISO members through capacity building**. A strategic programme – **Improved Development Processes** – was established in 2021 as part of the 2030 Strategy Rolling Implementation Plan. The programme is designed to increase the strategic effectiveness, efficiency, and market responsiveness of the ISO standards development process. It encompasses the **Committee Strategy Management** and **Optimize Deliverables** Projects, which are designed to operate in parallel and be mutually reinforcing per the outline below:



Based on the positive feedback from the ISO technical community, a component of the **Committee Strategy Management** project will seek to improve the structure, content and process for the drafting, approval, publishing and revision of SBPs. Presently, the framework for ISO SBPs is defined by Annex SC (normative) of the ISO/IEC Directives, Part 1, which has been in place since 2005. The defined objective of the SBP is to provide an analysis of important business, technological, environmental and social trends in the field addressed by the work of the ISO/TC. It should also explain the linkages between these trends and the priority areas in the standards development work of the committee. With emergent strategic priorities in the ISO system (ISO 2030 Strategy), the imperatives of demonstrating the contribution of standards to the SDGs and climate action / net-zero and the growing complexity of transversal standardization topics, there is a need to review the framework and its supporting guidance and processes.

The overall goal of the **Committee Strategy Management** project is to provide a safe, efficient and supporting environment fostering a positive culture shift in the use of committee-level SBPs. Building on the feedback received from the technical community, project objectives are threefold, encompassing the improvement of committee-level competencies, improved SBPs and better strategic oversight by TMB, alongside improved processes to support strategic deliverables. Taken together, these activities are designed to strengthen the role played by SBPs in prioritizing and managing technical activity at the committee level. The project is expected to sustain the results of previous ISO investments in project management and to further increase market responsiveness of ISO deliverables, by improving strategy management capacities within ISO committees, and providing the technical community with an enhanced set of ISO-mediated tools, including an ISO-specific strategic planning training to foster strategic excellence.

### 3.2.2 *Expected Benefits*

It is expected that the **Committee Strategy Management** project will:

- Foster a culture and system shift within the ISO system to better integrate strategic planning into committee and TMB deliberations;
- Increase strategic planning capacities and insights among ISO committees, supporting more regular and systematic review of priorities, market needs, deliverables, accountabilities and publication target dates;
- Foster more active and engaged internal committee management through the provision of new ISO/CS tools and supports for strategic and operational planning, accountability and meeting market needs.

From a strategic planning advisory perspective, the main expected benefit is a more robust framework for both ISO committees and for TMB to assess business trends, set priorities, allocate resources, identify and manage stakeholders, and link standardization efforts to wider international development, legal and regulatory currents.

### 3.2.3 *Critical Success Factors*

Critical success factors underpinning the success of the **Committee Strategy Management** project include:

- Strong engagement among leading ISO committees to share best practices and contribute to the project's implementation;
- Engaged TC leadership teams, especially among those NSBs holding TC secretariats;
- Willingness of Committee Managers to further develop their competencies in strategic planning;
- Successful engagement with political and economic actors outside of the standardization community, and;
- Analytical capacities within the project team and wider technical community to provide value-added strategic insight to the TMB.

## 3.3 **Purpose of the RFP**

---

The purpose of the Request for Proposals (RFP) is to enter into an Agreement with a qualified Strategic Planning Consultant (the "Consultant") to carry out the following twofold assignment further described below, within the framework of the **Committee Strategy Management** project and further detailed under section 3.3.1:

- To conduct a diagnostic analysis of the potential and purpose of improved strategic planning in ISO committees, recognizing the uniqueness of the ISO system
- To develop tools, guidance and related supports that will strengthen the competencies of ISO committees to deliver effective strategic plans in keeping with the defined potential and purpose

Bidders are requested to propose the best and most cost-effective solution to meet ISO's requirements, while ensuring a high-quality output.

### 3.3.1 *Scope and Service Requirements*

The scope of services is the development of a strategic planning approach designed to leverage global best practice in strategic planning and related disciplines including but not limited to themes of foresight, stakeholder engagement and risk analysis, and that is adapted to the uniqueness of the ISO system.

The Consultant will provide targeted advice in these areas to the SPTF for consideration. More specifically, the Consultant will aid in the enhancement of strategic planning within the ISO context, including:

- Independent proposals for revisions to the strategic planning purpose, approach and outcomes at the technical committee level for SPTF review
- An ISO-specific tool / template and generic methodology to support ISO committees in fulfilling the proposed strategic planning purpose
- Supporting guidance to aid committees to support the agreed approach

### 3.3.2 Expected outcomes

Upon completion of the mandate, we expect the SPTF will be positioned to:

- *Review and endorse proposals defining the scope and intent of strategic planning within ISO committees*
- *Review and endorse proposals for revisions to the SBP tool / template used by ISO committees*
- *Review and endorse proposals for supporting guidance for completion of the SBP template*

### 3.3.3 Approach and methodology

ISO requires the successful Consultant to carry out the following tasks on an iterative basis working in close consultation with the ISO Project Manager and the SPTF:



### 3.3.4 Timeline for implementation

Diagnostic and gap analysis of strategic planning in ISO context	<i>Within 3 months of contract signature</i>	<i>Collection of best practices in strategic planning in a standardization context and establishment of a purpose and rationale for strategic planning in ISO committees</i>
Identification and proposal of relevant strategic planning approaches, tools and methodologies	<i>Within 6 months of contract signature</i>	<i>Proposal for new strategic planning approach and supporting rationale, based on a complex of internationally accepted strategic planning tools, approaches and methodologies</i>
Intersection of identified tools and SPTF priorities in forward plan	<i>Within 9 months of contract signature</i>	<i>Application of new strategic planning approach and definition of a proposal to SPTF and ISO/TMB</i>

Preparation of guidance documents, templates and policy proposals	<i>Within 15 months of contract signature</i>	<i>Fourth, fifth quarter: Development of supporting tools and guidance for ISO Committees for approved approach</i>
---	---	---

### 3.3.5 *Critical success factors relating to the execution of the assignment*

- Clear and effectively communicated articulation of the value-addition of strategic planning in an ISO TC context
- Coherent and integrated proposals for the structure, form, content and development / approval process for committee-level SBPs
- Proposals for the integration of SDG and net-zero considerations in SBPs
- Clear linkages between theoretical principles and actual strategic planning practice within ISO committees
- Adaptability to feedback from ISO/CS, TMB, SPTF and an agile approach to guidance, formats and content development, allowing for adaptations and continuous improvement

### 3.3.6 *Target audience*

The Committee Manager and Chair roles have been identified as having the most responsibility for overseeing and coordinating the development of SBPs. These roles are central in managing the committee's projects and therefore requires a substantial level of project management knowledge and skill, supported by strong strategic / technical underpinnings in their fields of activity. We currently have approximately 800 Committee Managers from approximately 40 countries around the world.

SBPs benefit from the input of wider committee membership, especially working group Conveners and Project Leaders. These roles are further described in the [My ISO Job](#) publication. In some committees, this broadened leadership group is convened through a Chairs Advisory Group or similar structure and plays a key role in drafting and reviewing the SBP. Other CAGs assess new work item proposals through the lens of their SBP.

It is ultimately expected that strategic planning practice in ISO will evolve towards a model that is more structured, forward-looking and better connected with transversal issues both within and outside of the standardization community.

### 3.3.7 *Assignment coordination*

The assignment will be overseen by ISO/CS who will review and validate each step of the assignment. ISO/CS will also ensure the coordination with the SPTF which is equally composed of designates from the TMB and representatives of the ISO technical community with direct experience in drafting and revising SBPs.

### 3.3.8 *Supporting documents*

Consultants are invited to review the following documents, which provide the background on ISO statutes, procedures, technical work and current priorities.

[ISO Statutes](#)

[ISO 2030 Strategy](#)

[ISO/IEC Directives, Part 1](#) (clauses 1.5.5, 1.8.2, 2.1.2, 2.2.1, Annex C, Annex K, Annex SC and Annex SK.1 would be of particular interest)

[ISO TC business plans](#)

[ISO Annual Reports](#)

### 3.3.9 Location

The location of the work is Geneva, Switzerland. While the work may be undertaken on a remote basis, the Consultant shall be available for consultations with ISO/CS staff during normal business hours in Geneva.

## 3.4 Legal

---

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. Consultants will be expected to demonstrate their compliance with Swiss data protection laws.

## 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

- Date and place founded
- Short history of your company, general presentation
- Location of applicant
- Headquarters
- Other key locations
- Detail your presence in Geneva, if any
- Key numbers

#### 4.2.2 Company Profile (if applicable)

- Sales (CHF) for the last 3 years
- Sales Growth (CHF) for the last 3 years
- Number of customers
- Top 5 Corporate clients in terms of revenue
- Other (specify)

#### 4.2.3 Key strengths

- Specific competencies or skills
- Competitive advantage
- Formal Accreditations

#### 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 1.9.2 Evaluation Criteria of this RFP.

Indicate the % of your sales on Services relevant to this RFP only.

#### 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 sorts.

#### 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 note that references provided above may be directly contacted by ISO before and during the evaluation phase of this 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 Deliverables*

- In scope items, deliverables: describe the services you intend to provide as part of this project and match with our requirements
- Out of scope items: describe all items or requirements of this RFP that you will not address
- 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.
- Implementation plan: describe your implementation plan and timeline for this project
- Resources, roles and responsibilities
- Overall lead-times
- Governance, including escalation process, meetings, reporting
- Reporting: detail the reports that ISO will have access to during the implementation or project phase. If available, provide samples.
- Services Performance Metrics: If applicable, describe some performance metrics that will be used to measure performance of the contract in the future. If this will include a performance scorecard, provide details.
- List electronic systems you will grant ISO access to, if applicable, and on what terms.
- Services description
- Additional services: describe additional services or improvement you might provide in the future related to this project.

#### **4.6 Project Financials**

---

The proposed charging mechanism must:

- incentivise the Consultant both to reduce costs and to improve performance
- 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 a monthly basis to include all charges for that month.

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