



# Assessing WBA's relationship with Civil Society Organisations (CSOs)

February 2025

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# Executive summary

Every three years, the World Benchmarking Alliance (WBA) is externally evaluated by a third-party. This is done with the aim of taking a first high-level stock of WBA's effectiveness, coherence and first signs of impacts as part of WBA's Impact, Learning and Development strategy. In 2024, Technopolis Group carried out this evaluation. [The External Evaluation Report](#) found that WBA provides an important platform for Civil Society Organisations (CSOs) to participate in global conversations about [WBA's seven systems transformations](#), build networks, and establish connections with other Allies and corporates. However, despite WBA being a valuable source of information for CSOs' policy development and communications, the external evaluation report also suggests that this relationship is not being used at its full potential. WBA's relationships with civil society are often ad hoc, making engagement more challenging and less effective in inducing corporate change in policies, strategies, and practices. This study explores the reasons behind these ad hoc relationships, and suggests valuable steps that WBA needs to take in order to develop a consistent and centralised CSO engagement strategy, a priority for WBA's future impact. A clear and cohesive strategy will help maximise WBA's influence, foster stronger relationships with CSOs, and ensure that WBA's work is better integrated into broader efforts for corporate accountability, especially in regions where local context and knowledge are critical.

## Methodology

This case study was based on a combination of semi-structured interviews and focus group discussions, with both internal and external stakeholders. Externally, seven in-depth interviews were conducted with CSOs that have engaged with different transformations within WBA. Internally, two focus groups were organised with WBA's Engagement teams, alongside five individual interviews with key individuals from both the engagement and policy teams. These discussions provided valuable insights into how these CSOs interact with WBA across different transformations and highlights areas for improvement on WBA's engagement strategy with CSOs.

## Research insights

- **Clarify positioning and strategy alignment:** WBA needs to clearly define its role and purpose when engaging CSOs in the sustainability ecosystem to ensure internal alignment, and address challenges in connecting with CSOs compared to other stakeholders like investors, governments and companies. This includes deciding whether to appeal to specific CSOs or adopt a broader approach.
- **Centralise the coordination of CSO Engagement to mitigate risks:** The current decentralised and flexible approach allows for ad hoc adaptive relationships, but risks engagement fatigue, communication gaps, and reliance on individual networks. A more centralised strategy could ensure consistency, sustained relationships despite staff turnover, and define how to leverage current networks, such as in Europe, to expand outreach globally .



- **Strengthen collaborative relationships and tools:** Many CSO's relationships are transactional rather than collaborative. A clearer strategy, supported by tools such as a relationship guidebook, would foster deeper and sustained partnerships, reduce engagement fatigue, and allow WBA to leverage CSO strengths for greater impact, especially in the global south.
- **Identify impactful relationships to build CSO strategy:** Use the typology outline in this case study on WBA's relationship with CSOs based on our impact stories, to identify which type of relationship WBA needs to build, strengthen and support in line with our sphere of influence, action and mission.

## Recommendations

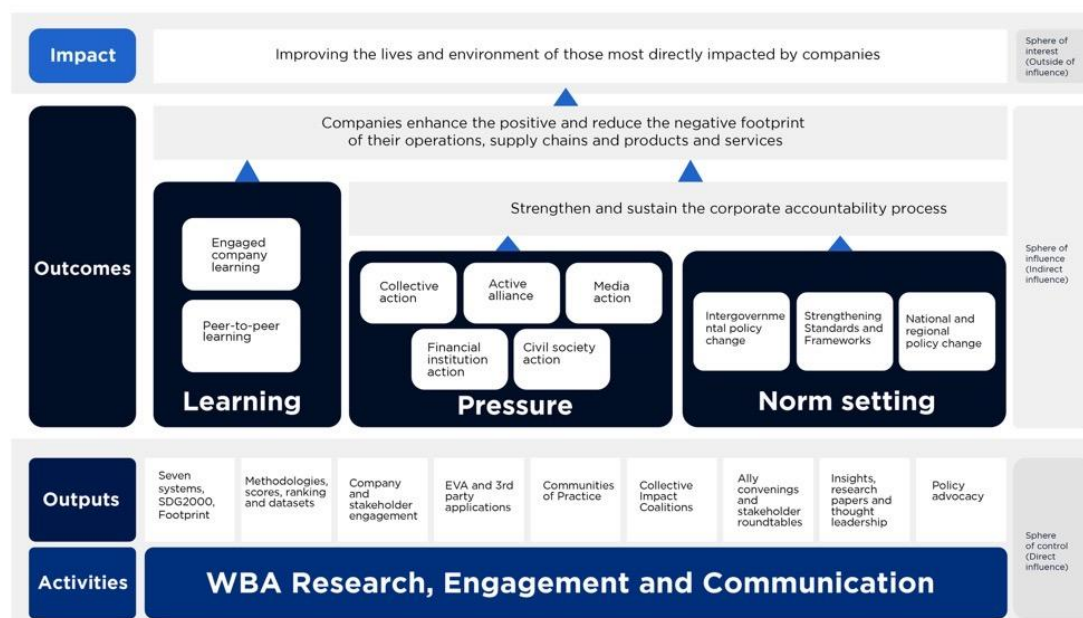
- Hire a new Civil Society Lead to strengthen the relationship between WBA and CSOs through the development of a centralised CSO engagement strategy.
- Develop a centralised CSO Engagement Strategy across WBA and define whether the new CSO lead should be accountable for this. Steps needed towards these include, defining how WBA wants to be perceived in the sustainability ecosystem among different stakeholders, identifying impactful relationships with current and potential Allies, identifying regional priorities for long term sustainable engagement, creating materials to upskill CSOs on using our benchmarks for their efforts and including relationship building, strengthening and sustaining as part of relevant colleagues' accountabilities.
- Develop a comprehensive set of CSO engagement guidelines. This should include an overview and training for the entire WBA team, particularly the engagement team, on how to provide data and effectively use WBA materials tailored to the needs of different CSO groups.



# Introduction

At WBA, we assess the contributions of the 2,000 most influential companies towards achieving the Sustainable Development Goals (SDGs) and global agendas such as the Paris Agreement and the Global Biodiversity Framework. We do this across seven system transformation systems, including Financial, Urban, Climate, Food & Agriculture, Nature, Digital, and Social. These systems are critical for guiding society and the global economy onto a more sustainable path in line with the SDGs. Our mission is to drive positive transformation in how businesses impact people, workers, communities, and the environment—especially in developing countries—through our research, engagement, and communication activities. These efforts align with the three main impact pathways outlined in our Theory of Change: Learning, Pressure, and Norm Setting.

FIGURE 1: WBA'S THEORY OF CHANGE



Civil society organisations (CSOs) —non-profit organisations that represent different segments of the society advocating for public interest in social, political, and economic issues— are key actors in WBA's Theory of Change, particularly for the Pressure and Norm Setting impact pathways. CSOs can use WBA's benchmarks' results and methodologies to pressure lagging companies to improve their performance. They can also play a vital role in the Norm Setting pathway, which involves influencing or informing regulatory changes using evidence from WBA's benchmarks and active participation in the broader movement around corporate accountability. Through coalitions, stakeholder roundtables, research dissemination, and policy advocacy, WBA's policy engagement team works closely with CSOs to develop, analyse, or evaluate how to input to public policy developments. This can lead to intergovernmental policy changes, strengthen standards and frameworks, and influence national and regional policies. Both Pressure and Norm Setting pathways contribute to enhancing and sustaining corporate accountability, ultimately ensuring that



companies reduce their negative impacts and enhance their positive contributions across operations, supply chains, products, and services.

The external evaluation report found that WBA provides an important platform for CSOs to participate in global conversations about transformation challenges, build networks, and establish connections with other allies and corporates. WBA is also seen as a valuable source of information for CSOs' to inform their strategy, policy development and communications. By supporting CSOs—mainly through providing accurate and comprehensive data, as well as networking opportunities—they are able to amplify and use our data and insights effectively, facilitating both their impact and ours. These interactions take various forms, including through Collective Impact Coalitions,<sup>1</sup> the Alliance<sup>2</sup>, media partnerships, policy development, dissemination of benchmark results, bilateral meetings, benchmark methodology development, and CSOs using WBA's benchmarks for their own advocacy efforts. Thus, CSOs are essential to WBA's corporate accountability strategy. For example, during consultation processes, WBA recognises their importance in amplifying the lived experiences of those communities that are most impacted by corporate activities and driving advocacy for policy change that takes into accounts the needs of these communities.

While WBA has a history of impactful engagement with CSOs, the 2024 external evaluation suggests that these relationships are often ad hoc, making sustained engagement more challenging and less effective in driving corporate change in policies, strategies, and practices. A lack of a centralised CSO strategy at WBA limits the potential leverage that external stakeholders like CSOs can exert to drive corporate behavioural changes. Moreover, the overreliance on few CSOs, can lead to exhaustion for these organisations, while also making it difficult for WBA to identify gaps in relationship-building and determine future priorities.

The evaluation also highlighted that the Norm Setting pathway is the longest route to impact for WBA. Its success, requires a robust network of key actors, such as CSOs, who can maintain momentum, legitimise WBA's work, and extend its reach through their networks and activities. This will contribute to making WBA's impact more sustainable. In particular since CSOs are important in connecting WBA with the individuals on the ground whose realities WBA aims to assess, especially in the Majority World. Engaging with these bottom-up stakeholders complements WBA's top-down strategy, as CSOs possess deep local knowledge, strong networks, and close connections to the communities most affected by corporate actions. However, as graph 2 shows, only 15% CSOs that WBA engages with are headquartered in countries from the in the Majority World, compared to 85% North Atlantic. Although a lot of our work with CSOs headquartered in the North Atlantic is with colleagues based on the Majority World, the lack of representation from organisations

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<sup>1</sup> A Collective Impact Coalition (CIC) is a time-bound coalition of global multi-stakeholders who have influence over companies, with WBA Allies at its core. CIC members take coordinated actions to incentivise key companies to improve their performance on a specific issue. Progress is measured over time using WBA's benchmarks. CIC members take coordinated actions to incentivise key companies to improve their performance on a specific issue. Progress is measured over time using the WBA benchmark.

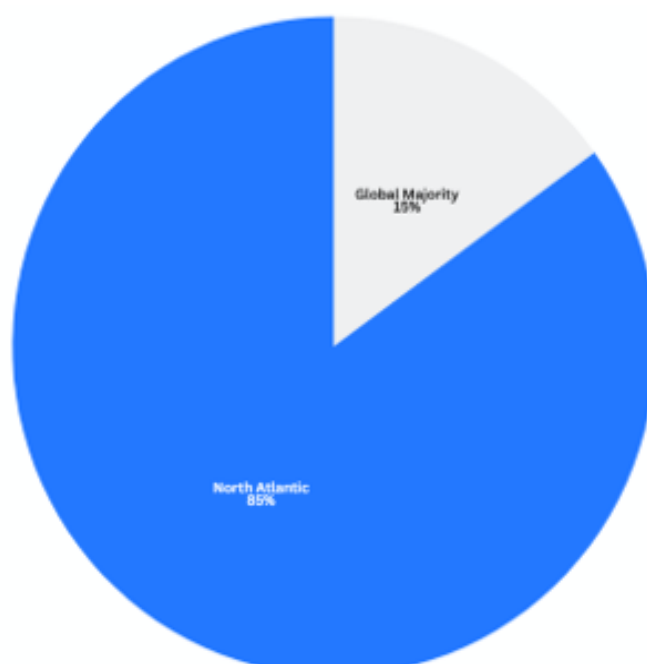
<sup>2</sup> Network of organisations operating across global, regional, and local spheres, aiming to influence how the private sector contributes to fulfilling the SDGs, as a tool of engagement within WBA, through Alliance events, CIC initiatives and methodology consultation processes.





headquartered in this region might limit our capacity to include diverse perspectives. This is important as we look to create regional narratives and localised stories for advocacy.

FIGURE 2: CSOs IN THE GLOBAL MAJORITY WORLD AND THE NORTH ATLANTIC



Therefore, developing a consistent and centralised strategy for CSO engagement is a priority for WBA's future impact. A clear and cohesive strategy will help maximise WBA's influence, foster stronger relationships with CSOs, and ensure that WBA's work is better integrated into the broader efforts for corporate accountability, especially in regions where local context and knowledge are critical, and where WBA policy asks will have significant impact.

### Scope of the case study

This case study aims to contribute to the development of a CSO engagement strategy at WBA, as recommended by the external evaluation, by examining the current relationship between WBA and CSOs. Through an analysis of both successful and less effective relationships with CSOs, combined with insights from internal consultation calls with engagement teams, this case study provides a deeper exploration of the steps, lessons learned, and challenges WBA needs to address in developing a comprehensive CSO strategy.

To this end, the case study explores a wide range of topics, including how CSOs use WBA's benchmarks and materials, WBA's sphere of influence within this group, how WBA is perceived within the CSOs ecosystem, what added value WBA brings, and what strategies could improve its relationships with CSOs. By gaining insights into CSOs' expectations, motivations, and perspectives when collaborating with WBA, as well as their views on our methodologies, benchmarks, reach, and impact, WBA can take meaningful steps toward developing an effective engagement strategy.



The findings from this case study will also serve as valuable background information for the incoming Civil Society Engagement Lead, who will join WBA at the end of 2024, by providing an overview of the WBA–CSO relationship and key challenges and priorities for 2025.

## **Methodology**

This study was based on a combination of semi-structured interviews and focus group discussions with both internal and external stakeholders. Externally, seven in-depth interviews with civil society organisations (CSOs) that have engaged with different transformations within WBA were conducted. These organisations include ShareAction, Oxfam, UNICEF, Reforestamos, CLR (Climate and Rights Lab), the Global Alliance for the Future of Food, and Clim-Eat. The interviews were conducted over the months of July and August 2024 and provided valuable insights into how these CSOs interact with WBA across various systems. Internally, two focus groups with WBA's engagement teams, alongside five individual interviews with key individuals from both the engagement and policy teams were conducted. These discussions were designed to explore internal perceptions of WBA's engagement strategy with CSOs and identify areas for improvement. The collected data was analysed using qualitative tools and enhanced by AI language models, which allowed us to uncover recurring themes, extract meaningful insights, and recognise areas of alignment or tension between WBA and the CSOs.

## **Challenges and learning**

Like any comprehensive study reliant on voluntary participation, access to stakeholders posed a challenge. Coordination with various transformations within WBA was instrumental in reaching out to potential interviewees. Some transformations successfully facilitated connections with at least one CSO participant, while others faced difficulties in securing interviews. However, with the support of our teams, we were able to ensure a diverse and representative range of perspectives from the CSOs we engaged.





# Key findings

## Discussion

Our interviews and focus groups revealed key insights into our current CSO engagement strategy. Discussions with the engagement team highlighted the need for WBA to clarify its positioning when working with CSOs. This clarity is crucial to differentiate ourselves in a competitive landscape and to ensure alignment within the organisation. Presently, ambiguity in our strategy has sometimes led to misalignment with other organisations and even within our own teams. This raises strategic questions such as: Should WBA refine its position to appeal to specific stakeholders or adopt a broader approach to cater to a diverse range of organisations? Additionally, why has connecting with CSOs been slower than with investors—is this due to capacity challenges or a matter of positioning? What types of relationships does WBA offer CSOs, and what investments are needed to make these relationships more impactful?

Our current CSO engagement strategy is largely shaped by how each transformation operates, with individual relationship holders playing a significant role. This decentralised approach has allowed WBA to adapt to regional needs and prioritise strategies in the complex interplay between public, private, and NGO sectors as they come. While this flexibility has advantages, it also creates challenges, such as missed communication opportunities and the risk of engagement fatigue with certain stakeholders. Most critically, WBA reliance on individual networks can be problematic if those individuals leave, making it difficult to maintain or rebuild those connections.

Moreover, the varying priorities of each transformation also means that they require different levels of engagement with CSOs. For example, the Social transformation requires higher engagement with CSOs, while others, like Financial Systems transformation, may need a more distant strategy. This depends on the topics at hand and the priorities of both the teams and individuals involved. Engagement also varies based on whether WBA is influencing multilateral organisations, governments, or companies, as each requires different approaches from CSOs. This fluidity has led some CSOs to feel left out due to shifting priorities, which can harm long-term relationships—especially concerning our alliance strategy and need for ongoing collaboration.

In addition, many of WBA's relationships with CSOs tend to be more transactional than collaborative. While CSOs appreciate WBA as a reliable data provider supporting their advocacy efforts, their perception of us as playing an advocacy role varies by transformation and is not consistent across the board. Although this aligns with our current strategy, limiting WBA association with certain advocacy efforts can also limit its influence in the corporate accountability ecosystem, where CSOs play a vital role.

This highlights WBA's complex positioning—balancing close ties with businesses while supporting advocacy efforts that align with CSO campaigns. This dual role offers advantages, such as promoting corporate learning and mediating between



stakeholders, but also presents challenges. WBA proximity to businesses has, at times, complicated its image among CSOs, leading to hesitation in joining coalitions for public policy or long-term advocacy. Conversely, aligning too closely with CSOs may limit WBA's ability to influence governments or companies that are averse to such organisations. Internally, there is ongoing debate about whether our flexible engagement strategy is optimal for scaling and sustaining impact.

WBA's success with investors shows that a unified, coordinated approach can lead to significant impact, and a centralised CSO strategy could similarly benefit WBA. Such a strategy would allow WBA to maintain flexibility while addressing some of the negative perceptions associated with its current approach. It would also help WBA expand its networks beyond Europe and engage with CSOs in regions where WBA lacks capacity. Understanding the dynamics of CSOs, particularly in the Global South, would facilitate clearer due diligence when identifying potential partners and allow WBA to better align with local strategies.

WBA's CSO engagement strategy should be based on a clear definition of WBA's role and the unique value that this offers to CSOs. In other words we should be compiling a list of reasons to answer the question: Why should WBA engage with CSOs? This would allow WBA to define its limitations, determine what WBA does through partners, and clarify what it manages centrally—all of which would support its funding applications. The strategy should include a comprehensive plan for nurturing these relationships, with a deeper understanding of different CSO types, their operational mechanisms, and how can WBA leverage their strengths for specific impacts.

We should also consider developing tools to facilitate engagement, foster deeper collaboration with strategic partners, and guide our teams toward a shared goal—minimizing engagement fatigue. Creating a guidebook and mapping our most impactful relationships could be a good starting point. Over time, this approach could reduce reliance on individual relationship holders and create a more sustainable model for managing CSO partnerships.

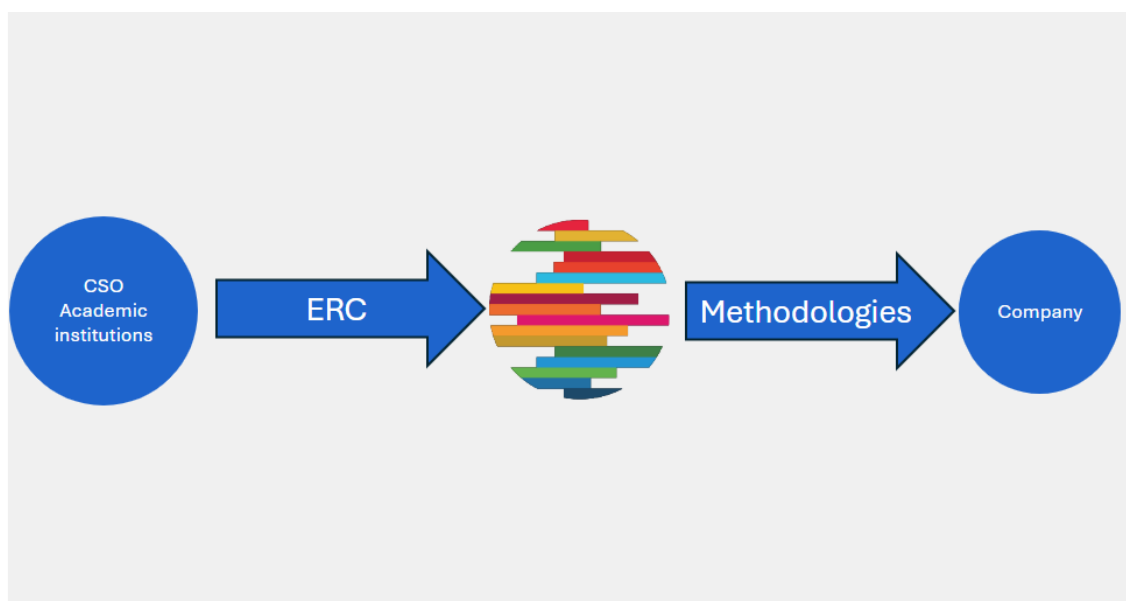
## Typology

The following typology is an initial mapping using both *WBA's impact stories* and the information obtained in the interviews carried out that reflects WBA's current relationships with CSOs. While this list is not comprehensive it might be a good starting point to help WBA identify impactful relationships and build its CSO strategy accordingly. A cost/benefit analysis of these different type of relationship, can help WBA to identifying which type of relationship it wants and/or it can prioritise in relation to its mission, sphere of influence and Theory of Change. This analysis can shape future priorities and strategies needed to build, strengthen and sustain those relationships where WBA's carries the most leverage to push for corporates change.



## Contributing to methodology development

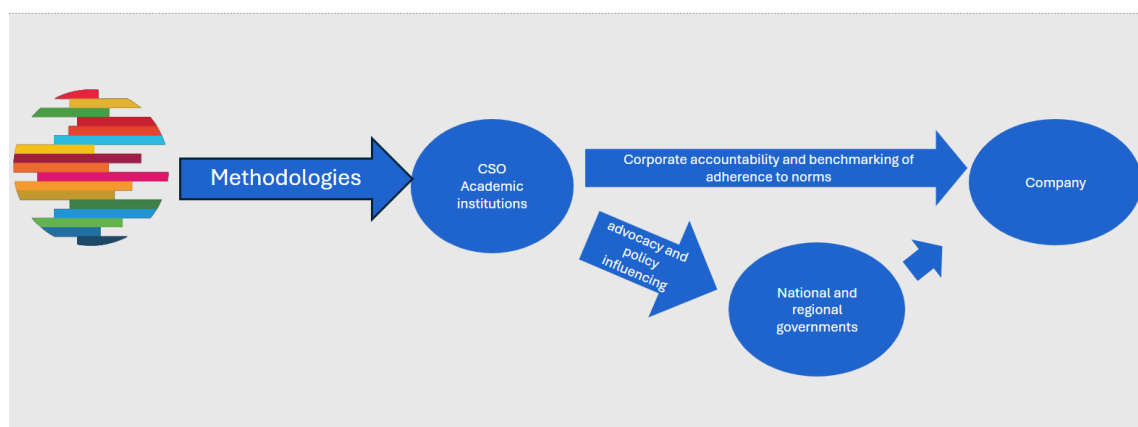
FIGURE 3: CSOs CONTRIBUTING TO WBA'S METHODOLOGY DEVELOPMENT



Our methodologies are a crucial element in the learning pathway of our Theory of Change. By engaging with these methodologies, companies gain insights into the best practices for achieving a sustainable and just future. When CSOs contribute to the development of our methodologies, they bring essential expertise that shapes the guiding principles for corporate improvement.

## Uses of WBA methodologies

Figure 4: CSOs USE WBA METHODOLOGIES TO INFLUENCE LOCAL-LEVEL CHANGES IN COMPANY'S BEHAVIOUR AND ADVOCACY EFFORTS WITH NATIONAL AND REGIONAL GOVERNMENTS

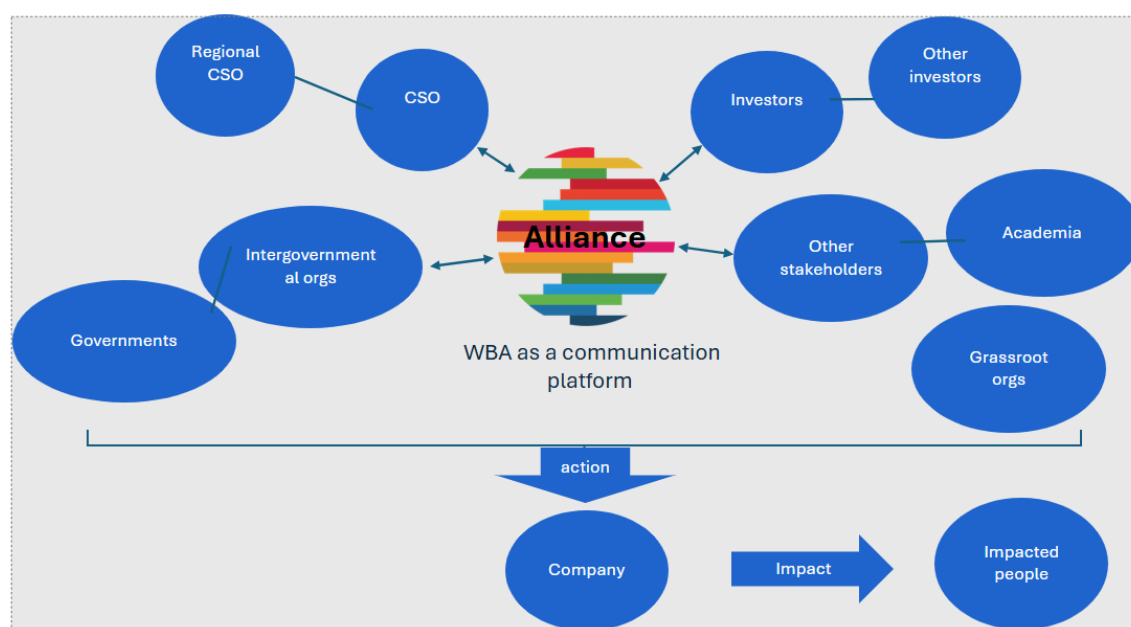


CSOs use WBA's methodology to influence local-level changes through snapshots<sup>3</sup>. CSOs use of WBA methodologies feeds into both the norm setting, pressure and learning of WBA's depending on the country. Snapshots can be conducted with different purposes, from influencing national policies, to help company learning by providing roadmaps through our methodologies, and to do advocacy/pressure targeted companies.

*"[...]published the 1st Colombian snapshot, assessing 24 companies. They marked the launch with a hybrid event, held in Bogota and virtually. The team expects this study to set the basis for more sustained, evidence-based engagement with business on human rights topic in the country".*

## Pressure through networks

FIGURE 5: CSOs USE WBA AS A COMMUNICATION PLATFORM TO COLLECTIVELY PRESSURE COMPANIES TO CHANGE THEIR BEHAVIOUR



Pressure through joint action relies on WBA's network, with several NGOs highlighting the value of WBA's networking space. However, simply bringing organisations together does not guarantee change; it is the practical actions taken by network members that drive impact. This type of approach requires a stronger time commitment, with monitoring and task-setting frameworks to ensure participation translates into meaningful action.

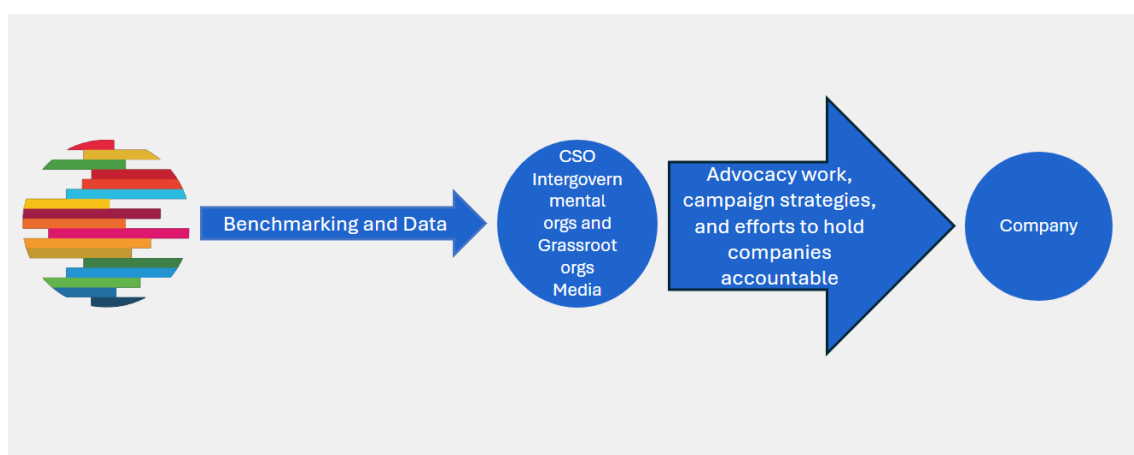
*"DIB launched the CIC in September. The roundtable held at the side-lines of the 77th session of the UNGA highlighted multi-stakeholder approaches to digital inclusion and in particular addressing ethics in AI development and application by the world's 200 most influential digital technology companies. 18 investors joined the CIC in Q3, bridging a total number of financial institutions to 32. They have*

<sup>3</sup> Third party assessments that use WBA methodologies to assess companies on their contribution to the SDGs. Snapshots are most often done at country level and carried out in countries where corporate transparency and legislation are minimal or non-existent, or where there is momentum for corporate change and accountability.

been allocated companies and commenced engagement with them to increase the adoption of ethical AI principles among the 130 companies that did not show public commitment to ethics in AI in the DIB report. All 130 companies were sent a letter asking them to make those commitments on ethical AI to promote a more inclusive and trustworthy digital economy and sustainable society. The non-investor group of the CIC published a joint statement calling on companies to make public commitment to ethical AI principles. The CIC member also engaged in a 2-week social media campaign.”

## Direct pressure

Figure 6: CSOs LEVERAGE WBA’S BENCHMARK AND DATA TO INFORM THEIR ADVOCACY AND CAMPAIGN STRATEGIES

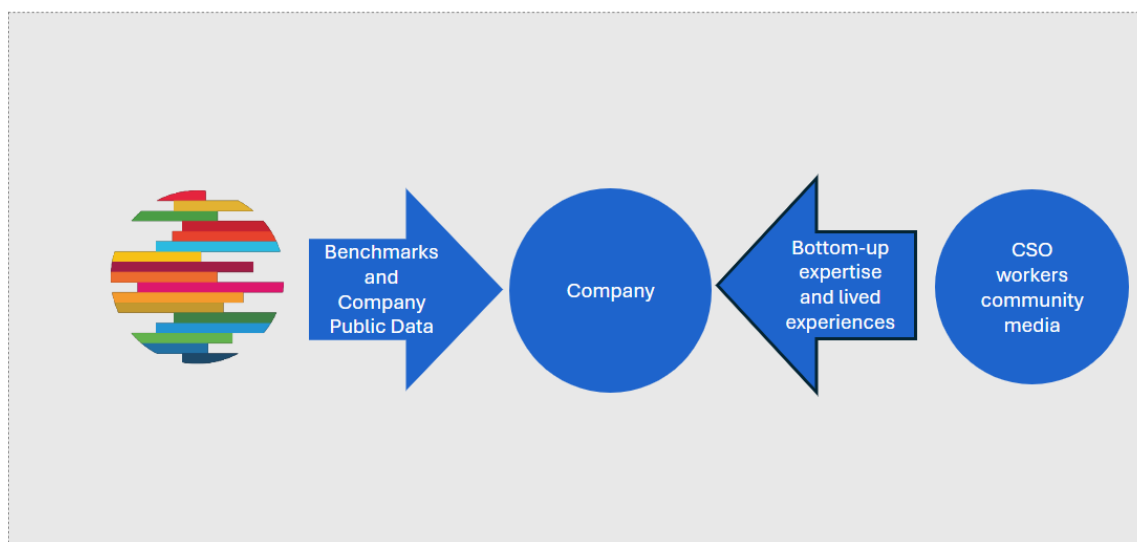


A general feedback from the interviews suggests that CSOs leverage WBA's benchmarks and data to inform their advocacy work, campaign strategies, and efforts to hold companies accountable. CSOs use WBA's data and rankings as part of their broader strategy to influence corporate behaviour.

*“Our ally NGO is using the Food and Agriculture Benchmark results as part of their corporate due diligence to determine whether it is acceptable for them to engage with a certain company. They also mentioned that they shared the respective scorecard with each of their corporate partners that is part of the Food and Agriculture Benchmark, to initiate a discussion about the outcomes.*

## Pressure through discrepancies

FIGURE 7: CSOs CONTRIBUTE TO WBA'S METHODOLOGY DEVELOPMENT BY IDENTIFYING DISCREPANCIES BETWEEN COMPANIES' ACTIONS AND WBA'S FINDINGS



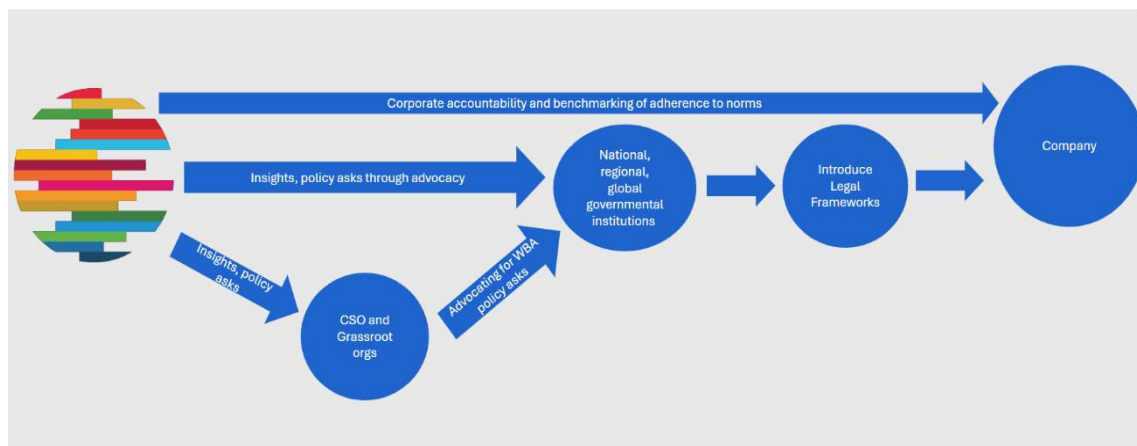
According to the interviews conducted, this framework is one of WBA's most impactful engagement strategies, yet it is not as widely used in the organisation. Different stakeholders examine WBA's data to identify any discrepancies between a company's actions and WBA's findings, forming a fundamental basis for corporate accountability. "Ground truthing"<sup>4</sup> can be a robust strategy for WBA to engage with CSOs, leveraging WBA's extensive data and insights. Identified discrepancies can directly impact company scores and potentially drive changes in corporate behavior.

<sup>4</sup> Manju, M., & Kohli, K. (2017) [Groundtruthing: A Note on Methodology](#)



## Norm setting & policy advocacy

FIGURE 8: CSOs WORK WITH WBA TO PUSH FOR NORM-CREATION AND SUPPORT POLICY ADVOCACY EFFORTS TO CHANGE COMPANIES' BEHAVIOUR AND PRACTICES



Although this is one of WBA's most common strategies, demonstrating its potential impact is challenging due to WBA's degree of separation in this model. Nonetheless, this approach supports WBA's strategic pillar of "Sustaining."

*"The climate team provided recommendations to the European Economic and Social Committee (EESC) to shape the next EU Council presidency and Commission's mandate/priorities on a just transition. This included recommendations on how to hold companies accountable on their just transition plans and tracking progress which is reflected in the EESC's final opinion piece. As an advisory body representing worker and business perspectives in the EU these recommendations can support better just transition guidance and implementation by companies in the EU. "*

# Recommendations

**To strengthen the relationship between WBA and CSOs, the strategic hire of a new Civil Society Lead is needed.** This person needs to develop a comprehensive CSO engagement strategy that is institutional and sits across transformations and functions. It also needs to have an impact-led mindset, this means developing a strategy that not only enhances WBA's influence but also CSOs objectives through a joint journey. This entails developing frameworks to assess the effectiveness of our partnerships and enhancing accountability within our engagement practices. This individual will ideally bring with them a set of global connections, working with CSOs across different geographies, particularly in the global south (grassroots & international organisations). The ideal candidate should demonstrate awareness of the complexities surrounding international organisation's engagement with local CSOs, and risks associated with sustainability and development practices by Western organisations in the global south. They should have a nuanced understanding of regional differences, socio-historical contexts and unique challenges faced by developing countries. These dynamics often influence how CSOs operate in a region, how they are perceived by different actors (investor & governments), what is the language that moves CSOs in those regions, and how to build a message that resonates with local CSOs expectations. It is important to recognise that the new Civil Society Lead will bring a diverse set of connections and priorities, and while WBA should welcome this input, it should do so while ensuring alignment with its overall strategy.

**To advance WBA's engagement with CSOs, a comprehensive and strategic CSO Engagement Strategy should be established.** Below are key elements to consider and address in the development of this strategy.

1. **Internal consultation sessions:** Initiate consultation sessions in WBA to foster open dialogue about our organisational self-image and narrative. The strategy must not only enhance WBA's collaborations with CSOs but also carefully articulate how the organisation wishes to be perceived in the sustainability landscape, balancing its relationships with business, investors and advocacy groups. An internal narrative is a requirement for clarity in external engagement. This requires careful assessment of the risks and benefits associated with various titles and roles WBA may adopt.
2. **Identify impactful relationships:** The Civil Society Lead should work with the Alliance team in mapping and cultivating relationships with influential allies that can enhance WBA's strategic aims. This is an ongoing process as part of the Alliance strategy. This should be complemented by a process of identifying non-allies who are impactful for WBA's efforts and start relationship building with these organisations to become active allies. This is also part of the Alliance strategy which is set to begin in 2025. A potential suggestion is to use key institutional moments such as the Allies Assembly to identify and foster stronger



relationships with partners who can advance shared goals regionally, even when WBA is not directly present, and through which WBA can monitor and be updated on regional priorities on an ongoing basis.

3. **Accountability in relationships:** Recognise the importance of integrating CSO engagement and relationship-building into the accountabilities of WBA colleagues, especially when concerning strategic organisations. For example, creating singular Points of Contacts to ensure that different teams are engaging with a CSO in an organised manner. This includes updating the Engagement Tool and having a database on what has been done and how has WBA worked with them. This will allow WBA to not only avoid stakeholder fatigue, over reliance on specific CSOs, and missed opportunities, but will also prevent CSOs contacts being lost if colleagues leave the organisation.
4. **Regional focus and strategic relationships:** Identify specific regions where WBA's engagement with CSOs could yield significant impact and build trust. Tailoring strategies to regional contexts will enhance relationship-building and ensure that efforts resonate with local stakeholders. This needs to be in line with transformations priorities & maturity, global momentums and WBA institutional strategy as a centralised, united front. A clearer understanding of the role of CSOs in certain regions can not only help WBA establish the proper norm setting strategies but also help it to build the necessary networks to facilitate long term engagement through stakeholder roundtables, joint action groups, benchmark development consultation, co-authored reports and shared initiatives. This also requires developing a narrative or storytelling on how WBA can contribute to furthering its CSOs allies' work too, creating a clear value proposition, that avoids furthering transactional relationships and is mindful of power dynamics introduced in these relationship-building efforts. It is this type of relationship-building that will enhance legitimacy and trust in WBA's work, This requires careful strategic oversight as the fast-paced dynamics of our work and the development ecosystem will often shift priorities and define our relationships
5. **Creation of relevant materials:** Develop practical tools, such as toolkits and educational materials, tailored to help CSOs understand and apply WBA's benchmarks in their specific context. This will facilitate more effective collaboration and empower CSOs to advocate for sustainable practices based on reliable data, exemplified in snapshots. The creation of these materials can ensure WBA's methodologies are still use by stakeholders in places where WBA's boundaries start. In addition to educational onboarding materials for CSOs, WBA should develop guidelines for impactful engagement (this project has started under Transition Working Group 3: Impact) This should outline how WBA interacts with CSOs in particular situations (see recommendation below)
6. **Develop relevant tracking indicators:** The CSO Engagement Strategy needs to be based and aligned with WBA's ToC. Activities associated with the CSO Engagement Strategy need to be clearly defined and measure across relevant



indicators in the Results Management Framework. The existent output and outcome indicator CSO action informed by WBA's material's is too general and quite underreported, as there is not a clear definition on when something is worth logging in the ET as an "engagement" based on the interviewed conducted.

Developing a comprehensive set of CSO engagement guidelines is necessary to improve WBA's interactions with CSOs. This should include an overview and training for the entire WBA team, particularly the engagement team, on how to provide data and effectively use WBA materials tailored to the needs of different CSO groups for impactful engagement. This can include a tailored toolkit addressing the specific requirements, working dynamics, and language of CSOs—similar to the Investor Engagement Strategy. Our Transition Working Group 3 ongoing efforts should also be integrated into the guidelines to ensure we have a unified impact focus approach. This can include the CSO mapping, identifying organisations with high impact and those with strong regional networks.

### Next steps for WBA

- **Hire a new Civil Society Lead.** This person should embody an impact-focused approach to develop a comprehensive CSO engagement strategy
- **Elements to address when developing the new CSO engagement strategy:** Define how WBA wants to be perceived in the sustainability ecosystem among different stakeholders to increase clarity. Identify impactful relationships with current and potential Allies. Identify regional priorities for long term sustainable engagement. Create materials were necessary to upskill CSOs on using our benchmarks for their efforts. Include relationship building and updating of CSOs relationship as part of relevant colleagues' accountabilities and update RMF indicators as needed to reflect new strategy outputs.
- **Develop a comprehensive set of CSO engagement guidelines.** This should include an overview and training for the entire WBA team, particularly the engagement team, on how to provide data and effectively use WBA materials tailored to the needs of different CSO groups towards impactful engagement.



# Conclusion

WBA has made significant strides in promoting corporate accountability and sustainability by assessing companies across seven critical systems. Civil Society Organisations play a key actor WBA works with to this end. CSOs are essential in the pressure and norm-setting pathways outlined by WBA's theory of change, helping to drive companies changing behaviours and policies and influencing regulatory policies. However, despite the positive role WBA plays in connecting with CSOs, there are significant challenges.

The external evaluation report from 2024 indicates that while WBA has engaged with CSOs in various impactful ways, much of the interaction has been ad hoc and decentralised. This lack of a centralized CSO engagement strategy has limited the effectiveness of WBA's influence on corporate practices and policy change. Additionally, an overreliance on a small number of CSOs may lead to fatigue and missed opportunities to expand relationships in the Global South.

To maximise its long-term impact, WBA needs to develop a more consistent and centralized strategy for CSO engagement. By refining its approach, WBA can better align its objectives with those of CSOs, enhance its influence, and ensure its benchmarks are more widely used for advocacy and accountability purposes. Strengthening these relationships, particularly in developing regions, will be key to advancing global corporate accountability and ensuring WBA's work is integrated into broader efforts for sustainable development.

To this end, WBA's priorities in this respect are threefold. A strategic hire of a Civil Society Engagement lead will help to centralised WBA's engagement with CSOs, by setting at an institutional level across the seven transformations. An institutional hire would also help to develop a centralised CSO engagement strategy and the development of engagement guidelines, that will provide not only more clarity on how WBA engages with this stakeholder externally but will also help to strengthen and sustain these relationships, by establishing a narrative of collaboration and reciprocity that can override the current extractive nature. This will include understanding WBA's priorities, how this aligns with CSOs regional priorities, the language among these actors, and how to keep momentum going from WBA's benchmarks and insights by cascading these through CSOs networks locally, further legitimising WBA's position in the ecosystem of corporate accountability.



## Our funding partners



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### **WORLD BENCHMARKING ALLIANCE**

Prins Hendrikkade 25, 1021 TM Amsterdam The Netherlands. [www.worldbenchmarkingalliance.org](http://www.worldbenchmarkingalliance.org)