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INTRODUCTION

In December 2011, the World Bank Group Library (ITSKI) in partnership with then World Bank Institute (WBI) and the Financial and Private Sector Development (FPD) unit started planning for an Enhanced Research Services (ERS) pilot to meet a long felt staff need. On February 14th 2012, the pilot was launched with seed funding from WBI, FPD as business sponsor and ITSKI as Implementer. FPD signed a contract with 10EQS as vendor.

The pilot was one of two initiatives funded by the World Bank Group (WBG) Knowledge and Learning Council to select Bank teams to support knowledge creation and sharing under the South-South Knowledge Exchange (SSKE). SSKE would provide WBG and its country clients a greater and a wider access to an international marketplace of expertise. The WBG already has extensive and wide ranging in-house experts across multiple sectors, industries and regions. These high level experts give the World Bank a competitive advantage in global development. In addition, WBG staff produce internally annual and semi-annual flagship publications. These include the World Development Report (WDR), the Global Economic Prospects (GEP), the Doing Business Reports (DB) and the Poverty and Shared Prosperity (PSP) annual series (World Bank 2017).

Supporting WBG authors, the WBG Library provides research services and manages subscriptions to external databases and thousands of ejournals for use by staff. Global crowdsourcing of expertise through ERS would complement these internal products while also mitigating costly staffing arrangements of direct hiring of short term consultants. A Project Implementation Team was set up, a criteria for project selection defined and representative projects across the World Bank and IFC identified. Statements of Work (SOW), procedures, timelines and deliverables were then identified and agreed upon for the selected projects.

The creation and transfer of Knowledge and Information has always been a dimension of the WBG’s role in development. Clients, partners, and the international community see the Bank as a main source of high-quality development analysis and expertise. The World Bank Group
not only produces as already referenced above, it also customizes and uses Knowledge to connect global audiences with direct contribution from the Library. In any given year, the Library responds on average to over 100,000 questions.

The WBG Library spends about US$ 3 million annually to deliver print and electronic publications and databases, serving a global workforce of more than 20,000 staff, consultants and contractors. It also offers research and reference services to staff and consultants. In this role: A request is submitted to the Library, a Reference Librarian provides quick reference sources if available; if not the question is passed on to a Research Librarian for more in depth research, the Research Librarian performs a reference interview and identifies likely sources of information. These sources of information are then sent to the requestor.

On February 8, 2012, the Library and its partners formulated a new research workflow to align with the pilot. After the search results are provided to the client, the client usually has two options (satisfaction with Library response or need for further analysis). Correspondingly under the pilot: if further analysis was requested, the Librarian would forward the request to a pre-screened and pre-selected vendor, the vendor would contact the client for scope and timeline definition, determine the cost and send an estimate to the Library. The Library would then seek approval from the client. If approved, the work would proceed. On completion, the vendor would send the deliverable to the Library for onward transmission to the client. Finally, the Library would conduct an evaluation. The Library would charge the vendor a nominal service fee to perform this coordination.

**PILOT IMPLEMENTATION**

The pilot ran for 1 year. At the end of the pilot, the Project Implementation Team determined that the established processes and procedures were robust, the perceived staff need existed and that the Library was in a position to provide analytical services to staff. This outcome was supported by evaluation results. When the Library performed the ERS pilot, it had funding from a business sponsor. At this stage, a dedicated funding source to scale up the pilot was not readily available. However, given the defined need and the validation provided by the pilot survey results, the Library was confident that it could deliver a demand-driven market based service even without the funding --- as long as it could be self-sustaining. This approach would enable the Library to evaluate the new implementation model and make any necessary changes.

Having determined that going forward was the best decision, the Library and FPD proceeded to prepare a Request for Proposal (RFP) to select a Global Research Firm. The bidding was won by Oxford Analytica (OA) and in November 2012, the Enhanced Research Analysis (ERA) work program was launched to build on the ERS pilot.
LESSONS LEARNED AND THE CASE FOR ERA

Overall during the pilot, the Library had learned some valuable lessons including: (1) quality control is critical, (2) dissemination of final products ought to be aligned with the Bank Group’s Access to Information (A2I) policies, (3) a properly defined scope of the final deliverable upfront enhances efficiency and improves accountability and commitment of Task Teams, and (4) a reputable Global Research Firm enables Task Teams to profit fully from a worldwide quality analytical service. In preparing the RFP, the bidding team relied heavily on these lessons to inform the vendor requirements.

Given the lack of funding, the Library anticipated that the volume of work might not reflect the actual existing latent demand given the layers of approval that staff would require under this model and which would impose on staff a prohibitive transaction cost and potentially dampen their enthusiasm. However, moving forward with the project was the only way of knowing what the actual response would be aside from speculating. This, the Library determined would be the best way of determining objectively a) whether to proceed with the Knowledge project as a purely demand driven initiative that operates like a private marketplace where clients preferences would be revealed overtly by ordering directly from the service and therefore make it self-sustaining, b) whether to make any changes and if so what changes that would be responsive to clients preferences or c) whether to make the work program proceed as an institutional mandated work program with a dedicated budget based on pre-determined needs. Given these constraints, the Library set its targets to generate from the business one order every month. To guard against the vendor perceiving the service coordination as free and potentially having the incentive to over utilize the coordination more than was necessary, the Library charged the vendor a 5% nominal service fee to coordinate the workflow between the vendor and WBG staff members.

The benefits as conceived during the pilot would still constitute: Less transactional costs and less overhead for staff allowing staff to focus instead on strategy and delivery of operational results, affordability with no costly time extensions for an already agreed upon deliverable meaning no budget distortions for a specific deliverable, availability of a large network of diverse experts that would complement internal Bank experts, alternative international viewpoints that would not only complement but also strengthen the Bank's development work, quality of projects at entry given the expanded expertise and viewpoints that would go in project preparation and last but not least, actionable intelligence for management decision-making since the reports would be analytical and not descriptive with the analysis based on local operating contexts from local experts with a unique perspective on local development issues including their specific socio-political contexts. The service was marketed through multiple channels including websites, newsletters, blogs, posters, presentations, email distribution lists, brochures, bookmarks, posters, cafeteria table tents, Library Integrated Reference Desk and Research services and strategic partnerships across the institution.
RESULTS

For a period of 4 years, ERA received on average 50 enquiries per month. These came through the Library’s regular channels for receiving requests (service email, Ask! a Librarian web form, telephone, walk-ins and Live chat). Some of the queries led to quotations and eventual approval by staff as orders while other quotations were not approved. Most ended up as research only not requiring further analysis, while others for various reasons were dropped either before or after price quotations. Dropped queries included requests that could not be carried out altogether after a preliminary review discovered that the requests were so niche that they lacked any available past research and data that could be used to inform their analysis. Such requests would require performing primary research which was out of scope of the ERA work program and were therefore infeasible.

For the requests that were approved as orders, ERA attracted a total volume of USD 183,500, generating total revenues of USD 110,220, saving staff USD 73,280 as the Library negotiated prices downwards on behalf of staff and collecting about USD 5,511 administrative fees for ITSKI for an average per order of about USD 13,107 before savings and USD 7,873 after savings. Had all orders that received quotation gone forward, total ERA volumes would have been USD 436,520 for a total revenue of USD 311,800 and savings of USD 124,720\(^4\) averaging about USD 19,842 per order before savings and USD 14,173 after savings. In a scenario where there were no dropped engagements at all, total ERA volumes would have been USD 1,170,678 for a total revenue of USD 702,407 and savings of USD 468,271.\(^5\) Dropped engagements before price quotation were largely due to sudden and drastic changes in the departmental priorities especially at the height of the far reaching institution-wide changes that the WBG was undergoing at that time. These changes were more acute in FY15 and FY16 but had not been foreseen before the launch or even during the planning of ERA.

In 2013, ERA was one of the few winners of the annual coveted Vice Presidential Unit (VPU) Awards for its innovativeness, sound implementation and in-built efficiency enhancing values.

Tables 1, 2 and 3 below provide a summary of the results and their projections.

Figures 1, 2 and 3 provide a summary of the FY volume; FY quote, revenue and savings comparisons and total quote, revenue and savings projections.

**Table 1.** Service summary

<table>
<thead>
<tr>
<th>Average monthly enquiries</th>
<th>50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of orders</td>
<td>14</td>
</tr>
<tr>
<td>Dropped Engagements after price quotation</td>
<td>8</td>
</tr>
<tr>
<td>Dropped Engagements before price quotation</td>
<td>37</td>
</tr>
<tr>
<td>Infeasible</td>
<td>3</td>
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</tbody>
</table>
Table 2. Quote, unit charges, savings and administrative charges in USD. Column 7 represents this latter

<table>
<thead>
<tr>
<th></th>
<th>Orders</th>
<th>Quote</th>
<th>Costs to Units</th>
<th>Savings</th>
<th>% Savings</th>
<th>ITSKI</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY13</td>
<td>4</td>
<td>58,000</td>
<td>36,520</td>
<td>21,480</td>
<td>37</td>
<td>1,826</td>
</tr>
<tr>
<td>FY14</td>
<td>2</td>
<td>30,000</td>
<td>14,000</td>
<td>16,000</td>
<td>53</td>
<td>700</td>
</tr>
<tr>
<td>FY15</td>
<td>8</td>
<td>95,500</td>
<td>59,700</td>
<td>35,800</td>
<td>37</td>
<td>2,985</td>
</tr>
<tr>
<td></td>
<td>14</td>
<td>183,500</td>
<td>110,220</td>
<td>73,280</td>
<td>40</td>
<td>5,511</td>
</tr>
</tbody>
</table>

Table 3. Total revenue and savings scenarios assuming no dropped orders benchmarked against actual revenues and savings.

<table>
<thead>
<tr>
<th>Scenarios (FY13,14,15,16)</th>
<th>Orders (Total)</th>
<th>Orders (Annual)</th>
<th>Quote (Total)</th>
<th>Revenue (Total)</th>
<th>Savings (Total)</th>
<th>Price (Before Savings)</th>
<th>Price (After Savings)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>14</td>
<td>3.5</td>
<td>183,500</td>
<td>110,220</td>
<td>73,280</td>
<td>13,107</td>
<td>7,873</td>
</tr>
<tr>
<td>2</td>
<td>22</td>
<td>5.5</td>
<td>436,520</td>
<td>311,800</td>
<td>124,720</td>
<td>19,842</td>
<td>14,173</td>
</tr>
<tr>
<td>3</td>
<td>59</td>
<td>14.75</td>
<td>1,170,678</td>
<td>702,407</td>
<td>468,271</td>
<td>19,842</td>
<td>14,173</td>
</tr>
</tbody>
</table>

Figure 1. FY volume comparison (Actuals)
Figure 2. FY quote, revenue, savings comparisons (Actuals)

Figure 3. Actual (1) quotes, revenues and savings benchmarked against potential scenarios 2 & 3 assuming no dropped orders.
FINDINGS

After nearly 5 years implementing ERA using the new service model, the Library came to the conclusion that the service was valuable and needed but that a central dedicated funding was necessary to proceed with the service.

Specifically, the following were the major findings:

- Staff require rapid response high quality analytical research. Central coordination eliminates any duplicative work, reduces costs and allows for easy discovery and re-use of existing similar work.
- In order to offer a quality analytical service, the Bank requires global vendors with the reputation, credibility and ability to meet the complexity of the Bank Group’s development needs across sectors, regions and industries. Vendor access to local expertise and proficiency in local languages are also valuable attributes and retaining multiple firms with expertise in different Bank areas would add value for niche areas with unpublished and hard to find information.
- While very important, staff don’t care only about cost and quality. Even more important is the quality of the engagement process. Seeking advice from all relevant units ensures comprehensive compliance with the Bank’s policies and procedures.
- A cumbersome workflow that is not efficient is an unnecessary burden to an already burdened staff but reliability matters more than low cost production.
- It is important to determine and communicate clearly on the mandate, procedures and processes with the vendor and enforce them judiciously. Failure to do so could portend serious reputational risks to the institution.
- Evaluation is a critical element. It helps determine whether and the extent to which set objectives are being met and whether and when to change course or not.
- Access to a dedicated list of experts can be a useful resource overall to staff’s work programs but crowdsourcing of expertise requires prior proper vetting.
- Central budgeting would ensure efficiency and competitiveness in execution. It would lower the bar for entry for staff, reduce any wastages associated with competing supply driven approaches and facilitate tracking of the flow, usage and impact of Research products created. Moreover, it can be used to ensure that future budgetary allocations are based on Research demand and performance from the service.
- Monitoring progress and documenting lessons learned complements any evaluation to inform execution.
- Integrated marketing in partnership with direct beneficiaries and other administrative units is important in getting the word out to the most number of staff members and potential beneficiaries for a sustainable long term service.
WAY FORWARD

Given the lack of central funding that contributed to the low request volumes which the Library had anticipated but wanted to verify empirically, coupled with the high resource intensive requirements the Library discovered was necessary to promote and manage the service, the Library came to the conclusion that central funding would be absolutely necessary to support a sustainable long term service. Since central funding has not been forthcoming, in order to meet the analytical needs of staff already known to exist, pending a future implementation of a central analytical services budget, in late 2016, the Library transitioned ERA to Access to Analysts (A2A) in order to continue serving staff within the existing constraints. A2A allows the Library to continue to offer analytical services to staff by leveraging the Library’s agreements with select vendors and within the existing Library budget as a high demand for these analysts’ reports continues. A2A works exactly as ERA but without the Library mediating any administrative transactions between the vendor and staff. Clients will work initially with two vendors (Oxford Analytica and Fitch). The WBG Library licenses several vendor’s content but these vendors have been chosen because they are the only ones the Library currently has an institution wide direct access to their reports for Bank Group staff. They are also the only vendors with this type of access with a subscription that permits WBG staff direct contact to featured analysts on a given report. Staff can get reports directly from these two research firms’ websites or they can contact the Library requesting a specific report. Once staff have a report, they can request for more information, clarification or elaboration directly from the Analysts mentioned in the reports. If the additional information required is significant, these vendors may charge a staff member more for creating a customized report off of the existing report the Bank already subscribes to.

Under A2A, the Library is also recommending to staff aggregated independent market and industry reports the Library does not subscribe to currently such as ReportLinker and Euromonitor International. If staff need reports or their equivalents from these firms that the Library does not already have from other sources, staff may purchase the reports directly from these vendors if they choose. The Library has created a website for the new A2A service to facilitate the workflow of the new business model. As part of the project closeout, the Library has also documented lessons learned reports on its implementation of the previous ERS pilot and the ERA work program. ERS and ERA represent the first attempt to create, share and disseminate knowledge by the WBG Library. The reports laid down valuable benchmarks that future centrally coordinated institution-wide Knowledge creation, sharing and dissemination initiatives can build upon and learn from, as well as, to create a strong and sustainable Knowledge and Information service.
BIBLIOGRAPHY

https://openknowledge.worldbank.org/handle/10986/2123

Endnotes

1 https://www.10eqs.com/about_us#presentation
2 The matching of practitioners from government, private sector, and/or civil society with their peers from other developing/emerging market countries for the purpose of peer-to-peer knowledge sharing on a topic that helps participants to address a pressing capacity constraint /development need.
3 For a project to qualify, they had to be current with an explicit objective to produce a discrete information and knowledge product within a given local context for peer to peer learning between specified South-South countries.
4 This approximation takes into account total average savings of 40%
5 This approximation assumes average revenues of USD 19,842 per order before savings and USD 14,173 after savings. In reality, they could be higher or lower than these since these hypothetical orders constitute many potential engagements that were dropped before any price quotation