



Professional Technical Services: Research and Authorship of the Second Edition Report on Climate and Conservation Finance for IPs, LCs, and ADP

Forest Trends' Communities and Territorial Governance Initiative (CTGI)

This is a competitively sourced consultancy to conduct research, analysis, and synthesis related to climate and conservation finance for Indigenous Peoples, Local Communities and Afro-descendants.

Overview

- **Role:** Professional Technical Services Consultant
- **Duration:** June 2026 – August 2027
- **Compensation:** Deliverable based. Amount available: US\$50.000,00.
- **Location:** Remote

1. Introduction

Climate and conservation finance plays a central role in addressing the climate and biodiversity crises. However, despite the growing recognition of the fundamental role of Indigenous Peoples (IPs), Local Communities (LCs) and Afro-descendant Peoples (ADP) in protecting forests, ecosystems and territories of extremely high socio-environmental relevance, these groups continue to receive only minimal shares of total global climate and conservation finance flows.

With the objective of consolidating and analyzing available data on global financial flows and the transfer of resources to territories, identifying gaps, trends and challenges for more direct, equitable and effective financing, [the first edition of the report “State of Climate and Conservation Finance for Indigenous Peoples and Local Communities” was developed](#). Since its publication, new financial mechanisms, institutional commitments, regulatory frameworks and initiatives continue to be developed and implemented, although challenges related to transparency, social and environmental safeguards and the effective delivery of resources to territories and communities persist.

The second edition of the report aims to continue and deepen this analysis, consolidating the methodological and analytical scope of the publication, incorporating recent and updated data and expanding the assessment of existing mechanisms, governance structures, rights, access, participation, safeguards and systemic barriers to the equitable distribution of benefits from climate and conservation finance, with particular attention to mechanisms that enable direct access to climate and conservation finance by IPs, LCs and ADP and their territorial organizations with a primary focus on the Global South, especially Latin America, Africa and Asia-Pacific.



2. About Forest Trends and the Communities and Territorial Governance Initiative

Forest Trends (FT) is an international non-profit organization working to conserve forests and other ecosystems through the development and promotion of financial mechanisms, environmental markets and incentive instruments aimed at environmental protection and sustainable development. The organization works to produce and disseminate transparent information on ecosystem values, financial flows and markets, as well as to build coalitions and strategic partnerships and demonstrate innovative environmental finance models.

The Communities and Territorial Governance Initiative (CTGI) is one of Forest Trends' initiatives and works in direct partnership with IPs, LCs and ADP to promote recognition and protection of their territorial rights, strengthen autonomous governance models and support community-led strategies for conservation, climate action and livelihoods. CTGI's work seeks to ensure that these peoples and communities are recognized not only as beneficiaries, but as central actors and decision-makers in climate and conservation finance mechanisms.

3. Objective

The development of the second edition of the report aims to contribute to more informed public policy and resource allocation decisions, as well as to strengthening policy advocacy, transparency and equity in climate and conservation finance flows to IPs, LCs and ADP. The report shall serve both as a technical reference document and as an advocacy instrument, supporting different audiences and stakeholders in understanding existing challenges and opportunities and promoting financial mechanisms that are more equitable, effective and aligned with the rights and priorities of peoples and communities in their territories.

4. Scope of Work

The Consultant shall provide independent technical services for the research, analysis, and writing of the second edition of the "State of Climate and Conservation Finance for Indigenous Peoples, Local Communities and Afro-descendant Peoples Report", based on a global analysis of climate and conservation finance flows, with a primary focus on the Global South, especially Latin America, Africa and Asia. The Consultant will work in the development of the methodology and data collection, ensuring that the final products meet the technical standards required by Forest Trends. The analysis shall address gaps identified in the first edition and consider developments occurring from the end of 2024 through the completion of the data collection and analysis supporting the drafting of the second edition, incorporating the most recent data and relevant milestones following the publication of the first edition.

The work shall involve the compilation, systematization and analysis of secondary data, complemented by interviews with key stakeholders. The report is expected to deepen the critical analysis of financing mechanisms, governance structures, rights, access and participation, social and environmental safeguards, systemic barriers and benefit-sharing mechanisms, culminating in the formulation of technical and policy advocacy recommendations directed at different strategic audiences.

The structure of the report shall follow the logic of the first edition, ensuring continuity and comparability. The adopted methodology shall be detailed and presented as part of the first deliverable to the coordinating team. The consultant shall be responsible for preparing all technical content of the report, including graphs, tables, figures, case studies and bibliography, to be delivered in formats suitable for subsequent layout by a specialized consultancy.

5. Expected Deliverables

The second edition of the Report is expected to maintain the global, synthesis-oriented nature of the first edition, while introducing targeted analytical deepening in priority areas such as governance, consultation, access, and benefit-sharing. Rather than expanding scope indiscriminately, the report should emphasize refinement of existing estimates, selective thematic deep dives, and strategically chosen case studies, ensuring both methodological robustness and continued relevance as an advocacy tool.

The Consultant shall submit the following deliverables:

- A. **Work plan and methodology:** detailing the proposed methodology, mapping of stakeholders and key actors to be consulted, initial bibliographic references, interview strategy and timeline.
- B. **Preliminary report 1:** containing the first analytical findings from compilation activities and analysis of secondary data. This first report should also consider the results from interviews conducted with main actors. Both of these sets of information shall be the basis for the first draft of the Report.
- C. **Preliminary report 2:** this second iteration of the Report draft shall incorporate the reviews from the coordinating team and consider new analytical findings from compilation activities and analysis of secondary data and/or further interview sessions. This second draft of the Report should also include the writing of case studies (to be selected during research and interviews)
- D. **Final draft:** after approval of the full content of the Preliminary Report, the final draft for revision should incorporate consolidated comments from the coordinating team and be submitted with annexes for final revision.

- E. **Final report:** after final adjustment, the Report shall be delivered in its final format for layout and translation.
- F. **Executive summary:** prepared as a standalone document clearly presenting the main results, key messages and recommendations.
- G. **Summary presentation:** detailing key findings and recommendations for dissemination in webinars, events and strategic meetings.
- H. **Database and technical annexes:** including analytical tables and references and sources of figures, footnotes and bibliographic references, and other relevant annexes used in preparing the report, organized to ensure methodological transparency.
- I. **Occasional participation in dissemination activities:** including webinars and other strategic actions agreed with the project team.

All deliverables shall be submitted in editable formats (Word, Excel, PowerPoint or equivalent), as well as PDF final versions, when applicable.

The consultant shall ensure that all footnotes are properly organized and referenced and that all hyperlinks are functional and correctly associated with cited sources. The references section shall follow the same standard adopted in the first edition (Chicago citation style), be complete and organized alphabetically. Layout and translation will be carried out by Forest Trends. The consultant shall be responsible for preparing all analytical and visual content, including references and sources.

Each submitted product will be reviewed by the Forest Trends technical team to ensure it aligns with the project's objectives and meets high standards of integrity.

6. Timeline

The consultancy will be contracted from June 2026 to August 2027, with activities distributed in phases and linked to specific deliverables, subject to adjustment. The following table is an indicative schedule for execution and delivery. Both the schedule (Annex 1) and the contract term may be adjusted by mutual agreement between the parties.

7. Proposal and Selection Process

Interested candidates must submit a technical and financial proposal, which will be evaluated by the responsible team. The technical proposal must outline the proposed methodological approach, the work plan, and the tentative timeline. Please submit a resume highlighting experience relevant to this consulting engagement. Any similar research or studies you have conducted may be submitted as an attachment for review.



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The financial proposal shall indicate the total consultancy fee (in USD), preferably broken down by deliverable or phase, and be compatible with the scope, complexity and duration of the work described in these Terms of Reference. Selection will be based on technical quality, consultant experience and financial adequacy. Forest Trends and the Communities and Territorial Governance Initiative reserve the right to request clarifications or negotiate adjustments with the selected candidate.

8. Consultant Profile

The Consultant must demonstrate specialized expertise and a proven track record in applied research and climate finance. As an independent contractor, the Consultant is expected to provide their own equipment and software necessary to fulfill the deliverables and shall manage their own schedule to meet the project milestones. The consultant shall have a minimum of 10 years of relevant professional experience in climate and conservation finance, environmental public policy, financial governance, social and environmental safeguards or related topics, including experience working with IP, LC and/or ADP.

Essential competencies include the ability to conduct critical and comparative analyses of complex issues, experience compiling and analyzing quantitative and qualitative data, experience conducting interviews with multiple stakeholders in English, Portuguese and Spanish, the ability to communicate technical findings clearly to different audiences, and the ability to work autonomously while meeting deadlines and incorporating consolidated feedback.

Previous authorship or co-authorship of analytical publications, institutional reports or reference studies will be considered an asset.

9. Payment

Payment for the consultancy will be made per deliverable, in US dollars (USD) upon formal approval of each product described in this Terms of Reference. After approval of the respective deliverable, the consultant shall submit the corresponding invoice and payment will be processed according to Forest Trends' administrative procedures. No advance payments will be made. Agreed amounts shall include all costs associated with carrying out the consultancy, as well as costs associated with taxes, currency exchange and required insurances.

10. Submission of Proposals

Proposals must be sent to ctgi@forest-trends.org, with the subject line "2nd Edition - CCF Report" by May 4th, 2026. Any questions may be directed, with copy, to the indicated email address until April 30th, 2026.



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Annex 1 – Expected timeline

Timeline	Main activities	Expected deliverables	Delivery deadline*
Months 1-2	<ul style="list-style-type: none"> - Review of the 1st edition and identification of main gaps - Methodological outline and preliminary references - Structuring of the work plan, including a map of stakeholders and key actors to be consulted, as well as the methodology and schedule for the interviews to be conducted 	A. Work plan and methodology	8 weeks
Months 3-5	<ul style="list-style-type: none"> - Compilation and analysis of secondary data - Conducting interviews - Systematization of information and writing of the first draft of the Report 	B. Preliminary report 1	20 weeks
Months 6-8	<ul style="list-style-type: none"> - Initial writing of case studies - Incorporation of consolidated comments from the coordinating team - Writing of the second draft of the report 	C. Preliminary report 2	32 weeks



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Months 9-11	<ul style="list-style-type: none"> - Drafting of the final draft of the report - Consolidation of analyses - Preparation of graphs, tables, and figures - Structuring of annexes 	D. Final draft (version for review)	44 weeks
Months 12-15	<ul style="list-style-type: none"> - Incorporation of consolidated comments - Final data update - Drafting of the executive summary - Drafting of the final version of the Report 	E. Final report (final version for layout)	60 weeks
		F. Executive summary	
		G. Summary presentation	
		H. Database and technical appendices	
Cross-cutting (on demand)	Occasional participation, by invitation, in webinars and strategic dissemination activities	I. Occasional participation in dissemination activities	<i>During execution</i>

**(term counted from the date of signing the contract)*