



REQUEST FOR PROPOSALS

ISO London Declaration Action Plan – ISO standards in support of climate change

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

Sustainability is core to our organizational vision and mission and ISO has publicly committed to supporting the successful achievement of the Paris Agreement, the United Nations Sustainable Development Goals (SDGs) and the United Nations Call for Action on Adaptation and Resilience. Recognizing that International Standards are effective tools to help governments, industry and consumers respond to today's most urgent climate-related challenges, in September 2021, ISO's General Assembly approved the **London Declaration** to transform the organization's approach to climate action and advance international standardization work to attain net-zero goals.

As part of this commitment, we wish to commission research that will deepen our understanding of how ISO standards can most effectively contribute to supporting the climate agenda and the transition to a net zero economy. We are seeking for a company or team of researchers (hereafter referred to as 'Consultants') to investigate:

1. Which existing ISO standards have the greatest potential to positively contribute to the achievement of climate goals, including the transition to a net zero economy (Assignment 1)
2. What new standards could be developed (or which existing standards could be modified) to respond to unaddressed market needs in the climate area (Assignment 2)

Each assignment is independent. In response to this Request for Proposal (RFP), consultants may submit a proposal for one or both assignments. **Given the large scope of the assignments, proposals from one individual, independent consultants will not be considered. However, joint biddings in conjunction with several independent consultants are possible.**

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 **2 May 2022 12:00 CEST** 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 at garcianebra@iso.org

Yours sincerely,

Noelia Garcia Nebra
Head of sustainability

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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: Noelia Garcia Nebra

Title: Head of sustainability

Address: Chemin de Blandonnet 8, 1214 VERNIER

Email: garcianebra@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	25 March 2022
Clarification calls with Consultants (upon request)	Between 30 March and 26 April 2022
Consultants return proposal	2 May 2022 12:00 CEST
Expected initial evaluation of proposals	Between 3 May and e 10 May 2022
Expected virtual interviews with short-listed proposers	Between 17 May and 23 May 2022
Expected selection of proposal	30 May 2022

Electronic format of all proposals must be received by **2 May 2022 12:00 CEST** 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 requirements of the RFP by cross-reference to the relevant section number.

Consultants are encouraged to supply innovative solutions in responding to this RFP, however, Consultants must strictly adhere, at all times, to the requirements of this RFP. You should include any additional supporting information or alternative proposals as a separate section titled "Alternative Options".

1.5 Response Deadline

Submissions are due as set in the paragraph 1.3 above, provided however that, if the deadline set for submission is extended, the ISO Project Manager will also specify the new date and hour for submission which will replace the above 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 Consultants 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 (see dates on table above). Please contact the ISO Project Manager (with tenders@iso.org in copy) 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, 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 Consultants 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 Consultants (including any personnel) are not eligible to participate in life or health insurance schemes available to ISO employees.
- The Consultants are also required to confirm that they are solely responsible for their tax status, paying any taxes and statutory contributions applicable in respect of fees and

reimbursements received. For individual Consultants residing in Switzerland who seek to be engaged directly, you must provide a copy of your AVS (social insurance) certificate demonstrating your independent contractor status in your proposal documentation.

- The proposal shall contain responses to all the RFP Questions as described in section 4 below.

Proposals not meeting these criteria will not be given further consideration.

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	Page #
Proposal description, including virtual interviews with short-listed proposers	40%	11
Experience within project area	15%	12
Consultant's profile	15%	12
Implementation Plan	20%	13
Financial Plan	10%	13
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 Consultants.

1.10 Health and Safety

The Consultants are expected to follow legislative health and safety directives, as dictated by the appropriate country.

1.11 General Conditions

By submitting a proposal, the Consultant agrees to all conditions and terms stated in this RFP. If the Consultants do not agree with particular terms, such terms must be discussed in detail with the ISO Project Manager before a proposal is submitted.

The working language for all communications is English.

Except for this RFP and otherwise public information, information or communications obtained in relation to this RFP (including clarification calls) may not be released without the express written consent of ISO.

By responding to this RFP, applicants agree that the decision of ISO is final and binding, including any decision to withdraw this RFP or disqualify any proposal. ISO shall not in any way be responsible for any costs incurred in the preparation and presentation of the Consultants' information.

ISO reserves the right to negotiate all terms and conditions in order to enter a formal contract with the Consultants, including regarding ultimate pricing. The ultimate decision regarding the awarding of a bid is subject to said negotiation. Inability to accept any required contractual term from ISO can result in disqualification of a proposal, without regard to any prior communication, shortlisting or process. This RFP document, the Consultants' response and, written addenda may form part of the contract.

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

Unsolicited telephone calls or visits to ISO or ISO staff during the RFP process to obtain proposal status information are prohibited and may result in the Consultants' being disqualified from the application process. News releases pertaining to this RFP or the award of any contract related to this RFP may not be made without the prior written permission of ISO.

All work and materials shall comply with all applicable provincial and federal laws, municipal ordinances, regulations, applicable building leases, and directions of inspectors appointed by proper authorities having jurisdiction. Where proof of certifications are required by ISO, the Consultants shall make all such certificates available for inspection.

The Consultants shall at all times act impartially and shall refrain from any relationship which would compromise its independence or that of its personnel. If the Consultants fail to maintain independence, ISO on the basis of its sole discretion reserves the right immediately disqualify the application. The Consultants 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 Project Manager, copying the ISO Procurement Manager by e-mail at tenders@iso.org.

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

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

The Consultants 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 Consultants whether in contract, tort or otherwise with respect to the giving of any such representation or estimate.

1.13 Confidentiality

Unless otherwise public, all information disclosed in connection with this RFP is confidential and the property of ISO. This information must only be released to the personnel of the Consultants to whom release is required in order to prepare a response to this RFP.

2. Background Information

2.1 About ISO

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.

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.

2.2 The importance of sustainability for ISO

The importance of sustainability is outlined in ISO's vision for 2030 of "making lives easier, safer and better" by developing International Standards that address economic, environmental and societal dimensions.

ISO has publicly committed to supporting the successful achievement of the Paris Agreement, the United Nations Sustainable Development Goals (SDGs) and the United Nations Call for Action on Adaptation and Resilience.

In this context, a Sustainability Unit has recently been created at the ISO Central Secretariat (ISO/CS) to coordinate ISO's efforts and initiatives in support of the UN SDGs and reinforce the organization's commitment and visible leadership in the sustainable development area.

3. Project Description and Requirements

3.1 Context

ISO has many International Standards that are essential in supporting the climate agenda; for example, they help adapt to climate change, quantify greenhouse gas emissions and promote the dissemination of good practices in environmental management.

International Standards can be extremely useful tools for industry, policy makers and other stakeholders to help them reach their climate goals. ISO is committed to working with its members, stakeholders and partners to ensure that International Standards and publications are used as widely as possible to accelerate the successful achievement of the Paris Agreement, the United Nations Sustainable Development Goals and the United Nations Call for Action on Adaptation and Resilience.

The London Declaration, signed in September 2021, defines ISO's commitment in supporting the climate agenda. This Declaration commits ISO to:

- Foster the **active consideration of climate science and associated transitions** in the development of all new and revised International Standards and publications
- Facilitate the **involvement of civil society and those most vulnerable to climate change** in the development of International Standards and publications
- Develop and publish an **Action Plan and Measurement Framework** detailing concrete actions and initiatives and a reporting mechanism to track progress

The first phase of the London Declaration Action Plan covers the period 2022-2023 and provides an operational framework to:

- Deepen the understanding of which ISO standards have the greatest potential to support climate action
- Assess where there are unaddressed market needs for International Standards related to climate action
- Determine how standards development processes can be improved in order to systematically consider climate impacts and respond to market needs in a timely manner.

As part of this Action Plan, ISO wishes to conduct research to develop a better understanding of:

1. Which existing ISO standards have the greatest potential to positively contribute to the achievement of climate goals, including the transition to a net zero economy (Assignment 1)
2. What new standards could be developed (or which existing standards could be modified) to respond to unaddressed market needs in the climate area (Assignment 2);

NOTE: When referring to the 'climate agenda' we mean the transition towards a net zero economy, in line with the goals set by the Paris Agreement and the goals and targets defined under the UN's Sustainable Development Goal 13, Climate Action. When referring to 'ISO standards or International Standards', we mean any of the different kinds of normative publications developed by ISO, whether they are International Standards, Technical Specifications, Publicly Available Specifications or International Workshop Agreements.

3.2 Scope

This RFP includes two assignments. Consultants may submit a proposal for one or both assignments.

Assignment 1: Mapping existing ISO standards

The expected outcome of this assignment is to identify which ISO standards have the **potential** to positively contribute to the achievement of climate goals, including the transition to a net-zero economy, and to **classify** these standards according to their level of potential impact.

This assignment consists of two tasks.

Task 1.1: Review of current mapping of ISO standards against SDG 13 – Climate action

ISO has conducted a mapping exercise, looking at which of its standards support the various UN SDGs. 1131 standards are currently mapped to SDG 13. However, this mapping is based on theoretical links between the subjects of the standards and SDG 13 (not empirical evidence), and it relies on the subjective assessments of ISO experts.

As a first step, the Consultants will propose a methodology/criteria to review the potential impact of these standards on SDG 13 and its targets, including assessing whether the impact of each mapped standard could be high, medium, or low. Any additional analysis of the standards at each impact level would be welcome – for example, are impact levels correlated with the technical sectors of the standards, or the type of standards (product specification standards, standards for test methods, management systems standards, etc.)? Standards assessed as having the highest level of potential impact will be prioritised for promotion and further empirical research on their use and impact, while those with lower levels of potential impact will be assessed to determine if they require revision to improve their potential impact level.

In addition to classifying standards, this task will also serve to improve the quality of the existing mapping to SDG 13, by identifying standards that have been incorrectly mapped (so that they can be removed).

Deliverable 1.1.a: Report summarizing the findings, suggesting improvements to the current mapping against UN SDG 13 and proposing a classification of the mapped standards according to their potential impact level.

Deliverable 1.1.b: Technical report describing the criteria/methodology used to review the mapping and assess potential impact, including guidance for future mapping efforts.

Task 1.2: Review of ISO catalogue to identify additional relevant standards

The second task in this assignment focuses on identifying relevant standards that have been missed in the initial mapping to SDG 13. Because of the number of standards in the ISO catalogue and the fact that the initial mapping relied on the voluntary participation of experts and their subjective judgements, it is possible that some relevant standards were not included.

In task 1.2, the Consultants will need to develop a methodology to identify any additional ISO standards that have the potential to positively contribute to the achievement of climate goals. There are many possible approaches to this task, but it may be relevant to review the existing mapping of ISO standards to other relevant SDGs and targets, such as SDGs 11, 12, 14 and 15, and/or to examine the portfolios of technical committees from high-emitting sectors (such as those related to energy production, agriculture, transport, etc.).

The Consultants will then use the same methodology used in task 1.1. to assess the potential impact of these additional standards (high, medium or low).

NOTE: There may be some standards that can be linked to SDG 13 targets but, in their current form, would not positively contribute to the achievement of climate goals (indeed, they may even have a negative impact). ISO is also interested in identifying these standards to see if they can be revised to include net zero considerations and thus have an eventual positive impact.

Deliverable 1.2.a: Report summarizing the findings, suggesting additions to the current mapping against SDG 13 and proposing a classification of the additional mapped standards according to their potential impact level.

Assignment 2: Mapping market needs

The expected outcome of this assignment is to provide ISO with an overall picture of the **major challenges** faced by public and private sector actors in achieving their climate goals and the **main tools** available on the market to help them overcome these challenges.

Governments and the private sector are increasingly committing to taking actions to combat climate change. However, they still face a multitude of important challenges to complete the net-zero transition, including the rapid shift in the climate regulatory landscape and the need to comply with various government and market requirements. In this assignment, the Consultants will work to identify and describe those challenges and to map them against current ISO standards and other relevant international standards, guidelines, frameworks, etc. The aim of this is to better understand ISO's place in the market and to identify any unaddressed market needs and priority sectors where new standards could be helpful.

Deliverable 2.1: Report summarizing the findings and suggesting potential future standardization opportunities for ISO.

3.3 Objectives and benefits

Using the results of the above Assignments, ISO will be able to:

1. Better promote the standards that are most relevant to climate action.
2. Prioritize the revision of specific standards in order to improve their impact on climate
3. Identify opportunities for the development of new standards and pathways for how standardization can contribute to climate action

The expected benefits of this exercise for ISO are as follows:

- ISO is increasingly recognised as a provider of climate solutions
- ISO increases its portfolio of standards supporting climate action
- ISO standards are increasingly used to meet climate targets

3.4 Timeline for implementation

The tentative timeline for carrying out the assignments outlined above is described in table below:

ASSIGNMENT	TASK	DELIVERABLES	INDICATIVE TIMELINE/ DEADLINE
1. Mapping existing ISO standards	1.1: Review of current mapping of ISO standards against SDG 13 – Climate action	<p>1.1.a Report summarizing the findings, suggesting improvements to the current mapping against UN SDG 13 and proposing a classification of the standards according to the potential impact level.</p> <p>1.1.b. Technical report describing the criteria/methodology used to review the mapping and including guidance for future mapping efforts.</p>	Within 3 months from the signature of the contract

	1.2: Review of ISO catalogue to identify additional relevant standards	1.2.a: Report summarizing the findings, suggesting additions to the current mapping against SDG 13 and proposing a classification of the additional mapped standards according to their potential impact level.	Within 4 months from the beginning of the task
2. Mapping market needs	2.1 Map of current standards against market needs	2.1: Report summarizing the findings and suggesting potential future standardization opportunities for ISO	Within 4 months from the beginning of the task

Each assignment is independent. In response to this RFP, consultants may submit a proposal for one or both assignments. Tasks 1.1 and 1.2 under assignment 1 are to be completed in priority and could be carried out in parallel depending on the capacity of the proposer. The final deadlines for each task will be specified in the final contract.

The Consultants will inform ISO whether the proposed timeline is feasible or if an adjustment should be considered.

3.5 Legal

Consultants will be expected 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 International Standards.

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

4. Consultant Proposal - RFP Questions

Please provide comprehensive responses to all questions in this section using Annex 1 and 2, for your proposal to be considered valid. Please indicate if you are submitting a proposal for one or both assignments.

4.1 Proposal Description [40%]

Please describe in a maximum of four (4) pages what you will be delivering by responding to the following:

- 4.1.1 Research methodology suggested to map and assess the impact of standards on climate (for assignment 1).
- 4.1.2 Research methodology suggested for mapping market needs (for assignment 2).
- 4.1.3 Any data or tools that you will require to carry out the assignment(s) and how you will access these.
- 4.1.4 Examples of existing research on the impact of standards on climate or other research that may be relevant to the current assignment.
- 4.1.5 Security measures of the Consultant to ensure the confidentiality and security of the shared ISO Standards.
- 4.1.6 Any comments/suggestions on the Assignments.

The submitters of the 3 proposals with the highest evaluation score will be asked to present their proposal during a virtual interview with the ISO Project Manager and members of the evaluation

committee. The expected structure for such interviews will be provided by the ISO Project Manager.

4.2 Experience within Project Area [15%]

Please in a maximum of three (3) pages describe 3 similar projects within the scope of this RFP that you have carried out previously. For each of these projects, please use the following Headings:

- 4.2.1. A brief description of the project.
- 4.2.2. Relevance to the scope of this RFP.
- 4.2.3. Major issues or problems that occurred and how they were resolved.
- 4.2.4. When those projects were delivered.

4.3 Consultant's Profile [15%]

Under the following Headings, please provide a summary description of:

- 4.3.1. Organization profile.
- 4.3.2. Team composition.

Using Annex 2, please provide a summary description of each team member's:

- Qualifications, experience, and technical skills relevant to this project.
- Motivation on the subject matter.
- Experience working with research teams.
- English written communication skills.
- Relevant publications or professional attainments.

Knowledge of ISO and ISO Members

Under the following Headings, please provide the following information:

- 4.3.3. Previous experience with ISO and ISO Members including contact person(s) and location.
- 4.3.4. Are any of the employees in your organization related, either personally or professionally, to a person currently employed by ISO or its Members?
- 4.3.5. To the best of your knowledge, was any ISO employee or contractor previously employed by your organization?

Conflict of interest and disclosures

Proposers 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 Proposal which, in ISO's opinion, gives rise, or could potentially give rise to, a conflict of interest.

All bidders must disclose:

- a. If they are subject to of any proceedings or other arrangements relating to bankruptcy, insolvency or financial standing.

- b. If they are subject of 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.

Joint bids

Where the Proposal is submitted as a joint bid in conjunction with one or more independent consultants, the Proposal shall identify which parts will be completed by which consultant. Each independent consultant shall be required to sign the consultancy agreement.

Consultants are permitted to subcontract parts of the Project provided that the Consultant assumes full responsibility for the subcontracted parts and that the Consultants assume full legal responsibility for its subcontractors (e.g. contractual obligations).

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 Implementation Plan [20%]

Under each of the following Headings, please provide the following information:

- 4.4.1. Bearing in mind that the Timelines in 3.4 are tentative, provide a description of your implementation plan and timeline for this project;
- 4.4.2. Description of how you will communicate and manage relationships with the ISO Project Team to ensure smooth running of the project.

4.5 Financial Proposal [10%]

The Consultants must submit a financial proposal for the selected assignment(s). The total value of carrying out both assignments should not exceed **CHF 110'000 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 the financial criteria.

Note: No reimbursement of expenses related to the preparation of any proposal will be made by the 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 assignment, including professional fees, insurances (medical, life), communication costs, electronics, taxes, etc.

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

The prices supplied must give ISO a full breakdown 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 Consultants to provide invoices on completion of each project task and after confirmation 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.

Please use the below form to provide the foregoing information. Where multiple Consultants are working on the different Assignments, please include a breakdown of the price per Consultant.

Financial Proposal		
Item No.	Initial Deliverable Description	PRICE (CHF)
1	Assignment 1 – Task 1.1	
2	Assignment 1 – Task 1.2	
3	Assignment 2	
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.