24.01.2019

Terms of Reference

Activity 2.4 “Conduct exemplary Supply Chain Study”

**(Budget section: 6. Workshop Activity no. 2.4)**

1. **Project frame, background information:**

**Title of the Action:** “Responsible seafood consumption for the benefit of people, oceans and climate.” (in short: Fish Forward)”

**Donor:** European Union (Grant contract - External Actions of the European Union: CSO-LA/2017/387 - 131)

**Locations of the Activity:** Turkey

**Background**

Worldwide, more than 800 million people depend on fish for food and income. But oceans and livelihoods are under severe pressure. 93% of fish stocks are either overfished (33.1%) or fully fished (59.9%). Climate change additionally impacts the productivity of marine ecosystems –with drastic consequences for livelihoods, food security and markets.

With most fishery stocks expected to remain maximally sustainably fished or overfished for at least the next decade, aquaculture must bridge the growing gap between supplies of aquatic food and demand from a growing and wealthier global population. Aquaculture has the potential to address the gap between aquatic food demand and supply and to help countries achieve their economic, social and environmental goals. The share of farmed fish in human diets has increased quickly, with a milestone reached in 2013 when the aquaculture sector’s contribution to the amount of fish available for human consumption overtook that of wild-caught fish for the first time (SOFIA, 2018)[[1]](#footnote-1).

Europe is the biggest market and importer of farmed/wild-caught fish in the world, with most of its imports coming from developing countries. European consumers and corporates play a vital role in protecting marine resources for millions of people who depend on them. A responsible choice of seafood in Europe is a global driver for change.

WWF’s EU co-funded Fish Forward II (FF2) Project raises awareness of sustainable seafood consumption, with 17 partner offices involved across 17 countries. Unsustainable practices in aquaculture and capture fisheries and climate change strongly affect people living in developing countries, where the majority of the fish we eat is coming from. Choosing and sourcing sustainable seafood benefit both people and nature.

**The specific objective of the Action**

One key FF2 project pillar states that by 2020, 30 companies will commit to improving their seafood portfolio in consideration of climate change, ethical supply chains and SDGs. This will require engagement with corporates across FF2 participating countries.

As part of WWF-Turkey, WWF-UK and WWF-Austria’s contribution to this pillar, we plan to contract a study focusing on a supply chain from a FF2 participating developing country[[2]](#footnote-2) (DC) to Europe. Turkey, as an Official Development Assistance recipient, was chosen as the project study site due to its importance as a sea bream/sea bass exporter to Europe. The **aim** of this supply chain study is to uncover/reveal the aspects that are important to guarantee socially and environmentally sustainable seafood products from DC. The study will provide information on the following aspects: traceability, climate change, labour conditions, social benefits of sustainable seafood livelihoods and gender.

**Description Activity 2.4: Conduct exemplary supply chain study**

WWF-Turkey, WWF-UK and WWF Austria will commission external consultant(s) to carry out a supply chain study. The study will trace the path of farmed sea bream/sea bass from Turkey to Europe. Research will be conducted focusing on selected elements across social, economic and environmental conditions which are important across the supply chain, from producers in Turkey to the European retailer. The study will shed light on the importance of producers gaining access to EU markets, as well as retailers purchasing stock from these sources. The key information from this report will be used for communication activities with target groups and stakeholders.

The study will be split into two components- the Turkish component focusing on the beginning of the supply chain in Turkey (producers, processors, exporters) and the UK/Austrian component focusing on retailer expectations in UK and Austria.

**Note:** **The UK/Austrian component (see annex 1) is mentioned within these TORs but will be carried out using a separate procurement process in the UK. The questions addressed in the UK/Austrian component of the study are outside of the scope of this study but are presented within annex 1 to provide a full overview of both components and to better understand how both components are connected.**

**If you are interested in completing both components of the study please tender for each one separately- please contact Emily Gibbs and Karim Ben Romdhane if you wish to do so (contacts available below).**

1. **Objective of the supply chain study**

Once finalised and combined, the two components of this study will:

* Underline the importance of DC producers (in this case based in Turkey) and other supply chain actors reaching the European market. This is increasingly important, as it can be difficult for these actors to meet corporate sustainability expectations due to a number of reasons (lack of information on the supply chain, lesser availability of environmental certifications within producer countries etc.).
* Highlight EU retailer sustainability expectations from their supply chains and how this can be further met by sourcing from DC countries (e.g. via investment in sustainability programmes such as aquaculture improvement projects).
* Provide recommendations to retailers and producers on how to bridge the gap between insufficient/improved sustainability efforts among DC producers and EU retailers’ sustainability expectations. The recommendations should also be relevant to the authorities as they set the legal framework in which retailers and producers operate.
* Be used to engage corporates (EU importers) and authorities and access their marketing and communication channels. The aim is to foster support from corporates for working with producers in developing countries and promoting their importance. The study will be used to set the scene for targeted workshops with corporates.
1. **Sources and Methodology**

**The questions to be addressed during the Turkish component of this study are:**

1. Map the supply chain, starting with the hatcheries and feed sector onwards to the selected Turkish sea bass/sea bream farms in Izmir and Muğla, Turkish wholesalers of seafood products, exporters and logistics companies and exporters to European retailers.
2. Map the certification agencies in the aquaculture sector in Turkey and visit exporters associations (e.g. Aegean Exporters Association).
3. Define volumes and value of sea bass/sea bream exports to the EU market in general and to the UK and Austria specifically.
4. To what extent are the various components of the sea bass/sea bream supply chain important to the local socio-economic environment? i.e. number of men and women employed by the sea bass/sea bream sector along the supply chain (producers, processors, feed producers etc.), importance of the aquaculture sector regarding the employment and job security of women and men. Determine if there are any implications for food security in Turkey.
5. What is the specific role of women within the sea bass/sea bream sector? i.e. gender ratio along the supply chain, percentage of women in decision-making positions, percentage of women in low skilled, low paid and low valued job positions etc.
6. Are sustainable practices, both environmentally and socially, considered and employed along the sea bass/sea bream supply chain?
* Regarding the environmental sustainability the focus should not only be on the farm level but also include hatcheries and in particular the fish-feed sector and its sourcing from fisheries in the Mediterranean, the Black Sea and distant water fleets e.g. fishing along the coast of Morocco.
* Are the products and the fish-feed components traceable to their origins and is the information verifiable?
* With regards to social responsibility the study should look at aspects such as decent working conditions (gender disaggregated), e.g. adherence to the principles of the International Labour Organisation (ILO), fair and equitable distribution of income in particular between both sexes and how the sea bass/sea bream industry harmonises with other industries (e.g. tourism in coastal areas) and local communities (or segments of local communities) that could be positively or negatively affected by the seafood sector. What are the challenges that prevent the seafood sector from complying with environmental sustainability and social responsibility?
1. Which measures are taken by the sea bass/sea bream supply chain to mitigate or adapt to climate change (termed as climate-smart agriculture/aquaculture by FAO) - or in the absence of these - could be taken by the industry to prepare for the beneficial or adverse effects of climate change?

**Note:** **The consultant will not only provide a report of their findings but also keep strong communication with WWF UK/Austria in order to feed into the UK/Austrian component of the report (see annex 1), for example when linking supply chains between the countries.**

**Outputs**

**•** The consultant’s primary output is the production of a report (the Turkish component of the supply chain study) outlining his/her methodology and findings. The final report and the data will be owned by WWF but attributed to the contractor.

* All outputs (report, budget etc.) are expected to be written in English.

• Photographs will be taken which can contribute to the wider FF2 photo library. The photographer assigns the exclusive rights regarding the photographs to WWF.

Summary table of project deliverables

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| **Deliverable** | **Description** |
| 1. Project management | It is anticipated that the consultant will develop a detailed budget and timeline for the deliverables. The project will be managed professionally and ensure timely completion of the deliverables. Communication with WWF will be regular and include email, Skype, in-person and telephone communications as required. At a minimum, a monthly verbal update will be anticipated. If a need is identified for there to be a presentation of interim findings/project update then this will be arranged between WWF and the consultant. |
| 2. Draft report | The draft report will contain the draft results from this component of the study. The consultant will collate data and information (both desk-based and in the field) in order to answer the above questions. The methodology is to be proposed by the consultant, and may be a combination of approaches such as data collection and interviews. The draft final report will be submitted to WWF (Turkey, UK and Austria) for review. Requirements for clarification or recommended amendments that do not affect the legitimacy/credibility of the study can be proposed as well as editorial changes. The consultant will then make any necessary changes and then develop the final version of the report.  |
| 3. Final report  | Completion of the project will be when the final version has been submitted as an e-copy in Word.It shall include clear presentation i.e. diagrams and explanations, clear descriptions of methodology, models and assumptions the consultant uses, and be of high quality. It may also briefly include any suggestions for further studies. |
| 4. Collaboration with WWF UK/Austria | The consultant will need to work with WWF UK/Austria to feed into the UK/Austrian component of the study |

**References**

The report analysis should concentrate on up to date and independent references, which includes but should not be limited to information provided by the WWF contact persons, scientific publications, and publicly available reports from relevant stakeholders (e.g. FAO, ILO, WSI (Women in the Seafood Industry)) as well as on the information gained through interviews along the supply chain.

Suggested references:

1. **Aysun KOP. (2018) Turkey's Aquaculture Potential and Developments in the Fish Feed Sector.** International Journal of Oceanography & Aquaculture, Volume 2 Issue 4.
2. **Ertör, I & Ortega‐Cerdà, M. (2018) The expansion of intensive marine aquaculture in** **Turkey: The next‐to‐last commodity frontier?** Journal of Agrarian Change,1–24.
3. **Nakamura et al. (2018) Seeing Slavery in Seafood Supply Chains.** Science Advances,
4. **WWF Global Seafood Charter 2015:** <http://d2ouvy59p0dg6k.cloudfront.net/downloads/wwf_global_seafood_charter_for_companies_june_2015_1.pdf>
5. **International Association for Women in the Seafood Industry:**

<https://wsi-asso.org/>

1. Corporate Sourcing policies from UK and Austrian retailers, particularly those we are partnered with- Marks and Spencer, Tesco and Hofe

**Replicability**

Developed methodology should be well documented in order to allow an updated replication in the future and comparative replication for other supply chains.

1. **Key facts**

**Approach:** Desktop and field-based research in close collaboration with WWF Turkey, WWF UK and WWF Austria according to an agreed time schedule

**Budget:** 16.000 EUR (VAT exempt)

**Fee Schedule and Payment**:

Payment terms for the contract will be following delivery of the final report. The proposals should include the daily rate and number of days to give the total cost.

**Timeline:**

A detailed timeline should be included, as well as critical steps and/or ‘milestones’. The final version of the study (approved by WWF) is expected at the end of August.

**Output:** 1 report in English (50 pages max)

**Commissioned by**: WWF Turkey

**Contact persons:**

**Ayşe Oruç (Program manager)**

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1. **Qualifications and experience needed:**
* A university degree in a related area, for example (but not limited to) Fisheries Engineering, Sustainability, Social Sciences, Marine Biology, Environmental Science
* At least 10 years’ experience with the seafood industry with an excellent knowledge of the supply chain actors in Turkey and an extensive knowledge of their counterparts in the EU.
* On the ground experience working with or alongside the seafood industry in Turkey.
* Good knowledge of legal aspects & aquaculture marketing strategies in Turkey and interaction between EU policies.
* Good understanding of sustainability, gender equality and social responsibility issues and familiarity with seafood certification schemes, eco-labels and social responsibility tools and guidelines (as published by NGOs, UN and FAO specifically)
* Good understanding of climate change, its effects on marine resources and adaptive strategies that the seafood sector can take
* Reliable communication experience with seafood opinion leaders in Turkey.
* Very familiar with seafood traceability
* Excellent knowledge of European retailers’ CSR policies
* Excellent Turkish language skills
* Excellent English language skills (written and spoken)
* Up to date knowledge of key humanitarian or development issues and trends in the seafood industry

**Annex 1:** The questions to be addressed during the UK/Austrian component of the study are:

**Note: these questions are outside of the scope of this study (Turkish component of the study)**

1. Map the EU (with special focus on UK/Austrian retailers) end of the supply chain (collaborating with the Turkish consultant to ensure the continuity of the supply chain mapping).
2. What are EU (with special focus on UK/Austrian retailer) expectations with regard to certifications, ecolabelling and voluntary information on seafood products in relation to minimum supply chain standards? For example, benchmarking the sea bream/sea bass supply chain against relevant Corporate Responsibility goals of UK and/or Austrian retailers/processors sustainability commitments regarding greenhouse gas emissions, human rights, sustainable fishing and supply chain transparency.
3. Are these expectations likely to hinder sourcing from developing countries?
4. What challenges does the sea bream/sea bass supply chain face when meeting these expectations in order to reach the EU market? i.e. lack of available certification schemes, limited ability to implement documentation and data collection, lack of transparency.
5. How can the sea bass/sea bream fish and fish feed producers overcome the obstacles identified in questions 3 and 4?
6. The consultant will draw conclusions, which take into consideration the findings of the Turkish component of the study. The consultant will recommend what needs to be done so that corporates continue to source from Developing Countries, and outline the reasons why corporates should encourage the implementation of sustainable practices among supply chain actors.
1. FAO. 2018. The State of World Fisheries and Aquaculture 2018 - Meeting the sustainable development goals. Rome. [↑](#footnote-ref-1)
2. Developing countries as listed by OECD/DAC:

http://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/DAC\_List\_ODA\_Recipients2014to2017\_flows\_En.pdf [↑](#footnote-ref-2)