

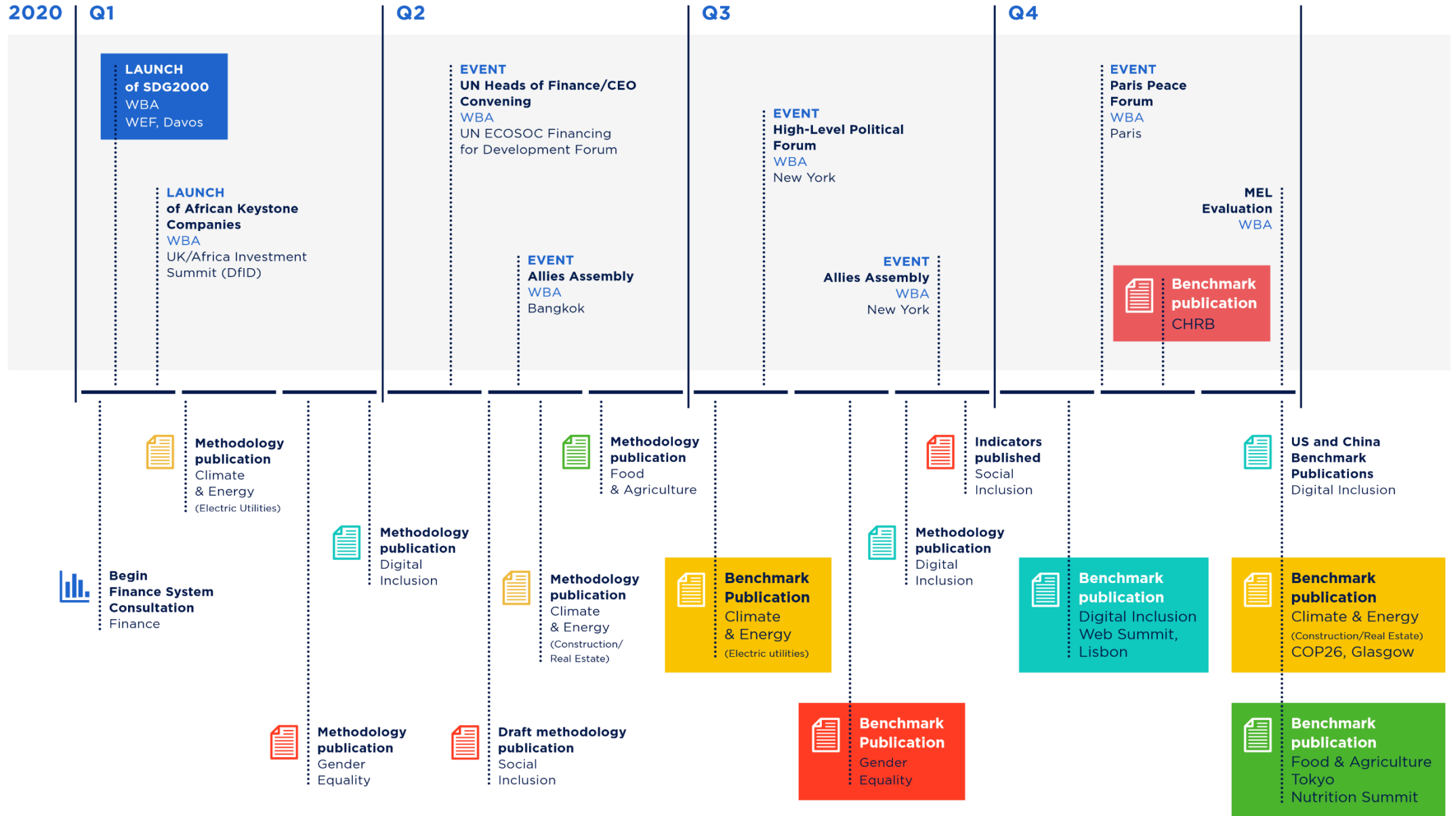


World  
Benchmarking  
Alliance

# Annual Plan 2020

## The Clock is Ticking

23<sup>rd</sup> December 2019



## Scale First, Depth Later

The **clock is ticking**. With only ten years to achieve the SDGs, we must be **aspirational**. That is why we choose **scale first, depth later**. Most benchmarks begin with around 30 companies - we're going for **2,000** by 2023. This means we are going to benchmark hundreds of companies in 2020.

We will do **spotlight** projects and benchmarks – like the Gender Equality and Empowerment Benchmark in Apparel – when it helps us **learn**, remain **credible** and stay **relevant**. We can then scale the lessons learnt.

Scale versus depth is one **tension**. We will face many more. In dealing with these, we **trust** in our **Allies** and the broader ecosystem by **sounding out** views and **sense checking** our decisions – always **listening** to different perspectives.

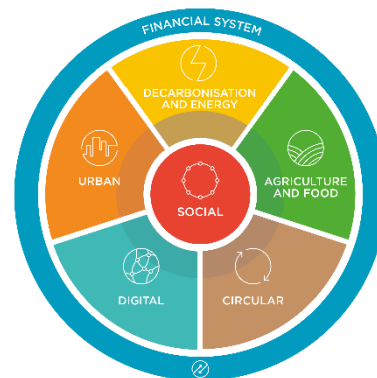
This will help us to remain **inclusive**. We need to be comfortable dealing with uncertainty, honest about what we do not yet know, but always **decisive, making** things **simple** and remaining **independent**. It's only through **scale** we can achieve our mission. The clock is ticking.

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## Benchmarking companies across seven systems transformations

Systems thinking is not a new way to compartmentalise development, sustainability or even the SDGs. But it is a new way to structure and assess the impact that business has on whether we achieve the SDGs by 2030. Systems place the SDGs into a wider narrative and illustrate the interlinkages between them, while at the same time divvying corporate accountability to the system(s) closest to a company's core business. Through the [WBA systems narrative](#), first launched at the High Level Political Forum in 2019, companies are presented with not only a clear dissection of where their operations have the opportunity to make a difference, but also roadmaps of how.



The SDGs can only be achieved with the contribution of keystone companies, sectors and cross-sectoral collaboration. Together, these actors have the ability to shift any negative or positive trends within their systems, and benchmarks have the ability to incentivise companies to move, motivate and influence one another. Just like keystone species are unique and imperative in a biological ecosystem, keystone companies are indispensable in their home system. All 2,000 companies have been selected due to their scale, influence, impact on developing countries and above all impact on this planet's habitats and inhabitants.

The seven systems present the framework through which the WBA will develop benchmarks. It provides the conceptual underpinnings and practical structure for assessing 2,000 companies by 2023. By the end of this fourth year, all keystone companies will have been assessed by at least one of our benchmarks. Many will have been assessed more than once as the annual cycle will be well underway – a rich time-series through which to assess progress. Indeed, we will have a particularly comprehensive picture of the most influential keystone companies that, because they feature in multiple systems, will have been assessed on a wide range of criteria.

But we know that benchmarks and data alone cannot create the change. That's why we were founded as an Alliance from our inception, based on an understanding that our success rests on our ability to build a diverse and inclusive global network of stakeholders from the public, private, and civil society sectors. Grounded in the spirit of SDG 17 (partnership for the Goals), our Alliance currently consists of over 100 organisations representing a range of sectors, industries, and geographic regions, and committed to collaborating with us to measure, monitor, and accelerate increased corporate action and accountability on the SDGs. Over the next year, we aim to significantly increase the impact Alliance, including through the recruitment of new voices that represent important constituencies in the global south.

2020 will be a year in which we further develop, and communicate, the three layers of WBA's core business – the WBA institution; the transformation benchmarks (e.g. Digital Inclusion) and the spotlight benchmarks (e.g. Seafood) and amplify the Alliance.

The full list of 2,000 keystone companies will be launched at the World Economic Forum in January 2020. Though not all 2,000 companies will be benchmarked in 2020, the announcement allows all companies and our Allies to digest the scale and scope of our ambitions. It puts the 2000 companies on notice of the intent that by 2023 they will be measured on their core business performance; and therefore is, at the same time, an invitation for them to work with us. It also builds a certain level of expectation surrounding these companies, not only amongst themselves, but also amongst other stakeholders.

## Social Transformation

The Social Transformation is at the heart of the WBA seven systems approach. Its scope is the achievement of universal human development by empowering people to pursue the choices they value and ensuring inclusiveness and equality with human rights at its core. The topics in this system are of particular importance to developing countries. The benchmarks are relevant to all industries and all companies globally. For this reason, by 2023, WBA will have benchmarked the progress of all 2,000 companies on some aspect of the social transformation.

### ***Objective***

In order to scale the social transformation, WBA will, during 2020, develop and consult on a small set of core indicators that are highly significant for developing countries, industry-agnostic and so can be applied to all 2,000 companies by 2023. Initial conversations have focused on exploring the potential scope of this benchmark and indicators of Allies. Other relevant initiatives have been mapped to identify potential topics and indicators such as human rights and living wages as well as new ones such as lobbying, anti-corruption and tax.

In addition to these core indicators, WBA will also integrate system-specific social indicators into each of our other benchmarks – this will ensure that relevant transformation-specific social issues are also taken into account. For example, the issue of women smallholder farmers may be relevant to the Food & Agriculture Benchmark. Digital Inclusion will explore privacy and affordability.

For relevance and learning purposes, our Spotlight Benchmarks will go deep and identify insights and lessons to scale our efforts more broadly.

- The Corporate Human Rights Benchmark will assess the progress of 225 companies in 2020;
- WBA's new Gender Equality and Empowerment Benchmark will launch with an in-depth analysis of ~35 apparel companies.

Plans for both of these benchmarks are outlined in detail below.

### ***Activities for 2020***

During the course of 2020, the key activities for the Social Benchmark with the core indicators are:

- (1) Produce a draft methodology detailing the Core Social Indicators against which all 2,000 companies will be assessed.
- (2) Consult on draft methodology in Q1 2020 with a mix of stakeholders, including those from, or representing, developing countries, to generate dialogue, understand perspectives and help develop the indicators in readiness for a more public consultation.
- (3) Establish an Expert Review Committee (ERC) and get input from them during Q1 2020.
- (4) Conduct public consultation on draft methodology in Q2 2020 with a mix of stakeholders to obtain feedback on the draft methodology before it is finalised.
- (5) Publish final methodology in Q3 2020.

## Gender Equality and Empowerment Benchmark (GEEB)

**PUBLICATION DATE | SEPTEMBER**

The Gender Benchmark will be our leading tool for measuring gender equality and empowerment among



companies. It will capture the comprehensive set of issues that women face (e.g. representation, compensation and benefits, health and safety, violence & harassment) across the full value chain of companies (e.g., workplace, supply chain, marketplace, community). It will consider the issues that are particularly relevant for the many women in developing countries that are part of these companies' supply chains. It will address both the *risks* to women's rights, as well as the potential *opportunities* linked to the equal treatment of women and men. It will consider the issues related to women that have been addressed in other 'social assessment' tools and resources (e.g., CHRB, UNICEF), with the aim of addressing opportunities for greater efficiency and 'gender mainstreaming' on the one hand, and greater depth on the other.

There is a significant appetite and need for a tool that is fully transparent (available for the public, companies and others to see) as well as comprehensive (looking at both commitment as well as actual performance; looking across the full value chain; covering all the key gender issues), that also drives consensus around the most effective way to measure gender equality or empowerment in a company context.

The objectives for 2020 are:

- (1) Continue to engage with key stakeholders to drive as much consensus across as many initiatives as possible regarding how to effectively measure gender equality/empowerment in companies, leveraging the Gender Benchmark as a key tool in this context;
- (2) Build on the knowledge gleaned from our [initial scoping report](#) and roundtables in [Mumbai](#), [Vancouver](#) and Bangalore to finalise the Gender Benchmark methodology, a spotlight on the Apparel industry, with an eye for sector-neutral factors that can help us later scale the lessons learnt, which offers a comprehensive approach to measuring gender equality/empowerment among companies;
- (3) Launch the first version of the Gender Benchmark, offering full transparency into where the top global Apparel companies stand on gender equality/empowerment;
- (4) Leverage key moments in 2020, particularly given the 25<sup>th</sup> anniversary of the Beijing Platform for Action (an important moment in the women's right movement), to drive support for the Gender Benchmark.

### ***Activities for 2020 and their purpose***

A big milestone in itself, as there is very limited consensus with regards to effective measurement of gender equality/empowerment among companies, is the draft methodology. Our goal is to socialise this with as many stakeholders as possible, to get a very broad set of initiatives to feedback on it, and implicitly offer their 'blessing' for the way forward in how things should be measured. The final methodology will be ready in March for publication.

Gender-disaggregated data is generally very poor, making the data collection a very telling phase of the benchmark cycle, and the engagement with companies to this end may differ from other benchmarks. The final benchmark will ultimately be published in September. There is overall a lot of action around sustainable fashion in the apparel industry, paired with a lot of focus on gender equality. However, seemingly there is only limited progress around the intersection between the two – i.e. social/gender-focused sustainability in the apparel sector (apparel companies will later be assessed on environmental components in the broader Circular transformation).

Another major element of the Gender Benchmark in 2020 is around community building which is essential in the feminist movement. With so many disparate initiatives, investing in community building is critical, especially as our version of community building is grounded in 'collective action'. The main engagement moments for the Gender Benchmark will focus on stakeholders in the apparel industry, including in developing countries, as well

as investors and civil society organisations and media. Given that 2020 marks the 25<sup>th</sup> anniversary of the Beijing Platform for Action, key moments for the Gender Benchmark will align with the various events happening in this anniversary year.

## Corporate Human Rights Benchmark (CHRB)

### PUBLICATION DATE | LATE NOVEMBER

The full CHRB methodology provides a deep-dive assessment that will be key in understanding the correlation between the wider social assessment on the SDG2000 and a deeper, spotlight assessment of human rights performance. CHRB has a major focus on developing countries: analysis in 2019 has shown that almost all allegations against the 200 multinationals within scope took place within developing countries.

Demonstrating the correlation between the WBA social-indicator scores and the CHRB will add legitimacy to the WBA social transformation assessments. A new review of CHRB's full methodology in 2020 will also enable closer alignment of the 225 CHRB companies with the SDG2000 companies, providing deep dives on keystone companies, developing country impact and high-risk sectors. Respect for human rights is fundamental to achieving the SDGs, but the CHRB focus is on transforming global business' approach to implementing the UNGPs (to mainstream the respect for human rights and provide the 'floor' on which to build positive contributions to the SDG 'ceiling').

### *Activities for 2020 and their purpose*

- (1) Produce five industry benchmarks, covering 225 companies, in extractives, apparel, agricultural, ICT and automobile sectors – due Nov 2020;
- (2) Conduct an in-depth review of the CHRB methodologies, including multiple public consultation rounds, tracking of progress against CHRB objectives, creation of revised methodologies for 2021 spotlight benchmarks. Q1 will focus on internal reviews and proposals. Q2 - Q4 will focus on external consultation, revisions and second consultations. Final versions of the new methodologies are likely to be published in Q1 2021, with final inputs received in Q4 2020;
- (3) Continue and expand the pick-up and use of 2019 CHRB data by key investor stakeholders. This happens throughout the year, but there is a focus around the shareholder AGM timetables.

In addition, there will be a strong focus on the following:

- Supporting the work to develop core social indicators and human rights components to other WBA benchmarks, in line with the push towards an assessment of the full SDG2000 company list; as well as accurately and consistently assessing human rights aspects across WBA benchmarks
- Supporting national and regional level use of snapshot assessments using CHRB methodologies to feed into policy level discussions regarding mandatory human rights due diligence and other government led interventions;
- Continuing external engagement as per 2019 (speaking slots at conferences, UNGC, WBCSD, seminars, investor awareness/training workshops, business & human rights events etc).



## Agriculture and Food System Transformation

The science is clear: without change the food system will destabilise the planet. However, it is possible to create a sustainable food future. Scientific reports on the food system published in 2019, such as the EAT Lancet report, and reports by WRI and the IPCC all contained this alarming and optimistic perspective. In summary, their message: a menu of solutions is available to feed nearly 10 billion people by 2050 without depleting the planet's resources. It won't be easy, the timeframe is short, and it entails no less than a systemic change that requires all to move. But it is possible. And it is time to act now.

### Food and Agriculture Benchmark

**PUBLICATION DATE | DECEMBER**

WBA's Food & Agriculture Benchmarks ("FAB") will ensure that keystone companies in all segments of the food systems will be assessed on their contribution to the three dimensions of food system transformation: nutrition, environment and social. In 2020, the WBA will initiate a 'call to action' for 300+ keystone companies in scope – the [draft scope](#) was presented at the 2019 EAT Forum - through the publication of the baseline benchmark, showing current commitments and kick-starting action in the lead up to the 2030 targets. This will be the largest benchmark ever undertaken in a first year by going system-wide through a baseline assessment of all companies.

In 2021, 2022 and 2023 all keystone companies will have been assessed on their contribution to the food system transformation, three times. This means that by 2023, we hope all companies will have formulated their commitment and contribution to food system transformation and have shown change in either commitments, policies and strategies, activities and processes and production - and preferably already in impact.

However, to achieve all targets of the food system transformation and to reach specific target groups involved – such as smallholder farmers and rural communities – smaller companies in the food chain need to also be involved. By 2023, WBA will have also developed with partners and Allies approaches to involve smaller companies in the food system transformation – which may differ for various segments in the value chain.

Objectives for 2020 are therefore:

- (1) Developing the indicators for the baseline benchmark;
- (2) Publishing the results of the baseline benchmark during the 2020 Tokyo Nutrition Summit;
- (3) Starting engagement with and opening conversations with all keystone companies selected for the FAB;
- (4) Establishing the agenda for how the Food & Agricultural Benchmark will evolve towards 2030 ('conceptual framework') to be presented at the 2020 EAT Forum;
- (5) Identifying models and different ways of including SME's and companies beyond the keystone companies in the transformation.

### ***Breakdown of benchmark***

Various existing benchmarks focus on sub-industries in the food chain: seed industry (ATSI), animal protein industry (BBFAW, FAIRR), seafood industry (SSI), food producers (ATNI) or cross-cutting themes such as deforestation (Forest 500) and human rights (CHRB). These benchmarks have had proven impact on industries but together leave relevant segments of the food chain untouched (such as fertiliser, machinery, retail, food service) or assess companies only on part of the agenda of food system transformation. This limits the possibilities for investors and other stakeholders to take food system transformation considerations into

account in their portfolio's and products and for other stakeholders to assess progress across the value chain and in the round.

Where crucial gaps in the food system transformation agenda are not covered yet by benchmarks produced by Allies or partners, WBA can initiate or maintain the development of spotlight benchmarks such as the Seafood Stewardship Index (because of its relevance for SDG 14) or the Access to Seeds Index (because of its relevance for SDG 2, target 2.3.1, Productivity of small-scale food producers). Mapping these gaps will be part of the conversation with the Expert Review Committee and consultation of Allies and partners. WBA setting up spotlight indexes, maintaining spotlight indexes or continuing existing spotlight indexes set up by partners and Allies will require additional funding and donor support.

### ***Activities for 2020 and their purpose***

For its activities and engagement, the FAB will as much as possible make use of existing events. Studies and milestones will be presented at events such as the EAT Forum (June), the World Food Summit (TBC) and the African Green Revolution Forum (TBC). For engagement with companies, trade fairs and industry events will be attended, such as the IDF World Dairy Summit (September), IFA Global Stewardship Conference (International Fertilizer Association) (February) and the Global Summit of The Consumer Goods Forum (June). For example, the different ways for SME inclusion will be presented at the Eat Forum 2020.

Launch of benchmarks will be linked to global events to ensure exposure in relevant stakeholder and target groups. The baseline benchmark is set to be published at the Tokyo Nutrition Summit in December 2020, just like the spotlight Seafood Stewardship Index was published during the Our Oceans Conference 2019 and the Access to Seeds Index regional seed industry summits in Bangkok (Thailand), Abudja (Nigeria) and Dakar (Senegal) in 2019.

For specific target groups, such as farmers, that are less likely to be found at these kinds of events, WBA will organise roundtables such as the farmer roundtables planned for November 2019 (Kathmandu and Nairobi). WBA will also organise an industry roundtable for companies from all segments of the food chain (inputs, production and processing, retail and service) to emphasise the systems dimension of the benchmark and explore opportunities to create change across the value chain.

Five methodology building blocks will be produced in 2020:

- (1) Final scope (industries and companies) for the benchmark,
- (2) Conceptual framework and baseline indicators, (the growing model for the benchmark until 2030), to be presented during the EAT Forum,
- (3) Baseline Benchmark Results, to be presented at Nutrition Summit in Tokyo,
- (4) First result of the exploration of inclusion of smaller companies, to be presented at EAT Forum,
- (5) Full methodology scheduled for Q1 2021 and depending on the planning of the UN Food System Transformation Summit 2021 where the first full benchmark will be presented.

## **Seafood**

For centuries, our planet's oceans, lakes, rivers and other water sources have shaped and inspired our societies and cultures, provided food sources and livelihoods, and informed adventurous and scientific intrigue. In recent years climate change, growing populations and mounting seafood consumption per capita, are placing monumental pressures on aquatic ecosystems. The Seafood Stewardship Index ("SSI") was the first WBA spotlight benchmark to be published (in October 2019) under the Food & Agricultural transformation. Because of its relevance for SDG 14 life below water, and considering that the seafood industry has its own complex supply-chain with unique issues, an in-depth benchmark of 30 companies has been developed. The SSI demonstrates how the world's leading seafood companies contribute to the sustainable management of our oceans and coastal ecosystems, as well how they help ensure that responsible, sustainable practices are

implemented in all stages of the supply chain. The first iteration of the benchmark was published at Our Oceans Conference in Oslo, October 2019.

### ***Activities for 2020 and their purpose***

Without additional funding, activities in 2020 will focus on outreach and engagement and dissemination of the results of the first benchmark. This is because WBA's focus is taking the lessons learnt from SSI and scaling it into the wider FAB systems benchmark (which contains a number of the largest seafood companies, albeit fewer than the 30 in the spotlight). Seafood Expo North America (SENA) in Boston (March), Seafood Expo Global in Brussels (April), and Seafood Expo Asia in Hongkong (September) are potential venues for outreach and engagement to communicate the results and promote actions arising from them amongst companies and the industry, Allies, investors, civil society and policy-makers.

At least one further Expert Review Committee call will be scheduled in 2020. This will be the first opportunity for the WBA to explore what 'comes after' a benchmark – identifying priorities for the engagement as well as reflecting on the process to date.

With additional spotlight funding secured, initial planning to produce the second iteration of the SSI will commence, set to be published in March 2021. Based on this timeframe, 2020 will involve restarting the development cycle. Stakeholder dialogues are an essential way to evaluate and discuss the results of the benchmarking cycle, thus based on the feedback received during these dialogues, a revision of the benchmark methodology will be developed. An important part of these activities is to revise and align the SSI methodology with the FAB.

Objectives for 2020 will therefore likely focus around:

- (1) Evaluation of the first iteration;
- (2) Continued engagement with companies in scope as well as other stakeholders;
- (3) Aligning methodology with the FAB and reflecting on lessons learnt.

## Decarbonisation and Energy Transformation

### PUBLICATION DATE | APRIL OR MAY & JULY

Through the international adoption of the Paris Agreement and the SDGs it was agreed that a major transformation of the energy system and high-carbon emitting industries is needed to reduce emissions and global temperature rise, including climate action in the creation of a green economy and jobs. Working in partnership with CDP, the Climate & Energy Benchmark aims to incentivise keystone companies to align their strategies and operations with a well below 2-degree pathway, and create a 'race to the top' whereby companies that are doing well will be recognised for their performance. This is part of our wider systems transformation narrative that, towards 2023, includes access to affordable, reliable and sustainable energy with a particular focus on developing countries.

In 2020, the Climate & Energy Benchmark will assess and compare the climate action performance of companies across three high carbon-emitting industries: oil and gas, electric utilities and automotive. The electric utilities benchmark will be based upon the experiences and learnings from the automotive one and use 2020 to complete the Methodology for oil and gas. Alongside, we will look to develop a benchmark for an additional industry, most likely real estate, guided by the availability of the methodologies developed by partners ACT and ADEME. During COP25, CDP and WBA co-published the first set of benchmarks for the automotive industry including 30 keystone companies. In 2020 the publications of electric utilities and further sectors will follow, listing a total of between 80-100 listed and non-listed companies in the first series of benchmarks. Together with partners CDP and ADEME, the methodologies for the three selected industries are developed and integrated into the stakeholder consultation process organised and coordinated by the WBA. The methodologies developed are building on existing methodologies from CDP and ADEME's ACT-project, the areas of disclosure recommended by the TCFD and adjusted based on the input given by stakeholders. These methodologies are aligned with the sectoral decarbonisation approach (SDA) enabling the measurement of the industries' alignment with a well below 2-degree pathway. By 2023, other industries will be added based on stakeholder's preferences, taking into account the rate of diminishing returns/impact.

Objectives for 2020 are therefore:

- (1) Engagement with companies across the three benchmarks;
- (2) Alignment of methodologies with partners;
- (3) Publication of electric utilities, and further benchmarks;
- (4) Roundtable events and open consultations;
- (5) Scoping of additional sub-industry benchmarks to include in the Decarbonisation and Energy transformation.

### ***Breakdown of benchmark***

CDP and WBA will co-publish the first cycle of the Climate & Energy Benchmark in 2020, including three industry specific sub-benchmarks; automotive, electric utilities and a third sector (potentially real estate). Based on WBA's landmark study in 2016 these industries have been prioritised as pivotal in reducing carbon emissions. Additional benchmarks will be decided through open consultations and stakeholder dialogue, ensuring benchmarks reflect societal needs and expectations.

We will continue to collaborate to ensure that we are building upon existing work and therefore reduce the burden for companies and provide easy usability for investors and other stakeholders. For instance, we aim to align with TPI and ClimateAction100.

### ***Activities for 2020 and their purpose***

The Climate & Energy Benchmark will take advantage of existing events and forums, ensuring the publication of reports and celebration of milestones are launched at events such as UNGA, COP and Bonn Climate Change Conference. For industry exposure the Climate & Energy Benchmark will also attend flagship events around the automotive, electric utilities and oil and gas sectors. This is to embolden engagement with the companies included in the benchmark, but also to ensure a wider conversation around business best practice and the role of the private sector in achieving the SDGs are supported.

WBA will organise various roundtables to discuss and align both industry recommendations and individual company recommendations to enable energy transition through the companies, policy makers and the financial industry. A roundtable for sub-industry in development will take place, as well as building upon policy conversations in 2019, such as during the GIZ-WBA workshop held in Berlin in September 2019 and during UNGA 2019.

## Digital Transformation

**PUBLICATION DATE | LATE OCTOBER OR EARLY NOVEMBER**

In the global consultations leading up to WBA's founding, companies in the digital system were highlighted among the most influential for SDGs. Information and communication technologies (ICTs) are widely considered to be cross-cutting tools that help accelerate the achievement of many, if not all SDGs. For example, Big Data and AI are beginning to see fruitful applications in health care and environmental management while mobile Internet connectivity continues to power financial inclusion that alleviates poverty.

However, the digital system will need to be transformed if it is to truly scale solutions for SDGs. First, the digital economy must leave no one behind. We need to move towards a world where people of all walks of life, in both developed and developing countries, share equally in the benefits of digital technologies, and are respected as value creators in the digital economy. Second, the development and deployment of digital technologies must prioritise the social good. This entails minimising risks and harms that arise from the use of digital technologies, especially to the most vulnerable groups in society.

### ***Breakdown of benchmarks***

WBA recognises that ever widening and proliferating digital divides are core to the problem of transforming the digital system and that risks and harms are disproportionately inflicted on those with less wealth, income, and power. In other words, digital inclusion is at the heart of a digital system transformation. Hence, the WBA is developing a benchmark that tracks companies on their business practices affecting four dimensions of inclusion: access, skills, use, and innovation.

The digital system is the newest among the seven systems requiring transformation to achieve SDGs. Consequently, public debates are still raging around ethical behaviour and social responsibilities for ICT companies as legal systems and international governance mechanisms struggle to keep up with new technologies and business models. ICT companies are starting to be held accountable for their actions on privacy and security in accordance to emerging legal standards and norms. However, as important as these issues are, privacy and security also need to be anchored in and linked to the more fundamental problem of exclusion -- half the world is still offline and excluded from the benefits of the digital economy.

### ***Activities for 2020 and their purpose***

WBA's Digital Inclusion Benchmark has set itself an ambitious goal: to help lay down an overarching framework that industry, investors, governments and civil society can use to assess the broader social performance of ICT companies using the lens of digital inclusion. In doing so, the WBA hopes to broaden the public policy discourse and to incentivise companies to consider the social equity and distributional justice impact of their operations that affect progress on SDGs, especially in the developing world.

In 2020, WBA will publish the methodology and first round of results of the Digital Inclusion Benchmark for an initial set of 100 ICT companies. These 100 companies are a subset of what has been identified to be keystone companies in the digital system, all of which the WBA intends to benchmark by 2023. The final methodology will be launched at UN World Summit on the Information Society in Geneva in late March, then further presented at both the ICT4D (location tbc) and RightsCon in Costa Rica. Later in the year, we will look to organise a joint public sector and investor roundtable during UNGA week, and at the margins of the Rise Conference in Hong Kong, hold the 2020 ERC meeting. The benchmark results will be published in end October or early November and followed up with roundtables in the US and China in December.

For 2020, these are the specific objectives:

- (1) Publish a credible benchmark methodology that serves as a best practice guideline for ICT companies;
- (2) Promote understanding of the Digital Inclusion Benchmark's objective and methodology among keystone companies;
- (3) Release the first round of results for an initial set of 100 keystone ICT companies by Q4 2020;
- (4) Spread awareness of the benchmark's framework and methodology among investors, governments, civil society actors, and international organisations.



## Circular Transformation

Over the past 50 years humanity's ecological footprint has increased by almost 200 percent, resulting in a widening gap between sustainable resource availability and demand. SDG 12 on responsible consumption and production specifically addresses the need to reduce our ecological footprint by changing the way we produce and consume goods. A shift to a circular economy - an industrial system that is restorative or regenerative by intention and design - is urgently needed. Today the global economy is only 9% circular<sup>1</sup> and the trend is negative, which means that the pressure to accelerate the transition to a circular economy is growing. Continued extraction of finite resources, climate and demographic changes will make it harder for businesses to provide the products and services necessary for a well-functioning global circular economy. Successful circular initiatives will reduce dependence on dwindling natural resources and will create value for companies and their stakeholders<sup>2</sup>.

WBA believes that a circular transformation is needed to be able to decouple consumption and production from natural resource use and to design the eradication of waste and pollution. Moving to a circular economy will unlock great economic potential and is needed in order to stay on a below 2-degree pathway. The WBA's Circular Transformation will benchmark companies around their role in shifting to a circular system. By 2023 we aim to evaluate hundreds of keystone companies that form part of this system. These benchmarks will focus on industries including apparel, personal goods, paper and packaging and manufacturing sectors. The impact of implementing circular economy principles on developing countries could be extremely beneficial as harmful, toxic or dangerous activities would be limited, better planned or regulated. These include, for examples, the use of harmful dyeing chemicals in the apparel sector, or the dismantling and recycling of ship or electronic waste.

### ***Activities for 2020 and their purpose***

As part of SDG2000 in January 2020, we will publish a list of hundreds of companies that we will benchmark in the system by 2023. Before any methodology development for a benchmark starts, the WBA assesses the potential for a new benchmark in a scoping report. Looking at our broad list of Allies and stakeholders, there are several front runners working on indicators/measurement tools in the circular economy. Irrespective of whether a partner is identified and who that ultimately is, it is WBA's intention for 2020 to deliver a scoping report which includes an assessment of feasibility and added value of a benchmark. It will also outline objectives, suggest and prioritise scopes and potential themes to be included with supporting rationales. The scoping report will also present a thorough overview of existing initiatives and identify current gaps to the field. If the right partner and accompanying funding is secured, WBA expects that in 2020 a benchmark can be initiated with results in 2021. The methodology will need to be adaptable with the potential to benchmark hundreds of companies across a variety of industries. Increasingly banks have started to explore how they can enable the transformation to a circular economy by providing finance under favourable conditions if companies demonstrate to develop circular products and business models. WBA will therefore involve banks in the methodology development to explore if the methodology could help banks in making these assessments.

Objectives for 2020 are:

- (1) Engagement with and alignment with existing benchmarks and stakeholders;
- (2) The creation of a scoping report;
- (3) Initial roundtable consultations on the transformations.

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<sup>1</sup> Systems Transformation publication (footnote 117): Circle Economy, "The circularity gap report 2019," Circle Economy, Amsterdam, 2019.

<sup>2</sup> WBSDC, tbc

## Financial Transformation

The financial system is a lever for all other transformations. Financial institutions form a critical part of the WBA theory of change, investors in particular. With its domain cutting across the other six systems we view the financial system as the lifeblood that keeps the systems alive, in the same way that the social transformation is the beating heart at the centre. Before beginning to draft a methodology or explore firm partnerships, we will conduct a year-long consultation in 2020 with financial institutions (including institutional investors, asset managers, banks, insurance companies, Multinational Development Banks and others) to gauge the correct positioning and angle of benchmarks. We are recruiting a dedicated Investor Lead to manage these engagements and the consultation to ensure a water-tight robustness of the eventual methodology. This will enable us to build and affirm a point of view on what constitutes positive long-term behaviour by financial institutions, financial market participants, and their authorities. This will result in the publication of the scoping report that will form the basis for methodology development on the finance system transformation benchmark in 2021 and inform ongoing policy engagement. It will also help us to simultaneously strengthen our relationships with critical stakeholders like investors in a complex system that shapes our methodologies, uses our results and is ultimately also going to be assessed through our benchmarks.

## Urban Transformation

Sustainable urban development requires that the benefits of urbanisation are shared, ensuring that all have access to infrastructure and social services. The Urban Transformation benchmark will assess and compare how companies are playing a part in fulfilling this aim, identifying and evaluating hundreds of keystone companies that form part of this system.

In 2020, WBA will map relevant industries and publish a list of the several hundred of companies in scope that make up this system across multiple sectors as part of the SDG2000 launch. Currently, we have no allocated funding for this transformation, and will continue to explore options throughout the year so that we can begin to scale efforts towards 2023.

## Organisational Impact

Combined, all these activities and objectives, ultimately takes us one step closer to the ambition set out in the theory of change to transform systems and improve business impact on people, workers, communities and the environment.

In response to a public request for proposals, WBA has commissioned external consultancy Steward Redqueen to advise the development and implementation of WBA's monitoring, evaluation and learning (MEL) framework. This framework, to be in place early 2020, will focus on creating accountability and should allow for continuous learning.

In addition, WBA has committed to an external mid-term review before the end of 2020 to take stock of where we are and whether we are on target to achieve projected outcomes.

The SDGs were created to leave no one behind in a world that allows many to head into increased prosperity and development, and the inclusion of developing countries in all WBA's work is imperative for this mission. To better understand and assess the actual role and impact of industries and companies included in our benchmarks in developing countries, the WBA is developing an *MNE impact in developing countries framework*. In addition, building on the outcomes of capacity building workshops in developing countries, the WBA will develop a strategy for building capacity in developing countries. In 2020, we will focus on operationalising both of these as well as continuously improving our approach.

# WBA Wide Engagement

## *The Alliance*

From its inception, the WBA has understood that success rests on our ability to build a diverse and inclusive global network of stakeholders from the public, private, and civil society sectors. Benchmarks compare companies' performance on the global challenges we all face and are a critical solution in driving progress, but they can only be as powerful as the number of actors using them. Thus, to build ownership and ensure that benchmarks reflect societal expectations and are relevant to the external environment they seek to change, it is critical that they be designed through true multi-stakeholder dialogue. Since the launch of our global consultation in September 2017, the Alliance has grown to over 100 organisations representing financial institutions, civil society, academic and research institutions, reporting standards and benchmarking bodies, multilateral institutions, and business platforms across both the global north and south. In addition, the WBA works with actors on a one-on-one basis to ensure that we are consistently *relevant* and *impactful* in our work.

As the Alliance has continued to grow over the past year, we would like to focus on strengthening our network in developing countries and with investor communities; and therefore in 2020 prioritise growth with the following:

- ***Financial institutions and financial representative organisations*** to strengthen our value proposition and theory of change around the power of benchmarks to reorient capital towards sustainable development through collective engagement. Part of this collective engagement will be placed on companies' supply chains and identifying where collective action is most impactful in developing countries.
- ***Business platforms and trade associations*** to continue socialising and strengthening our value proposition to companies, particularly as we consider what the most effective ways of engaging with companies will look like throughout the different methodology development process. Where we have a global organisation like the ICC already as an Ally, we will look to work with their sister-organisations in the global south.
- ***Civil society organisations, particularly those located in the global south***, to ensure that we are inclusive and representative, to reinforce our belief in the power of benchmarks to reflect societal expectations, and stay true to the underlying aim of the SDGs to leave no one behind.

By the end of 2020, we aim to grow the Alliance to 175 organisations representing a balanced and diverse constituency of actors committed to using benchmarks to incentivise, measure, and monitor corporate performance on the SDGs.

### *Ally Assembly:*

We will once again bring together our global community of Allies for a multi-day, in-person convening in the global south to delve deeper into key issues affecting the Alliance, including the way in which we engage with companies with long-tail supply chains in developing countries, and build new ways of collaboration.

## ***Engagement Strategy***

We have a multi-pronged approach to our engagement (which we expect will feed in directly to us building the Alliance too, as described above). With each stakeholder group, we will need to develop a specific engagement approach with developing countries:

## INVESTORS

**Aligning WBA indicators with the needs of investors in measuring impact and undertaking collective engagement.** Financial Institutions, especially large institutional players – have a pivotal role to play in mobilising the private sector in support of the SDGs. They can typically do so in three ways: bringing their investments in alignment with the SDGs; engaging with the companies in which they invest, directing them to bring their business models in alignment with the SDGs; and through policy advocacy in support of sustainable finance. In view of their role, in 2020, the WBA will focus on strengthening our engagement with the financial institutions as we develop benchmarks (so we ensure that the data we produce is relevant to the needs of investors) and seek to mobilise the financial institutions so that we can collectively engage with the companies that underperform in our benchmarks, also noting those that perform well.

## GOVERNMENT & POLICY

**Putting forward policy and regulatory recommendations for an enabling environment for business in the achievement of the SDGs.** This strategy is articulated around three pillars: using benchmarks results – which demonstrate how companies are behaving around the SDGs and where there are gaps of inaction – to reinforce the need for certain policy interventions; working with governments and multilateral organisations at both the global (UN, G20, G7 and others) and regional and local (African Union, European Union, ASEAN and others) levels on policy issues which promote good business practices and advance sustainable system changes; and harnessing the transformative power of the global financial system advocate for capital market reform so that markets become more long-term and sustainable.

## COMPANIES

**Engaging with companies directly through the benchmarking process; and providing a multi-stakeholder dialogue for accountability and leadership.** In addition to building the Alliance and activating engagement through our partner organisations, we will continue to focus on engaging companies directly through individual benchmark consultations. We will develop an illustrative ‘benchmark engagement journey’, which will put in place a consistent WBA approach to company engagement. At a WBA institutional level, we are exploring the possibility of establishing an informal CEO Leader network to support the socialisation of the benchmarks at a very senior level. While this group would not be a part of the Alliance or have any formal decision-making authority, it would serve as a sounding board for the WBA to help guide our approach and efforts around corporate engagement and accountability on the SDGs, and will provide a helpful network for us to tap into to ensure our benchmarks are as impactful as possible. We anticipate launching this CEO Network at the same time as the SDG2000.

## CIVIL SOCIETY

**Building a movement on transparency and accountability and providing a supporting environment where civil society can come together with the private sector to advance goals together.** The WBA has already developed a unique role as a ‘broker of conversation’. We know from our Allies and the UN High Level Political Forum that there is a demand for the WBA to continue to place emphasis on the new social contract and advancing the dialogue and relationship between the public and private sector, while establishing new norms of behaviour on sustainability. We will continue to broker this dialogue and support transparency efforts particularly around private finance initiatives, such as the Project Everyone spin-off, Make My Money Matter campaign.

## AMBASSADORS

**Expanding our group of high-profile individuals who can represent the WBA in their own circles and communities** by speaking direct. We hope to equip our Ambassadors with the right narrative and tools so that they can share their experiences of working with us and the importance of our work to driving shared goals and outcomes. We will consider both the value-add that we can provide for these individuals, as well as how to

engage them sparingly given time constraints, while also ensuring a regular stream of communications and outreach (i.e. offering opportunities to meet in-person once a year, convening virtual meetings, etc.).

### **Key Engagement Milestones**

Each benchmark has its own development journey with the scoping report, the methodology, public consultation and launch of the benchmark. This process also drives the engagement approach that is aligned to the benchmarks, for example, we will hold benchmark roundtables to delve into the specifics around individual benchmark methodologies. We will ensure that there is consistency between the different benchmarks and that all external moments are co-ordinated and launches are timed with key, global fora where possible.

In addition to the key milestones for benchmarks, the WBA will continue to ensure its relevance to the external environment through institutional engagement. All milestones will be mapped out in a separate Engagement Strategy before the end of the year, but in summary:

- *Global Advocacy and Socialisation:* This will involve continued advocacy and engagement at key fora such as the UN General Assembly, the High-Level Political Forum, and the World Economic Forum, as well as new efforts to build a presence and drive forward policy positioning at major geopolitical summits such as the G7 and G20.
- *Regional Policy Engagement:* This will involve new efforts to engage appropriate policy and industry stakeholders, including the EU, ASEAN, AIPEC, and BRICS, in order to build the relevance of benchmarks on a regional basis and increase awareness of the impact of large companies and their supply chains in developing countries.
- *WBA Roundtables:* This will include regular continued convenings of stakeholders to discuss issues relevant to leadership, accountability and corporate behaviour change. At least half of these will be held in the Global South.
- *Targeted External Representation:* This will include continued external representation of the WBA at key conferences, meetings, and forums held globally, to ensure that the benchmarks and other outputs are known about and used. These might be speaking opportunities, or WBA side-events, depending on the opportunity and need. We will prioritise gatherings in the Global South.



## Communications

**Inspire our audiences to transform through trustworthy, simple, aspirational and transparent communications on WBA and our benchmarks.**

Communications is critical to WBA as an organisation that is growing fast and needs to scale at pace with multiple audiences. There is a significant opportunity to support the engagement and research activities both at an institutional, transformation and benchmark level. Communications is essential to further build the WBA institution, underscore and affirm the robust methodologies we have and are developing, and ensure we develop benchmarks that are accessible and internationally respected and used by companies, investors, civil society and individuals alike. We develop high quality creative content to build a license to operate and boost dialogue. For WBA it is vital that colleagues become influential thought leaders with regards to the benchmarks at a global level. These deliverables will help build the WBA brand as well as ensure we build our reputation by living up to our values.

From the start of each project the communication function exists in symbiosis with research and engagement to leverage key moments for WBA such as the publication of benchmarks and the launch of the 2,000 keystone companies, as well as promoting the Alliance.

Objectives for 2020 are:

- (1) To build and sustain WBA's brand, giving WBA the license to operate.
- (2) Impactful publications of the benchmark results.
- (3) Launch the 2,000 keystone companies creating a moment of truth.
- (4) Keep the momentum going to keep our audiences motivated direct and through the Alliance.

### ***To build and sustain WBA's brand, giving WBA the license to operate***

We keep growing and building the brand. This means we will continue implementing the brand strategy we worked on in 2019 in visuals, tone of voice, language, content, messaging, narratives and social media.

- We want to be known as the accountability mechanism and why this matters to business and investors;
- We further build the brand by creating and publishing 'branded content': which means it is clear that WBA is the sender but in our communications we focus on letting the content do the speaking. Our data has to speak and through storytelling we communicate our content with our audience. By being aspirational and using storytelling in our communication we show different perspectives and dynamics.
- It is important to adapt our content and stories to the audience we are talking to, and those we want to talk more with. We see our main communication audience as companies, financial institutions and media, and adjust our language and presentation accordingly.

### ***Impactful publications of the benchmark results***

In 2019 we developed the first two iterations of our online publication tool for the Seafood Stewardship Index and the Climate and Energy Benchmark. In 2020 we will optimise and enhance functionality of this tool whilst publishing the results of the first Gender, Digital Inclusion and Food and Agriculture benchmarks. To create impactful publications in 2020, communications focuses on the following:

- Every benchmark will have their own story but how we present it to the world will always complement the others, as they are based on the same values.

- Communication will support the writing and presenting of benchmarks through text, visuals and the development of the online publication tool, which is part of our data platform (with an external party). Communication supports two key moments for each benchmark with messaging, social media and communication materials.
- All the above as well as additional communication plans, PR and social media will be executed in close collaboration with the researchers.

### ***Launch the 2,000 keystone companies creating a moment of truth***

Creating a significant moment of truth with our audiences reaffirm that the WBA approach and the global scale of our ambition is different and game changing. The intent is for our rankings to become the internationally accountable mechanism. The 2,000 list could be positioned as what world needs to achieve the SDGs and transform our systems. This would ultimately result in buy in to the role companies play and the impact that they have.

Key messages are:

- Scrutiny of business progress on the SDGs is inevitable.
- We are making action easier for companies to drive innovation for sustainable growth.
- We are up against it. Change takes time and courage, so leaders need to act now.

Through:

- *A statement of responsibility and influence:* Call to action for all keystone companies.
- *Credibility of research:* The go-to for getting to the real truth of performance.
- *Impactful content:* Demonstrate the cascade effect and tell how our benchmarks and methodologies can serve as roadmaps for companies, WBA benchmarks show where these companies really are so our stakeholders can all make informed assessments, stimulate transparency and accountability

We will implement the above through three important steps:

- Pre-launch: engagement with the 2,000 keystone companies and reaching them through networks and our business platform allies (ICC, WBCSD).
- Create a moment of truth in January and launch the list at the World Economic Forum in Davos.
- Post-launch: - drive scale and corporate action to keep building awareness for the 2000 companies.

### ***Keep the momentum going to keep our audiences motivated***

Key moments create a drumbeat of change for WBA. When there are fewer key moments happening, it is up to the communications team to keep the momentum going. This will take place via social media, newsletters, interviews (media relations), and by showing the importance of our Alliance. We are going to work closely with our Allies on the amplification of our moments as well as leveraging the good work of our Allies to create that drumbeat. Publishing a benchmark doesn't stop when we have launched the benchmark results. We will continue to highlight case studies and elevate the insights online and work with the research and engagement team to leverage the content. This will also build further positioning of our thought leaders through blogs, speaking opportunities and direct engagement.

**Primary audiences for communication purposes**

- The 2,000 companies
- Financial institutions
- Media.

**Secondary audiences**

- Governments;
- Civil society;
- Individuals (including youth).

# Operations

The institution WBA can be divided into research, engagement, facilitation – and fundraising which enables the other three. Without the benchmarks, there are no words to speak; without engagement there is no voice and no way of making it relevant to those who can influence company behaviour; and without facilitation, there is neither. Facilitation, or operations, are the cogwheels behind the scenes that drive the organisation and makes sure its internal mechanisms are smooth enough to allow scale, benchmarks to be published and conversations with stakeholders.

## Operational Highlights for 2020

Ensuring smooth operations needs a continuous focus on people, processes and culture.

### **People**

Having the right people on board at the WBA is crucial for its impact. It is our conviction that the only way to be impactful is through happy people who bring their full potential to work. In 2020, creating the right workforce is remaining the focus for human resources. This means hiring the right people and ensure an optimum performance through clear commitments cycles and learning and development. Further professionalising and standardising our human resources processes and policies, as well as internal communication, is crucial to support the fast growth of the organisation and remains part of the day to day tasks of human resources. For 2020 this means offering labour contracts in more countries, particularly recruiting those from or based in developing countries, including equal salaries and secondary terms of employment, such as pensions.

In 2020 there will be at least five benchmark publications in 2020, the workload will significantly increase within particularly the research team, and while that both demands working smarter (with automated tools and systems), it also means acquiring in-house or outsourced human talent. To develop the methodologies and launch the benchmarks according to the timelines laid out in this plan, we will grow the team with the below roles.

Not all the expertise required during 2020 will be directly employed or contracted by WBA, but rather we will aim to employ downstream partnerships (co-ownership) and research partnerships (outsourced research management) whenever possible and advantageous. We choose to do this for example when the level of technical expertise required or when the timeframe is very narrow to complete an activity or a project. One such case is that a research partner will be contracted for the pre-population of the questionnaire for the Digital Inclusion Benchmark, likely between spring and summer.

Not all additional roles and functions for 2020 have been decided, as the amount will depend on what budget allows – though the list below gives an overview of some of the needs:

- *1 Engagement & Future Financial System Transformation Lead*
- *10 Research Analysts (some in 2019):* They will be monumental in especially the data gathering and verification process, and in particular during phases of prepopulating the questionnaires with public information already disclosed by the companies. All 10 will be expected to have started by Q1 2020.
- *1 Business Manager (2019)*
- *1 Communications lead, to amplify our work and to ensure a drumbeat of change*

### **Learning and Development**

Equally important to finding the right people, is to ensure people to bring their full potential to work. Firstly, we further professionalise our bi-annual commitment setting conversations in which all employees, together with

their director, identify and clarify commitments. Each and everyone also identify a learning question in order to optimise performance. The latter is supported by an informal 360 feedback approach within the organisation. The learning questions, combined with a need to ensure the organisation is able to lead systems change in a world that is transforming will bring learning and development in the core and culture of the organisation and our day to day work. In order to support the entire organisation in a very effective and efficient way we will continue the four work streams:

- *Executive Team leadership development*
- *Transformation leads leadership development.*
- *Learning Project Team:* A group from across the WBA team that wants to develop specific skills and facilitation approaches
- *Alliance Learning Process:* This segment would include preparing and guiding main events in the year and continued review or feedback conversations.

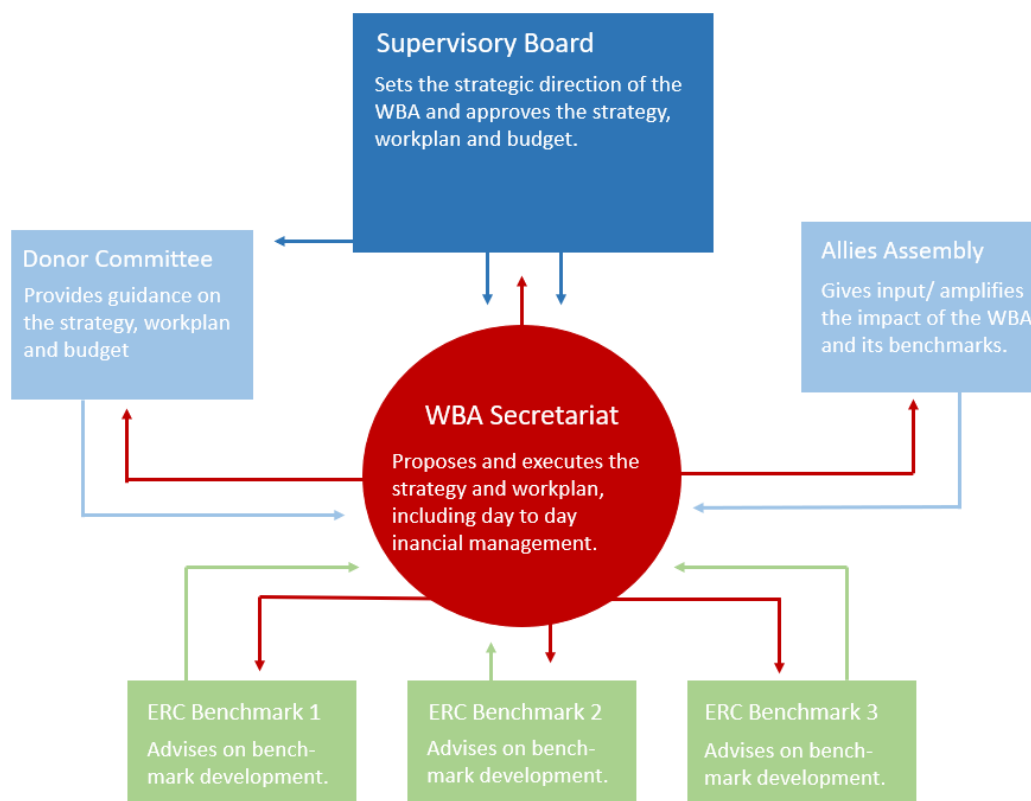
### Processes

Within operations we try to automate as many repetitive actions as possible. In 2020 this means we will further automate our administration to ensure predictability, agility and our ability to meet the reporting standards of our funders.

### Culture

Paying attention to our culture is crucial to support the fast growth of the organisation as well as to ensure we will deliver the impact in an effective and efficient way. The activities in human resources are key to build the culture. Furthermore we organise monthly onboarding days for all new employees and new hires have a mentor for their professional support and a buddy to help with the way of working. Our values are leading and core to these activities.

### Governance



All governance bodies will expand in the coming year to both serve as a mirror against one another and reflect the world in which WBA operates (see the section on Transformations for more details on individual Expert Review Committees). With two current Board members stepping down in early 2020, three new ones have to join in the same quarter. The WBA's Supervisory Board will be populated to completion by the end of 2021, at the latest. The objective is to have a balanced Board, not just across the individual members' experience and expertise, but also their backgrounds and personalities. The Board will need to develop a roster which establishes the terms in which a Board member joins, in particular with regards to the duration of their mandate and with regards to annual re-elections. In accordance with this roster, WBA will look to nominate and elect additional Board members during 2020.

*Donor Management:* In 2020 the WBA will continue to maintain regular contact with its existing core donors and will host two donor meetings – a spring one to coincide with the finalising of the 2019 annual report, and an autumn one to coincide with the planning of 2021. We expect the donor group to grow by at least four additional government members throughout the year – Sida (Sweden), GIZ (Germany), Canadian Ministry of Global Affairs and Finnish Ministry of Foreign Affairs.

We will also hold at least one face to face convening of current as well as potential donors (public and private) to function as both an updating and a learning session. In the same spirit, we would host three webinars that would give potential donors a chance to raise any questions or concerns with WBA, each other and current donors.

### ***Budget***

With WBA being entirely dependent on grants and long-term fundraising opportunities, there is a constant discrepancy between what the ideal budget is to deliver every activity and what the baseline budget is to deliver the main objectives. The budget provided in this annual plan is based on a combination actual costs and costs used in the grant proposals. We enter 2020 with a realistic funding gap. Realistic as we believe we able to close the funding gap as well as by increasing efficiency of delivering roundtables, methodologies, and launching a benchmark. In the case of being unable to close the funding gap, we have mechanisms in place to deal with eventual gaps that cannot be closed. A first way to do this is to maintain agility in the benchmarks, e.g. depth versus scale. This means that we adapt the number of indicators that we include in the methodology of our transformations whilst showing the road map to companies. Populating and analysing the indicators are labour and therefore cost intense and rather than postpone any work on new transformations to benchmark all 2,000 keystone companies before end of 2023.

### ***IT and Data***

Digitalisation and automation is important for the WBA to create the impact as it allows the people to focus on those tasks and activities where they can make a difference. To have an effective and efficient team, WBA continuously wants to vastly enhance its IT and Data platform.

The IT platform consists of a set products or tools to support our core processes. In order to efficiently and effectively grow and adapt this platform to our needs, WBA maintains a set of architecture guidelines and uses an agile/scrum development approach. These guidelines define the structure of the IT platform that is already in place to ensure that future additions to the platform satisfy the same requirements. Such guidelines create a solid foundation for our platform, making it more scalable, increasing performance, and reducing costs. It will also allow WBA to more immediately utilise new technologies, such as blockchain, artificial intelligence, and machine learning (when useful), as the platform tools will already be well integrated with each other. The agile/scrum development process ensures that the evolution of WBA's IT platform can withstand a constant state of flux, by being easily adaptable to change due to incremental builds and an iterative approach to

development. This approach also ensures WBA closely monitor and manage development costs. Tools within the IT platform thus far can be broken down into three categories:

*Institutional:*

- Team Collaboration Tool (Office365/Teams): to ensure fast decision making as well as enabling cross culture and function knowledge sharing. The activities for 2020 are aimed to support the ability to use it via onboarding and a buddy system for new hires, to optimise the usage via group support sessions and to enhance innovation via prototyping new functionalities by the super users;

*Engagement:*

- *Engagement Tool (Dynamics 365)* : to ensure that a comprehensive overview of our outreach and engagement is maintained and easily accessible to all internal WBA staff. An MVP of this product was launched in Q4 2019 in collaboration with Pixelzebra, a Dynamics 365 implementor, increased functionalities and usage are anticipated for 2020 as our needs grow;

*Benchmarks:*

A large proportion of the work undertaken by researchers throughout the year consists of data collection and analysis, and this will only increase over the next year and beyond. To alleviate the pressure of any manual work of the researchers as well as communication the IT platform also WBA focusses on three process steps: data collection, analysis and scoring and last but not least publication. In 2020 these are the activities planned. The architecture guidelines enable us to scale these activities up and down to enable flexibility in our budget.

- *Survey Tool*: in 2020 and with each iteration of a benchmark we will optimise our survey tool to allow the companies to provide data and to pre-populate data that is already available to the WBA. We will also continue to explore data scraping techniques to decrease manual labour during the pre-population phase of the data-collection.
- *Analysis and Scoring Tool*: this tool provides a space for researchers to analyse the data provided by companies, where they can (1) score companies per indicator according to the scoring guidelines developed by WBA (2) peer-review each other's scores and provide feedback and (3) see the scores weighted and ranked immediately. Further development and deployment of a scoring tool for survey data - this will likely unfold through merging the scoring tool directly within the survey tool in collaboration with Betabit;
- *Publishing Tool*: Bringing the wealth of information over to the stakeholder groups is an important element of our Theory of Change. We are building a publication tool that helps to communicate the wealth of data and insights. In 2020, the WBA will produce. another iteration of the publication tool. The WBA is working towards a publication tool that brings information directly from the survey tool (and thus scoring tool) to the publishing tool. In order to do so this product is developed with creative agency GRRR and Betabit.

## **Data Management**

In Q4 we started working on defining our data management vision and principles. In 2020 WBA will further develop and implement this strategic set of principles, which will include components related to governance, storage, security and privacy. It will ensure a plan is in place for handling any data acquired, created, stored, managed, processed or shared by the World Benchmarking Alliance. This will supplement the policies we



already have in place regarding the EU's General Data Protection Regulation (GDPR). The WBA aims to be transparent and share its data, however we also need to maintain (for companies) some privacy on confidential material. This interplay is an important consideration when working with WBA data.

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## St. World Benchmarking Alliance Foundation

Rhijnspoorplein 28  
1018 PX Amsterdam  
The Netherlands

<https://worldbenchmarkingalliance.org>

