

2014-11-11

Request for Proposal

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

In September 2010, the ISO Council endorsed the *ISO Action Plan for Developing Countries 2011-2015* after its approval by the ISO Committee on developing country matters (DEVCO) just prior to the Council meeting. This Action Plan links closely to and implements, from a developing country perspective, the ISO Strategic Plan 2011-2015. The Action Plan activities are built around six key objectives for the targeted countries:

- a) Increased participation in ISO technical work
- b) Capacity built in standardization and related matters for ISO members and their stakeholders
- c) Awareness improved on the role and benefits of International Standards and their use. International Standards are therefore increasingly used
- d) ISO members in developing countries strengthened at institutional level
- e) Regional cooperation strengthened
- f) Introduction of the subject of standardization as part of educational curricula initiated

In support of the ISO Action Plan for Developing Countries 2011-2015, in March 2011, Sida and ISO signed an agreement for the programme titled "Support of the ISO Action Plan for Developing Countries during 2011-2015". This Sida-ISO programme agreement was aimed at supporting the implementation of the ISO Action Plan for Developing Countries 2011-2015 with an overall objective of significantly enhancing the capacity and participation of developing countries in international standardization.

As agreed, an evaluation of the programme is due in Q 1 2015 to assess the results against the five criteria adopted by Sida: relevance, efficiency, effectiveness, impact and sustainability.

As such, we would like to invite your company to participate in this Request for Proposal (RFP). The purpose of this RFP is to allow several qualified suppliers to submit their best proposals for this service.

The contents of this document and any information obtained through related 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 **2400CET, 2014-11-30** after which time further proposals will not be considered 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,

Ismail Albaidhani
Director ISO Academy

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1. RFP Process, 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 Project Manager:

Contact: Claudia MacMaster
Address: ISO Central Secretariat, 1 ch. de la Voie-Creuse, CP 56, CH-1211 Geneva 20, Switzerland
Email: macmaster@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 Project Manager in written form.

1.3 Schedule and Deadlines

The project will follow the dates below:

Activity	Due Date
RFP released to potential suppliers	2014-11-11
Clarification calls with suppliers	2014-11-20
Suppliers return proposal	2014-11-30

Electronic format of all proposals must be received by 2400CET 2014-11-30 **by the person listed under 1.1**. 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 Response Deadline

Submissions are due as set in the paragraph 1.3 above, provided however that, if the deadline set for submission is extended, ISO 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.

1.5 Partial Responses

Partial proposals not meeting the requirements specified in this RFP will not be considered.

1.6 Clarification on RFP

The Supplier 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 designated ISO Project Manager.

Where appropriate, ISO reserves the right to circulate questions and the answers to all other suppliers without disclosing the source of the questions or revealing the substance of a proposal.

1.7 Validity

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

1.8 Evaluation of Submission

In evaluating responses for the next stage of the process, ISO will seek the most appropriate offer based on an evaluation of the Supplier, the fitness for purpose, the risk and the total cost having regard to the following.

- Cost competitiveness of the offer
- Relevant experience and references
- Ability to meet timeframes
- Company profile & stability
- Geographical Coverage
- Compliance with relevant regulatory bodies
- Ease of implementation
- Methodology and Project Management

Submissions will be reviewed for compliance with this Request for Proposal and reviewed in relation to the pre-determined criteria listed above.

1.9 Health & Safety

The Supplier is expected to follow legislative Health & Safety directives, as dictated by the appropriate country.

1.10 General Conditions

By submitting a proposal, the Supplier is agreeing to all conditions and terms stated in this RFP. If the Supplier 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.

Information relating to this document may not be released without the express written consent of ISO.

ISO shall not in any way be responsible for any costs incurred in the preparation and presentation of the Supplier's information.

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

1.11 Disclaimer

This RFP and its attachments contain all information the Supplier may require to prepare a proposal as requested by ISO.

The Supplier is advised that if confirmation or clarification of the contents or any further information is required, it should contact the ISO Project Manager in this RFP in the first instance.

The reception and consideration 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 Supplier is deemed to specifically acknowledge the following:

1.12 Confidentiality

All information contained in this RFP or disclosed in connection with it is confidential and the property of ISO. This information must only be released to the Supplier's personnel to whom release is required in order to prepare a response to this RFP.

2. Background Information

2.1 ISO

a) 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 19 500 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.

b) Today

Today ISO is a non-for profit membership organization with members from 165 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

2.2 ISO Academy

ISO devotes a considerable amount of effort to research activities to support standardization, as well as to academic and training activities to increase the capacity and enhance the capability of its members and the public for a wider participation in the world of standardization.

As of January 2014, all of these efforts have been brought together under the umbrella of the ISO Academy with the aim of increasing alignment, creating synergies and ultimately having a larger impact.

The activities under the ISO Academy are implemented, in part, through a network of highly qualified experts from around the world that work with the Academy under services agreements.

The ISO Academy Experts are carefully selected based on merit and ensuring they meet the highest standards, both in educational techniques and specific content.

Capacity building in developing countries

A key activity planned under the ISO Academy is assisting ISO's members from developing countries. Currently over 120 of ISO's members are from developing countries.

The following activities are currently envisaged to build the capacity of ISO's members from developing countries both on a national and regional basis:

- Consultancies/studies to assess the needs and gaps in selected members or groups of members so that targeted institutional strengthening can be performed.
- Training and events on standardization activities and their management. Includes standards development, related IT systems, and the marketing and sales of standards.
- Subject specific training on individual standards or groups of standards
- Awareness raising and promotional events to facilitate the implementation of specific standards in developing countries

3. Project Description and Requirements

3.1 Project

The Supplier will undertake an evaluation of the implementation and impact of the program "Support of the ISO Action Plan for Developing Countries during 2011-2015" against the five criteria adopted by Sida: relevance, efficiency, effectiveness, impact and sustainability.

The purpose of the evaluation of the programme is to allow Sida and ISO to look into the specificity of this type of programme and take stock of the results achieved, as well as make recommendations for improvement of delivery.

The target audience and main users of the evaluation findings will be Sida and ISO, although the results will be shared and discussed by DEVCO CAG, which also monitors the implementation of the Action Plan

3.2 Evaluation criteria and Questions

The evaluation of the programme will be undertaken using the five criteria adopted by Sida of relevance, efficiency, effectiveness, impact and sustainability.

Due consideration shall be given to the fact that the programme consists of a complex intervention at a global level with target groups and final beneficiaries from a wide cross-section of interests. Some of the activities delivered also are characterized as being one-off events, while the benefits arising from each one are expected to be further multiplied by the direct beneficiaries at the national levels. The evaluation methodology shall therefore be adapted to take this specificity into account in order to provide meaningful results.

The intent of each of the criterion is summarized below and contains translations to proposed evaluation questions and how they apply to the Sida-ISO programme.

i. Relevance

The extent to which a development intervention conforms to the needs and priorities of target groups, and the policies of recipient countries and donors:

- *Is the implementation and delivery of the programme outputs (results) consistent with the needs of ISO members in developing countries?*
- *To what extent is the programme consistent with the ISO Action plan for Developing Countries 2011-2015 and Sida priorities?*
- *Are the programme outputs aligned with the need for ISO members to participate better in international trade, e.g. WTO TBT agreement?*

ii. Efficiency

The extent to which the costs of a development intervention can be justified by its results, taking alternatives into account:

- *Were the planned programme activities and outputs delivered on time and according to plan? Were they adjusted, where necessary, to evolving needs from developing countries?*
- *Can the programme costs be justified by the coverage of the direct and final beneficiaries achieved?*
- *Did the regional approach provide a good forum for exchange of knowledge and experience in the most efficient manner?*

iii. Effectiveness

The extent to which a development intervention has achieved its objectives, taking their relative importance into account:

- *Has the programme achieved the objectives set out? And, to what extent did the programme support the implementation of the ISO Action Plan for Developing Countries 2011-2015?*
- *What are the contributory success factors for achievement or non-achievement of objectives? Have (and/or were) corrective measures been identified and/or considered?*
- *What are the opportunities and challenges with regards to the overall programme planning, monitoring, reporting and evaluation systems and procedures? What improvements are needed?*

iv. Impact

The totality of the effects of a development intervention, positive and negative, intended and unintended:

- *Did the Sida-ISO programme contribute in enabling ISO members in developing countries to better reach out to users of International Standards?*
- *Specifically, can evidence be found on the impact on ISO members in developing countries related to the 6 outputs of the Action Plan.*

v. Sustainability

The continuation or longevity of benefits from a development intervention after the cessation of development assistance:

- *To what extent are the programme activities sampled and analysed in the evaluation adequately sustained by the beneficiaries? i.e., replicated or continued at national levels.*
- *Of the programme activities sampled, to what degree did the ISO members in developing countries have the capacity to continue the activities without or with limited ISO/DEVT support?*
- *What can be improved in the programme so that the benefits produced can be sustained by ISO members in developing countries without external support?*

The questions proposed and elaborated above represent ISO's principal field of interest in requesting for the evaluation. Therefore, the evaluation team is expected to address the above questions and, in the interest of clarity, refine them as needed, and communicate through the Inception Report. The final set of questions, as agreed by Sida and ISO, should ensure that the stated objectives, obligations and activities of the programme are duly taken into account.

3.3 [Evaluation process and methodology](#)

It will be part of the evaluation assignment to develop a detailed methodological framework and work schedule, and to ensure an objective, transparent and impartial assessment of the programme including issues to be analyzed in the evaluation.

In structuring the evaluation assignment approach, the evaluation team is expected to consider the following and propose:

- *Suitable methods for data and information collection;*
- *Selection criteria for proposed study cases, e.g. a combination of national and regional events, a combination of technical areas, cases representing different geographical target groups, etc.;*
- *Basis and justification for the choice of countries for field visits and the focus for the evaluation (Field visits to 3 to 4 ISO members in developing countries is envisaged); and*
- *Appropriate methods of analysis of information and basis for making judgments.*

The evaluation will be divided into three phases:

- *Phase I: Preparatory phase*
- *Phase II: Desk/field work phase*
- *Phase III: Analysis and Reporting phase*

The details and expected outputs of each phase are summarized below

i. Phase I: Preparatory phase (Output: Inception Report)

This preparatory phase is devoted to making the preliminary assessment, structuring preparation of the evaluation approach, and desk review with delivery of an *inception report* respectively.

Prior to embarking on the evaluation assignment, the evaluation team will present an *inception report* setting out in full their understanding of these terms of reference, the proposed

methodological approach, work schedule, timeline and a budget proposal.

ISO will review and give (as appropriate) its comments and/or formal approval including any modification needed on the terms of reference.

ii. Phase II: Desk/Field work phase (Output: Draft desk/field reports)

Upon formal approval of the Inception Report, the evaluation team will proceed to the desk/field work phase of the evaluation applying the proposed approach, methods and following the time schedule agreed with and documented in the Inception Report.

iii. Phase III: Analysis and reporting phase (Output: Final Evaluation report)

The *final evaluation report* will be drafted and structured as set out in Annex A. The evaluation team will deliver the *1st draft final evaluation report* in accordance with the agreed time schedule, taking into account any comments received during the previous phase.

The evaluation team may be requested to present the findings of report to Sida and ISO in a joint meeting.

3.4 Location and duration of the assignment

The evaluation assignment is targeted to commence as soon as the contract is signed and be completed with the presentation of the final report by 2400 CET 28 February 2015 at the very latest. The evaluation team will propose a timeline to ISO as stated in 4.2 above.

The evaluation should take place in Geneva (Switzerland) and in the field, with visits to 3-4 countries where ISO programme activities have been implemented.

4. **Supplier's Proposal**

Please provide comprehensive responses to all questions in this section.

4.1 Proposal Description

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

4.2 Supplier's Profile

a) History

Date and place founded

Short history of your company, general presentation

Locations

Headquarters

Other key locations

Detail your presence in Geneva

Key numbers

Worldwide and at your location:

b) Key strengths

Specific competencies or skills
Competitive advantage
Formal Accreditations

4.3 Experience and Resources within Project Area

a) Major projects

Describe 3 previous similar projects in the scope of this RFP your company has 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.

b) Specific skills and Technical Know How

List here any specific skills you have in the area relative to the scope of this RFP.

4.4 Experience within Industry

a) Knowledge of ISO

Describe any previous experience with ISO. Provide ISO contact person(s) and location.

Is any employee in your organization related, either personally or professionally, to a person currently employed by ISO?

To the best of your knowledge, was any ISO employee or contractor previously employed by your organization?

b) Industry Experience

Describe your previous experience and number of customers within the standardization and education fields.

4.5 References

Existing customers

Provide 2 relevant current customers 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 during the evaluation phase of this proposal.

4.6 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.

4.7 Project Specific Questions

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

4.8 Project Financials

All prices should be expressed in Swiss francs. The proposed contract payment modalities shall be as follows: 30% at the acceptance of the Inception Report; 50% at the acceptance of the Draft Report desk and field work; and 20% at the acceptance of the Final Report. The invoices shall be sent to ISO only after confirmation given in writing of acceptance of the reports and payment can be expected within 30 days of the receipt of the correctly detailed invoice.

We are requesting you to propose in this paragraph the most suitable pricing structure matching our 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.

ANNEX A: OUTLINE OF THE FINAL EVALUATION REPORT

The format described below is intended to guide the structure of the main contents of the report.

The final evaluation report length should not be longer than 40 pages (including the executive summary). Additional information on the overall context, programme or aspects of the methodology and analysis should be confined to the annexes.

1. EXECUTIVE SUMMARY (3 pages maximum)

The executive summary should contain the following information:

- 1.1 – Purpose of the evaluation;
- 1.2 – Methodology;
- 1.3 – Analysis and main findings;
- 1.4 – Main conclusion and lessons learned; and
- 1.5 – Main recommendations.

2. INTRODUCTION

Presentation of context of the evaluation; evaluation's purpose and questions; and main findings.

3. THE EVALUATED INTERVENTION

Description of the evaluated intervention, and its purpose, logic, history, organisation and stakeholders.

4. FINDINGS

Factual evidence, data and observations that are relevant to the specific questions asked by the evaluation.

5. EVALUATIVE CONCLUSIONS

Assessment of the intervention and its results against given evaluation criteria, standards of performance and policy issues.

6. LESSONS LEARNED

General conclusions that are likely to have a potential for wider application and use.

7. RECOMMENDATIONS

Actionable proposals to the evaluation's users for improved intervention cycle management and policy.