

# REQUEST FOR PROPOSAL FOR SERVICES AS THE RESEARCH PROVIDER FOR THE 2024

## CORE SOCIAL INDICATOR ASSESSMENT

AND

## CLIMATE AND ENERGY BENCHMARK JUST TRANSITION ASSESSMENT

### INTRODUCTION

The World Benchmarking Alliance (WBA) aims to drive private sector engagement on 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) is split into two parts and sets out a draft scope of work for research provider support required to deliver:

- Part 1 - Draft core social indicator (CSI) assessments for 731 keystone companies in the financial system, urban and climate and energy (automotive manufacturing and transport) benchmarks from December 2023 to July 2024. In addition, the research provider will capture the evidence for each CSI in a disaggregated form to provide further clarity on the data (see 'deliverables' section below). Please note that 200 companies in the urban benchmark are included to indicate the maximum possible number of companies assessed; however, these companies are still to be confirmed for 2024 and could be removed making the total number of companies 531.
- Part 2 - Draft just transition (JT) assessments for 131 keystone companies in the climate and energy (automotive manufacturing and transport) benchmarks from May to July 2024. These are the same companies that are being assessed on CSI in the climate and energy benchmarks in Part 1.

The RFP 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 core social indicators (CSIs) from in the [Social Transformation Framework](#) and the just transition indicators from the Climate and Energy Benchmark's [Just Transition Methodology](#).

If your organisation can only participate in part 1 or part 2, you are encouraged to provide additional details. There is a preference for a single provider (or group of organisations under one contract) to provide the entire core social assessment (731 companies), the entire just transition assessment (131 companies), or both.

The CSI research will be done between January and July 2024, with a training period in December 2023. The just transition research will be done in June and July 2024, with a training period in May 2024. The exact weekly deliverables will depend on the final benchmarks' timelines which are still being confirmed.

## EXPECTATIONS OF THE PROPOSAL

We expect that your proposal will, first and foremost, estimate the personnel and financial resources required to deliver the core social indicator and/or just transition assessments 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:

- Research process and quality: interpreting large volumes of written data and assessing companies against our methodologies.
- Familiarity with social and/or just transition topics: depth of knowledge regarding social sustainability and/or just transition issues, including human and labour rights issues and how these intersect with the energy transition.
- Research intensity: being able to handle the research of several hundred companies within short and flexible timeframes.

Moreover, WBA would like to see a staffing plan including how staff changes will be handled throughout the project. We are interested in your approach to retaining people, supported by 2022 and 2023 (up to now) analyst retention rates.

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 Sarah Bradbury at [s.bradbury@worldbenchmarkingalliance.org](mailto:s.bradbury@worldbenchmarkingalliance.org) by Friday 10<sup>th</sup> November 2023. The contract is anticipated to be awarded in at the end of November 2023. Any requests for extensions and clarifications should be sent to the same address above. Project kick-off is anticipated to take place in December 2023 for the core social indicator assessment and May 2024 for the just transition assessment, and both will run until July 2024. The tendering process will be conducted in line with the WBA Procurement Policy 2018-2022.

## **PART 1: SOCIAL BENCHMARK CORE SOCIAL INDICATOR ASSESSMENT**

### **SCOPE OF 2024 CORE SOCIAL INDICATOR ASSESSMENT**

- The core social indicator (CSI) assessment will take place between January and July 2024, with a training period in December 2023.
- It involves generating a draft assessment for each company by applying WBA's 18 core social indicators (CSIs) to all 731 companies in scope. Please note that 200 companies in the urban benchmark are included to indicate the maximum possible number of companies assessed; however, these companies are still to be confirmed for 2024 and could be removed making the total number of companies 531.
- The CSI methodology includes 18 indicators and a total of 46 indicator elements (the number of elements per indicator ranges from 1 to 4). In addition, the research provider will capture the evidence for each CSI in a disaggregated form to provide further clarity on the data (see 'deliverables' section below). This either requires a yes/no answer or involves capturing qualitative or quantitative data from the scored CSI data. WBA will provide a list of these points.
- Companies in scope will come from multiple sectors and will be assessed according to report publication dates. The exact list and timeline will be provided by WBA.
- All research should be based upon publicly available information in English and no engagement or contact with the companies within scope is required on the part of the research provider.

### **PROJECT TIMELINE**

WBA envisions a project period of eight months from December 2023 to July 2024, including a training period of one month in December 2023 during which WBA will provide relevant materials to ensure that your research team can deliver the requirements of the methodology.

The training period will be followed by a seven month research period between January and July 2024 during which you will conduct the research and produce draft assessments which will be reviewed by WBA on a rolling basis. The research and draft assessments will be delivered and reviewed in weekly batches of roughly 40 companies per week to ensure a close feedback loop between your team and WBA. WBA will allocate the batches in alignment with corporate reporting timelines and will provide company lists before the project starts. Please note that the weekly project deliverables might be subject to change within the January to July timeframe if the number of companies being assessed is reduced.

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. Training and training materials, including detailed research guidelines, will be provided by WBA to maximise research quality.

## 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. CSI draft assessments – The draft assessments will include per company:
  - 18 indicators (CSIs)
  - Indicator score (0, 0.5, 1)
  - 46 indicator elements
  - For each indicator element:
    - Score in a met/partially met/not met format
    - Score explanation/comment
    - Evidence/excerpt
    - Reference and page number
    - Link to reference
    - Disaggregated data captured as either:
      - A supporting question requiring a yes/no answer e.g. if the company meets 1(a), does it commit to the Universal Declaration on Human Rights?
      - A requirement to explicitly state the data point(s) e.g. For indicator element 14(b), if the company discloses one or more time-bound targets, what are they?
3. Benchmarks and companies assessed:
  - Research element 1 – 400 companies in the financial system benchmark.
  - Research element 2 – 131 companies in the climate and energy benchmarks (101 transport and 30 automotive manufacturing).
  - Research element 3 – 200 companies in the urban system benchmark. Please note that these companies are included to indicate the maximum possible number of companies assessed; however, they are still to be confirmed for 2024 and could be removed making the total number of companies 531.
4. Data collection:
  - Data collected will be shared either in excel or directly in WBA's research tool, Airtable. 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.

**Table 1: Total maximum data points captured for CSI**

		Finance	Climate	Urban
CSI assessment	# of companies	400	131	200
	# of questions	46	46	46
	Data points	18,400	6,026	9,200

**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 can remain flexible as well as transparent as we work to tight timeframes.

## **PART 2: CLIMATE AND ENERGY BENCHMARK JUST TRANSITION ASSESSMENT**

### **SCOPE OF 2024 THE JUST TRANSITION ASSESSMENT**

- The just transition assessment will take place in June and July 2024, with a training period in May 2024.
- It involves generating a draft assessment for each company by applying WBA's just transition methodology to 131 companies in the climate and energy benchmarks.
- The just transition methodology includes 6 indicators and a total of 24 indicator elements (4 elements per indicator).
- Companies in scope for the assessment are from the automotive manufacturing and transport sectors and will be assessed according to report publication dates. The exact list and timeline will be provided by WBA.
- All research should be based upon publicly available information in English and no engagement or contact with the companies within scope is required on the part of the research provider.

### **PROJECT TIMELINE**

WBA envisions a project period of three months from May to July 2024, including a training period in May during which WBA will provide relevant materials to ensure that your research team can deliver the requirements of the methodology.

The training period will be followed by a two month research period in June and July 2024 during which you will conduct the research and produce draft assessments which will be reviewed by WBA on a rolling basis. The research and draft assessments will be delivered and reviewed in weekly batches of 20-30 companies per week to ensure a close feedback loop between your team and WBA (this number can be reduced if these assessments are completed alongside the CSI assessments). 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 weekly project deliverables might be subject to change slightly within the June and July timeframe.

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. Training and training materials, including detailed researcher guidelines, will be provided by WBA to maximise research quality.

### **DELIVERABLES**

The list of deliverables is indicative, and any adjustments will be made in accordance with the research provider.

1. Research and data collection – Gathering of qualitative and quantitative information disclosed by the companies and available in English in the public domain.
2. Just transition draft assessments – The draft assessments will include per company:

- 6 indicators
  - Indicator score (0, 0.5, 1, 1.5, 2)
  - 24 indicator elements
  - For each indicator element:
    - Score in a met/not met format
    - Score explanation/comment
    - Evidence/excerpt
    - Reference and page number
    - Link to reference
3. Benchmarks and companies assessed:
- 131 companies in the climate and energy (automotive manufacturing and transport) benchmarks.
4. Data collection:
- Data collected will be shared in excel or directly in WBA's research tool, Airtable. 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 can remain flexible as well as transparent as we work to tight timeframes.

## SUPPORTING NOTES FOR PARTS 1 & 2

1. Deadline for submission is Friday 10<sup>th</sup> November 2023. Clarifications on the scope of work required may be requested within this period from Sarah Bradbury at [s.bradbury@worldbenchmarkingalliance.org](mailto:s.bradbury@worldbenchmarkingalliance.org).
2. Contract decision is anticipated at the end of November 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. Conflicts of interest, particularly related to support services to the companies assessed, should be referenced in the proposal – and how to deal with them.
6. Research will be conducted in English and is based on publicly available information, so any researchers will need exemplary English language skills to understand and convey the nuances of the methodology and research.
7. Detailing examples/experience of similar work is encouraged, with a particular focus on quality control and oversight.
8. 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.
9. The WBA is a not-for-profit entity that receives funding from national governments and foundations in pursuit of public good benchmarks. Please consider this during the scoping of any proposals.
10. 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](#).
11. 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's remuneration compares to a real living wage in the relevant countries.
12. 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 for a mutually agreed upon period time following the termination or the expiry of the Agreement.