



The Global Benchmarking Network's Benchmarking Code of Conduct

To contribute to efficient, effective and ethical Benchmarking, GBN Member's agree to abide by the following principles for Benchmarking with other organizations.

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Introduction

The Global Benchmarking Network (GBN) Code of Conduct builds upon the foundational work of several benchmarking organizations, incorporating updates to ensure clarity, relevance, and alignment with current best practices.

The first widely recognized Benchmarking Code of Conduct was developed in 1993 by the American Productivity & Quality Center's (APQC) International Benchmarking Clearinghouse and the Strategic Planning Institute Council. This document, now commonly referred to as APQC's Benchmarking Code of Conduct, established fundamental principles for ethical and effective benchmarking.

Subsequently, in 1996, the European Benchmarking Code of Conduct was developed by the European Foundation for Quality Management (EFQM) and a coalition of sponsoring organizations. This version adapted the original guidelines to ensure compliance with European Union competition law.

A third version, incorporating further refinements, was introduced by the UK Benchmarking Institute in 2006–2007.

The GBN Benchmarking Code of Conduct continues this evolution, ensuring that members adhere to professional, ethical, and legal standards in benchmarking. By following this Code, GBN members contribute to benchmarking that is efficient, effective, and ethical.

1. Principle of Preparation

- 1.1 Follow a recognised Benchmarking Methodology to ensure a professional and effective approach.
 - 1.2 Understand your own work practices and processes before requesting information from benchmarking partners.
 - 1.3 Conduct background research using publicly available resources before contacting potential benchmarking partners. This ensures a good fit and enables you to ask relevant questions
 - 1.4 Respect your benchmarking partner's time by being fully prepared for each exchange, including setting an agenda and preparing key questions.
 - 1.5 Help your benchmarking partners prepare by sharing your key questions and agenda in advance of benchmarking meetings (whether online or in person).
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2. Principle of Contact

- 2.1. Respect the corporate culture of partner organizations and work within mutually agreed procedures
 - 2.2. Initiate contact through a designated benchmarking representative if that is the partner's preferred procedure.
 - 2.3. Clearly define communication roles and responsibilities with your benchmarking contact to ensure mutual understanding.
 - 2.4. Obtain explicit permission before sharing an individual's contact details.
 - 2.5. Do not share contact details in public forums without prior consent.
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3. Principle of Exchange

- 3.1. Be prepared to share the same type and level of information that you request from your benchmarking partner
 - 3.2. Establish clear expectations and mutual interest at the start of the benchmarking exchange to avoid misunderstandings.
 - 3.3. Be honest, transparent, and timely when providing information.
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4. Principle of Confidentiality

- 4.1. Treat benchmarking findings as confidential, unless prior consent is obtained from the benchmarking partner. Clearly specify what information will be shared and with whom.
 - 4.2. The participation of an organization in a benchmarking exchange should remain confidential unless they grant explicit permission to disclose it.
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5. Principle of Use

- 5.1. Use benchmarking information only for its agreed purpose and in accordance with mutual agreements.
- 5.2. Do not attribute benchmarking data or practices to a specific partner without prior permission.

- 5.3. Contact lists or information provided by benchmarking networks should only be used for benchmarking purposes.
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6. Principle of Legality

- 6.1. If there is any legal uncertainty regarding a benchmarking activity, seek legal advice or refrain from proceeding.
 - 6.2. Avoid discussions or actions that could imply restraint of trade, market or customer allocation, price fixing, bid rigging, bribery, or other anti-competitive behavior.
 - 6.3. Do not discuss costs with competitors if they are a factor in pricing.
 - 6.4. Do not obtain information through improper means or induce a breach of confidentiality.
 - 6.5. Never disclose or use confidential information obtained improperly.
 - 6.6. Do not share benchmarking findings with external organizations without permission from your benchmarking partner.
 - 6.7. If data must be anonymized ("blinded"), agree in advance with your benchmarking partner on what can be shared and how.
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7. Principle of Completion

- 7.1. Fulfill all commitments made to your benchmarking partners promptly.
 - 7.2. Ensure that the benchmarking process is completed to the satisfaction of all parties as mutually agreed.
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8. Principle of Understanding and Agreement

- 8.1. Treat your benchmarking partner with respect, in the manner they wish to be treated.
 - 8.2. Agree on how the shared information will be used and adhere to the agreement.
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9. Benchmarking with Competitors

When benchmarking with actual or potential competitors, the following additional guidelines apply:

- 9.1. Ensure compliance with competition law. Always seek legal advice before and during benchmarking with competitors. If uncertain, do not proceed. Consider a non-disclosure agreement (NDA) if necessary.
 - 9.2. Do not request or pressure competitors to provide sensitive data.
 - 9.3. Limit discussions strictly to agreed benchmarking topics.
 - 9.4. Consider using a third party to aggregate and anonymize competitive data.
 - 9.5. Treat all benchmarking information as internal and privileged.
 - 9.6. If exchanging confidential or proprietary data, establish a clear written agreement specifying access, protection measures, and handling procedures.
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Benchmarking Protocol

For Benchmarkers:

- Know and abide by the GBN Benchmarking Code of Conduct.
- Ensure that at least one team member is trained in benchmarking, and all participants have a basic understanding.
- Follow a recognized benchmarking methodology.
- Define benchmarking objectives and conduct a self-assessment before contacting potential partners.
- Prepare and share key questions in advance to facilitate meaningful exchanges.
- Have the authority to share information and be willing to do so.
- Work through a designated contact with mutually agreed arrangements.

During Direct Contact (Site Visit/Virtual Meeting):

- Provide an agenda in advance.
- Be professional, honest, and courteous.
- Introduce all attendees and their roles.
- Stick to the agreed agenda.
- Use clear, universal language (avoid jargon).
- Ensure that no confidential or proprietary information is shared without proper authorization.
- Offer to facilitate a reciprocal visit if applicable.
- Conclude meetings on schedule and express appreciation to your benchmarking partner.

Important Notice:

This Code of Conduct is **not a legally binding document**. While it provides ethical guidance, adherence does not guarantee legal protection. The authors assume no liability for any actions taken based on this document. Users must comply with applicable laws and regulations.