# TERMS OF REFERENCE

## Call for Applications

## Making One Global Strategy Work: Aligning and Delivering Across the Fairtrade System

## At a glance

| **Assignment** | **Strengthen strategy design, execution and alignment across Fairtrade International and its membership, including a mid-term review of its implementation** |
|---|---|
| Budget ceiling | €60,000 incl. VAT (all travel and expenses included) |
| Duration | October 2026 – June 2027 (9 months) |
| Deliverables | 8 deliverables, across 4 phases — see §4 for the full list |
| Proposal deadline | 31 August 2026, 18:00 CEST |
| Max proposal length | 10 pages (excl. CVs, references, samples) |
| Submit to | impact-tenders@fairtrade.net |
| Award basis | Quality 80% (proposal 40%, track record 40%) + Price 20% |

## 1. Introduction

Fairtrade International is a global non-profit representing 22 member organizations — three producer networks and 19 national Fairtrade organizations. We coordinate system-wide activities and own the FAIRTRADE mark, which appears on over 30,000 products worldwide. Around 90 staff work from our central offices in Bonn, Germany, empowering disadvantaged producers by connecting them with consumers, promoting fair trading conditions, and advancing gender equality through inclusive, sustainable, and market-driven solutions.

We operate as a federated system: each member pursues its own local strategy while contributing to the global Fairtrade Strategy. This gives us local relevance but creates a persistent challenge — keeping strategy design and execution consistent within Fairtrade International, aligned across members, and led by people equipped to run scalable, repeatable strategy processes.

We seek a partner to strengthen our strategy capabilities across the organization and the wider system — and, in Phase 3, to test whether the strategy's architecture and programmatic approach are fit for purpose, and whether we have the structure to deliver efficiently, while there is still time to adjust course.

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## 2. Purpose

The assignment must help us answer six questions:

- Where do we stand? The current state of strategy execution within Fairtrade International and across the system.
- What is working and what is not — and why? Opportunities, risks and gaps.
- What will we do about it? Prioritized actions, owners and timelines.
- How will we run strategy going forward, and who decides what? Shared format, design parameters, execution rhythm, MEL (monitoring, evaluation and learning) system and KPIs, and decision rights across Fairtrade International leadership, business units and members.
- Is the strategy's design itself holding up? We need to know whether the architecture and programmatic approach remain coherent, plausible and fit for purpose partway through delivery, while there is still time to adjust course.
- What comes next? A roadmap for the next strategy cycle or an extension of the current one.

## 3. Objectives

Meeting the purpose will give Fairtrade International:

a) Shared understanding — an evidence-based view of where we stand on strategy implementation based on the MEL system and KPIs, and of the key opportunities, risks and gaps.

b) Concrete ownership of strengthened practices — an owned action plan with practical tools and routines that improve strategy design and execution across business units and members, tailored to a federated system.

d) Design review — an independent, evidence-based check on whether the strategy's architecture and programmatic approach are working as intended, early enough to inform adjustments.

e) Delivery clarity — a clear roadmap and readiness for decisions on the next strategy, or the extension of the current one.

## 4. Deliverables and Scope

The partner will design and facilitate a three-phase process, producing eight deliverables. Page limits are maximums.

| # | Deliverable | Page limit |
|---|---|---|
| 1 | Workplan (Phase 0) | 5 pages |
| 2 | Strategy implementation report (Phase 1) | 25 pages |
| 3 | Stakeholder and alignment map (Phase 1) | 10 pages |
| 4 | Action plan (Phase 2) | 15 pages |
| 5 | Strategy execution toolkit (Phase 2) | 20 pages, excl. annexes |
| 6 | Capability-building materials (Phase 2) | No limit set |
| 7 | Formative evaluation of strategy architecture (Phase 3) | TBC at inception |
| 8 | Assessment and roadmap for next strategy cycle (Phase 3) | 15 pages |

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## Phase 0 — Inception

Deliverable 1: detailed workplan confirming approach and deadlines (max 5 pages).

## Phase 1 — Diagnosis: where do we stand?

Assess the current state of strategy implementation within Fairtrade International (across business units) and across the members in the Fairtrade system, including how local strategies connect to the global strategy. Identify opportunities, alignment wins and risks; analyse internal and external stakeholder engagement; and judge whether the strategy is coherent and plausible by design, based on implementation, risks and progress to date. Engage stakeholders through interviews, surveys and document review, and draw on comparable federated organizations.

Deliverable 2: report on strategy implementation across Fairtrade International and the system, covering opportunities, risks and gaps in design, cascading, execution rhythm, governance, decision rights, reporting, and leadership capabilities (max 25 pages).

Deliverable 3: stakeholder and alignment map showing how member strategies connect to the global strategy. Builds on the existing heatmap comparing local/regional strategies to the global strategy and assesses how strategic interests not yet in the global strategy could fit current or future implementation plans (max 10 pages).

## Phase 2 — Action plan, tools and capability building

Turn the diagnosis into a prioritized, owned action plan at the executive and strategy liaison level, plus a toolkit and operating routines drawn from good practice in federated organizations. We expect the partner to consider and adapt approaches such as: a single-page strategy (what we will do, what we won't, and how success is measured); roughly 10–15 written design parameters that set non-negotiables while leaving members autonomy on the "how"; a predictable review rhythm (e.g. quarterly KPI reviews); shared data and performance transparency; a network of change champions; and explicit clarity on which decisions are local, central or by consensus.

Deliverable 4: action plan with prioritized actions, owners and timelines, co-created with our core team (max 15 pages).

Deliverable 5: strategy execution toolkit — templates, design parameters, review-rhythm and decision-rights guidance — with advice on the MEL system and rhythm, and on translating global strategy into non-negotiables without imposing decisions. Should assess whether our consensus model serves or obstructs delivery (max 20 pages, excl. annexes).

Deliverable 6: capability-building materials so staff can run and scale the toolkit internally after the consultancy ends, via targeted sessions.

## Phase 3 — Testing the current strategy and preparing the next

Two workstreams run in this phase, in the order below: first, an independent, desk-based check on whether the strategy's own architecture is sound; then, using those findings, an assessment and roadmap for what comes next.

Deliverable 7: mid-term review and formative evaluation of the strategy architecture and programmatic approach (page limit to be confirmed with Fairtrade International at inception — no maximum is set out in the current brief).

What it would examine: whether the strategy's design is coherent and plausible; whether the interdependencies between Goals and Enablers are adequately tracked and managed; whether the programmatic approach and architecture (including the sustainable product programme approach) is fit for purpose and whether we have the structure to deliver efficiently, and if we are ready as Fairtrade system for varying Fairtrade models. Feeding into the new strategy and for interim adaptation

Deliverable 8: assessment and a concrete roadmap for the next strategy cycle — sequencing, milestones, governance and stakeholder engagement — ready for leadership decision-making, informed by Deliverable 7's findings (max 15 pages).

Across all phases the partner works closely with our leadership to co-create outputs that reflect our mission, values and the One FAIRTRADE INTERNATIONAL vision. Final deliverable guidelines and exact timelines, including the precise sequencing of Deliverables 7 and 8, are agreed at inception.

## 5. Timeline

Work is expected to start in Q4 2026. Indicative phasing, to be confirmed at inception:

| **Phase** | **Indicative timeline** |
|---|---|
| Inception and workplan (Deliverable 1) | October 2026 |
| Phase 1 – Diagnosis (Deliverables 2–3) | October 2026 – January 2027 |
| Phase 2 – Action plan, tools, capability (Deliverables 4–6) | January – March 2027 |
| Phase 3a – Formative evaluation of strategy architecture (Deliverable 7) | February – May 2027 (desk-based; overlaps the end of Phase 2) |
| Phase 3b – Assessment and roadmap for the next strategy (Deliverable 8) | April – June 2027 |

*Note: Deliverable 7 starts before Deliverable 8 so that its findings — on whether the strategy architecture itself is sound — feed into, rather than trail behind, the roadmap. Exact sequencing is to be confirmed at inception.*

## 6. Consultant Profile

### Experience and knowledge

- Track record of similar work in strategy execution, organizational capability building and strategic alignment — ideally in federated, networked or multi-entity organizations (international NGOs, membership bodies, franchises, alliances).
- Knowledge of sustainability, agricultural trade, market systems and international development relevant to Fairtrade.
- Demonstrable understanding of federated organizations like the Fairtrade as a system and multi-stakeholder global strategies
- Expertise in strategy design and execution in complex, uncertain settings, including cascading strategy across autonomous entities.
- Proven leadership development and capability building for senior teams.

- Systems thinking, with experience designing governance, decision-rights and performance-management arrangements across networks.
- Proven experience leading co-creative, participatory processes; a strong conceptual thinker able to simplify complexity and learn our context quickly.
- Demonstrated experience designing and conducting formative or process evaluations of strategy architecture, theories of change, or programmatic approaches, including familiarity with MEL frameworks — relevant to Deliverable 7.

### Characteristics and requirements

- Reliable on deadlines; analytical and results-oriented; critical about the quality of information.
- Sensitive with confidential information; able to communicate with staff worldwide at all seniority levels.
- Excellent written and spoken English; culturally sensitive.
- Registered consultancy with a tax-paying body, per EC Programme eligibility (see Annex 1).
- Adherence to Fairtrade's Code and research ethics policy.

## 7. Selection Procedure

The steps are: (1) publish the tender and invite proposals; (2) the evaluation committee — three core-team members, chaired by the FI CEO — scores each proposal individually against the criteria below, with the top three shortlisted; (3) select the consultant; (4) hold an inception meeting.

| Tender step | Date |
|---|---|
| Terms of Reference published | 3 August 2026 |
| Deadline for questions | 17 August 2026 |
| Answers sent | 24 August 2026 |
| Proposal deadline | 31 August 2026, 18:00 CEST |
| Presentation of top 3 | 9–10 September 2026 |
| Consultant selected | 18 September 2026 |
| Assignment starts | 1 October 2026 |

Late proposals are returned unread. Proposals above €60,000 incl. VAT are not considered. Shortlisted consultants present online for 15 minutes, followed by Q&A. We invited consultants to tentatively hold available times on 9 and 10 September to enable their potential participation in interviews.

## 8. Proposal Requirements

Submit a proposal of max 10 pages (excluding company bios, CVs, sample work and references), in English, as MS Word or PowerPoint plus a PDF. Structure it by phase — including a distinct sub-section on the proposed approach to Deliverable 7 — and match the selection criteria as closely as possible. Include:

a) Approach — a succinct, well-documented method addressing this ToR, structured by phase, including the proposed methodology and team for the Phase 3 formative evaluation.

b) References and samples — up to three client references and a relevant work sample, ideally including at least one prior formative or process evaluation.

c) Team — an overview of the project team with CVs reflecting the track-record criteria, including evaluation expertise.

d) Budget — in Euros (excl. and incl. VAT), max €60,000 incl. VAT covering all travel and expenses, broken down by deliverable, with an indicative estimation of days/rate per team member and per phase (with Deliverable 7 costed separately within Phase 3). Budgeting is to be on the basis of deliverables, with the scope of days/per deliverable utlimately under the purview and accountability of the contractor due to the potential for day count to vary in practice.

Email to impact-tenders@fairtrade.net with subject "Consultancy Application: Strategy Capability Building" before 31 August 2026, 18:00 CEST.

## 9. Proposal Assessment

The assignment goes to the most economically advantageous tender, judged on quality and price.

## Quality — scoring (max 100 points before weighting)

| Component | Criteria | Max |
|---|---|---|
| Proposal | Clarity of objectives, phasing and approach; fit of workplan and tools; understanding of federated organizations and the global-alignment/member-autonomy balance; understanding of Fairtrade, realism of approach, budget and timelines; awareness of expected challenges, including the specific risks of Deliverable 7 (limited data history, need for Strategy Lead time). | 40 |
| Track record | Understanding of expected results; independence and credibility; proven experience in strategy execution, capability building, multi-entity alignment and formative/process evaluation, with a similar assignment in the last three years; strong team composition including a project lead. | 40 |
| Budget | Best price for the quality described in this ToR. | 20 |

**Price**

Provide a combined price in Euros (excl. and incl. VAT), max €60,000 incl. VAT, inclusive of all travel and expenses (with Deliverable 7 costed separately within Phase 3). Given our not-for-profit nature, please flag any pro bono or reduced-rate contribution.

### Weighting and tie-breaks

Final score: Quality 80% (proposal 40%, track record 40%) and Price 20%. If scores tie, the higher combined Quality score wins; if still tied, the "Proposal" score decides. All participants receive written notice of the award decision; the consultant is contracted via a letter of assignment.

## 10. Communication and Confidentiality

All tender contact must be in writing to impact@fairtrade.net with subject "Consultancy Application: Fairtrade's Strategy Execution".

Documents shared by Fairtrade International are confidential, and the consultant must impose the same duty on any party it engages. A breach is grounds for exclusion without warning. All submitted materials are handled with due care, filed as confidential, and not returned.

## Disclaimer

Fairtrade International may update, change, extend, postpone, withdraw or suspend this ToR, the tender procedure, or any selection or award decision, and is not obliged to award a contract. Participants cannot claim compensation if any of these occur. Submitting a proposal means accepting all terms and reservations in this ToR and in subsequent tender documentation.

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**Annex 1**

**EXTERNAL ACTION FINANCIAL INSTRUMENTS**

**RULES ON PARTICIPATION IN PROCUREMENT PROCEDURES AND GRANTS**

# Part I: MFF 2021-2027 Instruments for External Action

## 1) Eligible countries for NDICI- Global Europe (NDICI- Global Europe Article 28 paragraphs 1 & 2)

**Participation under geographic programmes and under the Civil Society Organisations thematic programme and Global Challenges thematic programme:**

Participation in procurement and grant procedures for actions financed under geographic programmes and under the Civil Society Organisations thematic programme and Global Challenges thematic programme shall be open to international organisations and to all other legal entities who are nationals of and, in the case of legal persons, who are also effectively established in the following countries or territories:

(a) *EU Member States* (appendix 1)

(b) *IPA III beneficiaries* (listed in the Annex I of IPA III Instrument (appendix 2)

(c) *European Economic Area* (appendix 3)

(d) Developing countries and territories, (included in the OECD-DAC list of ODA recipients[1]), which are not members of the G20 group[2]:

- (i) *Least Developed Countries* (LDCs) (appendix 4)
- (ii) *Other Low Income Countries* (appendix 5)
- (iii) *Lower Middle Income Countries and Territories* (appendix 6)
- (iv) *Upper Middle Income Countries and Territories* (appendix 7)

(e) *Overseas Countries and Territories* (OCTs) (appendix 8)

[1] Please check the DAC List of ODA Recipients, effective for reporting on 2022 flows.

[2] Non-eligible G20 Members developing countries are: India, Indonesia, Argentina, Brazil, China, Mexico, South Africa. They are eligible under g) Turkey is also a developing country (upper middle income) G20 Member, but is eligible as a beneficiary listed in the Annex I of the IPA III.

(f) *Member States of the OECD* (appendix 9) are also eligible when contracts are exclusively implemented in a Least Developed Country[3] or in a Highly Indebted Poor Country (HIPC)[4].

(g) (i) *Developing countries, as included in the list of ODA recipients, which are members of the G20 group* (appendix 10) and (ii) *any other countries and territories* (ie. all countries of the world) when the relevant procedure takes place in the context of an action financed by the Union under this Regulation in which they participate;

The entities of countries under point g) (i) and (ii) can participate in procedures both where the country participates in the action as a donor co-financing and where the country itself is participating as a beneficiary of the action.

(h) any countries for which *reciprocal access* to external assistance is established by the Commission.

Currently there are no such countries.

(i) *Neighbourhood partner countries (appendix 11)*

(j) *the Russian Federation* when the relevant procedure takes place in the context of the programmes referred to in Annex I of NDICI- Global Europe in which it participates;

(k) where an agreement on widening the market for procurement of goods or services to which the Union is party applies, the procurement procedures for contracts financed by the budget shall also be open to natural and legal persons established in a third country other than those specified in the basic instruments governing the cooperation sector concerned, under the conditions laid down in that agreement.

**Participation under the Human Rights and Democracy thematic programme, the Peace, Stability and Conflict Prevention thematic programme and rapid response actions:**

Without prejudice to the limitations inherent to the nature and objectives of the action, a*ll countries* are eligible for participation in contracts financed under these programmes and actions that are fully untied (i.e open without limitations)

## APPENDICES

[3] See appendix 4 for the full list of LDCs.

[4] HIPCs are: Afghanistan, Benin, Bolivia, Burkina Faso, Burundi, Cameroon, Central African Republic, Chad, Comoros, Côte d'Ivoire, Democratic Republic of Congo, Eritrea, Ethiopia, Ghana, Guinea, Guinea-Bissau, Guyana, Haiti, Honduras, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Nicaragua, Niger, Republic of Congo, Rwanda, São Tomé & Príncipe, Senegal, Somalia, Sierra Leone, Sudan, Tanzania, The Gambia, Togo, Uganda, Zambia.

## *APPENDIX 1 :* EU MEMBER STATES

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|---|
| Austria, Belgium, Bulgaria, Czech Republic, Croatia, Cyprus, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden. |

## *APPENDIX 2 :* IPA III BENEFICIARIES

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|---|
| Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, Republic of North Macedonia, Serbia, Turkey.<br>* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence. |

## *APPENDIX 3 :* EUROPEAN ECONOMIC AREA

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|---|
| (only non-EU MS are mentioned) Iceland, Lichtenstein, Norway. |

## *APPENDIX 4 :* LEAST DEVELOPED COUNTRIES

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|---|
| Afghanistan, Angola, Bangladesh, Benin, Bhutan, Burkina Faso, Burundi, Cambodia, Central African Republic, Chad, Comoros, Democratic Republic of the Congo, Djibouti, Eritrea, Ethiopia, Gambia, Guinea, Guinea-Bissau, Haiti, Kiribati, Lao People's Democratic Republic, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Myanmar, Nepal, Niger, Rwanda, Sao Tome & Principe, Senegal, Sierra Leone, Solomon Islands, Somalia, Sudan, South Sudan, Tanzania, Timor-Leste, Togo, Tuvalu, Uganda, Yemen, Zambia. |

## *APPENDIX 5:* OTHER LOW INCOME COUNTRIES

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|---|
| Democratic People’s Republic of Korea, Syrian Arab Republic. |

## *APPENDIX 6 :* LOWER MIDDLE INCOME COUNTRIES AND TERRITORIES

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| Algeria, Bolivia, Belize, Cabo Verde, Cameroon, Congo, Côte d´Ivoire, Egypt, El Salvador, Eswatini, Ghana, Honduras, India, Indonesia, Iran, Kenya, Kyrgyzstan, Micronesia, Mongolia, Morocco, Nicaragua, Nigeria, Pakistan, Papua New Guinea, Philippines, Samoa, Sri Lanka, Tajikistan, Tokelau, Tunisia, Ukraine, Uzbekistan, Vanuatu, Vietnam, West Bank and Gaza Strip, Zimbabwe. |

## *APPENDIX 7 :* UPPER MIDDLE INCOME COUNTRIES AND TERRITORIES

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|---|
| Albania, Argentina, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Botswana, Brazil, China (People’s Republic of), Colombia, Costa Rica, Cuba, Dominica, Dominican |

| |
|---|
| Republic, Ecuador, Equatorial Guinea, Fiji, Republic of North Macedonia, Gabon, Georgia, Grenada, Guatemala, Guyana, , Iraq, Jamaica, Jordan, Kazakhstan, Kosovo, Lebanon, Libya, Malaysia, Maldives, Marshall Islands, Mauritius, Mexico, Moldova, Montenegro, Montserrat, Namibia, Nauru, Niue, Panama, Paraguay, Peru, Saint Helena, Saint Lucia, Saint Vincent & the Grenadines, Serbia, South-Africa, Suriname, Thailand, Tonga, Turkey, Turkmenistan, Venezuela, Wallis and Futuna. |

## *APPENDIX 8 :* OVERSEAS COUNTRIES AND TERRITORIES[5]

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|---|
| Aruba (NL), Bonaire (NL), Curação (NL), French Polynesia (FR), French Southern and Antarctic Territories (FR), Greenland (DK), New Caledonia and Dependencies (FR), Saba (NL), Saint Barthelemy (FR), Sint Eustatius (NL), Sint Maarten (NL), St. Pierre and Miquelon (FR), Wallis and Futuna Islands (FR). |

## *APPENDIX 9 :* OECD MEMBER STATES

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|---|
| Austria, Belgium, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden.<br><br>Australia, Canada, Chile, Colombia, Costa Rica, Iceland, Israel, Japan, Korea, Mexico, New Zealand, Norway, Switzerland, Turkey, United Kingdom, United States of America. |

## *APPENDIX 10 :* G20 MEMBER DEVELOPING COUNTRIES

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| Argentina, Brazil, China, India, Indonesia, Mexico, South-Africa, Turkey. |

## *APPENDIX 11 :* LIST OF COUNTRIES AND TERRITORIES IN THE NEIGHBOURHOOD AREA

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| Algeria, Armenia, Azerbaijan, Belarus, Egypt, Georgia, Israel, Jordan, Lebanon, Libya, The Republic of Moldova, Morocco, occupied Palestinian territory (oPt), Syria, Tunisia, Ukraine.[6] |

[5] OCTs listed in Annex II to the TFEU having special relations with the United Kingdom are covered by the scope of the EU-UK Withdrawal Agreement.
[6] Union support under this area may also be used for the purpose of enabling the Russian Federation to participate in cross-border cooperation programmes and in other relevant multi-country programmes.