

## **REQUEST FOR PROPOSAL FOR SERVICES AS THE GENDER BENCHMARK RESEARCH PROVIDER 2023**

### **INTRODUCTION**

The World Benchmarking Alliance (WBA) aims to drive the private sector's engagement in the SDGs through its benchmarks, envisioning a future where companies, investors, governments, civil society and individuals can quickly and easily compare businesses and motivate a 'race to the top'. WBA is a global non-profit organisation with most colleagues based in Amsterdam and a second office in London.

WBA procurement rules require a public tender for contracts above a certain size. This Request for Proposal (RFP) sets out the draft scope of work outlining the research provider support required to deliver the Core Gender assessment and the Gender Benchmark (GB) over a 3-year period.

The research provider is not expected to create or revise the methodology, but to assess companies using a subset of the existing GB methodology and indicators. Over a 3-year period, the key deliverables will be approximately 3,000 draft research assessments which then WBA's own core team of staff will finalise following (WBA-led) engagement with companies. WBA will also be responsible for carrying out any analysis and producing insights found as a result of the assessments.

Interested parties ('you') are invited to bid for one part or all parts of this scope of work. This RFP is provided to enable you to develop initial cost estimates and options to deliver the part(s) and as such should not be viewed as any form of agreement between you and WBA.

### **EXPECTATIONS OF THE PROPOSAL**

We expect that your proposal will, first and foremost, estimate the personnel and financial resources required to deliver the GB methodology 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 the GB methodology),
- Familiarity with diversity and inclusion topics (depth of knowledge regarding social sustainability issues, namely gender equality and women's empowerment, and business), and
- Research intensity (being able to execute in-depth research of 1,000 companies within condensed timeframes).

Moreover, WBA would like to see a staffing plan including how changes in staff will be handled throughout the project. We are interested in your approach to retaining people, supported with 2020 and 2021 (up to now) analyst retention rates, as well as gender-specific commitments or policies.

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 [m.george@worldbenchmarkingalliance.org](mailto:m.george@worldbenchmarkingalliance.org) by 5 January 2023, and requests for clarifications may be sent to the same address beforehand. Project kick-off is anticipated to take place in mid-February 2023. The tendering process will be conducted in line with the WBA Procurement Policy 2018-2022.

## DRAFT SCOPE OF WORK

This draft scope of work can be divided into two parts across a 3-year period. In Year 1, the first part consists of delivering draft assessments for approximately 1,000 companies across ~30 questions from the GB methodology, which will help create the 2023 Core Gender assessment. In Year 2, there will be draft assessments for an additional 1,000 companies across the same ~30 questions. In Year 3, new draft assessments will be delivered for the first 1,000 companies which are to be re-assessed across the same ~30 questions to complete the project in 2025.

The second part of this draft scope of work consists of delivering draft assessments for approximately 112 companies across another set of ~25 questions from the GB methodology focused primarily on the company's supply chain, which will help create the 2023 Gender Benchmark. In Year 3, new draft assessments will be delivered for these same 112 companies which are to be re-assessed across the same ~25 questions to create the 2025 Gender Benchmark.

All research should be based upon publicly available information in English, and no engagement or contact with the companies within scope is envisaged on the part of the research provider.

More details regarding this draft scope of work are included below.

### PART 1: SCOPE OF THE CORE GENDER ASSESSMENT

- In Year 1, the 2023 Core Gender assessment will consist of draft assessments for 1,000 of the world's most influential companies to achieve the Sustainable Development Goals, half of [WBA's SDG2000 companies](#) (Group 1). In Year 2, the 2024 Core Gender assessment will consist of another 1,000 companies (Group 2), to complete the other half of WBA's SDG2000 companies. In the final Year 3, the 2025 Core Gender assessment will repeat the draft assessments of the first 1,000 companies (Group 1). Over the 3-year period, there will be a total of 3,000 draft assessments across 2,000 companies.
- The current list of 30 questions to be included in the Core Gender assessment can be found in the attached MS Excel spreadsheet "WBA Gender Research 2023-2025.xlsx" under the tab "Core Gender questionnaire". These questions are currently undergoing consultation, and the final list will be shared in February 2023. For more information on the research approach to these questions, you can consult the [Gender Benchmark scoring guidelines](#) (please note that not all questions from these scoring guidelines will be included in the Core Gender assessment).
- All of the questions will be applicable to all companies. The current list of all 2,000 companies can also be found in the attached MS Excel spreadsheet "WBA Gender Research 2023-2025.xlsx" under the tab "SDG2000". The companies to be allocated to Group 1 (2023, 2025) or Group 2 (2024) will be shared in February 2023. The company list may be subject to slight alterations over the 3-year period as a result of unforeseeable mergers, acquisitions and/or bankruptcies.

### PART 2: SCOPE OF THE GENDER BENCHMARK

- In Year 1, the 2023 Gender Benchmark will consist of 112 companies within the apparel and agricultural sectors which have a large impact on women working in their supply chains. These companies are a sub-set of the 2,000 companies included in the Core Gender assessment under Part 1. In Year 2, there will not be a supply chain assessment. In Year 3, the same 112 companies will be re-assessed across the same supply chain questions. Over the 3-year period, there will be a total of 224 draft assessments across 112 companies.
- The current list of 112 companies can be found in the attached MS Excel spreadsheet "WBA Gender Research 2023-2025.xlsx" under the tab "Gender Benchmark companies 2023".
- The questions chosen to complete these assessments will be additional questions from the Gender

Benchmark questionnaire that focus specifically on the supply chain. While the consultations are ongoing, the current list of 25 questions to be included in the Gender Benchmark can be found in the attached MS Excel spreadsheet “WBA Gender Research 2023-2025.xlsx” under the tab “Gender Benchmark questionnaire”.

Table 1 provides a summary overview of the total data points to be captured from these two scopes of work.

**Table 1: Total data points captured across the 3-year scope of work**

		Year 1	Year 2	Year 3
Part 1	# of companies	1,000	1,000	1,000
	# of questions	x 30	x 30	x 30
	Data points	30,000	30,000	30,000
Part 2	# of companies	112	0	112
	# of questions	x 25	0	x 25
	Data points	2,800	0	2,800
<b>Overall</b>	<b>Total data points</b>	<b>32,800</b>	<b>30,000</b>	<b>32,800</b>

## YEAR 1 PROJECT TIMELINE

For Year 1, WBA envisions a project period of eight months, including a training period of two weeks during which WBA will provide trainings, including provision of detailed materials to ensure that your research team can deliver the requirements of the methodologies including understanding indicator topics and identification of relevant disclosures to allow the assessment to be done on a well-informed basis. The training period is currently foreseen to be held in February 2023.

The training period will be followed by a seven-month research period between March – September 2023 during which you will conduct the research and draft assessments for the 1,000 companies in Group 1, while WBA analysts will be reviewing on a rolling basis. The research and draft assessments will take place in 11 batches (each batch consisting of around 100 companies per 3-week cycle allowing 2 weeks for research and 1 week to ensure a close feedback loop between your team and WBA. As such, initial assessments and secondary reviews by your team will need to be phased, with detailed timelines for each batch to be confirmed before the beginning of the project. WBA will allocate the batches in alignment with corporate reporting timelines and will provide company lists for all batches before the project starts. Please note that the project timelines might be subject to change.

WBA will review the draft assessments and will make relevant amendments to the assessments in-house. A secondary review by your team, however, will be required in case of systemic issues/misunderstandings. Trainings and training materials, including detailed researcher guidelines, aim to maximise research quality.

**Table 2: Indicative project timeline**

Task/deliverable	Feb	Mar	Apr	May	June	July	Aug	Sept
Training								
Research and draft assessment period by research provider		50	150	160	160	160	160	160
Review of draft assessments by WBA		50	150	160	160	160	160	160

## **YEARS 2 & 3 PROJECT TIMELINE**

The research timeline for Year 2 may be spread out over a longer period of time, likely beginning towards the end of 2023 continuing into Q3 of 2024. The research timeline for Year 3 will most likely begin at the end of 2024 to conclude in June 2025. The overall project will conclude in August 2025 at the latest.

More precise timelines for Year 2 and Year 3 will be established during Year 1.

## **DELIVERABLES**

The list of deliverables is indicative, and any adjustments will be made in accordance with the research provider. If your organisation can only deliver parts of the deliverables, you are encouraged to provide additional details.

1. Research and data collection – Gathering of qualitative and quantitative information disclosed by the companies and available in English in the public domain.
2. Draft assessments – The assessments will include:
  - Researcher judgement in a met/not met (binary) format for each data point
  - Researcher explanation/comment, i.e. excerpt of the researcher’s text that was used for scoring
  - Reference to information source(s) (e.g. corporate report, website etc.) the researcher’s scoring decision is based on
3. Data collection – Data collected will be shared via either:
  - A Microsoft-compatible document (such as Microsoft Excel or Microsoft Access), or;
  - A Microsoft Excel file that is completed using the template and instructions provided by WBA (preferable).

Should the provider choose the first option, the file must be exportable – meaning all the data can be downloaded into an Excel format predetermined by WBA. It is preferred that the research provider use existing WBA tools rather than proprietary tools.

Any proprietary database developed and owned by a third party for which WBA has to pay for use will be strictly avoided.

## **Additional information to be included in the proposal**

Project management and quality control processes, including a project plan, weekly check-ins, monthly reports, closeout report and named senior lead/project managers. We seek a partner that has the ability to remain flexible as well as transparent, given that we work with tight timeframes.

## SUPPORTING NOTES

1. Deadline for submission is **5 January 2023**. Clarifications on the scope of work required may be requested within this period from [m.george@worldbenchmarkingalliance.org](mailto:m.george@worldbenchmarkingalliance.org).
2. Contract decision is anticipated in January 2023.
3. Proposing companies should familiarise themselves with the WBA Procurement Policy which provides a framework for this RFP, in particular p.4-8, p.20-23 and noting that:
  - Draft general terms and conditions are included in the WBA Procurement Policy
  - Standalone Data Protection Agreements are not envisioned for the proposal
  - Proposal review template will be adapted from p.21-22
4. A fixed total cost budget is anticipated, but days, day-rates and fixed costs should be detailed in both pound sterling and 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. Conflicts of interest, particularly related to support services to the companies assessed, should be referenced in the proposal – and how to deal with them.
7. 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.
8. Detailing examples / experience of similar work is encouraged, with particular focus on quality control and oversight.
9. Full research team does not need to be named but lead staff backgrounds and experience should be disclosed where possible. Also the gender breakdown of your team across different functions will be requested.
10. The WBA is a not-for-profit entity who receives funding from national governments and foundations in pursuit of public-good benchmarks. Please consider this during the scoping of any proposals.
11. 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 countries on the Development Assistance Committee (DAC) [List of ODA Recipients](#).
12. 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.
13. WBA's donor institutions may request access to books, records and any supporting documents related to the funding, including eligible costs, for 3 years following the termination or the expiry of the Agreement and WBA's or the Auditor General's right to have access to such documentation for monitoring, audit and evaluation purposes. Therefore, it is required that subcontractors and sub-recipients retain such information and authorize WBA to access copies of any review, evaluation or audit reports as well as to access the subcontractors and sub-recipients' premises or any other premises where activities are taking place, for monitoring and audit purposes.

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