

Fairtrade International: Public Systems Report

Version dated: 2 December 2024

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DEFINING THE INTENDED CHANGE

A Monitoring, Evaluation and Learning (MEL) system should be situated within and guided by a conceptual framework that explains what an organization's vision for change is, and how its activities and interventions contribute to that change. This is often referred to as a 'theory of change.' By defining more clearly Fairtrade's intended change, and by capturing understanding of how Fairtrade contributes to these changes, Fairtrade's theory of change provides a framework for identifying appropriate outcomes to be monitored for measuring progress.

Fairtrade's theory of change first version (v1.0) was developed between 2011 and 2013, including an extensive process of involvement of stakeholders to help define both intended and unintended changes arising from Fairtrade activities, and to identify the best indicators for monitoring these outcomes. This initial version focused on the impact Fairtrade aimed to have on workers, farmers and in their communities. In October 2015, a second version of the theory of change (v2.0) was approved which included the changes Fairtrade wished to see in markets, in line with the 2016-2020 strategy.

Then, in 2020 after five years of the second version of Fairtrade's theory of change, the initial assumptions were tested through a theory of change review (i.e., an analysis of research evidence and monitoring data). This analytical exercise came also as a recommendation from an external evaluation that was commissioned by the Global Leadership of Fairtrade International in 2018 to assess MEL activities in the Fairtrade system, where key recommendations were: (1) to invest in MEL leadership and have a clear accountability across the system, (2) to have a coherent data strategy, (3) to have clear links with the strategy, and (4) to measure what matters. This led to the transition of the MEL team into a Global Impact team to address the recommendations from the external review (See Figure 1). The theory of change review coincided with Fairtrade's strategy cycle 2021 – 2025 and consisted in three phases:

Phase 1: Reflection

The review process began in 2020 with a series of systemic-wide consultations to define an early draft for validation by various stakeholders. In addition, a user survey was developed as an opportunity for everyone in the Fairtrade system to be heard and add their contribution to the review based on their challenges with the previous version. Last but not least, a rigorous meta review of research evidence referred to as [evidence mapping](#) based on 150 studies helped us understand how in the last five years, had Fairtrade achieved its desired outcomes vis a vis the theory of change.

Phase 2: Calibration

During this phase, a close engagement with the strategy development team was ensured to align the theory of change with the global [Fairtrade Strategy](#)¹. Then, all the inputs gathered from were discussed to generate a first draft of the detailed theory of change.

¹ See Fairtrade's 2021 – 2025 strategy in Appendix 1.

A next step was to engage with experts in the system to validate an initial list of indicators to adjust data tools for monitoring. In terms of the indicators, this first draft was used to identify outcome level indicators as well as have in place the protocols for standardising definitions. This exercise allowed to reduce the number of indicators and to focus on strategic key performance indicators (KPIs). All this led to the development of a strategy reporting framework that was done jointly with the strategy development team.

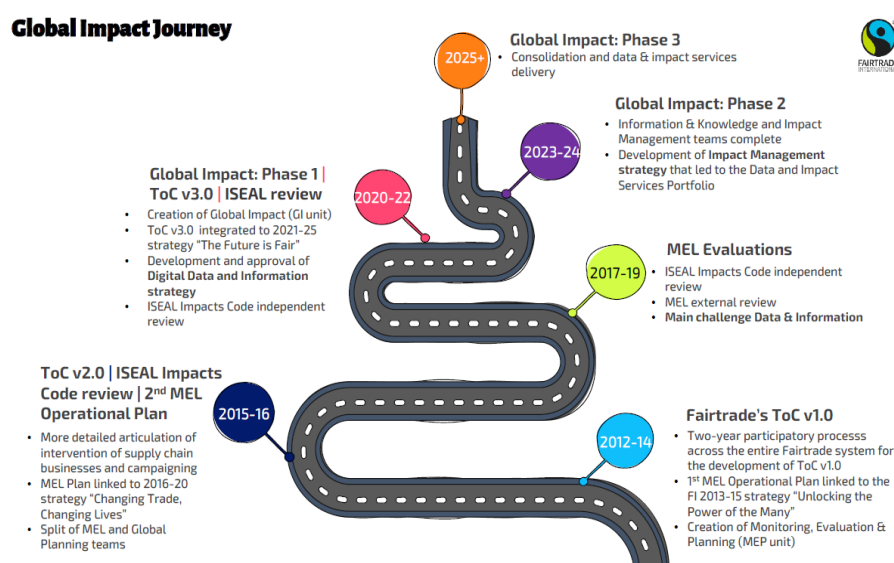
Phase 3: Re-calibration

The second draft of the theory of change was completed during this phase and was used to develop a communication strategy. The process was fine-tuned, resulting in a final version of Fairtrade's theory of change (v3.0). This enabled the creation of an infographic (see Figure 1) and a digital version that was developed including all the interventions, intermediate and long-term outcomes, and impacts for ease of understanding. This [digital version](#) was publicly launched on the Fairtrade International website in September 2022.

It is noteworthy to mention that while we have a revised theory of change and have adjusted our assumptions based on the learnings from the review, we recognize that the nature and extent of change brought about by Fairtrade interventions will depend on a range of contextual factors. Contextual factors may work in tandem with Fairtrade to create greater benefits and opportunities for small producers and workers, or they may act as constraints on what Fairtrade can achieve. The theory of change acknowledges that Fairtrade contributes towards change for small producers and workers, rather than being the sole determinant of change.

In line with our efforts to learn and adjust, since our strategic cycle ends in 2025, we are already in process of a next round of a systematic meta review – evidence mapping to look at external research evidence and sense check the progress that Fairtrade has been able to make in the past years vis a vis its theory of change and strategy 2021-2025. While the positive outcomes will help us re-affirm our interventions that are maximizing impact for producers, the gaps will help in drawing learnings that will contribute to our next strategic cycle as well as adjustments to the theory of change.

Figure 1. Fairtrade's MEL and Theory of Change Journey 2012-2024



SCOPE AND BOUNDARIES OF FAIRTRADE'S MEL SYSTEM

Fairtrade's MEL system: recap

Fairtrade's Monitoring, Evaluation, and Learning (MEL) system has been implemented since 2007 with the main focus at the beginning on small producer and worker organizations data that was monitored through audit processes. Until March 2015 the producer data collected was based on a series of monitoring questions developed by the stakeholders in the MEL Working Group and integrated into a Word format for audit data capture. The list of indicators was chosen to balance the need for information in relation to as many as possible of the impact areas of most importance to Fairtrade, with the need for cost-effectiveness and relative simplicity of data capture. These indicators were revised and amended after the approval of Fairtrade's theory of change v1.0.

Linked to the theory of change v1.0, Fairtrade launched in 2013 a project to improve our monitoring system which was designed to deliver improvements over the period 2013-2016. The work focused on improving the tools used at the existing points of contact between the Fairtrade system and the producer groups holding Fairtrade certification.

An improved tool for the collection of monitoring data during the audit (named CODImpact) was implemented in April 2015. The next phase of the monitoring project focused on improving the tools used to collect data during Fairtrade producer support visits, with revised tools ready for implementation during 2016. The final phase of the project aimed to develop sample-based procedures for collecting a limited amount of household and community level information. The Fairtrade International Board agreed an overarching plan for Fairtrade MEL, 2013-2015 in November 2013. This plan was implemented and continued aligned to certain extent with the strategy 2016-2020.

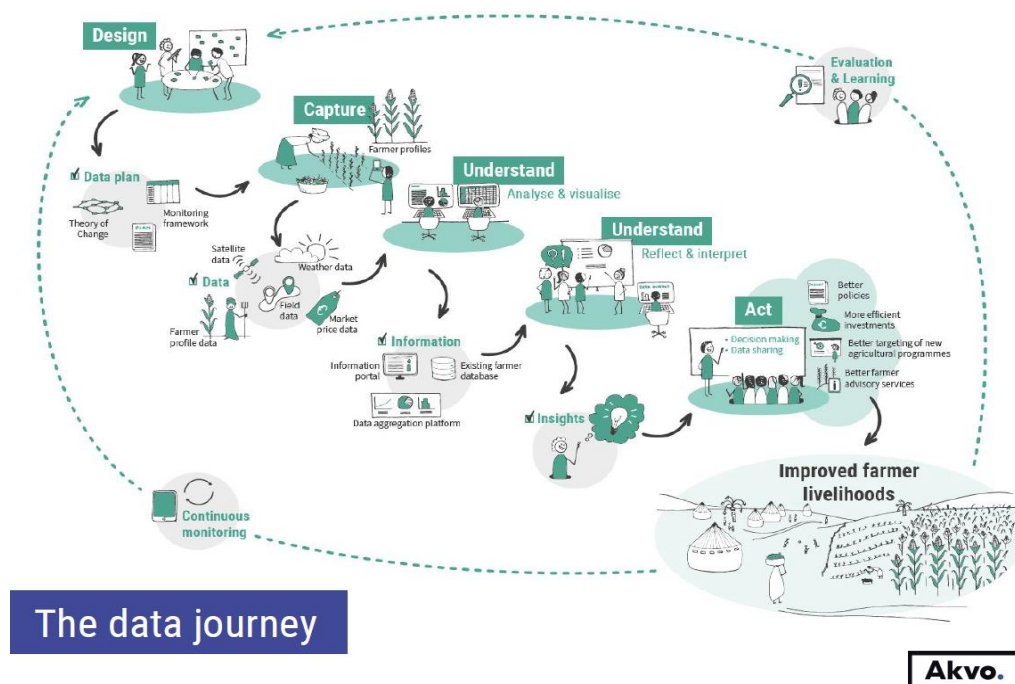
The completion of the strategy required us to look at our MEL plan to consider whether to what extent needed adjustments to reflect any new dimensions in coming Fairtrade strategy 2021-2025.

Fairtrade's MEL system: today

Our current MEL system is based on the recently updated Fairtrade theory of change v3.0, which is closely aligned to the results we want to achieve as a system through Fairtrade global strategy 2021-2025 with high level aspirations set for 2030.

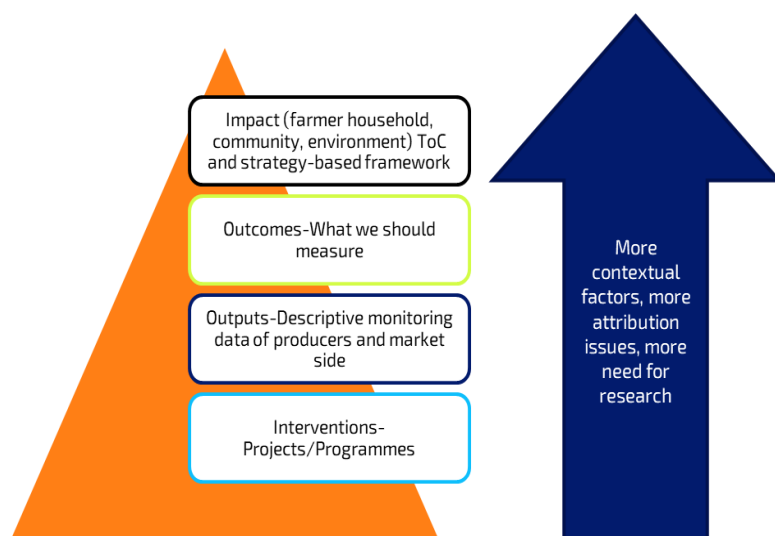
As mentioned above to implement our MEL system we are using Fairtrade's theory of change v3.0, that serves as the foundation of Fairtrade's data & insights journey (See Figure 2). It forms the basis of monitoring the key outcomes and impact areas that we want to achieve and have the adequate data collection systems to support the monitoring. The full list of monitoring indicators for which data are currently collected is listed in Appendix 2, with linkages to the relevant themes in the theory of change. This is a part of improving the effectiveness of Fairtrade's MEL system.

Figure 2. Fairtrade's Data & Insights Journey



In the "design" phase of the data & insights journey, a clear articulation of the interventions that Fairtrade intends to achieve, helps to determine which of the outcomes should be monitored and for which purpose (e.g., accountability, accountability, steering, learning, communication), and with what methods (see "capture" phase). Once data is collected, the next phase "understand" allows data analysis to generate information which through active reflection and interpretation leads to new insights and understanding of how change occurs in various situations and for different groups of stakeholders (see "act" phase).

Figure 3. Measuring what matters and for what purpose

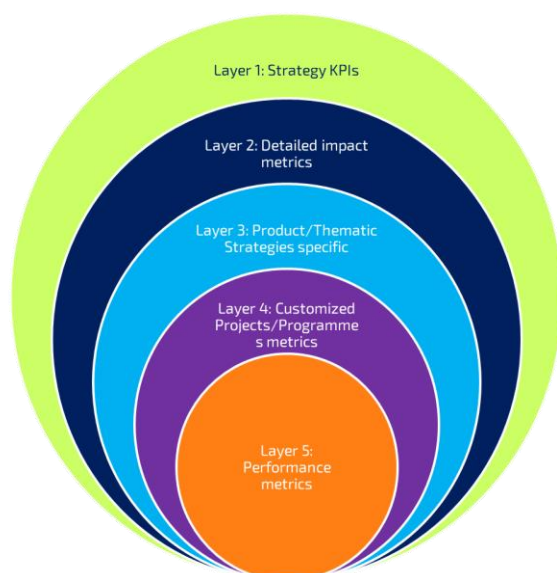


It is critical to be sure what data is needed for which purpose and how it will be analysed before it is collected so that every bit of data is used and all the efforts and cost to collect data are not used in vain. This can then be used to make impact-driven decisions based on actionable data & information. The data journey is relevant at all levels, including systemic, organizational, and interventional. We are cognisant of the fact that with a large system like Fairtrade, we cannot measure everything, therefore we need to be selective and measure what matters with clear purpose in order to decide what level will give us the right insights.

Based on this, today's MEL system, as depicted in Figure 3, sets the boundaries of our work. Fairtrade's 2021-2025 strategy covers the time horizon of specifically 2025 but with high level aspirations articulated up to 2030 in line with the UN Sustainable Development Goals. The MEL system reflects this by focusing on output indicators for all certified producer organizations and the monitoring of key outcome/impact indicators with a sample of producers. However, many of the outcomes and impacts of Fairtrade can only be assessed through in-depth research and evaluation. For that reason we maintain ongoing commitment to engage with outcome and impact evaluations, as well as other types of in-depth research, to complement global monitoring especially on topics that are regularly set and updated through the learning agenda of Fairtrade and those where assumptions in the theory of change need to be tested out in case they are weak causal assumptions

With that as a focus, the global monitoring system that informs the MEL system is focused on different layers of data as illustrated in Figure 5 below:

Figure 4. Global monitoring informing the overall MEL system



- Layer 1: The overarching strategy KPIs include outcome level indicators that need to be monitored regularly in order to assess whether we are in line with achieving our high level aspirations on the over-arching global system wide priorities. These are more relevant for the leadership teams and decision makers to ensure we stay on course, steer and adjust where need be.
- Layer 2: Some of the topics for strategy KPIs require a lot more depth and are covered in detailed impact metrics. This is more relevant for operational leads to facilitate their work streams.
- Layer 3: This is focussed on specific metrics that are relevant to product or thematic strategies to go a bit deeper.
- Layer 4: These are the customized metrics that are relevant to projects and programmes and are specific to the donors as well as the entities involved in the relevant projects/programmes.
- Layer 5: This is focussed on some performance metrics vis a vis the activities and action plans of specific product and thematic strategies that have a lot more output level metrics

Note that layer 1 also includes regular scope level descriptive monitoring data from all certified producer organizations. As such, regular monitoring covers all products and all countries where these producer organizations are present. It also includes data related to market progress monitored by the marketing-facing organizations present in countries where Fairtrade products are sold on an annual basis.

In recent years, Fairtrade has implemented an increasing number of projects (specific product or thematically-focused interventions working with specific groups of producer organizations, bilateral donors, and/or commercial partners, which go beyond certification support) and programmes (a collection of projects under a single umbrella). These projects (as well as Fairtrade's commissioned studies) are showcased on the [Fairtrade Impact Map](#), a digital resource for both the public, commercial partners, and the Fairtrade system to understand our project & commissioned studies portfolio, our country-disaggregated monitoring data, as well as more information about the countries in which we work.

An inventory of these projects and programmes is consolidated and support is overseen by the International Partnerships & Programme Implementation team (another team within Fairtrade International) as well as the Global Resource Mobilization Working Group, a systemwide group including representatives from Fairtrade International, Producer Networks, and National Fairtrade Organizations working on externally-funded project and programmes. The International Partnerships & Programme Implementation team and Working Group organizes this support through a global 2021 – 2025 strategy, yearly action plans, and an outcome-based programmatic framework.

The Global Impact team works with the International Partnerships & Programme Implementation team to support MEL for these projects and programmes through (1) linking project/programme monitoring indicators to overarching Strategy KPIs, impact metrics, and product/thematic strategies (i.e., Layers 1 – 3 above), (2) developing digital tools and opportunities for institutional learning and collaboration, and (4) offering customized MEL support for particular projects or programmes. Internally-funded projects and programmes are similarly supported through coordination with the Global Products, Programmes, and Policy team.

Research and Evaluation forms a key component of the Fairtrade MEL system, giving an in-depth impact-level picture of what is happening to Fairtrade producer organizations, producers, their communities and why. Our research and evaluation is guided by our [Research for Learning Agenda](#), a list of research needs consolidated by theme and linked to our Global Strategy. The Research for Learning Agenda serves two purposes: to give internal (Fairtrade) guidance and increased system clarity on the most important topics to explore, and to guide external (researchers/consultants) on what topics of research will be useful for Fairtrade. The topics on the Research for Learning Agenda are developed through a triangulated, consultative process including an analysis of system needs/demands, identification of research gaps in the Fairtrade Theory of Change pathways, and the needs of the Fairtrade strategy. In recent years, we have also prioritized topics that are more immediately actionable (i.e., connected directly to immediate producer or market needs, and can be conducted in a shorter period of time).

We as Fairtrade International commission at least 1-2 research pieces or impact evaluations a year (while supporting more research done throughout the global Fairtrade system). In addition, we engage with external research/researchers guided by our academic engagement policy and [student research policy](#) as well as through participative webinars, discussions. Finally, we host records enabling analysis and discussion of external research on our Learning Hub, centralized internal-facing evidence platform hosting (mostly) external research on Fairtrade's impact.

KEY COMPONENTS OF THE MEL SYSTEM

DATA AND INFORMATION

Over the years Fairtrade has systematized data collection, data management for its currently approximately 2,000 producer organizations. The main focus has been on global monitoring indicators that are at the scope level and some at the outcome and impact level.

The monitoring data forms a core basis for our understanding of the dynamics of how certification is developing, and how the benefits of Fairtrade are being distributed between products, geographies, and producer organizations. They give us a good idea where the system is performing relatively well and where it is not, which enables decision-makers to plan and focus their interventions. Other aspects of the data are analysed and shared internally in response to specific questions, or specific stakeholder needs. Relevant data are also shared with key internal stakeholders to enable their own analysis and planning.

In addition to the producer data, Fairtrade collects market monitoring data for a small set of market indicators via the National Fairtrade Organizations and the certifier. These data are also collated, cleaned, and analysed on an annual basis. These data is used primarily for internal analysis and annual reporting operations.

a. Data systems and tools: The following different types of systems and tools support the MEL system:

- [CODImpact](#): This is the most extensive and wide spread data collection tool that is done in conjunction with the audits, the auditors collect these data. CODImpact will be replaced in 2024 by FairInsight (see below)

- [FairInsight](#): This is a producer self-reporting tool, the initial focus was on enabling digital capacities of producer organizations and enabling reporting on Fairtrade Premium investments, a reporting requirement in the Fairtrade Standards. A big value driver for producers to report in FairInsight is the possibility to create from the data reported Commercial Profiles and Marketing Reports that can be shared with commercial partners. In addition to this, other functionalities have been added, including a survey management tool. In future, other topics linked with standards will also find the respective sections so that the producers do not have to go to multiple places to report. Additionally, specific areas for each producer organization to share their geolocation data is active on the platform. FairInsight is a major shift in making producer organizations as the owners and custodians of their own data.
- [Fairtrace](#): This a transaction data tool where traders report their Fairtrade sales volume. They also report Fairtrade Premium amount paid to producers when applicable.
- [Connect](#): This is a licensing management tool that National Fairtrade Organizations uses, where licensees report their Fairtrade sales in consuming markets. The market sales data coming from this tool is key to monitor Fairtrade sales trend in various countries, it gives us an insight in consumer demand of Fairtrade products.
- [Certification and audit data](#): Certification data such as basic information of certified producer organizations and traders form a foundation of outreach statistics that Fairtrade publish. Analysis of audit outcomes is an integral part of Fairtrade monitoring system. Internally we monitor the overall performance as part of strategy indicators. Externally we publish the overall performance analysis as part of Fairtrade HREDD report, and product specific analysis in Banana dashboard.
- [Deforestation data](#): In 2022, we started the deforestation monitoring on a pilot basis for cocoa and worked with eight producer organizations in Ghana and Cote d'Ivoire to collect geolocation data, identify deforestation alerts and produce risk assessments. In 2023, in preparation for new requirements in the revised Fairtrade Cocoa and Coffee Standard as well as emerging EU legislation on preventing deforestation in supply chains, we went through a major expansion in this area. Other than producer organizations being the owners of geolocation data and having their own space to report through FairInsight, we have a partnership with Satelligence that generates deforestation risk assessments. In addition, we are strongly working with the producer organizations on the ground to build their capacities to also collect and report geolocation data. Technical improvements, data sharing and engagement with commercial partners are ongoing in parallel as well.
- [Living wage data](#): within cooperation with IDH and other Fairtrade schemes under the umbrella of Living Wage Coalition, we have been collaborating on data collection related to living wages. Given some data sharing challenges, we are also working to embed Fairtrade standard related wage data collection into Fairinsight based on the pilots conducted in 2024 this will be integrated by 2025. We are in regular communication with IDH to ensure methodology alignments or differences are clearly understood by us and our stakeholders.

- Human rights and Environmental Risks mapping: This is a product risk map that is published on the Fairtrade website as a part of Fairtrade's commitment to transparency.
- Human Rights and Due Diligence Report: outlines how the organization identifies, addresses, remediates, and tracks human rights and environmental risks within Fairtrade certified supply chains and its operations. The report details Fairtrade's fundamental actions for mitigation and remediation, which include: (1) Engaging with rightsholders, (2) Providing minimum prices and premiums (3) Offering direct support to producer organizations, (4) Implementing programs and advocacy efforts. The report presents aggregated audit scores related to human and environmental rights for producer organizations and traders audited in 2022, highlighting compliance with Fairtrade certification criteria. An analysis of corrective measures on three major coffee producers is also included.
- [Banana dashboard](#): rich set of information to learn more about Fairtrade bananas and the path to a fairer banana sector. Users can learn about Fairtrade producers and origins, exploring contextualized monitoring data about farmers, workers, production, area, sales, premium and premium use. For the first time a tool provided product-level insights into human rights and environmental topics with audit data analysis. More than nine human rights and environmental topics were analyzed with detailed insights about audit results, understanding context and Fairtrade requirements. In addition, all risks identified in the banana industry were mapped to audit analysis, projects & programmes, services, offer and research to provide better understanding on how Fairtrade is addressing risks. Lastly, in addition to data and insights, dashboard contains 'offer' section with more qualitative information on sustainable banana offer (living wage, living income, climate and HREDD), projects and programmes producer support and services offered to producer organizations as well as information about protection policy.
- [Producer satisfaction](#) and [global crisis surveys](#): These are surveys to measure the satisfaction of producer organizations with Fairtrade services. In the last years we have been also doing a global crisis survey to understand challenges faced by the producers so that their needs can be addressed through various interventions and support. For example, the COVID survey results led to the set-up of COVID fund to support the producers. Fairtrade also supports the Producer Networks in better understanding the satisfaction and needs of their Producer Organizations by running, on a yearly basis, a Producer Satisfaction Survey. This survey is conducted online and is targeted towards the management of the Producer Organizations. Data is used to improve Producer Network support services and reflect on strengths and challenges of the past year. We are seeing continuous value in keeping the producer satisfaction survey running as its an important input for our regional networks to adjust and adapt. However, based on most recent crisis survey we may consider moving it to a frequency of once in 2 years. However, its still of value as external realities are changing quite fast and unintended outcomes of all regulatory changes may still lead to unprecedented situations for producers to cope with.

b. Business Intelligence Tools: Fairtrade has invested in the past years in internal business intelligence tools to create various visualization dashboards on many of the data sources

described. The member organizations that provide producer support in the field has the access to the dashboards that analyse compliance pattern. A system wide data warehouse and Business Intelligence tool, FairLens, has been up and running several years already. It governs and processes main business critical data turning into information. By combining sales information with other data sets, such as certification, impact and market, and aligning the information with data governance, it provides standardised and consistent data throughout the Fairtrade system. In 2024 Fairtrade started investing in global product dashboards that serve as an 'one-stop shop' for any relevant product data & insights. So far [Banana dashboard](#) has been developed fully, phase 1 of coffee dashboard development has been completed, with cocoa dashboard development planned for 2025. Fairtrade is a federated system where member organization invest in a common information system infrastructure that allows members to access data collected from different sources. Fairtrade plans to continue advancing innovation this domain.

- c. Global Data Governance:** A global data governance group was set in the past years to take decisions linked to definitions and calculations in order to ensure single source of truth is available for the Fairtrade system on specific topics. The work from this group will have a renewed focus in 2025 with a lot more focus on data sharing as well as conditions of data sharing which goes hand in hand with traceability and transparency initiatives.
- d. Digital Data & Information (DDI) Strategy:** This was one of the recommendations from the external review of MEL activities, back in 2019 we did not have a Fairtrade system wide coherent data strategy. Today, we have a digital data & information strategy that was approved in February 2022 with a focus in integrating the main transactional data systems for transparency and traceability purposes, and into setting up a digital services team that will focus in delivering services and governing global digital investments.

The DDI vision of integrating our core systems to give end-to-end supply chain visibility, better quality and more timely data and, most importantly, the ability to turn the rich pool of data we collect into meaningful and valuable information for the benefit of our producers and customers – is starting to take shape.

A number of key digital initiatives and trials have been implemented through the stewardship of the DDI Steering Committee and the design and implementation of the FairMarket team. We are now at the stage where we need to bring together a dedicated Digital team to build on these initiatives and accelerate the implementation of new opportunities. This is critical to satisfy customers' information needs and be competitive in the marketplace.

The core initiatives planned for 2025 are centered around compliance with regulations such as EUDR and building our systems and applications to open access to data to stakeholders across the group in a timely, responsible and secure manner. The priorities for this workplan were developed with a high level of stakeholder engagement to understand and address Members' needs.

GLOBAL MONITORING

As explained in the previous section, global monitoring sets the boundaries of the MEL system, it informs what outcomes to monitor and thereby need to be embedded in one of the data sources that inform the different layers of indicators.

- **Strategy KPIs & theory of change:** Every year we have two cycles of updates with the leadership teams. One is focused on status of the new indicators and tools roll out, the other focuses on actual data to understand progress. We plan deep dive sessions in between these meetings with relevant high level groups in the Fairtrade system, to inform decision making. There is a digital dashboard underway for facilitating strategy KPI reporting.

The learning from recent revisions to the theory of change have been that we need to keep the theory of change alive by layering stories and evidence alongside. The digital version of the theory of change allows us to do that. In addition, we aim to make minor adjustments every year based on data and research results and do a proper update every 3-4 years based on similar evidence mapping as we did recently to make sure we are factoring in unintended outcomes as influence of context. This will allow us to adapt our MEL systems.

- [Monitoring dashboard](#) in our website in collaboration with the International Trade Center: It includes key descriptive statistics for the top seven global products. This published and updated regularly in our website. For more detailed product-level information Fairtrade started developing interactive, user-friendly product-specific global dashboards that provide additional and more detailed data analysis with contextualisation, as well as key qualitative information relevant for a product category. First global dashboard focused on banana and was published in 2024, and coffee and cocoa dashboards will become available in 2025.
- **Reporting and communication:** Several information products rely on the data and statistics generated throughout the year like overall monitoring report, regional monitoring reports and annual report. These are updated annually on our website.

CUSTOMIZED MONITORING

As mentioned above, the Global Impact team works with various teams within Fairtrade International such as the Global Resource Mobilization, Global Products, Programmes and Policy teams to support MEL for projects and programs through (a) linking indicators from these to overarching strategy KPIs and project / programme (i.e., layers 2 -3, see Figure 4 above), (b) developing digital tools and opportunities for institutional learning and collaboration, (c) offering customized MEL support for particular projects or programmes.

Historically, monitoring indicators for Fairtrade projects and programmes had unfortunately been a bit disconnected from centralized monitoring and the overall

Fairtrade's theory of change. Use of common indicators was rare, with individual projects and programmes making their own MEL frameworks based on their customized needs, making it difficult to gain an aggregated analysis across products and themes. We are happy that in recent years this trend has reversed.

After development of the revised Fairtrade theory and change and the strategy KPIs, we worked with the teams mentioned above to ensure these indicators were used as an indicator base for outcome-based programmatic framework as well as incorporated in product/thematic strategies.

Common indicators set the groundwork for better future aggregate analysis of outcomes across our portfolio of project/programmatic work. We also have developed new digital tools and opportunities for system-wide collaboration around project/programme MEL. We have been working with TolaData since 2023 to offer our member organizations access to an online platform useful for project monitoring. One notable feature of TolaData, that we as Fairtrade co-developed with them, is the Global Indicator Library, which houses all the Global Strategy KPIs included in our monitoring process. This resource is available for other Fairtrade users to incorporate into their own projects, promoting greater transparency and standardization in how we measure impact at both global and local levels within Fairtrade. Part of this feature enables data aggregation for more comprehensive insights. We also since 2020 have been organizing a Project/Programme MEL Task Force, bringing together Fairtrade system members on a quarterly basis to discuss learnings, share resources, develop guidance documents, and provide MEL technical feedback.

Finally, we offer the Fairtrade system customized MEL support for particular projects and programmes. These support activities include developing bespoke theories of change, developing indicators, overseeing data collection, analysing data, producing dissemination products and running learning workshops. This support is offered on an ad-hoc basis based on need, with the expectation that this offer will increase in the future, but already in recent years we have supported various programmes as well as multiple smaller engagements with National Fairtrade Organizations and commercial partners. As of 2024, we launched a standardized "Data & Impact Services Portfolio" where Fairtrade system members can choose the services most useful for their needs and engage with the GI unit through a structured, systematic process.

RESEARCH AND EVALUATION

An ongoing programme of commissioned research is an important component of our MEL system. In-depth research gives us a detailed picture of what is happening to Fairtrade producers and their communities, and why. It allows us to gather information about farmer and worker experiences and perceptions. Through the general use of mixed method approach and a combination of data collection tools, research brings contextual analysis and explanation that monitoring data cannot yield. For impact and more complex outcome indicators, evaluation and other research is the only effective way to gather relevant data.

The Fairtrade system has been commissioning between one-two outcome/impact evaluations annually. Impact and outcome evaluations are usually focused on major products and programme focus, and are commissioned to external institutions with significant expertise in assessing the sustainability effects of certification. We do not seek to influence the findings of these studies. We believe that commissioned evaluations can be objective where the consultants and the commissioning agency take a professional approach. Positive benefits of commissioning evaluations include being able to ensure that researchers have full and accurate information about Fairtrade data and key stakeholders, being able to ask research questions consistently across products and geographies, having full access to data generated by these evaluations (important for meta-level analysis), and more.

Fairtrade-commissioned evaluations focus primarily on core products and incorporate evaluation of key strategic areas such as hired labour, social compliance, climate change, gender, producer services, or other themes that are important for system stakeholders. Our knowledge about each core product or key theme will therefore be supported by new research evidence and data every few years. We seek to ensure that impact and outcome evaluations employ mixed methods to generate robust qualitative and quantitative findings. Wherever financially and logistically possible we require researchers to integrate a counterfactual into the evaluation research.

We also value and utilize good quality independent external research that has not been directly commissioned by the Fairtrade system, but which has considerable scope to support internal learning and knowledge about our effectiveness. We welcome interaction and partnership with independent research projects, with a view to ensuring that such research can be as accurate and useful as possible. To this end, we have developed a Fairtrade [Research for Learning Agenda](#), in which internal Fairtrade stakeholder have identified research to cover the most crucial research gaps. This agenda is disseminated through the Fairtrade website, at international conferences such as the [Fair Trade International Symposium](#), and through professional networks so to develop external research partnerships focusing on these topics. We coordinate work on commissioned research across the Fairtrade system through our Research Task Force, a participatory group bringing together Fairtrade stakeholders to discuss research needs, develop Terms of Reference, share lessons learned, and turn research insights into actionable recommendations and next steps.

It is Fairtrade's policy to publish full impact evaluations wherever possible. Studies published to date are available on the Fairtrade International [website](#).

We engage with external research/researchers guided by our academic engagement policy and [student research policy](#) as well as through participative webinars and discussions. This academic engagement policy and student research policy guides how we respond to academics and students whom reach out to us for data requests as well as for longer-term academic partnerships. We receive multiple data requests per year from these stakeholder groups and 1-2 request a year for longer-term partnerships. We are currently working towards more pro-active engagement with academic researchers and accelerate our academic partnerships in 2023 and beyond.

Finally, we host records on external research enabling analysis and discussion of external research on our Learning Hub, a centralized internal-facing evidence platform hosting (mostly) external research on Fairtrade's impact. This Learning Hub hosts records of over 389 studies on Fairtrade's impact, and is filterable and searchable by theme, product, region, country, and more. It also offers opportunities to engage with studies through ratings, discussions, and polls.

LEARNING AND COMMUNICATION

Fairtrade International is committed to communicating the results of monitoring and evaluation processes internally, and to using relevant findings to influence planning and decision making – both for the MEL system itself but more importantly for programme and strategic decisions. For example:

- Monitoring data and analysis are shared with the Fairtrade International Executive Team, the Board, and other governance and operational bodies within the Fairtrade system on an annual basis. It is also used as an input into planning and standards setting processes.
- Evaluation results are made publicly available and shared with staff throughout the Fairtrade system. It is Fairtrade International's policy that workshops should be held as part of every evaluation process, where results are shared with relevant stakeholders, and used as the basis for further discussion of findings, recommendations and actions.
- The Global Impact team is in close collaboration with key system stakeholders developing updated MEL frameworks for different important products and thematic strategies. These frameworks build on past work and will lay out systematically how progress in each area will be measured through monitoring and evaluations over a multi-year period, as well as support sound and continuous accountability and learning in key programme areas.
- The Global Impact also produces 'Impact Briefs' on demand, synthesis documents for internal learning which bring together insights around a particular product or theme, drawing on data, information, and research from multiple sources.

Since 2020, Global Impact has had a specific and targeted MEL Capacity Building strategy for Fairtrade system stakeholders. In 2021–2022, a systematic MEL Capacity Building module was run for the entire Fairtrade system, encompassing around 20 classes over nine months and following a rigorous syllabus. For 2023 and beyond, we use a combination of needs assessments and customized trainings to ensure the capacity for learning and adaptation is continuously built throughout Fairtrade. In 2024, we have started working on rolling out 'FairLearn', an e-learning platform useful for the Fairtrade system (and soon, external Fairtrade partners) to build their capacity through courses on a variety of thematic topics (HREDD, Living Income, Climate & Environment, etc.)

As mentioned earlier, learning is also enhanced through collaboration around various digital platforms (Learning Hub, Impact Map, FairLearn) as well as Task Forces (Project/Programme MEL Task Force, Research Task Force). Learning is also promoted through targeted activities in individual projects and programmes. The Global Impact unit

provides a written guidance document (updated on a yearly basis) to provide the structure and internal and external resources to support this decentralized learning.

STRUCTURE: ROLES AND RESPONSIBILITIES

The Fairtrade MEL system has had dedicated staffing and annual expenditure budget since 2008. Since more than a decade now, the budget allocations to the MEL systems have been increasing given the importance of data and digital needs of the Fairtrade system. To give an example, MEL investments 2014 – 2019 were on average €650,000 on an annual basis (excluding staffing costs). Starting in 2020, investments in MEL activities increased from €700,000 to €1,350,000 in 2022. Moving forward, MEL investments linked to data & tools will be covered by the Digital team and as such overall budget for MEL activities will decrease with a focus on monitoring and evaluation.

In terms of staff, in 2016 the Global Impact unit had 2.3 FTE compared to 13.5 FTE in 2024. This increase in staff is part of the response to the external review undertaken between 2018-2019 to assess MEL activities in the Fairtrade system that led to the creation of a Global Impact unit with defined focus to address data and information as well as impact management aspects. The proliferation of regulatory needs has also meant additional resources needed for data collection and capacity building especially on deforestation, environment indicators and gearing up for HREDD laws. Our team vision is to accelerate the delivery of data & insights through user-friendly digital tools that enable all Fairtrade stakeholders to make impact driven decision, communicate effectively and advocate for Fairtrade.

The Global Impact unit is made up of two teams: Information & Knowledge and Impact Management. The Information & Knowledge team's core tasks are related to data management, data governance, data strategy and BI tools, while the Impact Management team is responsible of the global monitoring framework based on the theory of change including customized project and programme MEL and research and evaluation. This split in the focus of the Global Impact unit has led to tremendous progress in MEL activities across the Fairtrade system in the last three years.

Fairtrade Global Impact unit and other MEL staff members in other Fairtrade organizations have significant experience in monitoring, evaluation, project management, and research. Current Fairtrade International staff positions with full-time focus on MEL related work, and responsibility for implementing aspects of the Fairtrade MEL system globally, are listed below. The responsibility for overall management and leadership of the Fairtrade MEL system lies within the Global Impact unit at Fairtrade International in its main office located in Bonn, Germany.

Table 1. Fairtrade International Global Impact staff (as of November 2024)

Role	FTE
Director of Global Impact	1
Head, Information & Knowledge	1
Head, Impact Management	1
Data Scientist	1
Impact Monitoring Manager	1
Impact, Evaluation and Learning Manager	1
Impact Portfolio Manager	1
Data Analyst	4
Data Assistant	2
Student Assistant	.5

Staff within various other Fairtrade functional units – including International Partnerships & Programme Implementation, Communications, Global Products, Policy, Programmes, and Standards Pricing and Assurance teams in Fairtrade International, Business and IT Solutions team from Fairtrade's certifier FLOCERT and MEL staff in Producer Networks and National Fairtrade Organizations – also dedicate time to activities which support the MEL system related activities.

In addition to the specialized staff working within Fairtrade International, there are three regional MEL managers (Asia, Africa, and Latin America) in post with accountability to the Producer Networks and work independently. The Fairtrade MEL community of practice includes a wider group of Fairtrade staff in market-facing organizations with dedicated time to work in MEL-related topics.

OPPORTUNITIES FOR ENGAGEMENT

The [Impact and Research pages](#) contain the links to many pieces of MEL work, including published monitoring reports, published evaluation reports, the Fairtrade's theory of change, the Impacts Public System Report, results from consultative processes and information about the research publications. The contact point for queries in relation to the MEL system is impact@fairtrade.net.

APPENDICES

Appendix 1: Fairtrade Strategy

See <https://files.fairtrade.net/publications/Fairtrade-Global-Strategy-2021-2025.pdf>

Appendix 2: Indicators list

KPIs technical information										
Impact area	Relevant for	KPI	reported by	Metric	Unit	Definition	Source of Data	Responsible for Data Provision	Years available	Target 2025
Sustainable resilient livelihoods	SPOs only	1.Living Income	Product (cocoa, coffee, banana), country	1.1	%	Percentage of Fairtrade Farmers in global commodity chains who earn a living income	Senior Advisor Sustainable Livelihoods, CODImpact / FairInsight	Global Impact	2021, 2022	25% for all products
	SPOs only	1.Living Income	Product (cocoa, coffee, banana), country	1.2a	#	Number of countries with established living income reference prices	Senior Advisor Sustainable Livelihoods	Global Impact	2021, 2022, 2023, 2024	TBD
	SPOs only	1.Living Income	Product (vanilla, cashew, coconut, rice, orange, mango), country	1.2b	#	Number of countries with proxy living income reference prices	Senior Advisor Sustainable Livelihoods	Global Impact	2021, 2022, 2023, 2024	TBD
	Cocoa SPOs only	1.Living Income	Product (cocoa)	1.3a	#	Number of licensees paying FLIRP	Senior Advisor Sustainable Livelihoods	Global Impact	2020, 2021,2022	Demand Dependent
	Cocoa SPOs only	1.Living Income	Product (cocoa)	1.3b	%	Percentage of the volumes sold at FLIRP from total cocoa volumes sold	Senior Advisor Sustainable Livelihoods	Global Impact	2020, 2021,2022	Increase
	SPOs only	1.Living Income	Product (cocoa, coffee, banana)	1.4	#	Number of POs in global commodity chains with farmer income measured vs living income benchmarks	Senior Advisor Sustainable Livelihoods	Global Impact	2021, 2022	TBD
	HLOs only	2.Living Wage	Product (banana, flowers)	2.1	TBD	TBD	Pricing	Global Impact	TBD	TBD

Decent work	HLOs only	3.HREDD for POs (decent working conditions)	HLOs, human rights area, year	3.1a	%	Percentage of non-conformities (score 1-2) related to human rights areas audit data	Audit results	Global Impact	2021, 2022	Year-on-year monitoring of non-conformities on critical topics
	HLOs only	3.HREDD for POs (decent working conditions)	HLOs, year	3.2a	Average	Average Score in audit related to human rights areas	Audit results	Global Impact	2021, 2022	Year-on-year increase in average score
	HLOs only	3.HREDD for POs (decent working conditions)	HLOs, year	3.3a	%	Percentage non-compliance (score 1-2), compliance score (3,4,5), best practices (4,5) related to human rights	Audit results	Global Impact	2021, 2022	Year-on-year increase in average score
	HLOs only	3.HREDD for POs (decent working conditions)	HLOs, organizational strength areas	3.1b	%	Percentage of non-conformities related to organizational strength audit data	Audit results	Global Impact	2021, 2022	Year-on-year monitoring of non-conformities on critical topics
	HLOs only	3.HREDD for POs (decent working conditions)	HLOs	3.2b	Average	Average Score in audit related to organizational strength	Audit results	Global Impact	2021, 2022	Year-on-year increase in average score
	HLOs only	3.HREDD for POs (decent working conditions)	HLOs	3.3b	%	Percentage non-compliance (score 1-2), compliance score (3,4,5), best practices (4,5) related to organizational strength	Audit results	Global Impact	2021, 2022	Year-on-year increase in average score

Sustainable,
resilient and
fairer
supply
chains

All

4.HREDD for POs (POs strength)	POs,SPOs,HL Os	4.1a	Score distributi on main area (%)	Percentage non-compliance (score 1-2), compliance (score 3,4,5) best practices (4,5) related to human rights main areas	Audit results	Global Impact	2021, 2022	Year-on-year monitoring of non-conformities on critical topics and average scores
4.HREDD for POs (POs strength)	POs,SPOs,HL Os	4.2a	Score distributi on main area (%)	Distribution of POs organizational strength related audit performance (score 1-5) (Main areas)	Audit results	Global Impact	2021, 2022	Year-on-year monitoring of non-conformities on critical topics and average scores
4.HREDD for POs (POs strength)	POs,SPOs	4.3a	%	Percentage of compliance on human rights areas (3,4,5); percentage of best practices on human rights areas (score 4,5)	Audit results	Global Impact	2021, 2022	Year-on-year monitoring of non-conformities on critical topics and average scores
4.HREDD for POs (POs strength)	POs,SPOs,HL Os	4.1b	Score distributi on main area (%)	Distribution of human rights related audit performance (score 1-5) (Detailed Areas)	Audit results	Global Impact	2021, 2022	Year-on-year monitoring of non-conformities on critical topics and average scores

		4.HREDD for POs (POs strength)	POs,SPOs,HL Os	4.2b	Score distributi on main area (%)	Distribution of POs organizational strength related audit performance (score 1-5) (Detailed areas)	Audit results	Global Impact	2021, 2022	Year-on-year monitoring of non-conformities on critical topics and average scores
		4.HREDD for POs (POs strength)	POs,SPOs	4.3b	%	Percentage of compliance on organizational strength (3,4,5); percentage of best practices on organizational strength (score 4,5)	Audit results	Global Impact	2021, 2022	Year-on-year monitoring of non-conformities on critical topics and average scores
Sustainable, resilient and fairer supply chains	SPO only	5. Producer Satisfaction	Region	5.1	%	Percentage of POs satisfied or very satisfied with producer support services	Producer Satisfaction Survey	Global Impact	2021, 2022	increase in satisfaction over time
Gender equity & social inclusion	SPO only	6.Inclusivity and diversity	Committee type, region	6.1	%	% of producers represented on governance bodies. Proxy indicator producers represented on (1) PNs Board members and (2) PNs Committees	Governance and Gender Survey	Global Impact, Producer Networks	2021, 2022	Increase over time
	SPO only	6.Inclusivity and diversity	Committee type, region	6.2a	%	% of women serving as (1) Board members, (2) Committees	Governance and Gender Survey	Global Impact, Producer Networks	2021, 2022	Increase over time
	SPO only	6.Inclusivity and diversity	Committee type, region	6.3a	%	% of youth among: (1) PNs Board members (2) PNs Committees members	Governance and Gender Survey	Global Impact, Producer Networks	2021, 2022	Increase over time

Environmental sustainability	SPOs only	7.Climate resilience practices and deforestation	country, region	7.1	# and %	Number and percentage of POs that participate and/or apply climate resilient practices and/or good agroecological environmentally sustainable practices and/or implement risk mitigation and climate adaptation plans	Climate resilience internal survey	Global Impact, Producer Networks	2021, 2022	1
	Cocoa and coffee SPOs only	7.Climate resilience practices and deforestation	country, region, product (coffee, cocoa)	7.2a	# and %	Number and percentage of SPOs that have geolocation data ready	Satelligence	Global Impact	2020-2022	Cocoa: 407, 100% Coffee: 312, 50% to be confirmed, based on 2022 number of certified SPOs
	Cocoa and coffee SPOs only	7.Climate resilience practices and deforestation	country, region, product (coffee, cocoa)	7.2b	# and %	Number and percentage of SPOs that are deforestation free	Satelligence	Global Impact	2024	Cocoa: 407, 100% Coffee: 312, 50% to be confirmed, based on 2022 number of certified SPOs
Sustainable, resilient and fairer supply chains	All	8.Market growth	product, production type, country, year	8.1a	MT	Volume sold (metric tonnes)	Fairtrace (sales) and CODImpact (production)	FLOCERT, Global Impact	2020,2021,2022	Banana (10%); Cocoa (16%); Coffee (42%); Flowers (4%); Sugar (1%)

	All	8.Market growth	product, production type, country, year	8.1b	%	Percentage change in volumes for global products (both producer side and market side volumes)(organic/conventional)	Fairtrace (sales) and CODImpact (production)	FLOCERT, Global Impact	2020,2021,2022	Banana (10%); Cocoa (16%); Coffee (42%); Flowers (4%); Sugar (1%)
	All	8.Market growth	HLOs, SPOs, product, year	8.2	\$	Premium generated and premium use	Fairtrace (Premium generated) and CODImpact/FairInsight (Premium use)	Global Impact	2021,2022	TBD
	All	8.Market growth	country, product, year	8.3	%	Top producer countries by volumes sold	Fairtrace	Global Impact	2021,2022	TBD
	All	8.Market growth	country, product, year	8.4	%	Top market countries by volumes sold	Connect	Global Impact	2021,2022	TBD
	All	8.Market growth	year	8.5a	€	Absolute license fees, year to year change	Finance	Global Impact	2017,2018,2019,2020,2021, 2022	TBD
	All	8.Market growth	country, year	8.5b	%	Percentage contributions to license fees by NFOs	Finance	Global Impact	2021,2022	TBD
	All	8.Market growth	business model, year	8.6	%	Percentage split by business models (ATCB, FSP, OZB)	Finance	Global Impact	2021,2022	TBD
Decent work, Sustainable, resilient and fairer supply chains	Commercial actors	9.Business practices (HREDD for licensees)	country	9.1	# and %	# and % of Commercial actors at different stages of engagement, action, programmes and advocacy for Fairtrade	Licensee survey	Global Impact, NFOs	NA	NA

Empowered farmers & workers, Decent work, Sustainable, resilient and fairer supply chains	Traders, manufacturers, retailers	9.Business practices (HREDD for licensees)	type of commercial actor	9.2	#	# commercial partners who implement HREDD regulations (engage with suppliers to identify, prevent, mitigate, and account for how they address human rights violations and environmental impacts in a Basic, Average or Excellent manner)	Licensee survey	Global Impact, NFOs	NA	NA
Sustainable, resilient and fairer supply chains	Businesses	10.Business satisfaction	type of commercial actor	10.1	%	Percentage of commercial actors satisfied or very satisfied with services provided by Fairtrade system	Licensee survey	Global Impact, NFOs	NA	NA
Sustainable, resilient and fairer supply chains	All	11.Traceability and transparency	type of actor	11.1	%	Percentage of transactions which are tracked on a Fairtrade digital platform with known chain of custody model		Global Impact	2021,2022,2023	1
	All	11.Traceability and transparency	type of actor	11.2	%	Percentage of transactions between traders tracked on a Fairtrade digital platform with PO identity preservation (either PO lot no or PO FLO ID)		Global Impact	2021,2022,2023	Banana (95%); Flowers (95%); Coffee (50%)
	All	11.Traceability and transparency	type of actor	11.3	%	Percentage of operators who make their data (volumes, price) transparently available on a Fairtrade digital platform to 1) actors within the supply chain and ii) actors beyond the supply chain		Global Impact	2021,2022,2023	0.25

	All	11.Traceability and transparency	type of actor	11.4	%	Percentage of POs for which Fairtrade has i) mapped the supply chain to at least one licensee and ii) have shared this information with the PO on a Fairtrade digital platform		Global Impact	2021,2022,2023	0.5
	All	11.Traceability and transparency	type of actor	11.5	%	Percentage reporting Premium use on a Fairtrade digital platform		Global Impact	2021,2022,2023	1
	All	11.Traceability and transparency	type of actor	11.6	%	For each reporting year: 1) percentage of POs by PN and producer setup that have completed results for the previous plan period 2) percentage of POs by PN and producer setup that have completed plans for the upcoming plan period		Global Impact	2022,2023	1) at least 60% per PN and producer setup 2) at least 70% overall, globally
Sustainable, resilient and fairer supply chains, Gender & social inclusion, Environmental sustainability, Decent work, Sustainable resilient livelihoods	Policy makers, governments	12.Advocacy and citizen engagement	thematic area, product	12.1	#	Number of Fairtrade recommendations submitted and reflected in legislative amendments (national/EU)	Advocacy group survey	Global Impact	2022	TBD
	Policy makers, governments	12.Advocacy and citizen engagement	thematic area, product	12.2a	#	Number of requests/invitation to take part in policy dialogue around topics like LI, LW, gender, climate change, etc.	Advocacy group survey	Global Impact	2022	TBD
	Policy makers, governments	12.Advocacy and citizen engagement	thematic area, product	12.2b	#	Number of requests of policy dialogue that Fairtrade participated to	Advocacy group survey	Global Impact	2022	TBD
	Policy makers, governments	12.Advocacy and citizen engagement	thematic area, product	12.3a	#	Number of campaigns FT joined around different topics (LI, LW, Gender, climate change, etc.)	Advocacy group survey	Global Impact	2022	TBD

Policy makers, governments	12.Advocacy and citizen engagement	thematic area, product	12.3b	#	Number of campaigns FT launched around different topics (LI, LW, Gender, climate change, etc.)	Advocacy group survey	Global Impact	2022	TBD
Policy makers, governments	12.Advocacy and citizen engagement	thematic area, product	12.3c	#	Number of people reached by these campaigns around LI, LW, HREDDD, Climate Change, public procurement (# of clicks, # of retweets, # of shares, # of visitors webpage, etc.)	Advocacy group survey	Global Impact	2022	TBD
Policy makers, governments	12.Advocacy and citizen engagement	thematic area, product	12.4	#	Number of policy makers that convey our messages in public statements	Advocacy group survey	Global Impact	2022	TBD
Policy makers, governments	12.Advocacy and citizen engagement	thematic area	12.5	qualitative	Qualitative evidence show that a number of FT advocacy demands (in the area of trade), in relation to social and environmental sustainability, are included in public laws and policies.	Advocacy group survey	Global Impact	NA	NA
Policy makers, governments	12.Advocacy and citizen engagement	region	12.6	%	Consumer Awareness: Percentage of Public Recognition and Trust in Fairtrade Label	Globescan survey, Market surveys	Global Impact, Communications team FI	2021,2023	74% for both
Policy makers, governments	12.Advocacy and citizen engagement	gender, region, priority area	12.7	#	Number of research based on priority areas of PNs Number of consultations of producer and workers organisation by PNs on advocacy priorities Number of producers being consulted and compensated for it Number of funds allocated to PNs to work with advocacy Number of advocacy trainings within the system	Advocacy group survey	Global Impact	NA	NA

All	13.Partnership	thematic area	13.1	#	Number of strategic partnerships on key thematic areas	GRM internal survey	Global Impact, Global Resource management Working Group	2021,2023	10 additional
All	13.Partnership	thematic area	13.2	#	Number of projects and programmes on key thematic areas	GRM internal survey	Global Impact, Global Resource management Working Group	2021,2023	10 additional
All	13.Partnership	thematic area	13.3	#	Number of SPOs and beneficiaries impacted projects and programmes on key thematic areas	GRM internal survey	Global Impact, Global Resource Mobilization Working Group	2021,2023	TBD