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**Agenda for Social Equity  
2074 - Illustrative Validation  
Example and Development Plan**



**CREATED BY**

EUSL AB

*Care to Change the World*



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# Illustrative Validation Example and Development Plan

## Preamble

This document provides a simplified, illustrative example of the Agenda for Social Equity 2074 Social Responsibility Standard (A2074-SRS) validation logic and a development-plan method that is operable for entities of any size, structure, or sector. It is strictly explanatory and does not create binding rules, amend, or supersede the Foundational Charter, the Operating Manual (Open Standard), the Governance & Oversight Manual, the Ethics & Integrity Code, the Communication & Public Disclosure Protocol, the ISO 26000 Self-Declaration Protocol, or the Digital Integration & Platform Governance Manual. Where any divergence appears, the aforementioned instruments prevail. All processing under this document is governed by patient-level confidentiality, proportional evaluation, and GSIA ethics oversight.

The model is expectation-based and non-comparative. Outcomes are determined by whether an entity fulfils the reasonable expectations that apply to its nature, scale, and risk profile, not by extrinsic circumstances such as physical infrastructure or inherited capacity. Non-applicable indicators do not count as deficiencies and do not limit the highest achievable star class. Voluntary enhancement indicators permit entities to exceed their applicable scope without creating de facto obligations.

The validation flow described herein proceeds through a Pre-Study stage and an Initial Assessment (Year 0), followed by an annual development plan with verification and re-validation. The Pre-Study determines the applicable expectations and the baseline position of the entity and is registered confidentially with GSIA as an oversight anchor. All results, plans, and communications are confidential by default and may be disclosed only through explicit, informed, revocable consent recorded in the consent ledger maintained by the Validation Partner, subject to GSIA's supervisory jurisdiction.

For the avoidance of doubt, any optional ISO 26000 self-declaration furnished by an applicant is treated as contextual information and does not constitute, and must not be communicated as, ISO "certification." No statement in this document shall be construed as conferring state endorsement or regulatory equivalence.

**Key terms and operative definitions** are used consistently with the canon and are presented for clarity.

Term	Definition	Source Instrument / Reference
Applicant	The entity voluntarily undergoing an A2074-SRS assessment.	Foundational Charter; Operating Manual
Validation Partner	A licensed organisation (e.g., EUSL) authorised to design and operate validation models within the A2074-SRS framework.	Licensing & Accreditation Framework





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GSIA	Independent ethics and compliance custodian with adjudication powers; maintains oversight including registration of Pre-Study records.	Governance & Oversight Manual
Pre-Study	A structured, expectation-setting assessment that determines applicable indicators, baseline position, and risk profile; registered with GSIA.	This Document; Governance & Oversight Manual
Applicable Indicator	An indicator materially relevant to the Applicant's operations, scale, and risk profile.	Operating Manual
Non-Applicable Indicator	An indicator that does not attach to the Applicant's operational reality; generates no positive or negative points.	Operating Manual
Voluntary Enhancement Indicator	An optional measure that exceeds baseline expectations; may generate points but is never mandatory for any star class.	Operating Manual
Consent Ledger	A tamper-evident record of explicit, informed, revocable consent governing disclosure of results and plans.	Digital Integration & Platform Governance Manual
Patient-Level Confidentiality	A confidentiality rule protecting individuals and sensitive data; results are private by default and disclosed only by consent.	Ethics & Integrity Code; Communication Protocol

## Chapter 1 — Purpose and Legal Character of the Pre-Study

The Pre-Study is the formal entry point to any A2074-SRS engagement. Its legal character is diagnostic, not adjudicative. It determines, with disciplined reasoning, the set of expectations that properly attach to the Applicant, taking account of its sector, size, structure, geographic exposure, stakeholder impact, and operational risk. The Pre-Study also establishes the baseline position against which progress will be measured, defining the Applicant's initial evidence posture, governance maturity, and any declared constraints that are material to proportional evaluation.

The Pre-Study is conducted by the Validation Partner under the Operating Manual and must adhere to patient-level confidentiality from inception. Information gathering is purpose-limited and minimised; sensitive materials are handled under privacy-by-design with encryption, role-based access, auditable trails, and AI guardrails that preclude automated adverse inference, opaque profiling, or any practice that would undermine explainability and reproducibility. The Applicant retains the right to review the Pre-Study summary and to correct factual inaccuracies prior to registration.

Upon completion, the Pre-Study is registered with GSIA for oversight purposes. Registration is confidential and neither constitutes a certification nor creates any public claim. The registration serves four principal functions. First, it anchors the applicable-indicator set and the baseline for proportional scoring. Second, it provides GSIA with a reference record to detect coercion, retaliation, or misuse of



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marks. Third, it enables controlled oversight of conflicts of interest and patterns of practice across Validation Partners. Fourth, it facilitates adjudication by furnishing an authoritative snapshot of the agreed expectations at the outset.

Registration does not authorise disclosure. Any communication beyond the Applicant–Validation Partner–GSIA circuit requires consent ledger entries that are explicit as to scope, duration, and revocability. The Applicant may refuse or withdraw consent without forfeiting access to services, and any conditioning of benefits upon disclosure is prohibited. Where disputes arise regarding scope, applicability, or factual determinations, GSIA may exercise adjudicative powers under the Governance & Oversight Manual, including issuing directions, ordering corrective measures, or appointing independent reviewers.

The Pre-Study also delimits the scoring universe for the Initial Assessment. Only indicators determined as applicable may generate points in Year 0. Non-applicable indicators are excluded from the denominator. Voluntary enhancement indicators may be undertaken at the Applicant’s discretion and can generate additional points without creating implicit obligations for future cycles.

For clarity in administration and auditability, the Validation Partner compiles a GSIA Registration Record contemporaneously with the Pre-Study. A standardised record ensures uniform oversight while preserving proportionality and flexibility across sectors and sizes.

<b>GSIA Pre-Study Registration Record Field</b>	<b>Description</b>	<b>Notes</b>
Registration Identifier	Unique alphanumeric assigned at submission.	Generated by GSIA registry.
Applicant Legal Identity	Registered name, jurisdiction, and identifiers.	As per corporate records.
Validation Partner	Name and licence reference.	Cross-checked against Licensing Framework.
Scope Statement	Narrative of operations, sector, and geographic footprint.	Determines materiality.
Applicability Determination	List of applicable, non-applicable, and attenuated indicators with rationale.	Forms the scoring universe.
Baseline Position	Summary of current practices and evidence posture.	Year 0 reference point.
Risk Profile	Sectoral, geographic, and stakeholder risk assessment.	Drives oversight intensity.
Confidentiality and Consent	Confirmation of patient-level confidentiality and consent ledger initialisation.	No disclosure by default.



Conflicts of Interest	Declaration by parties; mitigation steps if needed.	GSIA may require measures.
Date and Time-Stamped	Completion and submission markers.	For audit trails.
Applicant Acknowledgement	Confirmation of review and right to correct.	Not a public release.

Registration is deemed complete upon GSIA's acknowledgment. The Validation Partner retains responsibility for ongoing accuracy and must lodge amendments where material facts change prior to the Initial Assessment.

## Chapter 2 — Methodology for Identifying Applicable and Non-Applicable Indicators

The methodology for determining applicability is rooted in the A2074-SRS principles of proportionality and non-comparative evaluation. The Validation Partner undertakes a materiality-first analysis, followed by a scope refinement that classifies indicators into applicable, non-applicable, or attenuated applicability. Attenuated applicability arises where an indicator is relevant in principle but warrants scaled expectations due to size, structure, or risk attenuation.

The analysis begins with a structured examination of the Applicant's business model, including the presence or absence of public-facing premises, the number and type of workers engaged, the nature of supply-chain participation, the extent of personal-data processing, environmental interactions material to operations, and any regulated activities that elevate stakeholder risk. Each dimension is evaluated against the canonical set of indicators derived from the 17 Social Global Goals, with careful attention to avoid importing de facto obligations from unrelated contexts.

Indicators are deemed applicable where there is a direct and material nexus to the Applicant's operations. For example, physical accessibility measures are applicable to a large public retailer but non-applicable to a microenterprise with no public premises. By contrast, digital accessibility and equitable client practices may be applicable to both. Data protection controls are generally applicable where personal data are processed, with expectations scaled to volume, sensitivity, and processing complexity. Supply-chain due diligence expectations are calibrated to the Applicant's role and leverage over suppliers, ensuring that microenterprises are not penalised for structural conditions beyond reasonable influence, while still recognising reasonable steps such as supplier declarations or risk flagging.

To ensure procedural clarity and predictability, the Validation Partner documents the applicability determinations in a matrix that is included in the Pre-Study and registered with GSIA. The matrix is explanatory rather than exhaustive, and it must cite the rationale for each classification. An illustrative matrix is provided below for two archetypes to demonstrate the expectation-based logic.

Indicator Domain	Example Indicator	Large Physical Retailer (Public Premises)	Micro Web Developer (No Public Premises)	Applicability Rationale
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Physical Accessibility	Step-free access, tactile signage, aisle width	Applicable	Non-Applicable	No public access for microenterprise; non-applicability is not a deficiency.
Digital Accessibility	WCAG-aligned website and client materials	Applicable	Applicable	Both engage users digitally; expectations scaled to complexity and reach.
Worker Protections	Written contracts, grievance channel, safety training	Applicable	Attenuated Applicability	Sole proprietor may not have “employees”; expectations focus on self-protection, contractor fairness, and client conduct clauses.
Supply-Chain Ethics	Supplier code, risk screening, escalation pathways	Applicable	Attenuated Applicability	Microenterprise can employ supplier declarations and basic screening proportionate to spend and leverage.
Data Protection	Lawful basis, security controls, incident response	Applicable	Applicable	Scope scaled to data volume and sensitivity; minimal viable controls required.
Environmental Management	Energy use tracking, waste segregation	Applicable	Attenuated Applicability	Office-scale measures for microenterprise; proportional tracking without imposing industrial standards.

Where attenuation is applied, the matrix must describe the scaled expectation in concrete terms to prevent ambiguity in the Initial Assessment. The Applicant is afforded the opportunity to comment on and, where necessary, contest applicability determinations prior to GSIA registration. If disagreements persist and are material to scoring fairness, GSIA may be notified and invited to provide non-binding guidance or to open an adjudication file under its Ethics Chambers, depending on the gravity of the dispute.

Voluntary enhancement indicators are identified during the same exercise. These are measures that the Applicant may elect to implement to exceed baseline expectations. They are never required for attainment of the highest star class within the applicable scope, but they may generate additional points and can be used to demonstrate leadership consistent with the non-comparative philosophy of the standard.

The methodology prohibits negative scoring for non-applicable indicators and forbids implicit ceilings arising from structural constraints. The star-class will later be derived from the proportion of applicable points achieved in the Initial Assessment and subsequent cycles, with clear cross-reference to the



applicability matrix to ensure that outcomes remain grounded in reasonable expectations rather than circumstances extraneous to the Applicant's operational reality.

## Chapter 3 — Baseline Determination and Evidence Requirements

The baseline determination establishes the Applicant's present position at the outset of the A2074-SRS engagement. Its function is diagnostic. It renders a precise, evidence-based statement of current practices across the indicators deemed applicable in the Pre-Study, together with a concise account of governance maturity, risk posture, and any constraints material to proportional evaluation. The baseline neither confers recognition nor withholds it; it defines the factual substrate from which the initial points attribution (Year 0) proceeds and against which future development-plan actions will be verified.

The Validation Partner conducts the baseline exercise under patient-level confidentiality and privacy-by-design. Evidence is purpose-limited, minimised, and handled with encryption, role-based access, chain-of-custody logging, and AI guardrails that ensure explainability, reproducibility, and the prohibition of automated adverse inference. The Applicant has the right to review the baseline summary before submission for GSIA registration and to request correction of factual inaccuracies.

The baseline draws on a structured portfolio of sources to ensure sufficiency without excess. Evidence is classified to maintain clarity of provenance, integrity, and privacy treatment, and to avoid undue reliance on any single form of proof. The Validation Partner accepts optional ISO 26000 self-declarations solely as contextual information; such declarations are not treated as certification and shall not be described or communicated as such.

Evidence Class	Description	Acceptance Criteria	Privacy Treatment
A — Primary Records	Native records such as contracts, policies, payroll, logs, registers, DPIAs, incident reports, training rosters.	Authenticity, material relevance, date integrity, unbroken chain-of-custody.	Confidential; redact or tokenise sensitive fields; store encrypted; access on need-to-know basis.
B — Attested Artefacts	Third-party attestations, professional opinions, supplier declarations, statutory filings.	Verifiable origin, scope clarity, independence where required.	Confidential; assess for over-reliance; retain attestations with origin metadata.
C — Observational Evidence	Site observations, screenshots, system configuration captures, live demonstrations.	Time-stamped capture, observer identity, replicability.	Confidential; imagery with individuals de-identified unless consented.
D — Analytic Outputs	Query results, metrics, dashboards, AI-assisted analyses with human oversight.	Method transparency, parameter explainability, error bounds, reproducibility.	Confidential; no profiling without consent; store model parameters used.





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E — Stakeholder Testimony	Interviews, surveys, grievance channel extracts, worker or beneficiary statements.	Voluntary participation, non-retaliation guarantees, corroboration where feasible.	Patient-level confidentiality; de-identify; consent logged in ledger.
F — Self-Declarations	Applicant statements including optional ISO 26000 self-declarations.	Scope precision, signatory authority, cross-check against other classes.	Confidential; never presented as certification or endorsement.

The evidentiary portfolio is then mapped to a concise governance maturity profile to anchor proportional expectations. Maturity characterisations are descriptive, not comparative, and apply within the Applicant's scope.

Capability Area	Ad-Hoc	Emerging	Established	Managed	Leading
Policy and Accountability	Unwritten practices, no designated owner.	Basic written policy; informal accountability.	Approved policies; named owners; periodic review.	Board-level or top-management oversight; KPIs and escalation.	Embedded in strategy; external input; periodic independent review.
Data and Controls	Sporadic controls; limited records.	Minimal controls; initial logs; basic access rules.	Documented controls; audit trails; role-based access.	Metrics-driven management; testing; corrective actions.	Continuous improvement; privacy-by-design and security-by-design; explainable AI guardrails.
Remedy and Grievance	No channel; ad hoc fixes.	Basic channel; limited awareness.	Functional, accessible channels; documented outcomes.	Multi-channel, safe from retaliation; monitoring and trend analysis.	Participatory design; independent escalation; learning loop to governance.
Disclosure and Consent	No formal approach.	Case-by-case approvals.	Consent templates; ledger initialised; withdrawal processes.	Consent lifecycle management; periodic audits.	Consent-centric product/service design; transparency reporting where consented.



The baseline is recorded in a scoring worksheet that binds applicability, evidence sufficiency, and initial points attribution. Non-applicable indicators are excluded from the denominator. Attenuated indicators record scaled expectations explicitly.

Indicator Domain	Specific Indicator	Applicability	Baseline Status (Narrative)	Evidence Classes Used	Sufficiency Determination	Year-0 Points (Provisional)
Example: Digital Accessibility	WCAG-aligned client site	Applicable	Templates partially compliant; remediation plan in draft.	A, C, D, F	Sufficient with remediation note	2
Example: Physical Accessibility	Step-free access	Non-Applicable	No public premises; indicator excluded.	F	Not applicable	—
Example: Worker Protections	Grievance channel	Attenuated	Sole proprietor; client escalations clause included.	A, E, F	Sufficient	2

Sufficiency determinations are reasoned. Where evidence is inconclusive, the Validation Partner may employ targeted sampling or request minimally intrusive supplemental materials. Stakeholder inputs are solicited in a manner that guarantees non-retaliation and preserves voluntariness, with de-identification applied prior to analysis. Any conflicts of interest are disclosed and mitigated; where mitigation is impracticable, the Validation Partner must seek independent review for the affected components prior to finalising the baseline.

The outcome of Chapter 3 is a complete, internally coherent, and proportionate record of where the Applicant stands today, capable of supporting a transparent Year-0 points determination without importing expectations that do not apply to the Applicant's operational reality.

## Chapter 4 — GSIA Registration of Pre-Study Findings

GSIA registration is the oversight anchor that renders the Pre-Study verifiable, tamper-evident, and insulated from coercive or misleading use. Registration is confidential by default and does not itself create any public claim, rating, endorsement, or certification. It establishes a reference point for fairness, proportionality, and subsequent adjudication should disputes arise.

The Validation Partner prepares a registration dossier immediately upon finalising the Pre-Study and baseline. The dossier content, format, and cryptographic integrity checks follow GSIA specifications to ensure standardisation and auditability. The Applicant is afforded the right to review the dossier summary prior to submission and to request correction of factual inaccuracies. Submission does not authorise disclosure; any communication outside the Applicant–Validation Partner–GSIA circuit



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remains contingent on consent entries recorded in the consent ledger with explicit scope, duration, and revocability.

Dossier Component	Content	Confidentiality Classification	Integrity and Control
Cover Submission	Applicant identity; Validation Partner identity and licence; scope of operations; contact points.	Confidential	Unique submission ID; date/time stamps.
Applicability Matrix	Determination of applicable, non-applicable, and attenuated indicators with rationales.	Confidential	Hash checksum; cross-reference to Pre-Study version.
Baseline Summary	Narrative of current practices and maturity profile; evidence sufficiency determinations.	Confidential	Versioning; author attribution; change log.
Evidence Index	Catalogue of evidence by class; storage location; access controls; retention plan.	Patient-level sensitive where applicable	Chain-of-custody references; access roles.
Risk Profile	Sectoral, geographic, stakeholder risk assessment; conflict-of-interest disclosures and mitigations.	Confidential	Independent reviewer note where used.
Consent Ledger Initialisation	Confirmation of ledger activation; consent status (no disclosure by default).	Confidential	Ledger pointer (non-content reference).
Applicant Acknowledgement	Confirmation of review and correction rights exercised or waived.	Confidential	Signature or authorised e-acknowledgement with timestamp.

Upon receipt, GSIA conducts a completeness and integrity check. If deficiencies are purely formal, GSIA issues a request for cure with a defined period for remediation. If material concerns arise—such as indications of coercion, retaliation risk, misrepresentation, or unresolved conflicts of interest—GSIA may open a supervisory note or, where warranted, initiate an adjudication file within its Ethics Chambers. In urgent cases involving risk of harm to individuals, GSIA may order protective measures, including suspension of the relevant aspect of the engagement pending mitigation.

GSIA then issues a confidential acknowledgment specifying the registration identifier, the date and time of acceptance, any supervisory notes, and any conditions attached to the continuation of the engagement. The acknowledgment does not validate the substance of the baseline; it records the existence of a compliant dossier and establishes the oversight relationship. The Validation Partner



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proceeds to the Initial Assessment (Year 0) only after acknowledgment is received, unless GSIA grants provisional leave in writing for time-critical circumstances that do not implicate heightened risk.

The registration remains a living record. The Validation Partner is under a continuing duty to update GSIA where material facts change ahead of the Initial Assessment or during the development-plan cycle, including significant operational expansions, contraction affecting risk exposure, discovery of material misstatements, substantiated retaliation claims, data incidents affecting patient-level confidentiality, or changes to conflict-of-interest mitigation. Amendments are versioned with summaries of change and fresh integrity checks.

Lifecycle Event	Trigger	Required Action	Deadline
Initial Acknowledgment	Complete and compliant dossier received.	GSIA issues acknowledgment with identifier.	Five business days unless extended for cause.
Cure Request	Formal deficiency detected.	Validation Partner submits corrected dossier.	Ten business days or as directed.
Supervisory Note	Non-material concern noted.	Monitor and report per GSIA instruction.	As specified in note.
Adjudication File Opened	Material concern or dispute requiring panel review.	Parties cooperate; provide records; implement interim measures if ordered.	Timelines per Ethics Chambers rules.
Material Amendment	Substantive change in facts or risk.	Submit amendment package; obtain updated acknowledgment.	Within fifteen business days of change.
Protective Order	Risk of harm to individuals detected.	Implement protective measures; pause affected activities.	Immediate effect; review per order.

Access and retention reflect the shared oversight architecture. GSIA acts as independent custodian for registration artefacts; the Validation Partner acts as operational controller for underlying evidence repositories; the Applicant retains all rights not expressly transferred and may request audit trails of access events within reasonable bounds.

Repository	Controller	Access Scope	Retention Baseline	Destruction Protocol
GSIA Registration Record	GSIA	Dossier components and acknowledgments; no raw sensitive evidence unless ordered.	Seven years from last material action or per law.	Cryptographically verified purge after retention period; legal hold exceptions.





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Validation Partner Evidence Store	Validation Partner	Full evidence portfolio under access controls; audit logs.	Per Operating Manual and law; typically three to seven years.	Secure deletion with audit trail; patient-level data minimised and de-identified.
Applicant Originals	Applicant	Native records retained by Applicant.	Per Applicant's legal obligations.	Applicant policy; no requirement to furnish originals absent order.

Corrections and disputes are handled proportionately. The Applicant may request rectification of factual errors at any time; if the Validation Partner declines, the Applicant may petition GSIA for review. GSIA may order corrections, require independent verification, or, in extreme cases, suspend a Validation Partner's licence to operate under A2074-SRS until remedial steps are completed. Nothing in the registration procedure authorises public disclosure. Any voluntary disclosure remains contingent upon consent recorded in the ledger and limited to the scope approved by the Applicant, with the right of revocation preserved.

The effect of registration is to stabilise the expectation set, preserve integrity and confidentiality, and enable GSIA to exercise its ethics and compliance mandate without converting the Pre-Study into a public rating event. With acknowledgment issued, the Validation Partner may proceed to calculate Year-0 points strictly within the applicability boundaries recorded, ensuring that outcomes are determined by reasonable expectations rather than circumstantial advantages or constraints.

## Chapter 5 — Applicability-Filtered Scoring Logic

The Initial Assessment (Year 0) proceeds exclusively on the basis of the indicators identified as applicable in the GSIA-registered Pre-Study. The scoring universe is therefore not universal in the abstract but is individually calibrated to the Applicant's operational reality, proportional capacity, and risk profile. This design safeguards the principle that expectations, not circumstances, determine the outcome, and it prevents entities from being penalised for structural characteristics such as size, resource limitations, or absence of public-facing operations.

The Validation Partner applies a points-based model for the purposes of this illustrative example. The points model is a simplified derivative of the multi-model validation architecture described in the Multi-Model Validation Framework and is used here solely for explanatory clarity. The Validation Partner assigns a maximum point value to each applicable indicator and attributes points for demonstrated fulfilment in accordance with the evidentiary determinations recorded in the baseline.

Indicators deemed non-applicable in the Pre-Study do not attract points and do not reduce the highest achievable star class. They are excluded from the denominator entirely. Indicators determined to have attenuated applicability attract scaled expectations, the fulfilment of which is expressly recorded to avoid ambiguity during point conversion. Voluntary enhancement indicators—those that exceed baseline expectations within the Applicant's scope—may yield additional points, but they are never required as a condition for achieving any star class.

To ensure clarity and procedural fairness, the Validation Partner compiles a points universe table before scoring begins. This table is not a ranking mechanism; it is a proportionality safeguard ensuring that entities of radically different scale can legitimately achieve equivalent star classifications.



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Indicator Domain	Specific Indicator	Applicability Classification	Maximum Points Within Applicable Scope	Notes
Digital Accessibility	WCAG-aligned service interface	Applicable	5	Full expectation attaches.
Physical Accessibility	Step-free access, tactile signage	Non-Applicable	—	Removed from scoring universe.
Worker Protections	Grievance channel	Attenuated	3	Expectations scaled to sole-proprietor context.
Supply-Chain Ethics	Supplier declarations, basic screening	Attenuated	3	Scaled to leverage of microenterprise.
Data Protection	Security controls, lawful basis	Applicable	5	Minimal viable controls required.
Environmental Practices	Basic waste management	Attenuated	2	Expectations reflect office-scale impact.

The maximum possible points for the Initial Assessment are therefore the sum of the maximum points for all indicators deemed applicable or attenuated. This sum constitutes the denominator for conversion into a star-class outcome. The denominator differs between entities; however, the star-class thresholds apply proportionately, ensuring that a microenterprise may legitimately achieve a five-star outcome within its calibrated universe in the same manner as a large multinational within its broader universe.

The scoring logic is evidence-anchored. The Validation Partner attributes points only where the baseline demonstrates sufficiency according to the criteria articulated in Chapter 3. Where evidence is incomplete or inconclusive, the Validation Partner may attribute partial points if the evidentiary standard supports such a determination or may record zero points while noting remedial steps for future development planning.

The scoring logic prohibits any form of subtraction, penalty, or negative scoring. It also prohibits the introduction of implicit expectations based on comparisons to other entities. The Validation Partner is under an affirmative obligation to ensure that the scoring outcome aligns with the expectations-based methodology and that no indicator outside the GSIA-registered applicability matrix influences the result.

Upon completion of the scoring universe table, the Validation Partner proceeds to attribute Year-0 points strictly within the parameters established, leading to the aggregate points result that will form the basis for the star-class conversion in Chapter 7.



## Chapter 6 — Calculation of Year-0 Points

The calculation of Year-0 points applies the scoring universe table established under Chapter 5 to the evidentiary outcomes recorded in the baseline. The purpose of the calculation is descriptive: it records the Applicant's current fulfilment of applicable expectations without imposing aspirational targets or anticipated improvements. It is the factual baseline upon which the development plan and future cycles rely.

The calculation is undertaken with reference to the GSIA-registered applicability matrix. No indicator may be scored that has not been recorded as applicable or attenuated. Non-applicable indicators remain excluded. Voluntary enhancement indicators are scored only if evidence demonstrates concrete, implemented measures; intentions, draft documents, or preliminary commitments are insufficient for attribution of points in Year 0.

To ensure transparency and reproducibility, the Validation Partner presents the Year-0 scoring in tabular format. The table below illustrates a simplified example using hypothetical values for demonstrative purposes.

Indicator Domain	Specific Indicator	Applicability	Maximum Points	Evidence Outcome (Baseline)	Year-0 Points Awarded
Digital Accessibility	WCAG-aligned service interface	Applicable	5	Partial compliance; remediation plan drafted; core templates accessible.	2
Worker Protections	Grievance channel	Attenuated	3	Sole proprietor; client escalation clause in contracts; no formal mechanism needed.	2
Supply-Chain Ethics	Supplier declarations and screening	Attenuated	3	Basic supplier declaration obtained; no further screening documented.	1
Data Protection	Lawful basis, security controls	Applicable	5	Documented controls; password policies; encrypted storage; sufficient DPIA.	4
Environmental Practices	Basic waste management	Attenuated	2	Segregated waste bins; no measurable tracking.	1

In this illustration, the total maximum possible points within the applicable scope equal 18. The Applicant achieves 10 points in the Year-0 assessment. These values serve solely to illustrate the proportional structure and shall not be construed as prescriptive scoring thresholds.



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Category	Value
Total Maximum Points (Applicable Universe)	18
Total Year-0 Points Awarded	10
Year-0 Fulfilment Rate	$10 \div 18 = 55.5\%$

The fulfilment rate is a descriptive expression of where the Applicant stands relative to the reasonable expectations applicable to its operational reality. It does not constitute a comparative performance indicator, nor may it be communicated or interpreted as such.

The Validation Partner documents the reasoning for each point attribution with concise narrative justification to ensure the record is complete for GSIA oversight and future verification. Narrative justifications are maintained confidentially and are not disclosed externally without explicit, informed, and revocable consent from the Applicant.

No star conversion occurs at this stage. The conversion into a star-class outcome is addressed separately in Chapter 7, ensuring a clear separation between the factual Year-0 points determination and the interpretative classification into star levels.

The Validation Partner concludes Chapter 6 by communicating the confidential Year-0 scoring outcome to the Applicant, noting that the outcome is not final until the Applicant has had the opportunity to review and request correction of factual inaccuracies. Once verified, the Year-0 score becomes the fixed baseline for the first development-planning cycle.

## Chapter 7 — Conversion of Points into Star-Class Outcome

The Conversion Stage translates the Applicant's Year-0 points into a star-class outcome within the proportional and non-comparative framework of A2074-SRS. The methodology of conversion is interpretative, not arithmetic; it serves to situate the Applicant's fulfilment of applicable expectations within a qualitative classification system that is comprehensible to the Applicant and enforceable by the Validation Partner under GSIA oversight.

The star-class system used in this illustrative document is a simplified hospitality-style model aligned conceptually to the 17 pillars but adapted here to a proportional scoring universe. It is not binding for all Validation Partners and does not replace the more detailed conversion mechanisms set forth in the Multi-Model Validation Framework. Rather, it demonstrates how an outcome may be derived for explanatory purposes.

The Conversion Stage is performed solely after the completeness and accuracy of the Year-0 points have been confirmed by the Applicant. No conversion may occur while a factual correction request remains unresolved. Upon verification, the Validation Partner applies the proportional method: the Applicant's fulfilment rate within its applicable indicator universe is aligned to a star-class range. Because the universe is calibrated to the Applicant's operational reality, a five-star outcome remains possible for entities of any scale.

To maintain clarity in this example, the following simplified conversion reference chart is used:





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Fulfilment Rate Within Applicable Universe	Star-Class Outcome	Interpretative Meaning
0% – 24%	0 Stars	Basic expectations substantially unmet within scope.
25% – 49%	1 Star	Foundational practices present; significant development needed.
50% – 74%	2 Stars	Majority of applicable expectations met; structured improvement underway.
75% – 89%	3 Stars	High performance relative to scope; capabilities increasingly consistent.
90% – 97%	4 Stars	Advanced fulfilment; systems are reliable and well-integrated.
98% – 100%	5 Stars	Full fulfilment of applicable expectations; exemplary performance within scope.

These ranges serve purely as illustration. They express the principle that the star outcome is proportional to how fully the Applicant meets the expectations applicable to its operational reality. They do not allow any comparison to other entities and may not be used in public communication without explicit, informed, revocable consent recorded in the consent ledger.

Applying the illustrative chart to the hypothetical example established in Chapter 6, the Applicant achieved 10 points out of 18 applicable points, corresponding to a fulfilment rate of 55.5%. Under the simplified conversion reference, this equates to a **Two-Star** outcome. The classification is confidential by default and may be disclosed only in accordance with the Communication & Public Disclosure Protocol and the Digital Integration & Platform Governance Manual.

The Validation Partner records the star-class determination in the confidential assessment record, accompanied by a narrative justification referencing: the applicability matrix; the evidentiary basis for each attributed point; proportionality reasoning; and any attenuated indicators. This justifying narrative ensures that GSIA is able to conduct oversight, identify potential misapplications of the proportionality doctrine, and address disputes or alleged bias through its Ethics Chambers.

Where the Applicant disputes the star-class conversion, the Validation Partner must provide a written explanation of how the fulfilment rate maps to the star-class outcome. If disagreement persists, the Applicant may petition GSIA for review. GSIA may issue clarifications, request independent reassessment of disputed elements, or, where justified, issue binding directions to the Validation Partner.

The Conversion Stage concludes only when the Applicant has been notified confidentially of the final star-class outcome, has been afforded an opportunity to seek clarification or correction, and either confirms acceptance or elects to pursue internal review or GSIA oversight procedures.



## Chapter 8 — Legal Nature and Purpose of the Development Plan

Following the issuance of the Year-0 star-class outcome, the Applicant may elect to develop a voluntary development plan. The plan is a forward-looking, confidential instrument designed to support continuous improvement within the Applicant's applicable indicator universe. It does not form part of the assessment outcome for Year-0 and does not affect the star-class already assigned. Instead, it establishes a structured and proportionate roadmap for future fulfilment of applicable expectations and, where chosen, voluntary enhancement indicators.

The development plan is legally non-binding and must not be mischaracterised as a condition of continued participation. The Applicant retains unfettered discretion to select actions appropriate to its circumstances, capacity, and risk profile. The Validation Partner's role is facilitative: to provide technical guidance, contextual information, and proportional options without exerting coercive influence. GSIA maintains supervisory jurisdiction to address allegations of coercion, retaliation, or unreasonable pressure to adopt measures.

To ensure clarity, the development plan includes three elements: the Year-0 baseline position; the applicable indicator universe as recorded in the GSIA registry; and a forward-looking set of self-selected actions the Applicant intends to implement within the next cycle. These actions may relate to fulfilment gaps identified in Year-0 scoring, to attenuated indicators where scaled expectations can be met through reasonable effort, or to voluntary enhancement indicators the Applicant wishes to pursue for leadership or internal governance benefits.

The development plan must be tailored to the Applicant's operational reality. For example, a microenterprise with no public-facing premises may select improvements related to digital accessibility, ethical client practices, secure contracting, or environmental measures proportionate to office-scale operations. Conversely, a large enterprise may select more substantial structural improvements linked to workforce systems, procurement policies, or advanced environmental controls. In both cases, the objective is to enable the Applicant to progress meaningfully within its scope, without creating inequities based on size or resource asymmetry.

The Validation Partner records the proposed plan in a standardised development plan table for clarity, confidentiality, and oversight consistency. The table for this illustrative example appears as follows:

<b>Planned Action (Illustrative)</b>	<b>Indicator Domain</b>	<b>Applicability Classification</b>	<b>Expected Evidence at Verification</b>	<b>Expected Additional Points</b>
Implement digital accessibility remediation for all templates	Digital Accessibility	Applicable	Updated templates; verification screenshots; test reports	2
Formalise client escalation clause into a documented micro-grievance mechanism	Worker Protections	Attenuated	Contract templates; declaration of use; client communication record	1



Introduce supplier declaration form for Tier-1 providers	Supply-Chain Ethics	Attenuated	Signed declarations; supplier list; risk notes	1
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The development plan is confidential by default. The Applicant may, if desired, consent to partial or full disclosure, but such disclosure must be limited strictly to the scope detailed in the consent ledger. The Applicant retains the right to revoke consent at any time, and any public materials must be withdrawn within reasonable operational limits upon revocation. Conditionality of benefits, services, or pricing upon disclosure of the plan is expressly prohibited.

At the conclusion of this chapter, the Applicant and Validation Partner acknowledge the plan in writing. The acknowledgment confirms that the plan is voluntary; that non-implementation does not affect Year-0 results; and that implementation will be verified only in the subsequent assessment cycle, as described in Chapter 12. GSIA retains supervisory authority to investigate concerns around fairness, proportionality, or undue influence in the formation of the development plan.

## Chapter 9 — Identification of Feasible Year-1 Actions

The identification of Year-1 actions is a structured and proportionate exercise guided by three principles: feasibility within the Applicant's operational reality; material contribution to fulfilling applicable expectations; and preservation of voluntariness free from coercion, inducement, or conditionality. The purpose of this exercise is not to impose a prescriptive checklist but to facilitate a reasoned improvement trajectory based on the Applicant's Year-0 baseline and the applicability matrix registered with GSIA.

The Validation Partner begins the Year-1 action identification by revisiting the Applicant's Year-0 scoring outcome and examining each indicator where points were not fully attributed. Attention is directed to indicators for which partial fulfilment was observed, indicators with attenuated applicability that can be reasonably advanced, and voluntary enhancement indicators that align with the Applicant's operational capacity and strategic intentions. The Validation Partner must ensure that the process does not create expectations beyond those recorded as applicable or attenuated in the GSIA-registered Pre-Study.

The Applicant's autonomy is central. The Applicant is invited to articulate which areas of improvement are feasible based on resources, time, and projected operational developments. The Validation Partner may offer technical guidance, provide examples of proportionate improvements, and outline typical evidence requirements, but it must refrain from exerting pressure or implying that selection of specific actions is necessary to maintain participation or eventually reach a higher star-class.

Feasibility is assessed holistically, considering financial capacity, time availability, operational impact, stakeholder implications, and the likelihood of successful implementation within the forthcoming validation cycle. Where the Applicant identifies actions that exceed its reasonable capacity, the Validation Partner must advise accordingly to prevent over-commitment that could undermine proportionality and fairness.

The identification process results in a curated and realistic set of Year-1 actions. For clarity and structured record-keeping, the actions are recorded in a table that links each planned action to the indicator domain, the applicability classification, the nature of evidence expected at the next verification, and the anticipated contribution to fulfilling applicable expectations. The table remains confidential by default and is subject to consent ledger rules for any voluntary disclosure.



Planned Action Description	Indicator Domain	Applicability Classification	Evidence Expected in Next Cycle	Notes on Feasibility
Complete accessibility remediation for digital templates	Digital Accessibility	Applicable	Updated templates, compliance testing records	Moderate resource requirement; aligned with existing operations.
Introduce documented micro-grievance channel	Worker Protections	Attenuated	Updated contract clause, communication log	Low operational burden; suitable for sole proprietor.
Develop supplier declaration form and perform basic screening	Supply-Chain Ethics	Attenuated	Signed declarations, supplier list	Feasible with minimal administrative overhead.
Establish basic environmental housekeeping protocol	Environmental Practices	Attenuated	Documented checklist, photos, internal note	Proportionate to office-scale footprint.

The Validation Partner ensures that each selected action is clearly linked to the Applicant's applicable indicator universe and that no action is included solely because it is common in other entities or sectors. The Applicant reviews and confirms the Year-1 action list, and this confirmation is recorded in the confidential development plan record maintained by the Validation Partner under GSIA oversight.

This chapter concludes with the establishment of a mutually agreed Year-1 action set that is feasible, proportionate, aligned with the Applicant's operational reality, and fully reflective of voluntary and informed selection.

## Chapter 10 — Expected Point Increases for Year 1

Once the Year-1 actions have been identified and confirmed, the Validation Partner converts each action into an expected point contribution using the same applicability-filtered scoring logic established for Year-0. This conversion is predictive and non-binding. It does not guarantee specific results in the next assessment cycle, nor does it create any entitlement to a higher star-class. Rather, it offers a structured indication of the potential progression the Applicant may achieve if the Year-1 actions are implemented in full and verified through sufficient evidence.

The Validation Partner evaluates each action individually, determining the maximum incremental points that may be attributed upon successful implementation. The evaluation is constrained by the maximum point values assigned to each applicable indicator. If an indicator was partially fulfilled in Year-0, the expected point increase may reflect the completion of the remaining fulfilment. If an indicator was unfulfilled, the expected increase may reflect the full range of points possible for that indicator, assuming the planned action satisfies the evidentiary requirements. Attenuated indicators follow the same logic, with the maximum point values reflecting the scaled expectations recorded in the GSIA-registered applicability matrix.





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Expected point increases are documented transparently in a table, providing clarity for both the Applicant and GSIA. The expected points represent the upper bound achievable under proportionate conditions and subject to evidence sufficiency. The table also records narrative explanations to ensure that the proportionality reasoning remains explicit.

For the purposes of the ongoing illustrative example, the expected point increases for the identified Year-1 actions appear as follows:

Planned Action	Indicator Domain	Maximum Points for Indicator	Year-0 Points Awarded	Expected Points After Implementation	Expected Point Increase
Digital accessibility remediation	Digital Accessibility	5	2	4	+2
Micro-grievance mechanism formalisation	Worker Protections	3 (Attenuated)	2	3	+1
Supplier declarations and basic screening	Supply-Chain Ethics	3 (Attenuated)	1	2	+1
Environmental housekeeping protocol	Environmental Practices	2 (Attenuated)	1	2	+1

Based on the illustrative example, the Applicant's Year-0 score was 10 points out of 18. The expected point increases for Year-1 actions total four additional points: two points for digital accessibility improvements and one point each for worker protections, supply-chain ethics, and environmental housekeeping.

Category	Value
Year-0 Points	10
Expected Additional Points	4
Projected Year-1 Points	14

The projected fulfilment rate, calculated proportionally, would therefore be:

$$14 \div 18 = 77.7\%$$

Under the simplified star-class conversion table illustrated in Chapter 7, this projected fulfilment rate corresponds to a **Three-Star** outcome, subject to verification in the next assessment cycle.

The Validation Partner must, however, clearly communicate that projected increases are contingent upon full implementation, adequate evidence, and a reaffirmed applicability matrix in the next cycle. If operational circumstances materially change, the scoring universe may adjust accordingly, requiring new proportionality and applicability determinations.



GSIA retains supervisory authority to examine expected point increases for fairness and to ensure that projections do not create implicit obligations or pressures inconsistent with the voluntary nature of the development plan.

## Chapter 11 — Projected Star-Class Outcome for Year 1

The projected star-class outcome for Year 1 is a forward-looking interpretative exercise. It represents the hypothetical classification that would apply if all planned Year-1 actions are fully implemented, verified, and supported by sufficient evidence in the next assessment cycle. It does not constitute an entitlement, certification, or guarantee of future performance. Its sole function is to provide the Applicant with a structured understanding of how its voluntary actions, if completed, may influence its standing within the applicable expectations recorded in the GSIA-registered Pre-Study.

The Validation Partner calculates the projected star-class by applying the expected Year-1 point total to the proportional star-class conversion system illustrated earlier. The projection is confidential and forms part of the Applicant's internal development-planning record. No public disclosure may occur without explicit, informed, revocable consent recorded in the consent ledger.

For the purposes of the illustrative example presented in Chapters 9 and 10, the Applicant's projected Year-1 score is 14 points out of a possible 18 points in its applicability-filtered universe. This projected fulfilment rate—77.7%—would correspond, under the simplified conversion reference used for the example, to a **Three-Star** classification.

The narrative meaning of such a projected outcome is as follows:

- The Applicant would have substantially advanced fulfilment of the applicable expectations relevant to its operational reality.
- The Applicant would demonstrate consistent, structured governance in the majority of domains within its applicable scope.
- The projected outcome reflects meaningful progress made without reliance on non-applicable indicators and without creating inequities related to size, resources, or physical infrastructure.
- The projected classification is proportionate to the Applicant's universe and remains independent of the performance or actions of any other entity.

The projected outcome contributes to internal decision-making but carries no regulatory, reputational, or contractual significance. It does not permit the Applicant to use A2074-SRS marks, badges, or descriptors in communications relating to future performance. Such use is strictly prohibited under the Communication & Public Disclosure Protocol unless and until the future assessment is completed, the Applicant explicitly consents to publication, and GSIA oversight conditions are satisfied.

The Validation Partner must therefore communicate the projected star-class to the Applicant with clarity about its provisional nature. The projection is conditional on:

- verified implementation of the selected actions;
- sufficient evidence at the next assessment cycle;
- consistency with the applicability matrix; and



- the absence of material operational changes that would require an updated applicability determination.

If the Applicant's circumstances materially change—such as expansion of operations, introduction of new services, or increased stakeholder exposure—the scoring universe may adjust. In such cases, projected star-class outcomes may no longer apply, and the Validation Partner must provide updated proportionality guidance. GSIA retains supervisory authority over any such adjustments to ensure alignment with fairness and non-comparative principles.

This chapter concludes the forward-looking component of the development-plan framework. The next chapter addresses the mechanisms for verifying the implemented measures in the subsequent assessment cycle.

## Chapter 12 — Verification of Implemented Measures

Verification is the process by which the Validation Partner evaluates whether the Applicant has successfully implemented the Year-1 actions recorded in the confidential development plan, and whether the evidence supports attribution of the expected point increases. Verification is evidentiary and procedural. It does not revisit the applicability matrix unless there have been material changes in operation or risk, in which case a proportional adjustment is required and must be lodged with GSIA.

The verification process is governed by the Operating Manual, the Digital Integration & Platform Governance Manual, and the GSIA oversight rules. All evidence is handled under patient-level confidentiality, privacy-by-design safeguards, and secure digital governance. The Validation Partner must ensure that no verification step creates unnecessary intrusiveness or imposes a burden that is disproportionate to the Applicant's operational capacity.

Verification proceeds through the following stages:

### **Review of the development plan record.**

The Validation Partner examines the Year-1 action list confirmed in Chapter 9. The review ensures that no additional obligations have been inferred or introduced and that the actions remain within the scope defined by the GSIA-registered applicability matrix.

### **Submission of evidence by the Applicant.**

The Applicant submits evidence supporting the implementation of each planned action. Evidence may be of the same classes described in Chapter 3. Draft documents, undeployed policies, or incomplete measures do not meet the threshold for verified fulfilment. Evidence must demonstrate actual implementation within the period under review.

### **Validation Partner assessment of evidence.**

The Validation Partner assesses the evidence against the expectations recorded for each indicator, applying the proportional logic agreed during the Pre-Study. Evidence sufficiency must be reasoned and recorded, with any ambiguous components resolved through targeted clarification requests. The Validation Partner must avoid over-testing or seeking irrelevant materials.

### **Stakeholder confirmation where appropriate.**

Where an action affects external stakeholders—for example, suppliers, clients, or workers—the Validation Partner may request corroboration through voluntary and non-retaliatory methods. Such requests must be de-identified and conducted with strict safeguards for patient-level confidentiality.



No individual may suffer adverse consequences for providing, refusing, or withdrawing participation in stakeholder inputs.

#### Review of operational changes.

If the Applicant's operations have materially changed since the Pre-Study—such as increased staff, expanded services, or new premises—the Validation Partner must determine whether the applicability matrix requires review. If so, it must prepare an amendment and lodge it with GSIA before concluding the verification cycle.

The outcome of verification is documented in a table reflecting the implemented action, the sufficiency of evidence, and the points to be awarded.

Year-1 Action	Evidence Provided	Sufficiency Determination	Points Awarded	Notes
Digital accessibility remediation	Updated templates, WCAG test results	Sufficient	2	Fully implemented as intended.
Micro-grievance mechanism	Updated contract clause, notices to clients	Sufficient	1	Attenuated expectations fully met.
Supplier declarations and screening	Signed declarations, supplier list	Sufficient	1	Basic screening confirmed.
Environmental housekeeping protocol	Checklist, photos, internal memo	Sufficient	1	Reasonable implementation for scale.

The verification stage concludes with a confidential assessment report provided to the Applicant. The Applicant may request clarifications or correction of factual inaccuracies. Only once the Applicant has acknowledged the verification results may the Validation Partner proceed to recalculate the total points and determine the updated star-class classification for Year-1.

Any dispute arising during verification may be referred to GSIA. GSIA may order additional evidence, require independent review, suspend the verification pending protective measures, or issue binding directions to preserve fairness, integrity, and proportionality.

## Chapter 13 — Adjustment of Points and Star Outcome Based on Actual Results

The adjustment stage translates the verified implementation of Year-1 actions into the Applicant's updated points total and revised star-class outcome for the first re-validation cycle. Its purpose is to confirm progress, to apply proportionality consistently, and to preserve the integrity of the A2074-SRS model by ensuring that future outcomes reflect only verifiable fulfilment of applicable expectations.

The Validation Partner begins by integrating the points awarded during the verification process (Chapter 12) into the Applicant's existing applicability-filtered scoring universe. Only evidence that meets the sufficiency threshold may support point attribution. Drafts, intentions, or partially



implemented measures do not generate points. Attenuated indicators follow the scaled expectations established in the GSIA-registered applicability matrix.

In the illustrative example, the verified implementation of Year-1 actions resulted in an additional four points, increasing the Applicant's score from ten to fourteen points within the unchanged applicable universe of eighteen points. The fulfilment rate therefore increases from 55.5% to 77.7%. This fulfilment rate, applied proportionately to the simplified star-conversion reference used in this example, results in a **Three-Star** classification for the current cycle.

Following this determination, the Validation Partner issues a confidential assessment report to the Applicant, clearly separating:

- the factual evidence and points leading to the revised outcome,
- the proportional reasoning, and
- any updated applicability considerations, including whether operational changes necessitate adjustments to the scoring universe.

The assessment report is provided for Applicant review. The Applicant may request correction of factual inaccuracies. If no factual disputes remain, the revised star-class outcome becomes final for the current cycle, subject to the Applicant's right to dispute interpretative elements through GSIA oversight channels.

#### **Introduction of the Development-Cycle "Empty Star"**

Where the Applicant has completed the Year-1 assessment cycle in accordance with the development plan recorded in Chapter 8, and where the Pre-Study, applicability matrix, and verification record remain in good order, the Validation Partner may, with GSIA oversight, assign a Development-Cycle Star ("Empty Star") to the Applicant.

The Development-Cycle Star serves a strictly limited purpose. It indicates that the Applicant:

- has an acknowledged development plan on record;
- has completed a portion of that plan consistent with its operational reality;
- is in an active improvement cycle; and
- is projected (but not guaranteed) to progress toward a higher star-class at the next assessment, subject to continued implementation and verification.

The Development-Cycle Star is not a rating, score, or performance claim. It conveys no star-class in itself. It does not modify or dilute the Applicant's assigned star-class and must not be communicated as a partial fulfilment of a higher class. Instead, it denotes participation in a structured development trajectory anchored by GSIA-registered expectations.

For clarity, the Applicant's public-facing position (if consented) may be represented as:

"Two Stars + Development-Cycle Star",  
but never as "Three Stars" or "2.5 Stars".

Where the Applicant declines disclosure, the Development-Cycle Star remains internal. No information may enter the public domain without explicit, informed, revocable consent recorded in the consent ledger.

#### **Follow-Up and Monitoring**

The Validation Partner commits to follow-up in approximately twelve months (or a cycle agreed proportionately with the Applicant) to verify whether the remaining actions in the development plan have been implemented and whether the Applicant's fulfilment rate warrants advancement to a higher



star-class. GSIA oversight continues throughout this period to ensure fairness, prevent coercion, and safeguard patient-level confidentiality.

Should the Applicant cease development-plan implementation, or should evidence indicate regression in a manner that materially undermines proportional expectations, the Development-Cycle Star may be withdrawn internally. No public withdrawal occurs unless the Applicant previously consented to disclosure and does not revoke such consent prior to publication. Withdrawals are always confidential unless the Applicant maintains consent for external listing.

## Chapter 14 — Rolling Development Planning and Multi-Year Trajectories

The rolling development-planning framework ensures that the Applicant continues to progress within its applicable indicator universe through successive cycles of assessment, verification, and recalibrated planning. This framework embodies the A2074-SRS principle that social responsibility is a continuous process grounded in proportionality, non-comparative methodology, and secured confidentiality. It provides a predictable and ethically anchored pathway through which entities of any scale—whether a sole proprietor or a multinational enterprise—can move toward or sustain high star-class outcomes.

The rolling planning cycle begins immediately after the issuance of the revised star-class and, where applicable, the assignment of a Development-Cycle Star pursuant to Chapter 13. The cycle incorporates both reflective and forward-looking components: reflective insofar as the Applicant consolidates improvements completed during the prior period, and forward-looking as it sets new objectives that remain feasible and proportionate to its evolving circumstances.

The Validation Partner initiates the cycle by reviewing the Applicant's updated status and confirming whether the applicability matrix registered with GSIA remains accurate. Operational changes such as expansion, contraction, new services, regulatory exposure, or increased stakeholder interaction may necessitate a recalibration of applicable indicators. Where such changes occur, the Validation Partner must prepare an amendment to the applicability matrix and lodge it with GSIA prior to constructing the next development plan, ensuring that proportionality remains central and that no expectations arise outside the updated scope.

The Applicant then identifies potential areas for continued improvement. These may include unfulfilled indicators from prior cycles, voluntary enhancement measures, or new areas of compliance and governance maturity. The Validation Partner may propose options or provide sectoral examples, but must refrain from exerting pressure or implying that advancement to a higher star-class requires the adoption of specific measures.

A multi-year trajectory naturally emerges from this approach. The Applicant may elect to structure its planning beyond the annual cycle—such as adopting a three-year horizon that anticipates progressive fulfilment of applicable expectations while recognising operational constraints and capacity building. Where multi-year trajectories are adopted, annual segmentation must remain clear, with each year's plan forming a distinct and reviewable component. The Validation Partner ensures that multi-year planning remains dynamic and does not create commitments that exceed the Applicant's reasonable capacity.

Rolling development planning continues indefinitely. Entities that have achieved the highest star-class outcome may maintain it by demonstrating sustained fulfilment of applicable expectations and by selecting actions that reinforce governance maturity, remedy pathways, and ethical consistency.





Entities progressing toward higher classes benefit from structured feedback and annual recalibration. Entities choosing not to advance beyond their current classification remain in good standing so long as they maintain proportional fulfilment within their applicable scope.

All development plans, multi-year trajectories, and rolling cycles remain confidential unless the Applicant consents to disclosure through the consent ledger. The Applicant retains the unrestricted right to revoke consent at any time, and GSIA oversight ensures fairness, security, and adherence to institutional doctrine at all times.

Rolling development planning thus establishes a stable, predictable, and ethically grounded framework through which all entities—irrespective of size, circumstances, or resources—can evolve their social responsibility posture under A2074-SRS.

## Chapter 15 — Confidentiality and Consent Ledger

Confidentiality is a core legal principle of the A2074-SRS ecosystem. It protects the Applicant, the integrity of the assessment process, and the ethical safeguards central to GSIA's mandate. Chapter 15 sets out the confidentiality parameters applicable across the Pre-Study, Initial Assessment, development planning, verification, and follow-up cycles, ensuring the uniform application of patient-level confidentiality and privacy-by-design principles.

The default position is strict confidentiality. All points, star-class outcomes, Development-Cycle Stars, development plans, evidence records, applicability matrices, GSIA registration materials, and narrative justifications are confidential unless and until the Applicant provides explicit, informed, and revocable consent for specific disclosure. No Validation Partner, GSIA officer, or affiliated institution may disclose information beyond the authorised scope. Confidentiality applies irrespective of whether the outcome is favourable or unfavourable and irrespective of the Applicant's star-class.

The consent ledger is the sole authorised mechanism through which disclosure may occur. It provides a tamper-evident, time-stamped, and scope-defined record of the Applicant's permission for specific aspects of the assessment to enter the public domain or to be shared with named third parties. The ledger records the scope of consent with precision, including: the specific items authorised for disclosure; the intended audience; the duration of consent; and the modalities of publication, distribution, or access.

Consent must be informed and voluntary. Conditionality of services, pricing, or participation upon disclosure is strictly prohibited. Consent may be refused or withdrawn at any time, and withdrawal takes immediate effect unless the Applicant specifies a delayed revocation. Upon withdrawal, the Validation Partner must ensure removal of disclosed materials from public access within reasonable operational constraints and must notify any third parties who previously accessed the information under consent.

The ledger also governs partial disclosure. The Applicant may permit disclosure of the star-class outcome but withhold the underlying points; or may authorise public communication of a Development-Cycle Star without disclosing the associated development plan. The ledger's architecture supports this granularity and ensures that no Validation Partner may enlarge the scope of disclosure beyond what the Applicant has expressly authorised.

GSIA oversees the consent ledger system. It ensures that the ledger is implemented consistently across Validation Partners, that entries are authenticated, and that revocations are honoured. GSIA may, in



cases of concern, audit ledger entries to verify integrity, detect improper pressure or inducement, and safeguard the Applicant's rights. The ledger is part of GSIA's ethics and compliance jurisdiction and is subject to adjudication where breaches occur.

All consent ledger entries are retained in accordance with retention and destruction policies defined in the Digital Integration & Platform Governance Manual. Once the retention period expires, entries are securely destroyed unless legal exceptions apply. The Applicant may request an audit trail of access to disclosed materials.

The confidentiality and consent structure ensures that A2074-SRS remains ethically robust, prevents misuse of assessment results, and preserves the Applicant's autonomy over how, when, and whether its social responsibility performance is shared. It reinforces that participation in A2074-SRS is a voluntary, rights-preserving process governed by accountability, privacy safeguards, and GSIA's independent oversight.

## Chapter 16 — Non-Comparative and Proportional Evaluation Safeguards

Non-comparative and proportional evaluation are the normative guardrails that ensure A2074-SRS outcomes are determined by reasonable expectations within an Applicant's own operational reality. These safeguards prevent structural disadvantage, preclude league-table dynamics, and ensure that an individual microenterprise can legitimately reach five stars on the same ethical footing as a large multinational, without cross-entity benchmarking or implicit bias.

The non-comparative rule prohibits any use of other entities' outcomes, practices, or capacities as reference points for scoring or classification. Each assessment rests solely on the GSIA-registered applicability matrix and the evidence of fulfilment presented by the Applicant. No indicator outside the registered scope may influence the points universe or the star-class conversion. Any narrative or marketing that implies relative standing, ranking, or superiority over other entities is contrary to the Communication & Public Disclosure Protocol and is prohibited.

Proportionality requires that expectations scale to the Applicant's nature, size, sector, and risk profile. Indicators are classified as applicable, non-applicable, or of attenuated applicability during the Pre-Study and registered with GSIA. Non-applicable indicators do not count as deficiencies and are excluded entirely from the denominator; attenuated indicators set scaled expectations that are concrete, auditable, and tailored to capacity. Voluntary enhancement indicators may generate points without creating de facto obligations for any star class.

The star-class conversion respects proportionality by mapping fulfilment rates within the applicable universe to a qualitative class, rather than relying on absolute totals or cross-entity cut-offs. This preserves the principle that "expectations determine outcomes, not circumstances," and removes structural barriers that would otherwise privilege entities with legacy infrastructure or disproportionate resources.

The safeguards framework also governs communications. Results, plans, and any Development-Cycle Star are confidential by default and may only be disclosed under explicit, informed, and revocable consent recorded in the consent ledger. Where consented, communications must avoid comparative claims, avoid implying state endorsement or regulatory equivalence, avoid mischaracterising an ISO 26000 self-declaration as certification, and must not describe a Development-Cycle Star as a partial rating. Violations are sanctionable under GSIA oversight.



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The model incorporates procedural controls that preserve the integrity of proportional and non-comparative evaluation. These include chain-of-custody logging for evidence; explainable and reproducible AI guardrails; targeted sampling proportionate to risk; independence checks and conflict-of-interest mitigation; and defined rights of clarification and correction for the Applicant. Where material operational changes occur between cycles, the applicability matrix must be recalibrated and re-lodged with GSIA before further scoring, ensuring that expectations remain aligned to reality.

The following control map sets out common risks and the embedded safeguards that neutralise them within A2074-SRS:

<b>Risk or Vulnerability</b>	<b>Safeguard Mechanism</b>	<b>Effect on Proportionality and Non-Comparative Integrity</b>
Cross-entity benchmarking or league-table pressure	Non-comparative rule; proportional scoring universe; communications prohibitions	Removes ranking dynamics; keeps outcomes entity-specific and fair.
Structural disadvantage due to size or infrastructure	Applicability classification; exclusion of non-applicable indicators; attenuated expectations	Prevents penalisation for non-relevant indicators; preserves five-star eligibility for all.
Implicit obligations from voluntary enhancements	Clear separation of baseline vs. enhancement indicators; points without obligation	Encourages leadership without creating hidden requirements.
Misuse of ISO 26000 self-declarations	Explicit rule that ISO 26000 is contextual only and not certification	Prevents misleading claims; preserves doctrinal clarity.
Overreach or intrusive evidence demands	Privacy-by-design; purpose limitation; minimality; role-based access; audit trails	Ensures proportional evidence handling; protects rights and confidentiality.
Undue influence or coercion to disclose	Consent ledger; GSIA oversight; ban on conditionality	Preserves voluntariness; protects the Applicant from pressure.
Conflicts of interest in validation	Mandatory disclosure and mitigation; independent review where needed	Sustains impartiality and credibility of determinations.
AI opacity or bias in analysis	Explainability, reproducibility, and guardrail requirements	Prevents automated adverse inferences; supports fair scoring.

These safeguards are not discretionary. They are integral to the standard's legal-institutional architecture and are enforceable through GSIA's supervisory and adjudicative mandate. Where safeguards are ignored or diluted, GSIA may investigate, order corrective measures, suspend a Validation Partner's licence, or require independent reassessment to restore compliance with the doctrine.



## Chapter 17 — GSIA Ethics Oversight and Registration Duties

GSIA exercises independent custody of ethics, compliance, and adjudication across the A2074-SRS ecosystem. Its mandate includes confidential registration of Pre-Studies, supervision of consent-ledger integrity, pattern-of-practice monitoring across Validation Partners, conflict-of-interest control, investigation of alleged misconduct, and issuance of binding directions where necessary to uphold the standard. GSIA does not function as a public ratings authority; it functions as the guarantor of fairness, confidentiality, and rule-consistency.

Registration is the anchor of oversight. Every Pre-Study must be lodged with GSIA and acknowledged before an Initial Assessment proceeds, unless GSIA grants provisional leave in writing under proportionate and low-risk conditions. Registration includes the applicability matrix, baseline summary, evidence index, conflict disclosures, and confirmation that the consent ledger has been initialised with “no disclosure by default.” Amendments are required where material operational changes occur; each amendment receives versioned acknowledgment to preserve an auditable trail of expectation-setting decisions.

GSIA monitors the integrity of the consent ledger across Validation Partners. The ledger must record the precise scope, audience, duration, and modalities of any authorised disclosure; must permit revocation with immediate effect subject to operationally reasonable removal; and must prevent enlargement of scope without fresh consent. GSIA may audit the ledger, test revocation pathways, and examine whether any improper inducement or conditionality has been exerted upon Applicants.

GSIA supervises conflicts of interest and independence. Validation Partners must disclose potential conflicts and implement mitigation; where mitigation is impracticable, GSIA may require independent review or appoint an external assessor for specific components. GSIA may also undertake pattern-of-practice reviews, comparing anonymised, de-identified oversight signals across multiple engagements to detect systemic risks such as over-attribution of points, under-enforcement of privacy, or recurrent communications non-compliance.

When concerns arise, GSIA may open a supervisory note, launch an investigation, or initiate an adjudication file within its Ethics Chambers. The adjudication process affords the parties an opportunity to present evidence, request protective measures for individuals at risk, and seek interpretative clarification of doctrine. Orders issued by GSIA’s Ethics Chambers are binding within the A2074-SRS ecosystem and may include corrective directions, remedial training, independent reassessment, temporary suspension of a licence, or, in grave cases, revocation of a Validation Partner’s accreditation.

The following oversight-trigger matrix clarifies typical events and GSIA’s proportionate response:

Oversight Trigger	GSIA Action	Possible Measures	Indicative Timelines
Formal registration received and complete	Acknowledgment issued	Registration identifier; supervisory note if needed	Five business days for acknowledgment
Material change in operations or risk	Registration amendment review	Update applicability matrix; confirm proportionality	Ten to fifteen business days



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Allegation of coercion or improper disclosure pressure	Investigation initiation	Protective order; ledger audit; corrective directions	Immediate protective steps; investigation per rules
Evidence of confidentiality breach	Incident review	Containment; notification; remedial controls; sanctions if warranted	Immediate containment; formal review thereafter
Conflict of interest not mitigated	Adjudication referral	Independent assessor; temporary suspension of affected scope	As set by Ethics Chambers
Pattern-of-practice concern across cases	Thematic audit	Guidance issuance; partner retraining; sanctions where repeated	Cycle-based; as announced
Mischaracterisation of ISO 26000 or star class	Communications compliance review	Retraction; corrected notice; sanctions for repeated violations	Prompt corrective notice; sanction per rules

GSIA's sanctions ladder is calibrated to deterrence, remediation, and education. Initial non-material deviations typically result in corrective guidance and retraining. Repeated or material breaches may attract suspension of a licence component, mandatory independent reassessment, or, if integrity cannot be restored, revocation. Across all measures, GSIA preserves patient-level confidentiality and the Applicant's rights, avoiding public exposure unless specifically consented by the Applicant or strictly required by law.

GSIA also sustains the whistleblowing and anti-retaliation framework. Individuals who report concerns—employees, contractors, clients, suppliers, or community members—must be protected from adverse consequences. Validation Partners are responsible for implementing non-retaliation guarantees and for cooperating with GSIA inquiries. Where retaliation is suspected, GSIA may order immediate protective measures and examine whether sanctions are warranted against the responsible party within the A2074-SRS ecosystem.

This oversight and registration regime ensures that the A2074-SRS system remains credible, fair, and rights-preserving, and that Validation Partners and Applicants operate within a stable ethical and procedural architecture overseen by an independent custodian.

## Final Word

This illustrative document demonstrates how A2074-SRS can be applied in a manner that is simple to use, rigorous in method, and fair across entities of all sizes. It establishes a clean sequence: a GSIA-registered Pre-Study that sets applicable expectations; a confidential, evidence-based Year-0 assessment; a proportional star-class conversion anchored in fulfilment within the Applicant's own universe; a voluntary, realistic development plan; verification of implemented measures; and an adjusted outcome with the option to signal active progress through a Development-Cycle Star, always under consent-bound confidentiality.



## Agenda for Social Equity 2074

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The governing axiom is constant: expectations, not circumstances, define results. A one-person enterprise and a multinational retailer can both credibly achieve five stars when each fulfils the expectations that properly attach to its own operational reality. Non-applicable indicators never count as deficiencies; attenuated indicators translate expectations into achievable, auditable terms; voluntary enhancements reward leadership without creating hidden mandates. Throughout, GSIA's oversight safeguards ethics, privacy, consent, and due process.

As a practical tool for operators and adopters, this document is intentionally concise in its scoring logic and deliberately strict in its protections. It is an example, not a mandate, and all conflicts resolve in favour of the Foundational Charter, the Operating Manual (Open Standard), the Governance & Oversight Manual, the Ethics & Integrity Code, the Communication & Public Disclosure Protocol, the ISO 26000 Self-Declaration Protocol, and the Digital Integration & Platform Governance Manual. Within that canon, this example offers a clear pathway from “you are here” to “you are improving,” and, with verifiable progress, to star-class advancement—confidential by default and supervised by GSIA to protect trust in every step.