World Benchmarking Alliance

WBA RESEARCH PARTNER (2024-2026)

RFP Q&A

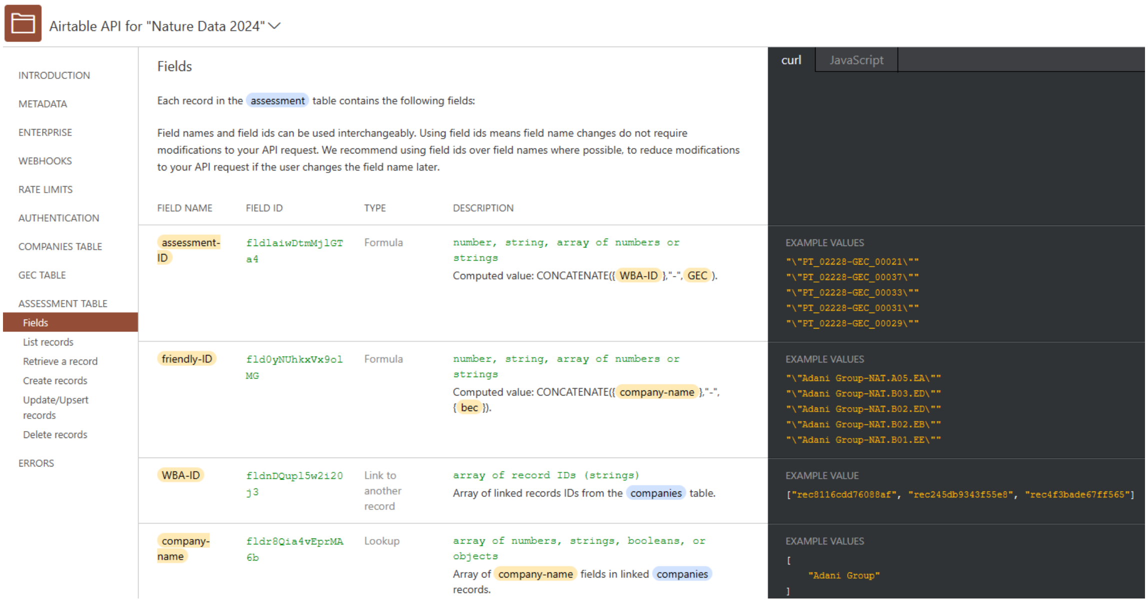
Technology

Who is responsible for building WBA's Airtable tools?

The Airtable-based data storage infrastructure is entirely built and managed by WBA. It will be the responsibility of the Research Partner (RP) to integrate with this system via Application Programming Interface (API), but they have no responsibility for the Airtable infrastructure itself.

Could you explain in more detail the Airtable API?

Airtable provides APIs for every database created in their software out of the box, meaning no API endpoints for the Airtable infrastructure need to be developed by the RP. More details regarding Airtable's API can be found in [their reference documentation]. In addition, documentation outlining the endpoint structure for each of the tables to which the RP will need to contribute data will be provided – see below for an example.



The Airtable infrastructure contains a table per benchmark dataset, along with additional tables for methodology elements which appear in more than one benchmark. Each element or contextual datapoint record has a unique identifier, which RPs will be able to use to ensure they are pushing data to the correct location.

What is the nature of the technical integration between the RP and WBA?

The stipulation of technical integration via API between the RP and WBA works on the assumption that the RP already has some form of technology solution in which its research is conducted and stored. Putting this assumption aside, the technical integration requirement is intended to address the following needs:

1. The data provided to WBA is clean and consistent (e.g. uniform data structures, no variation in the format of data provided in the same field, consistent application of units, no hidden errors such as spaces or carriage returns in the dataset).
2. The data provided to WBA is accurate (e.g. the processes enforced by any tools allow for consistent assessments and thorough quality checking).

3. The means by which the data is provided to WBA and changes made by WBA are returned to the RP are done in a highly efficient way (e.g. avoiding scenarios whereby offline files are being shared back and forth for amendment and import/export into systems, progress tracking is disconnected from the research, the identification of incorrect assessments is manual and communicated sporadically).

Fundamentally we are open to suggestions on how best to achieve these ends. For example, instead of the integration of two separate systems, it could be proposed that the RP works directly in our systems, or WBA works in the RP's proprietary systems. The guiding principle should be how best to meet the needs above, considering the RP's knowledge of their own infrastructure, processes and preferred ways of working.

Is WBA interested in additional services the RP may be able to offer?

WBA are conscious that not all prospective partners are created equal – for example some have greater expertise and experience in technology, while others may focus on deep domain knowledge. All interested parties are encouraged to fully articulate where they believe they can add value to the project and what they believe to be their unique selling points, even if these points are not expressly mentioned in the request for proposals (RFP). Such information if provided will be considered in our review of the proposal's general Approach (see RFP Annex B).

Data

Does WBA have an idea of what types of datasets they are looking to automatically extract?

WBA expects that the RP will rely solely on information disclosed directly by companies as published on their official websites, and not rely on other external sources.

What is the nature of "a record"?

A *Record* refers to a unique combination of a company and either…

- a scored element OR
- a contextual datapoint

… during a period of time.

Depending on the record in question, the period may vary. For example, for all scored elements it is consistent – the current research cycle. However, some contextual datapoints may refer to a particular financial or calendar year, for example in the case where we are recording historical emissions. In any case, the record counts provided in the RFP Annex E should be considered unique.

What is the intention behind collecting source documents in Phase 1?

Collecting these documents in Phase 1 is primarily to understand when in the year each company has previously published documents which are pertinent to their assessment. This understanding in turn allows us to better estimate the workload and plan resources in Phase 2. If the RP already has an internal database of sources and dates, then this can be used to support the planning. The RP should refer to this in their proposal as the intended approach and indicate the percentage coverage of WBAs latest SDG2000 list of companies.

Bear in mind that in Phase 2, regardless of whether the RP already maintains a database of sources, this information will need to be pushed to WBA's infrastructure as part of the assessment.

What kind and quantity of sources does WBA expect?

The nature of company disclosure varies wildly based on several factors, and as such we don't have an estimated number of sources per company. Generally speaking, we are particularly interested in Annual Reports and Sustainability Reports, but this should not be considered exhaustive.

Could you explain the nuance in the SDG2000 attribute collection vs. rest?

Unlike the rest of the research, the data for the SDG2000 company attributes is collected annually. This is a set of firmographic datapoints including revenue, number of employees, emissions and targets data pertaining to the company. The list hasn't been finalised yet, but it will be the same 45 datapoints each year, notwithstanding any changes which we would discuss collaboratively.

Research Process

Is the approach in the RFP for Phase 2 different to previous approaches?

Yes – this approach to completing the research for all 2,000 companies in a single cycle, led by the disclosure timeline of the companies, is a step-change to how we have compiled our research previously. To date, we have produced our benchmarks sequentially, which has allowed us to iteratively develop our research approach and balance resources as a growing organisation. For more information, please see page 3 of the RFP.

Does WBA stipulate any preferences regarding the makeup and organisation of the RP's team?

We do not have any specific requirements regarding the makeup or organisation of your team except for the obligation to pay all staff engaged on the project, be they in-house or contracted, a living wage (see 'Additional Information' on page 10 and 'Selection Criteria' on page 12 of the RFP).

Aside from this, we will judge success of the project based on the critical success factors in the RFP. So long as the RP is providing high quality, accurate data in an efficient manner, we are happy. Note that strategic guidance on the topics and accuracy of the assessments is provided by WBA during the assessment review process, but beyond that it is your responsibility to organise your team with the right mix of seniority, skills and subject matter knowledge to achieve the outcomes described.

What is the role of the Research Partner in public communication?

The RP does not have a role to play in external communication with companies – this is managed by WBA's analyst and engagement teams. If the RP would value recognition in WBA's public communications, to what extent could be discussed in collaboration with our communications team following the award of the project.

What are the expectations around cut-off dates of the research?

Data collection in Phase 2 will be carried out on a rolling basis. The publication of a key piece of disclosure by a company (typically this is the company's Sustainability Report) within the October – October period will act as a trigger point at which data collection and assessment should begin for the company.

Once assessment of the company has begun, we will consider all available company disclosure at that point in time as part of the assessment. That includes the recently published report, as well as information that might be less timebound (such as a webpage), or information that might be subject to a less regular refresh cycle (such as a specific policy that the company publishes publicly).

This is a one-time activity, and once the assessment is complete it will be shared with the company for review and feedback, the results of which will be actioned by WBA. Only in extenuating circumstances would we look to reopen the assessment within the same research cycle.

This rolling approach means that we don't have a set 'cut-off date' across the entire research process, nor are we looking at a set fiscal year, which becomes difficult to manage when you consider the global scope of the SDG2000 list of companies and associated variability in fiscal year periods. Rather we are attempting to gather the most up-to-date information for any given company at the point within our cycle that it is refreshed.

How will we train analysts on the methodologies, and communicate questions regarding their ongoing application?

WBA benchmark teams will provide a minimum of one training session per methodology. These will take place over Teams conference calls, last several hours, and walk through each indicator in detail.

It is important to note, however, that this is not where the training ends. Further upskilling for relevant individuals in the RP's team will continue to take place over the course of Phase 2 as and when needs are identified. This could take the form of additional training sessions, text-based guidance, worked examples or other approaches we design together. There are two areas that are imperative to ensuring that knowledge transfer is taking place effectively:

1. Designing data review and feedback into the technology, so that RP and WBA team members can review work in near real time, whilst project managers are able to track error rates and identify trends in the data which might signal the need for further guidance.
2. Implementing processes and forums where analysts can interact, share knowledge, ask more general questions and have them answered promptly by WBA points of contact.

Both points are referenced in critical success factors one and two for the project (see RFP page 9), and importantly we will cocreate a process that works for all involved.

How flexible is the project plan?

The project planning is agile and should be responsive to the needs of both teams, as well as the disclosure patterns we are seeing from companies. There may be cases where we need to scale up to meet peaks in disclosure publication, but also where we know there is an upper ceiling on our ability to scale, so we need to let some assessments lag in order to flatten the peak.

Some elements need to be fixed however, and as such we are aiming to have all the methodologies streamlined and set in advance of the start of the project. As this work is currently ongoing, please refer to Annex E of the RFP to support the effort and pricing estimates for your proposal.

What expectations does WBA have of data quality levels?

Data quality is imperative – reflected in it being listed as a critical success factor for the project. There are two elements to data quality:

1. Cleanliness. This refers to the data being free from any clear and obvious errors such as the use of incorrect or inconsistent units, format issues or omitted information.

2. Accuracy. This refers to the correct assessment of a piece of data having been completed against the methodology.

The first of these elements is a given – we will not accept datasets that haven't been cleaned.

The second is more complex, and we recognise there is nuance and subjectivity involved in judging "correctness". This is where training and effective lines of communication are vital. We recognise that there will always be a degree of interpretation involved in the assessment of certain indicators and that we are attempting to produce clear judgements from highly varied sources. We should aim to collectively track the number of false positives and negatives being identified and expect to see this number trend down over the course of the project.

WBA will put processes in place to review data and track quality over the course of the project, but we will not dictate any processes on behalf of the RP. Ultimately, we care that the data provided is clean and accurate, and it's down to the RP to ensure that their processes facilitate that outcome.

Please see also the response to *'What is the nature of the technical integration between the RP and WBA?'* above.

Procurement

Do we envisage organising this work following a project-driven model, or would we consider other approaches such as a retained team?

This work will follow a traditional project model with a defined scope, deliverables, and timelines. Whilst we recognise there are advantages to other approaches, such as retaining a dedicated team of analysts within a RP, we do not have the resources to effectively manage that close an engagement.

With that said, it is important to emphasise that we are looking to build a partnership with our chosen vendor – the term Research *Partner* rather than *Provider*, is a carefully chosen one. So whilst the contract might be for this defined project, we don't anticipate a rigid client-supplier relationship and are looking to work with a team biased towards a similar collaborative approach.

Will you accept partial bids?

Bids for part of the work will be accepted. However, it is worth highlighting that one of the benefits WBA stands to gain from a smaller number of suppliers is reduced incremental overheads and increased economies of scale. Therefore, proposals covering the full scope of the RFP are likely to be able to demonstrate an advantage.

Will we accept bids from consortia, or with subcontractors?

Bids from consortia, partnerships and/or working with subcontractors are welcomed (please also see the answer to '*Does WBA stipulate any preferences regarding the makeup and organisation of the RP's team?*', with particular attention to living wages for all engaged on the project). The same party can be involved in multiple proposals should they wish, although we would caution against spreading resources too thinly.

Do we anticipate any changes to the scope of the project?

At the end of the current research cycle, WBA will have completed its initial goal of assessing all seven systems transformations and all 2,000 companies. Whilst previous years have seen the addition of several new benchmarks to achieve this goal, this will not happen over the duration of the next research cycle. The scope of the project – both in terms of the benchmarks and the number of companies – will remain as defined in the RFP.

Note that this also means that benchmarks carried out by Ranking Digital Rights, who began transitioning into WBA on January 1, 2024, will also remain out of scope of this project.

What funds do we have available for the project?

All interested parties are encouraged to deliver a proposal that as best as possible accurately reflects the scope of work, deliverables and timelines outlined in the RFP. It is important to WBA that the funds we put behind the project accurately represent the scale of its ambition, and that any partner we work with does not present an unrealistically low budget which subsequently limits their ability to deliver in a way that is sustainable for their business and their people.

Of course, we do not have unlimited funds for this work. However, to aid in the realistic drafting of projections we can share that the budget earmarked for the project is in the low seven figures, Euros, including taxes and fees.

How many interested parties are there?

WBA have had initial conversations with a dozen interested parties, and we of course hope that these conversations translate into proposals.

Who is the team engaged on the project?

The team assessing the responses will include representatives from across the Research team, including staff responsible for methodologies, assessments, process and technology. The panel's recommendations will also be reviewed by WBA's leadership group and supervisory board.

The project itself will see the RP engaging with a wide range of WBA team members, predominantly members of the Research team. We do not anticipate anything beyond natural attrition in the wider team over the coming period.

Could you provide more detail on how the scoring will be applied?

A score of 0, 5 or 10 points will be applied to each statement under the headings laid out in Annex B of the RFP, depending on how well the assessor feels the proposal meets that requirement. Therefore, there are a maximum of 180 points available. There is no additional weighting applied to the different sections beyond that afforded by the number of statements within each section.

This scoring will form a basis for comparing the proposals, to be supplemented by additional analysis of the content of the proposals carried out by each assessor. All information that influences the award decision will be documented and available to bidding parties following the finalisation of the contract award.

What are the plans for procurement of services post-Phase 3?

Whilst WBA's procurement policy stipulates an open tender for all procurements exceeding €200,000, it should be noted that we view this project as the start of a long-term relationship. We expect that both parties will work to build a fruitful partnership across the duration of the project, which will in turn prove highly favourable in any future procurement. We will look to engage in an open dialogue around future contracts with the RP during Phase 3 of the project.