

SHORT TERM CONSULTING OPPORTUNITY WITH THE CRFM SECRETARIAT

1	Title Promoting Regional Trade & Agribusiness Development in the Caribbean: Study on Linking Fisheries and Tourism in the Caribbean
2	Summary The CRFM Secretariat is inviting expressions of interest from suitably qualified persons to undertake a short term assignment aimed at documenting and promoting stronger linkages between the fisheries and the tourism sectors in the CARICOM/CARIFORUM region. The links between these two productive sectors need to be further supported and strengthened to create economic opportunities, reduce national food import bills and foreign exchange outflows, create employment opportunities, and improve economic resilience, which will benefit coastal and rural communities and enhance sustainable development of the countries.
3	Special Notice The CRFM Secretariat will recruit up to 4 consultants to prepare the case studies. Each consultant will prepare a case study for one country, that is, his or her country of residence.
4	How and where to Submit Expression of Interest Expression of interest and supporting documentation should be submitted in PDF format to: Executive Director, CRFM Secretariat, at: secretariat@crfm.int , sherlene.audinett@crfm.int
5	Fees Each Consultant will be paid a fees of US400 per day for 5 days or a total US\$2000.00 for each case study
6	Content of the Expression of Interest The Expression of Interest should be based on the terms of reference below and concise. It should confirm that the consultant(s) have the necessary expertise, experience and is available to deliver the outputs as specified within the required deadlines. CV or resume of the consultant(s) should be submitted with the expression of interest.
7	Deadline Expression of interest should be submitted to the CRFM Secretariat on or before 5.00 pm on Friday 11th September 2015 .
8	Clarification For further information or clarification on this invitation, please contact: Ms. Sherlene Audinett : sherlene.audinett@crfm.int or telephone +501-223-3443
9	Acknowledgement This assignment is being undertaken with funding provided by the Technical Centre for Agricultural and Rural Development (CTA).

TERMS OF REFERENCE

PROMOTING REGIONAL TRADE & AGRIBUSINESS DEVELOPMENT IN THE CARIBBEAN

STUDY ON LINKING FISHERIES TO TOURISM-RELATED MARKETS

1. Context

Many CARIFORUM countries are highly dependent on imported food and agricultural products with little added value and are also very susceptible to changes in world food prices. Such prices may spike upwards as climate change and climate variability exacerbate droughts and floods in the world's major agricultural producing regions.

Both subsistence and commercial fishing, including aquaculture can contribute significantly to the well-being of the people and the social and economic development of the CARIFORUM countries. The living marine resources of the Exclusive Economic Zones (EEZ) have provided a vital source of food, employment, foreign exchange earnings and social stability of coastal communities. Similarly, aquaculture also offers an avenue for increased local production for food security and to reduce dependency on imported fish in response to growing demand from the tourism sector.

According to the CRFM statistics, total fish imports in the CARICOM States in 2014 was 68,038 mt valued at US\$270 million, while total fish exports amounted to 74,067 mt valued at US\$269 million. These figures underscore the importance of the sector, an important commodity exporter in terms of earnings, despite battling with the adverse impact of climate change and the global financial and economic crises in recent years.

Tourism is the backbone of the economy in most Caribbean States. The region is often described as "the most tourism-dependent region in the world". There were approximately 25 million visitors contributing \$49 billion or 14% of the region's gross domestic product in 2013¹. Linking fisheries and tourism can catalyse the socio-economic benefits each sector brings in the CARIFORUM countries. This is consistent with the objectives of the Caribbean Community Common Fisheries Policy and the strategic goals of the 2013-2021 Strategic Plan of the CRFM². Promoting sustainability in the fisheries sector also mitigates any threats of exploitation of the sector by illegal, unreported and unregulated (IUU) fishing, especially in relation to inshore coastal fisheries, which play a vital role in rural coastal economies. In this regard, revitalisation of the fishing sector can reinforce the linkages with the tourism sector, while also prioritising both conservation and sustainable management.

The links between the two productive sectors fisheries and tourism need to be further supported to create economic opportunities, reduce food import bill and foreign exchange outflows, which

¹ Rochelle Turner (2014). Travel & Tourism, Economic Impact 2014, Caribbean (Report). World Travel and Tourism Council

² CRFM. 2013. CRFM Strategic Plan (2013 – 2021) CRFM Administrative Report. 35 pp.

will benefit coastal and rural communities and enhance sustainable development of the countries

2. The opportunities of strengthening linkages between tourism and fisheries

In countries in the Caribbean ACP States growth and development in the fisheries and tourism industries have been pursued separately and policy and institutions have not been geared toward fostering positive linkages and when existing, these linkages have not been well documented.

High quality food, every day of the year, is essential to hotels, lodges and resorts. Often the food purchasing bill of a tourism site is large in the context of the local economy, but surprisingly little is spent locally.

The opportunities and challenges of increasing the content of locally produced fish and seafood on the menu of tourism related establishments are considerable, yet if it can be done in a way that meets commercial needs and customer tastes, this is one way in which tourism operations can significantly increase their contribution to local economic development. Common problems of sourcing fish and fishery products locally are well known – inadequate quality, reliability, or volume of produce, exacerbated by poor transport and lack of communication and information between supplier and purchaser.

A frequent problem in increasing inter-sector linkages is often the mismatch between supply and demand and the lack of intermediary support structures that enable buyers and suppliers to come together. As the tourism sector develops fish, fish-farmers and sea-food processors wishing to supply this market will have to comply with increasingly strict hygiene, food safety and quality standards.

To service the tourist market local producers need to find profitable and competitive ways to meet tourism industry demand for volume, quality, regularity, traceability and safety requirements. The ability of local fish-food systems to meet these requirements will be dependent both on supply factors (natural resource base, fish systems in place, agro-processing and marketing capacity) and the kind of tourism development (mass tourism, high end niche, eco-tourism, branded product, certification etc). The exposure of tourists to specific local products could also help export market penetration when returning home such visitors help build a domestic demand. A further consideration for demand for local produce is the seasonality of visitor arrivals which implies that demand for fish and fishery products from the hotel sector will be depressed during the off-season.

- Branding, certification and labeling: potential for value addition

Branding – the process of creating and disseminating the brand name of a given fisheries product, country, region or company via advertising or other marketing campaigns – can boost

Caribbean fisheries products both for local consumption and export. Through branding locals and tourists become more aware of Caribbean fisheries products, can contribute to sustainability and increase their revenue.

Certification is a process that can bring significant added value to a product and boost the products image and marketability. From the initial steps of the formal application for a fisheries to be assessed against a certain standard by the certification client, to the assessment by the competent and recognized body, fisheries products can attain vital accreditation. This accreditation acts as an assurance from the accrediting body that the product, process and service conforms to agreed requirements and has been inspected along the production chain (based on ISO Guide and Principles for Food Import and Export certification for example). This not only boosts a products image, but certifies its quality.

Certification in the fisheries industry involves the establishment of voluntary or mandatory standards, often backed by a public or private sector instrument or institution, in order to provide consumer guarantee that certain pre-specified standards have been met for a specific product.

Labeling, including eco-labeling, additionally increases product value by certifying the given product with a distinctive logo or statement confirming that the product complies with conservation and sustainability standards, amongst others. This also involves the consumer who can make the choice to support, promote and sustain certain labels over others. This can also contribute to efforts to combat IUU. Certifications vary from the most stringent to the most flexible, and including initiatives such as organic labelling, fair trade or equitable labelling and other such schemes.

For some producers, eco-labelling (for niche markets in which a premium price is paid for 'green' products) can present an opportunity to add value to existing products, expand reach in existing markets, or maintain market share in a competitive environment through product differentiation and therefore provide these exporters with potential to enhance their export earnings.

3. Study

This study is aimed at filling a data gap in fish and fishery products for the tourism industry in the Caribbean ACP States by documenting success stories on business models linking fisheries and tourism-related markets and innovative partnerships.

The documentation of these successful Caribbean experiences will serve to enrich the exchange of knowledge amongst actors and contribute positively to economic growth and sustainable livelihoods through the promotion of trade between the agri-food and tourism sectors in the region.

Objectives

General objective

- (i) The general objective of the study is to document successful business relationships between fish producers and fish processing businesses on the one hand, and tourism industry enterprises in the Caribbean on the other hand, in support of economic diversification, value addition, sustainable regional trade and employment creation.

Specific objectives are to:

- (i) Identify cases of linking fishing and tourism industries and analyze key drivers of success and key limitations.
- (ii) Identify good practices and the key innovations in building “win-win” market relationships amongst fishermen and fish-farmers, processors and entrepreneurs with the hotel / restaurant / foodservice sector at national and regional levels and which increase local sourcing and value addition.
- (iii) Suggest key institutional and policy bottlenecks that need to be addressed in order to upscale benefits for agribusiness (fisheries and aquaculture) and tourism sectors.

Tasks of the consultants

- (i) Identify and develop study on successful case of trade linkages between fish producers and processors with buyers in the tourist-related markets which can be up-scaled or replicated, and document lessons learned and policy implications.
- (ii) The case study should highlight market access and gains for the stakeholders, innovative product development, branding and marketing strategies, organisation of the sector and PPPs.
- (iii) Review existing financing mechanisms and identify relevant agencies (both regional and international) which provide financing support for fisheries trade linkages and provide recommendations on the financing models that are appropriate within the Caribbean context (for example, for small-scale providers, groups & associations and large scale producers and fish-processors).
- (iv) A total of 4 case studies will be prepared, one by each of 4 consultants, documenting the situation in 4 different CARIFORUM States. The reports are to be prepared in keeping with the format and specifications provided by the CRFM Secretariat.

Deliverables

A study to be finalized by **27 October 2015** which will include:

- (i) At least 4 case studies documented on successful models of trade linkages between the fisheries sector and the tourism sector with relevant photos for publication. Each case study report will include a section on financing mechanism models and a listing of agencies which support fisheries and trade linkages and recommendations on appropriate financing models for the CARIFORUM Region. **Delivery date of Draft Report 9th October 2015.**
- (ii) The output will also include a power point presentation of no more than 8 slides with the findings and recommendations of each case study.
- (iii) A small expert working group will be convened to review and validate the draft reports. The meeting of the **working group will be held 22-23 October 2015.**

- (iv) The Final version of the study report incorporating the recommendations of the working group to be provided no later than 27th October 2015.
- (v) The assignment will require a total of 20 person days (5 person days per consultant) and will be conducted between 15 September and 27 October 2015.
- (vi) The output of this assignment will be presented at a regional workshop in Barbados during the 1st week of November 2015.

Profile of the consultants

- (i) Advanced degree or equivalent in economics, development studies, resource management, tourism development or related disciplines.
- (ii) At least 15 years experience on projects related to linkages between the agribusiness and the tourism sector in the Caribbean Region.
- (iii) Working knowledge of the fisheries and tourism sectors in the Caribbean and of key players and initiatives.
- (iv) Working knowledge of financing mechanisms in support of trade.