



# WBA RESEARCH PARTNER (2024-2026) REQUEST FOR PROPOSALS

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# INTRODUCTION

The World Benchmarking Alliance (WBA) is a global non-profit organisation with physical offices in Amsterdam and London. We aim to drive the private sector’s engagement in the UN Sustainable Development Goals (SDGs) through benchmarking, envisioning a future where companies, investors, governments, civil society and individuals can quickly and easily compare businesses.

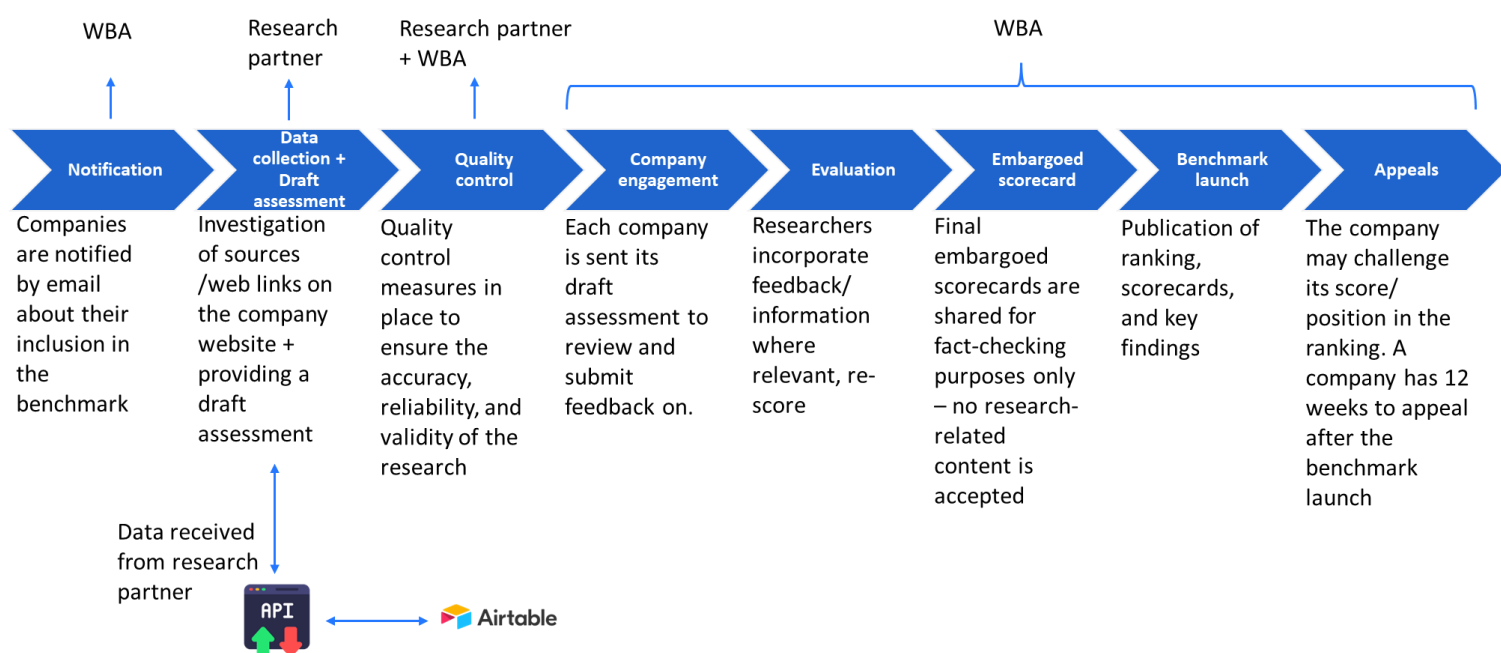
To do this, we have identified seven global systems which need to rapidly transform to put our society, planet and economy on a more sustainable and resilient path. For each of these systems, we have developed methodologies which allow us to assess corporate performance (as disclosed in publicly available documents such as sustainability reports) in the area. Using these methodologies we regularly assess a sample of 2000 “keystone” companies, producing benchmarks which rank their performance against each other. In doing so, we collect detailed information on where the private sector is performing well, and where there is room for improvement.

## OUR RESEARCH PROCESS

To date, WBA has produced its benchmarks sequentially one after another, which has enabled the iterative development of our research approach since founding in 2018. However, this has its limitations. As a result, we have begun laying out a clearer, more predictable model, which will unify each team’s benchmarking process and result in all 2000 companies being assessed during the first year of a two-year cycle.

Starting in October 2024, we will assess company policies and performance across benchmarks on a rolling basis, based on the dates at which companies publish relevant documentation such as their annual and/or sustainability reports. A critical factor in the success of this approach will be understanding the reporting cadence of the keystone company universe, which in turn will allow us to anticipate peaks in demand for both WBA and Research Partner (RP) resources.

Figure 1: Overview of the end-to-end research process for a given company.



# SCOPE OF WORK

The scope of the project is influenced by two key elements – the company list and the methodologies against which each company should be assessed.

1. The Company List

WBA maintains a list of 2000 “keystone” companies, each of which is assessed against one or more methodologies depending on the nature of their impact upon the seven system transformations that need to take place to achieve the SDGs.

2. The Methodologies

Each of the benchmark methodologies comprises a set of indicator elements, and a set of contextual datapoints.

Extrapolating this relationship of companies to methodologies results in a total anticipated universe of approximately 1.2 million records to be collected. For more detail on how many elements and datapoints are contained in the methodologies, please see Annex E.

Please note that:

- An extensive methodology review is currently underway with a focus on simplification, so we anticipate the total number of datapoints to decrease for the 2024-2026 research cycle.
- The current [list of 2000 companies](#) can be found on our website. This list will be revised before the 2024-2026 research cycle, but no substantial changes are anticipated.
- All research should be based upon publicly available information only. No collection of data from sources behind a paywall is required.
- Only information published in English is accepted.
- The RP is not expected to create or revise any methodology or elements therein.
- No production of analysis or insights derived from the data collection is required.
- All data and assessments are published by WBA under a [Creative Commons Attribution 4.0 International License](#).



# ACTIVITIES AND DELIVERABLES

## Phase One: Setup and Training

July 1, 2024 – October 5, 2024

The first phase of the project entails preparatory work to ensure the smooth operation of the data collection phase. The focus should be on project planning and software development, in close collaboration with the WBA team.

### Activities

1. Technical integration  
WBA uses [Airtable](#), a low-code application development platform, to collect and review data. Within this system, several databases will be created each with their own Application Programming Interface (API) endpoint. Within these databases will be a range of unique identifiers for the records which need to be populated in the data collection phase.  
  
It is expected that the RP leverages these APIs to write data to the correct location in near real-time as work is completed.
2. Source identification  
Establish a comprehensive dataset of relevant source materials for each company, to be stored in WBA's source library. This dataset will inform the planning for phase two, as well as being referenced in the data collection itself.
3. Methodology implementation  
Refers to all work needed to implement methodologies in the RP's systems and processes.
4. Methodology training  
Several training sessions will be organised by WBA to familiarise the RP's analysts with the methodologies. The RP is expected to actively engage in the preparation of these sessions to ensure they are of maximum relevance, and to feed back any gaps that emerge.

### Deliverables

1. API integration between WBA and RP software to enable near real-time flow of data.
2. Project planning document detailing the process that will be undertaken by the RP in Phase Two. RP should clearly lay out the steps of the research process including quality control, the predicted cadence of draft assessment delivery and mechanisms for receiving and acting on feedback from WBA analysts.
3. Source library dataset, including copies of documents, webpage captures, and metadata.
4. Collection and analysis of company reporting dates as needed to support project planning.
5. Plan to ensure effective communication between RP and WBA teams. In addition to Airtable, we utilise Microsoft Teams as our primary communication and collaboration platform.
6. All components of WBA methodologies are implemented in the RP-side software and processes to eliminate the need for any "setup" work during the data collection phase.
7. Engagement in training sessions conducted by WBA on each of the methodologies.



## Phase Two: Data Collection

October 7, 2024 – October 6, 2025

The data collection phase makes up the majority of the project time and deliverables. It is during this phase that RP analysts will be collecting and assessing information which is then passed to WBA analysts and reviewed in close collaboration with them.

### Activities

1. Data collection  
Gathering of qualitative and quantitative information publicly disclosed by companies.
2. Assessment  
Scoring of data collected against the methodologies for which the company is within scope. Completion of quality assurance prior to transferring data to WBA.
3. Data feedback, review and iteration  
Engagement with WBA analysts to continuously receive and act upon feedback, both specific to a given assessment as well as more general feedback on methodology application or processes.

### Deliverables

1. Continued maintenance of source library dataset, including copies of all documents, captures of all webpages, and related metadata.
2. Research for each company in the keystone universe comprising two different kinds of information:

<b>1. Element Scores</b> A record for each of a defined set of methodology elements, stating the researcher's assessment for that element.	<b>2. Contextual Datapoints</b> A record for each of a defined set of datapoints, stating the required data in the format stipulated for that datapoint.
<b>For each record from 1. or 2. above...</b>	
3. Source – Details of the publicly available document or webpage which was used to make the assessment or record the datapoint.	
4. Evidence – An excerpt of the most pertinent passage in the source which supports the record.	
5. Analyst Comment – Brief explanation of the analyst's decision-making process, giving the rationale for the assessment made. In the majority of cases this will be a selection from a set of standardised phrases.	

3. A target number of assessments by agreed dates, as defined in the project planning document.
4. Rigorous project management process for sharing and acting upon WBA quality assurance, including continuous implementation of specific changes, as well as regular high-level reviews of quality and progress against target assessment numbers.



## Phase Three: Review & Iteration

*January 1, 2026 – June 30, 2026*

WBA aim to publish the results of the research conducted under Phase Two in January 2026, followed by a 10-month period during which WBA analysts will work to engage companies, socialise the research findings and conduct further analysis of the data. During this period, research demand on the RP will be greatly reduced.

### *Activities*

1. Project review and iteration  
Detailed review of what went well during Phase Two, and where challenges arose.  
Improvement of systems and processes in preparation for the next research cycle.
2. Source identification  
Ongoing maintenance of the source library dataset in anticipation of the next research cycle.
3. Keystone data collection  
Collection of a small number of attributes related to the SDG2000 keystone companies.

### *Deliverables*

1. Project retrospective process, integrating feedback from both WBA and RP stakeholders, culminating in the production of a short report outlining successes, challenges and recommending changes for the next research cycle.
2. Continued maintenance of source library dataset, including copies of all documents, captures of all webpages, and related metadata.
3. Research for each company in the keystone universe to update a subset of 90 attributes for each company (see Annex E).



# TIMELINES

## Request for Proposals

The RFP process will contain several opportunities for questions and clarifications, following the timeline detailed below.

Activity	Date
Request for Proposals Published	April 17
Q&A Session Period 1*	w/c April 29
Q&A Session Period 2*	w/c May 13
Anonymised Summary of Q&As Published	May 17
<b>Final Response Deadline</b>	<b>May 31</b>
Post-deadline Pitches	w/c June 03
<b>Selection Deadline</b>	<b>June 07</b>

\* Q&A sessions conducted with interested parties upon request.

## Project

The project will commence with the awarding of the contract, no later than July 1, 2024, and will run until June 30, 2026. It will follow the broad timeline outlined below, which we will refine together.

	Activity	Date	
Pre-Cycle	Phase 1	Technical integration	
		Source identification	
		Methodology implementation	
		Methodology training	
2024-2026 Cycle	Phase 2	Data collection	
		Assessment	
		Data feedback, review and iteration	
	Data publication		January 2026
	Phase 3	Project review and iteration	
		Source identification	
Keystone data collection			
End of research cycle		October 2, 2026	
2026-2028 Cycle	Start of the research cycle	October 5, 2026 – September 29, 2028	





# BUDGET

WBA encourage you to propose what you believe to be an appropriate budget for the scope of this work in your response. We will gladly work with you during the procurement process to ensure that your response is competitive and in line with the funds we have available for the project.

# YOUR RESPONSE

WBA expects that proposals will, first and foremost, outline your approach to meeting the deliverables listed in this RFP during the three project phases (see “Activities and Deliverables” section).

Crucially, this description of your approach should be accompanied by projections of the personnel and financial resources required to produce the deliverables in the proposed timeframe. Please ensure you propose a total budget, along with breakdowns for the different activities outlined across the three phases. The provision of a projected cost per record (see Annex E) for Phase 2 would be appreciated.

## Critical Success Factors

Critical success factors ensure clarity, accountability, and successful outcomes of the research processes and are essential to effective collaboration. Your response to this RFP should detail how you intend to meet each of these critical success factors.

1. Building a relationship of transparency, trust and shared ownership of outcomes. Success for both WBA and the Research Partner is a quality dataset; everything else contributes to that.
2. Efficient processes, eliminating duplicated or unnecessary effort wherever possible. This is particularly vital when it comes to communication flows between people and technology. Clear communication protocols, including regular progress updates, feedback mechanisms, and points of contact for addressing issues or concerns must be established.
3. Leveraging technology where appropriate to eradicate repetitive manual tasks, allowing the people working on the project to utilise their time effectively. Smooth integration between the research partner’s technology and WBA’s is essential.
4. Research must be of the highest quality from the perspectives of both methodology application and data cleanliness.

## Additional Information

Additional information WBA anticipates receiving through your proposal includes the following areas:

- Your approach to finding and storing the most recent publicly available corporate disclosure, and your coverage of the SDG2000 list.
- How you guarantee high levels of data coverage, along with exemplary accuracy and cleanliness in datasets that you produce.
- Demonstrable familiarity with the topics covered by WBA’s seven system transformations.
- Description of your project management methodology, in particular outlining how risks related to the project (such as delays, quality issues), will be identified and mitigated.



- Information on any tools in use, 3<sup>rd</sup> party or proprietary, particularly those which automate any part of the research process. Details on the role of such tools, monitoring processes you have in place, and their estimated accuracy (in the case of applied Artificial Intelligence) would be welcomed.
- Information on your ability to develop integrations between any 3<sup>rd</sup> party or proprietary software that you use in the data collection process and other 3<sup>rd</sup> party programs.
- Details on how you maximise employee retention, including how the impact of attrition will be managed during the project. Information regarding your staffing structure, the personnel planned for the project, the proportion of directly employed versus contracted personnel and analyst retention rates for the past 3 years would be welcomed.
- Guarantees regarding the payment of living wages to all members of staff engaged in any way on the project. Details regarding the hourly and monthly pay of employees across the various roles, not including overhead costs, should be provided within the proposal. Anonymised employee pay slips will also be requested for the lowest-paid analyst working on the project. During the project, WBA may also request to conduct employee interviews and/or review employee bank statements as part of our due diligence process to ensure a living wage is paid.
- The most recent day rates for all staff members anticipated to be involved in the project, along with a breakdown of sub-contracting costs if relevant.
- Your approach to the ownership of data and documentation produced on behalf of WBA resulting from this project.
- Any conflicts of interest, particularly related to support services provided to the companies assessed, should be referenced in the proposal, alongside how you plan to manage them.
- Your current CSR and/or sustainability policy.

## Contact Details

Any requests for clarifications may be sent to [a.guy@worldbenchmarkingalliance.org](mailto:a.guy@worldbenchmarkingalliance.org). Responses to this RFP should be sent to this same address no later than **May 31, 2024**.

The tendering process will be conducted in line with the WBA Procurement Policy 2018-2022 (see Annex C).



# ANNEXES

## A) Supporting Notes

1. The deadline for submission is 31 May 2024. Clarifications on the scope of work may be requested within this period from Alex Guy ([a.guy@worldbenchmarkingalliance.org](mailto:a.guy@worldbenchmarkingalliance.org)).
2. Contract decision is anticipated by the second week of June.
3. A fixed total cost budget is anticipated, but days, day rates and fixed costs should be detailed in euros, inclusive of VAT or any other applicable taxes. Breakdowns of the time and cost for various phases of research are encouraged, including costs incurred during the training period and research period respectively. Regarding the latter, cost breakdowns into cost per element are encouraged.
4. Detailing examples/experience of similar work is encouraged, with a particular focus on quality control and oversight.
5. 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.
6. 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.
7. It is anticipated that some proposing research partners 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.
8. 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.



## B) Selection Criteria

All proposals will be assessed using the following criteria:

### Approach

General impression and feasibility of the approach  
A clear understanding of WBA benchmarks and mission

### Quality and proposed scope of the work

The research proposal outlines how it will meet WBA's research deliverables  
The research proposal fits with WBA's research process and timeline  
A clear description of how the quality of the research will be maintained  
Process and deliverables are clearly described

### Qualifications and experience of the organisation and team

Demonstrated experience with the transformation topics  
Demonstrated experience with similar assignments/research processes  
Clear approach for staffing plan and management of staff retention  
Team members have demonstrated skills and experience with similar projects and activities  
Living wages and good working conditions for employees

### Data management and technical capability

Understanding of and commitment to data management best practice  
Demonstrated ability to develop the integrations needed to facilitate frictionless data transfer  
Clear explanation of how technology is leveraged to ensure data is clean and accurate

### Project management

Clear project management description  
Work and communication style that is compatible with the WBA team

### Cost and budget

Overall cost, cost efficiency  
Completeness of financial considerations, clarity and transparency of budget plans

All proposals will be subject to an initial review. Any responses not meeting the requirements will be rejected in full and will not be assessed or scored further. Proposals not rejected will be scored using the following scoring model:

Table 1: Scoring model

Points	Interpretation
10	<b>Excellent</b> – Overall the response demonstrates that the partner meets all areas of the requirement and provides for all of the areas evidence requested in the level of detail requested. This, therefore, is a detailed excellent response that meets all aspects of the requirement leaving no ambiguity as to whether the partner can meet the requirement.
5	<b>Good</b> – Overall the response demonstrates that the partner meets all areas of the requirement and provides for all of the areas evidence requested, but contains some omissions in relation to the level of detail requested in terms of either the response or the evidence. This, therefore, is a good response that meets all aspects of the requirement with only a trivial level ambiguity due the partner's failure to provide all information at the level of detail requested.



0	<b>Poor</b> – The response does not demonstrate that the partner meets the requirement in one or more areas. This, therefore, is a poor response with significant ambiguity as to whether the partner can meet the requirement due to the failure by the partner to show that it meets one or more areas of the requirement and/or no response has been provided.
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## C) Tender conditions and confidentiality contractual requirements

This section of the RFP sets out WBA's general policy requirements and the general conditions relating to this procurement process. Please note the following:

The process will be conducted in line with [WBA's procurement policy](#).

All information supplied to you by WBA, including this RFP and all other documents relating to this procurement process, either in writing or orally, must be treated in confidence and not disclosed to any third party (save to your professional advisers, consortium members and/or sub-contractors strictly for the purposes only of helping you to participate in this Procurement Process and/or prepare your proposal) unless the information is already in the public domain or is required to be disclosed under any applicable laws.

You shall not disclose, copy or reproduce any of the information supplied to you as part of this Procurement Process other than to prepare and submit a proposal. There must be no publicity by you regarding the procurement process or the future award of any contract unless WBA has given written consent to the relevant communication.



## D) Research Methodologies

All methodologies are currently under review to ensure relevance, alignment across benchmarks where applicable, and incorporate learnings derived from past iterations. Please note that the review process may result in changes in the methodology and hence the number of elements in each transformation is not final.

The final methodologies for the 2024-2026 research cycle will be available on our website before the start of the research with the research partner.

### **Social transformation:**

[Social Transformation Framework](#)

### **Social spotlights:**

[Gender Benchmark](#)

[Corporate Human Rights Benchmark](#)

### **Urban transformation:**

[Urban Benchmark Methodology](#)

### **Finance:**

[Financial System Benchmark Methodology](#)

### **Decarbonisation and Energy:**

[Electric Utilities Benchmark](#)

[Transport Benchmark](#)

[Automotive Benchmark](#)

[Oil and Gas Benchmark](#)

[Buildings Benchmark](#)

[Heavy Industries Benchmark](#)

[Just Transition Methodology](#)

### **Digital:**

[Digital Inclusion Benchmark](#)

### **Nature:**

[Nature Benchmark](#)

### **Nature spotlight:**

Oceans (Under development)

### **Food and Agriculture:**

[Food and Agriculture Benchmark](#)



## E) Company and Element Estimates

The table below provides an estimate of the number of records (scored elements as per transformation methodologies and contextual datapoints), and the number of companies per benchmark.

Transformations	No. of scored elements	No. of contextual datapoints	No. of companies
Social	46	100	2,000
Urban	117	24	300
Financial	76	300	400
Decarbonisation and Energy	230	-	450
Digital	130	132	200
Nature	88	120	700
Food and Agriculture	145	50	350
<b>Spotlight benchmarks*</b>			
Gender Assessment	41	-	2,000
Gender Benchmark	35	-	112
CHRB	200	-	200
Just Transition	24	-	450
Ocean	60	-	100
Ranking Digital Rights	300	-	50
Seafood Stewardship Index and Small-scale producer work	70	-	350
<b>Institutional data collection</b>			
SDG2000 company attributes data	-	45**	2,000

*\*Includes estimates of already established and potential future benchmarks*

*\*\*SDG2000 company attributes are reviewed annually, so please double this figure. You should factor a single data collection looking at disclosure published pre-October 5<sup>th</sup> 2024 in Q4 of 2024, plus ongoing data collection throughout Phase 2 as part of the rolling assessment.*





## F) Change Log

Any amendments made to this RFP will be recorded in this annex.

<b>Version</b>	<b>Date</b>	<b>Description</b>
1	17 <sup>th</sup> April 2024	First version of document published.
2	22 <sup>nd</sup> May 2024	<p>(Page 3) Figure 1 updated. Arrows between the second process block and 'API', and between 'API' and 'Airtable' previously indicated data flow in a single direction. They now indicate data flowing in both directions.</p> <p>(Page 7) Phase 3, Deliverable 3 incorrectly referred to "a subset of 100 attributes". This has been updated to read "a subset of 90 attributes", to correctly align with the 45 SDG2000 company attributes listed in Annex E, multiplied by the two rounds of data collection which uniquely apply to these datapoints.</p> <p>(Page 17) The Change Log was incorrectly labelled Annex E. It has been updated to Annex F.</p>

