

REQUEST FOR PROPOSAL FOR SERVICES AS A WBA RESEARCH PROVIDER IN 2021 CORE SOCIAL INDICATORS

INTRODUCTION

The World Benchmarking Alliance (WBA) procurement rules require a public tender for contracts above a certain size. This RFP sets out a draft scope of work for research provider support that will enable the integration of a core social indicators across all WBA transformation benchmarks. It is provided to enable interested parties (**'you'**) to develop initial cost estimates and options to deliver the scope and as such should not be viewed as any form of agreement between you and the WBA.

The research provider is not expected to create or revise a methodology, but to assess companies using the final version of the core social indicators which will be launched in January 2021. The draft indicators are detailed [here](#). The key deliverables will be approximately 1,000 draft company research profiles that WBA's own core team of staff will finalise following (WBA-led) engagement with benchmarked companies. The (approx.) 1,000 company assessment is tentatively called 'the 2021 core social assessment'.

EXPECTATIONS OF THE PROPOSAL

We expect that your proposal will, first and foremost, estimate the personnel and financial resources required to deliver the 2021 core social assessment in line with the expectations and draft deliverables listed herein. Furthermore, WBA anticipates that you will be able to demonstrate how you will deliver in three key areas: researcher quality (interpreting large volumes of written data and scoring companies against our methodology), social experience (depth of knowledge regarding social sustainability issues including human and labour rights issues) and research intensity (being able to handle the research of several hundred companies within short timeframes).

WBA expects that proposals will detail the tasks, time and costs involved, including day-rates for staff of various seniorities, breakdown for any sub-contracting, costs for using any proprietary software/databases and an eventual 'cost-per-researched-company'. Responses to this RFP should be sent to d.neale@worldbenchmarkingalliance.org by the 15th November 2020. The contract is anticipated to be awarded in December 2020. The tendering process will be conducted in line with the WBA Procurement Policy which interested parties can obtain on request.

SCOPE OF 2020 CORE SOCIAL ASSESSMENT

- The 2020 core social assessment will be the first application of the WBA's core social indicators. They will be applied to all companies in scope for transformation benchmarks in 2021, plus 100 financial sector companies (to support the development of the financial system transformation benchmark in 2022). Companies in scope will come from multiple sectors including food and beverage, retail, automobile manufacture, oil and gas, electric utilities, electronics, telecommunications and IT services.
- The assessments will be tied to the requirements of the food, energy, digital and finance system workplans. This means that for the food, energy and digital systems, there is a need to front-load research in the first half of 2021.

- The assessment will apply the final version of the core social indicators. The framework containing the indicators will be formally published in January 2021, although the final indicators will be ready for review in December 2020. The draft indicators will change, but the overall research burden per company should remain roughly the same. During testing, the time taken per company assessment (starting from zero) was approximately one day, including secondary quality checks.
- All research should be based upon publicly available information, primarily in English, and no engagement or contact with the companies within scope is envisaged on the part of the research provider.

DRAFT DELIVERABLES IN 2021

The list below is indicative and can be added to. If your organisation could only deliver elements of the deliverables or elements of the methodology assessment, you are encouraged to provide additional details, although there is a preference for a single provider (or group of organisations under one contract) to cover all core social indicators. The final timeline for deliverables will depend on the exact research timings in 2021 of the other benchmarks and this is still being confirmed (the dates below are provisional).

Core Deliverables

1. Project Management and Quality Control processes, including project plan, weekly check-ins, monthly reports, closeout report and named senior lead/project managers. We seek a partner who has the ability to remain flexible as well as transparent as we work with tight timeframes.
2. Training – ensuring your research team can deliver the requirements of the methodology, including understanding indicator topics, identification of relevant disclosures and applying the scoring criteria.
3. Database – with 1,000 companies to assess, an exploitable database to house the research is a key deliverable. The research database should:
 - House the researcher commentary and scores, with logging to provide tracking of entries
 - Be accessible by the WBA team and the research-provider's team during the research phases
 - Be exploitable (i.e. all the data can be downloaded into CSV / XL format, based on selection criteria)
 - Be scalable (an additional 1,000 companies will be added in 2022)
 - Be preferably based on Microsoft Access
 - Be handed over to WBA on completion
4. Research element 1 – Supporting the food and agriculture benchmarks. 360 companies assessed in Q1 for sharing with companies in Q2.
5. Research element 2 – Supporting the digital inclusion benchmark. 150 companies assessed by early August.
6. Research element 3 – Supporting the climate and energy benchmarks in the decarbonisation and energy system transformation. 180 companies (100 in oil and gas, 30 in auto manufacture, 50 in electric utilities). Draft assessment will be ready for WBA 'use' in August 2021.
7. Research element 4 – Revising the climate and energy benchmark company scores following feedback from company engagement (likely to be approx. 50% of the companies and to take 50% of the time of a full assessment per company) in late August-early September. Company feedback will be provided by WBA and the research team should review public materials, interpret company feedback, reach a judgement on which scores to change and account for that decision in the research database.
8. Research element 5 – Assessing 100 companies from the finance sector to be delivered to WBA by end of September 2021.

9. Research element 6 – Assessing the remaining 210 companies (to bring total to 1,000) to be delivered by end of Q3 2021.

SUPPORTING NOTES

1. Deadline for submission is 15th November 2020. Clarifications may be requested within this period from d.neale@worldbenchmarkingalliance.org.
2. Contract decision is anticipated within December 2020.
3. Proposing companies should familiarise themselves with the WBA Procurement Policy (Concept) which provides a framework for this RFP, in particular p.4-8, p.20-23 and noting that:
 - a. Draft general terms and conditions are included in the WBA Procurement Policy
 - b. Standalone Data Protection Agreements are not envisioned for the proposal
 - c. Proposal review template will be adapted from p.21-22
 - d. The WBA Procurement Policy (Concept) is in the process of being updated
4. A fixed total cost budget is anticipated, but days, day-rates and fixed costs should be detailed in euros. Breakdowns of the time and cost for various phases of research are encouraged.
5. Research provider will need to work closely with WBA staff, so a seamless/accessible research database is preferred.
6. Research providers wishing to use existing research to support the project (for example a data-provider with pre-existing human rights data) would need to demonstrate the complete alignment with the WBA methodology.
7. Conflicts of interest, particularly related to support services to the companies assessed, should be referenced in the proposal – and how you propose to deal with them.
8. Research will be conducted primarily in English and is based on publicly available information, so any researchers will need exemplary English language skills to understand the nuances of the methodology and research.
9. Proposals should include key assumptions made by the proposing organisation (such as the time per company to implement the draft core social indicators) and key support you feel you may need from WBA to best deliver the scope of work.
10. Detailing examples / experience of similar work is encouraged, with particular focus on quality control and oversight. With such a large number of companies and an eventual public ranking of companies, consistency and accuracy in implementing the indicators is vital.
11. A full research team does not need to be named, but lead staff backgrounds and experience should be disclosed where possible.
12. The WBA is a not-for-profit entity who receive funding from national governments and foundations in pursuit of public-good benchmarks. Please consider this during the scoping of any proposals.
13. The WBA values inclusivity and we are working to support the achievement of the SDGs. There is a preference to support organisations and workers based in Development Assistance Committee (DAC) countries.
14. It is anticipated that some proposing organisations are likely to be small to medium sized enterprises without significant public policies and reporting. In addition to the requirements set out in the WBA Procurement Policy, we strongly encourage proposals to articulate how they ensure that employees and workers will receive a living wage or living income if they are participating in the project. For proposals that rely on a network of freelance or short-term contracts, we would like to see an explanation of how the researcher remuneration compares to a real living wage in the relevant countries.

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