
World Economic Forum



TERMS OF REFERENCE FOR THE DEVELOPMENT OF AN AMAZON ORIGIN COCOA PITCH BOOK

[About the World Economic Forum and the Tropical Forest Alliance](#)

The World Economic Forum is the International Organization for Public-Private Cooperation. The Forum engages the foremost political, business, and other leaders of society to shape global, regional and industry agendas. It was established in 1971 as a not-for-profit foundation and is headquartered in Geneva, Switzerland. It is independent, impartial, and not tied to any special interests. The Forum strives in all its efforts to demonstrate entrepreneurship in the global public interest while upholding the highest standards of governance. Moral and intellectual integrity is at the heart of everything it does.

Our activities are shaped by a unique institutional culture founded on the stakeholder theory, which asserts that an organization is accountable to all parts of society. The institution carefully blends and balances the best of many kinds of organizations, from both the public and private sectors, international organizations, and academic institutions.

The Tropical Forest Alliance (TFA) is a global multi-stakeholder platform focused on reducing commodity driven deforestation. Hosted by the World Economic Forum, the TFA works with over 160 public, private, and civil society actors to catalyze high-impact partnerships to address the inherent tensions that exist to grow production while protecting the forests - public and private, producer and market, global and local, people and the forest frontier. The TFA operates regional platforms in Latin America, West and Central Africa, China, and Southeast Asia. It is supported by the Governments of the Netherlands, Norway, Germany, and the UK, as well as the Gordon and Betty Moore Foundation and the Cargill Foundation.

[Background](#)

In Latin America, the TFA Latin America Commodity Dialogues are currently underway and are aimed at building and sharing collective solutions that can lead to more sustainable outcomes and better business practices in the cocoa, beef, and soy value chains. The Cocoa Dialogues planned for 2021 were co-convened by TFA partners in the region, including Cacao, Bosque y Paz (Colombia), Cacao, Forests and Diversity (Peru) and Cocoa Action (Brazil) aiming to design and launch a Cocoa Amazon Origin Initiative. This initiative will be supported by USAID under the U.S. Department of Agriculture and U.S. Forest Service International Programs. It will promote a shared vision for Amazon Origin Sustainable Cocoa and collectively ensure that the necessary information, conditions, and actors are mobilized and prepared to implement an Amazon Origin Sustainable Cocoa Agreement

Amazon Origin Cocoa combines numerous conditions to be a strong example of a new pathway for bioeconomic development in the Amazon region. The economic flow of better-positioned cocoa will move the sector financially and has the potential to convert efforts into funding and investments. To do this, TFA seeks to create an ecosystem of committed actors and platforms around deforestation-free and sustainable cocoa production, that can co-develop and implement enabling conditions to accelerate reconversion towards sustainable productive cocoa models at jurisdictional levels in Colombian, Peruvian, and Brazilian Amazon. TFA is leading the development of a positive narrative for sustainable cocoa production from the Amazon to the World, as a baseline to draw-up the case for Amazon origin sustainable cocoa, and to agree upon an action plan and governance structure to implement this initiative; all of which will result in a roadmap and a summary of opportunities that will be consolidated under a Latin America Cocoa Pitch Book.

Objectives

The purpose of this work is to develop a Pitch Book that systematizes the results of several consultancies (reports, studies, analysis) commissioned by TFA under the Amazon Origin Cocoa project, to create a roadmap with recommended steps on how to connect Latin America value chain actors to international markets, identifying channels and highlighting the right attributes, challenges, and barriers. This implies including support in contacting consultants, key partners and with TFA team to raise Brazil, Colombia, and Peru best information, so as the Cocoa Dialogues' outputs. The consultant shall connect all information under a common Latin America narrative, and work in an analytical way to raise potentialities and challenges appropriate to each country. It also includes the development of a communication strategy to properly disseminate key messages on LATAM Cocoa differentiated production, and a graphic design of the material.

Deliverables

1. Complete analysis of the outputs of several Amazon Origin Cocoa studies and ongoing consultancies, TFA Latam Reports, and other relevant data raised in the planning meeting, to be provided by TFA. The analysis should consider the connection with Bioeconomy and initiatives developed by the 1 Trillion Tree initiative.
2. Coordinate a round of meetings with partners to receive inputs and endorsement on the proposed content. The selection of partners will be agreed in coordination with TFA team.
3. Draft of a Pitch Book containing a minimum of three chapters with the following proposed topics:
 - a. **The case:** Introduction, Amazon Cocoa Baseline, Amazon Cocoa product, Market Analysis, connection with new global trends
 - b. **Latin America Cases:** Champions and Scalable Cases in Peru, Colombia, and Brazil
 - c. **Plans for scaling and elevating Amazon Origin Sustainable Cocoa:** Summary of the opportunities to enhance and potentialize the positioning of the Amazon Cocoa in the National and Global Markets; Plan of a common Marketing and Positioning Strategy.
4. Support in developing the Proposal for a Phase II of the Amazon Cocoa Roadmap, strategically pointing investment opportunities to unlock the supply chains, and fill gaps on the monitoring, traceability, and incentives to smallholder producers.
5. Final document and executive summary both designed for web and print publication in English, Portuguese, and Spanish, along with an editable Word version.

Requirements

- Demonstrated knowledge of the cocoa value chain in Latin America
- Proven experience in conducting research and compiling and analyzing data
- Excellent written and verbal communications in Portuguese, English and Spanish
- Experience working in environment and climate issues
- Hands-on experience managing complex projects and multi-stakeholder initiatives, including creation of visually compelling presentations and communications materials
- Strong team player who can build relationships and work collaboratively across the organization and with partners
- Ability to work in a fast paced, dynamic, and flexible organizational structure
- Proven experience with Graphic Design (provide a portfolio of previous similar projects)

Please note that any services requiring processing of personal data will need to comply with the EU's General Data Protection Regulation (GDPR) requirements.

The Intellectual Property Rights clause to be included in the consulting agreement is as follows:

1.1 Except as expressly stated in the Agreement, nothing contained herein shall be construed as the Forum granting the Service Provider, either expressly or implied, any right, interest, or license in or to any of the Forum IP. The Service Provider expressly agrees that the applicable Forum Entity shall be, at all times, the sole and exclusive owner of all right and title in and to all Forum IP.

1.2 Unless otherwise explicitly agreed in the Agreement, all Results shall be, at all times, the sole and exclusive property of the Forum. The Service Provider shall transfer, and hereby transfers, all such Results (in whatever form held) to the Forum free of charge. Specifically, all Results shall be deemed work-made-for-hire and the exclusive property of the Forum.

1.3 The Parties agree that, unless otherwise explicitly agreed in the Agreement, all Service Provider Pre-Existing Material shall be and remain the sole property of the Service Provider. As to any Service Provider Pre-Existing Material, the Service Provider shall grant and hereby grants to the Forum Entities (as well as the Forum members, partners and/or constituents, as the case may be) a worldwide, perpetual, non-exclusive, royalty-free license to use, copy, modify, distribute, display, broadcast and create derivative works of such Service Provider Pre-Existing Material, including the right to have third parties do any of the foregoing, to the extent required for the Forum Entities' use of the Results, Services and/or Deliverables.

1.4 The Service Provider warrants that the Results do not and shall not violate the intellectual property rights of any third party.

1.5 The Service Provider shall defend, indemnify, and hold harmless the Forum Indemnified Parties against third party claims that any Results infringe or violate such third party's intellectual property rights. The Forum shall promptly notify the Service Provider of any claims by third parties received by the Forum Indemnified Parties that any Results infringe such third party's intellectual property rights. The Service Provider shall provide all reasonable cooperation or participate in or take over the court proceedings where possible under applicable law (at Service Provider's expense) and shall otherwise provide full authority to the Forum to defend or settle the claim or suit. All costs and risks associated with any legal action under this Section 10.5 shall be the sole and exclusive liability of the Service Provider. The Service Provider shall reimburse the Forum Indemnified Parties for any expenses associated with any Forum Indemnified Party's participation in any action and or settlement discussions, including without limitation, court costs and reasonable attorneys' fees.

1.6 Further, if an action is filed on account of violation of intellectual property rights with respect to Results or if any such item is deemed to violate third party intellectual property rights, the Service Provider, at its own expense, shall have the option to either replace any item which is deemed to infringe third party intellectual property rights with an equivalent item or obtain the third party's consent for the Forum Entities (as well as the Forum members, partners and/or constituents, as the case may be) to continue to use the item in dispute. If neither option is possible or available, the Service Provider shall be liable for all damages to third parties as well as the costs incurred by any Forum Indemnified Party to obtain an equivalent replacement item on its own.

Instructions

- Proposals must be sent to TFA@weforum.org by 17:00 CET on December 5th and should consist of a CV for each person working on this consultancy, and a one-page document outlining qualifications for this specific role, including expected remuneration.
- Proposals should be for a fixed price for the entire work, including all expenses and taxes, in US Dollar (USD).
- Expected start date: December 10th, 2021.
- Expected completion date of all deliverables is February 15th, 2022.
- Please note that any services requiring access to personal data will need to adhere to the EU's [General Data Protection Regulation \(GDPR\)](#).