REQUEST FOR INFORMATION

FUTURE OF PRI REPORTING

BUILDING A TECHNOLOGY PARTNERSHIP TO SUPPORT THE FUTURE DEVELOPMENT OF PRI REPORTING

BACKGROUND

The PRI is the world's leading proponent of responsible investment with a global signatory base of more than 5,000 investment managers, asset owners, and service providers. More details about the PRI are available here, about the Pathways offering here and Reporting here.

We have a long history of collecting data from our signatories on their approach to responsible investment through the annual Reporting & Assessment framework. We are undertaking a digital transformation and will launch our MyPRI portal including a new framework (Pathways) which has been designed to support signatories to manage their responsible investment with greater precision and confidence. Responsible investment is an evolving field, and Pathways will be updated periodically to reflect changes in the activities and needs of our signatories.

Consequently, we are looking for a **technology partner** to help us build a new solution to reporting which will add value to our signatories and help fulfil our mission.

PROJECT OUTCOMES

Given the evolving investor reporting landscape, regulatory requirements and ongoing technological changes, we are **seeking a technology partner** with the capabilities, market intelligence and active interest in our mission to support us with development and on-going iteration of a new reporting platform.

The aim of the partnership is to collaboratively define and develop a platform for new reporting related products and services. This new approach will modernise PRI's reporting and provide design guidelines for a future-proof solution that delivers enhanced value to signatories and remains an essential part of their responsible investment journey.

The successful partner will work with PRI to deliver the following outcomes:
1. Discovery: co-define **requirements** based on signatory / PRI needs, partner capabilities and future ideas/strategies:
2. Develop: **conceptual design** of the future reporting product; and

3. Deliver: proposed **roadmap** for design, development and implementation.

PARTNER SELECTION CRITERIA

We are looking for a partner to be selected based on responses to the following questions:

1. **Company background**
   1. Company overview (background, vision, history, size, years of operation).
   2. Description of market positioning, differentiation and value proposition.
   3. Expertise in responsible investing and investment industry.
   4. List of sustainability credentials and certifications.
   5. Profiles of key individuals who would lead & support the organisation.
2. **Your product offering**
   6. Overview of your product offering.
   7. Outline the design process, evolution and its purpose.
   8. What is your longer-term vision and strategy for your product offering.
3. **Customer relationships and collaboration**
   9. Description of your collaborative model(s) with clients and stakeholders.
   10. How have you worked with your clients to build out the product?
   11. Overview of key partnership(s), highlighting your approach, role and outcomes.
   12. Description of your approach to agile and iterative collaboration in context of evolving requirements.
   13. Rationale for partnership with the PRI (including benefits for your organisation).
4. **Approach to data & technology - Data capture**
   14. What data collection mechanisms does your platform support (e.g., APIs, web forms, document uploads, third-party integrations)?
   15. How does your platform handle structured and unstructured data inputs?
   16. Can you customise data capture workflows to suit the needs of PRI reporting, and if so, how?
   17. How do you ensure data quality, validation and completeness at the point of entry?
   18. What external systems or data sources does your tool/platform currently integrate with (e.g., ESG frameworks, regulatory databases)?
5. **Approach to data & technology - Data storage and management**
   19. Description of technologies underpinning your data architecture (e.g., cloud infrastructure, databases and location of sub-processors).
   20. How are these technologies hosted (e.g. managed service, self-hosted, white-labelled)?
   21. How does your data storage model comply with international data protection regulations (e.g., GDPR), what data roles do you fulfil (controller vs processor), and what locations is the data stored in?
   22. Which security standards/certifications does your organisation meet (e.g., ISO 27001, SOC 2)?
   23. How do you handle data breaches and ensure end-to-end data security?

6. **Approach to data and technology - Data analysis and outputs**
    24. Description of the platform's analytical capabilities (e.g., dashboards, benchmarks, trend analysis, predictive insights).
    25. How does your platform and technology allow customisation of data outputs based on filters and other parameters (e.g., customisation based on org. type such as asset owner and investment manager)?
    26. How does the technology manage and visualise complex frameworks (e.g., ESG, progression levels)?
    27. Provide a list of three relevant clients (with links, where available) and describe the services delivered — including an overview of data inputs and outputs/insights. If confidentiality agreements limit the detail you can share, please indicate this accordingly.
    28. Provide a use case or example of how your product has provided decision-useful insights for end users.
    29. Short articulation on how your technological capabilities can leverage PRI reporting.
7. **Product Design**
    30. Describe the UX approach for data inputting, analysis and outputs visualisation - especially from the perspective of non-technical users.
    31. Describe your approach to user-centred design and accessibility standards that apply to your tools/products (e.g., WCAG).
    32. How does your product utilise AI/ML and what are its use cases for customers (e.g., benchmarking, identification of emerging themes)?
    33. What is your approach to responsible AI, transparency, and bias mitigation?
    34. Confirm that PRI and signatory data will not be used to train public LLMs?
    35. Overview of product roadmap and resources for continuous growth and innovation over next 3 years.
    36. Product maintainability and ease of updates description (e.g., extent of hard coding required / drag-and-drop applicability).
8. **Pricing**
    37. Outline of overall pricing model.
    38. How that might apply to this opportunity?
    39. Please provide an indicative range based on pricing calculation.
    40. Anticipated outline of commercial model that would underpin this partnership.

PROJECT TIMELINE

All submissions will be reviewed, and shortlisted partners will be invited to interviews to help inform the final partner selection for this project This indicative timeline will be discussed and agreed with the selected partner(s).

	Month	Activities and objective
Initiation	September - October	Selection
Step 1	October	Programme initiation

| Step 2 | October '25 – Q1 26 (TBC) | Programme delivery |

If you require more information about this request, contact us by **September 5th**.

SUBMISSION REQUIREMENTS AND ASSESSMENT CRITERIA

Proposals should include and will be assessed based on your responses to the Partner Evaluation Criteria. Please refer to the Microsoft Form. All expressions of interest will be treated as confidential.

SUBMISSION DEADLINE

Proposals must be submitted electronically by **12th September**.

CONTACT DETAILS

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APPENDIX 1 – CURRENT REPORTING & ASSESSMENT FRAMEWORK

PRI's Reporting Framework was launched in 2014. It's latest version in 2025 consists of 259 indicators in total. Most indicators in the Reporting Framework are presented as multiple-choice questions with the option to add contextual disclaimers. The Reporting Framework uses advanced branching logic to display relevant indicators to signatories based on their business type and asset allocation. The answers that signatories provide are processed into scores which signatories use for peer comparison and benchmarking. Additionally, signatories use reporting to support their stakeholder and client engagement strategies and for meeting PRI membership requirements. Traditionally, the annual reporting window is open from May – July, with publication of results in November.

APPENDIX 2 – STREAMLINED REPORTING IN 2026

To address challenges from the evolving investor reporting landscape, PRI's reporting in 2026 will be streamlined, consistent with themes in the 2024-2025 Reporting Framework. Reporting will be scored, and signatories will be assessed against approximately 40 mandatory questions. The data signatories provide will create the basis for peer benchmarking. The streamlined reporting is aligned with the Pathways framework, which will be launched in November 2025 via MyPRI – a new centralised portal for PRI products and services.
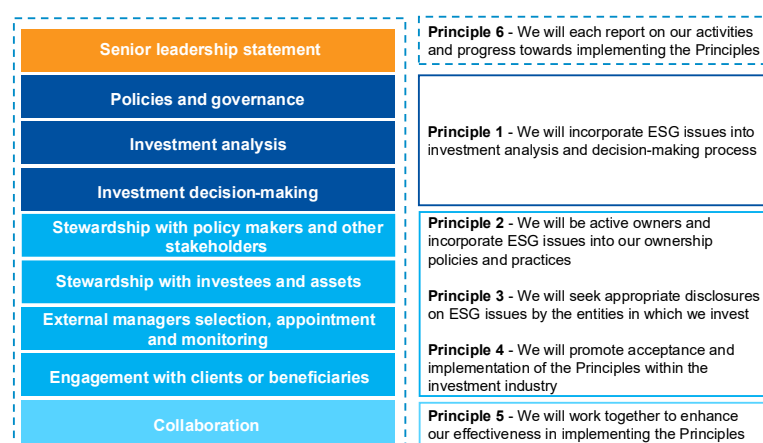
Schematic overview of reporting and Pathways: 9 underlying pillars mapped against the 6 principles.

APPENDIX 3 – FUTURE OF PRI REPORTING

In 2027 we aim to launch a renewed product on a flexible and scalable platform. The platform should allow the PRI to innovate continuously to meet the diverse and emerging needs of our signatories. This project seeks to address the changing responsible investment landscape by further improving and modernising the value proposition and user experience for signatories. This request for information will inform PRI's approach to future of reporting and potentially pave the way for a long-term partnership. We are expecting to explore the capabilities and adaptation possibilities of various AI-driven solutions and data scraping, with the goal to provide signatories with real-time benchmarking and insights.

PRI | Principles for Responsible Investment