

**Corridor Analysis Methodology Guidance Notes**

Draft 14/04/2015

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| **Title** | FishTrade Project Corridor Analysis |
| **Purpose** | As part of Result area I of the FishTrade project, the objective of this work is to conduct research on products and value of intra-regional fish trade in food security along four trade corridors across the African continent.  The purpose of the research is to present the main characteristics of the trade corridor, identify key aspects of fish trade along the corridor, and make recommendations as to how to ameliorate trade along the corridor in the context of the FishTrade project and in the regionally specific policy context. |
| **Location** | Multiple locations across Africa. |
| **Duration** | Six months |
| **Start Date** | April 2015 |
| **Reporting to** | Program Manager, World Fish |

**Introduction**

The intent of this document is to inform the process of research planning by partners interested in developing the Corridor Analysis (CA). It sets out the background and underlying logic behind the development of the CA, and serves as a basic guideline for how to proceed in developing a research plan to meet the immediate and medium term needs of the FishTrade project.

**Background**

Despite major interventions and initiatives to promote fisheries development Africa still faces challenges in boosting intra-regional fish trade for sustainable economic growth and poverty alleviation. Trade in fish on the continent is impeded by the complexity of rules and regulations governing intra-regional trade, a lack of business and marketing skills, exporting of unprocessed (therefore lower-value) fish, and inadequate infrastructure.

Information on the contribution of fish trade to national development objectives (including employment, food security and poverty reduction) is weak or incomplete in national and regional policy contexts across Africa. A large proportion of fish trade is undertaken on an informal basis by small-scale fishers and traders, further compounding the lack of data. Without a more detailed understanding of informal trade, the challenge of quantifying the contribution of fish trade in terms of national development is made even more complicated.

The Fish Trade Program, jointly implemented by AU-IBAR, NEPAD, and WorldFish, aims to improve food and nutritional security and reduce poverty in Africa by enhancing the capacities of regional and pan-African organizations to support better integration of intra-regional fish trade into nation-state policy agenda. The Program will work in four African Union defined corridors in Africa (Western, Southern, Eastern and Central) and will deliver on the following results:

1. Generate information on the structure, products and value of intra-regional fish trade in food security in Africa and make it available to stakeholders.
2. Come up with a set of recommendations on policies, certification procedures, standards and regulations, and get them well embedded in national and regional fisheries, agricultural, trade and food security policy frameworks in sub-Saharan Africa.
3. Enhance the capacities for trade amongst private sector associations, in particular of women fish processors and traders and aquaculture producers, to make better use of expanding trade opportunities through competitive small and medium scale enterprises; and
4. Facilitate adoption and implementation of appropriate policies, certification procedures, standards and regulations by key stakeholders participating in intra-regional trade in the four trade corridors.

Mapping and analyzing Africa’s fish trade is needed to generate a clearer understanding of the full contribution fish trade makes and its potential for growth, with a view to create wealth within fisheries across the continent. Trade in fish is influenced *inter alia* by demand and supply factors, the costs of production and transportation, competition from other food sources and Illegal, Unreported and Unregulated (IUU) fishing. In order to fully contextualize the potential for fisheries growth in Africa, and the specific role that fish trade can play in addressing food security and alleviating poverty, there is a need to develop comprehensive analytical profiles of trade corridors across the continent.

Result 1 of FishTrade is to generate information on the structure, products and value of intra-regional fish trade in food security in Africa and make it available to stakeholders. As part of Result 1, Corridor Analyses (CA) will be designed, researched and disseminated. Each Corridor Analysis will comprise of desk based analysis and field based research within and along the four trade corridors[[1]](#footnote-1). This will include mapping key corridors and sub-corridors, assessing and determining the volume, value, and diversity of fish trade along the corridors, identifying dynamics and trends of fish trade (including key drivers, actors and stakeholders), key constraints, barriers and challenges.

The Corridor Analysis process represents a prime opportunity to address this data gap, and in so doing to provide policymakers with information they need on fish trade’s contribution to national development. Recognizing that ‘trade’ has many dimensions, at the corridor level, the CA process should give due consideration to multiple aspects, including:

* Volume: Total tonnages caught, grown, processed and purchased
* Values: Overall monetary worth of trade in fish, and where in the value chain these values accrue
* Number of participants: Estimates of the number of men, women and children engaged in catching, processing and trading fish. Consideration should also be given to the sustainability implications of increasing (or decreasing) numbers of market entrants.
* Margins: return to capital, noting that capital being only one of the factors of production. Returns on labour, opportunity costs and overall productivity levels should also be considered.
* Value-added: income share along the value chain links based on transformations as a result of processing
* Price data: value accruing to different actors in the chain based on trade in fish.

Using both secondary and primary sources, in addition to the trade data described above, the findings are expected to include information on fish consumption, emphasizing fish’s role in food and nutrition security, with particular focus on poor, food insecure and marginalized populations. The findings will also consider post-harvest losses, the role of aquaculture, certification and standardization issues, infrastructure and value chain structure.

Of particular interest and importance is the role of small scale fishers, especially with reference to the role of women in fish trading and processing. Based on literature reviews and recommendations of the March 2015 launch meeting, it is recognized that although a great deal of fish trade is undertaken by small-scale fishers and traders, much of this trade is informal, but very little data exists on it. The Corridor Analysis process represents a prime opportunity to address this data gap, and in so doing to provide policymakers with information they need on fish trade’s contribution to national development.

In terms of outputs, four analytical reports describing fish trade along the target corridors described above will be produced. In tandem with this, key data will be plotted and displayed using interactive GIS-based mapping tools, generating large-scale maps for each of the four corridors, with overlays indicating, *inter alia*, key production and processing zones, trade flows, key markets and population centres, border points and more. When these inputs are completed, a synthesis report on intra-regional trade will be produced, alongside issue-specific policy briefs oriented at Regional Economic Communities (REC).

**Outputs**

Per the project proposal document, outputs from the corridor analysis will include:

1. Four analytical reports describing the nature of fish trade in the target corridors, each approximately 100 pages in length.
2. Synthesis report on Intra-Regional Fish Trade in Sub-Saharan Africa capturing the key insights and messages, no more than 25 pages in length.
3. Fact sheet on Intra-Regional Fish Trade in Sub-Saharan Africa will be produced and about three policy briefs [one focused on key constraints, the other on trade barriers and the third one on challenges] will be produced for RECs (5-10 pages maximum).
4. Stand-alone publication on certification procedures for Fish and Fish products in the Intra-Regional Trade in Africa will also be produced[[2]](#footnote-2).

In addition to the above, in recognition of the need for accessible information for policymakers, key data will be plotted onto GIS maps which will be developed in collaboration with GIS and mapping specialists from World Fish in Penang, Malaysia. Selected CA partners will be expected to provide the relevant datasets in map-ready form throughout the CA process as required.

The Mapping process is expected to result in a GIS based series of maps which include:

1. main sources of fish supply within the corridor and along the corridor, including major capture fisheries, areas known for aquaculture, imports of fish from intra-regional trade coming into the corridor and imports from outside the continent coming into the corridor
2. main species and products in terms of volume
3. main markets for fish and fish products within the corridor e.g. urban centres and/or geographical areas of high consumption
4. fish trade volumes within, along and outside (i.e. exports) the corridor area
5. main concentrations of fishers, processors and traders
6. major areas/locations/trade nodes of informal trade
7. areas with large numbers of low income/poor consumers

1. locations of interventions underway to improve trade? e.g. capacity building, infrastructure, services, harmonization, with key project details included
2. success stories where trade has been improved
3. locations where there are known difficulties in implementing policy and/or major barriers to trade

Furthermore, with increasing global interest in promoting corridor level planning as a means to promoting regional integration (Gálvez Nogales, E. 2014), this process represents a methodological innovation that will be of interest and utility in understanding trade flows in fish or other products in other parts of the world.

Oversight of this activity will be carried out and coordinated by WorldFish, NPCA and AU-IBAR. WorldFish will facilitate the analysis and assessment of corridor B, NPCA will work in corridors A and D, while AU-IBAR will focus on corridor C. At the technical level, WorldFish will have responsibility for this activity, including the development of a detailed methodology, providing training and capacity building as required, and coordinating the publications.

**Key features of the CA process and results are expected to be:**

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| Process | Result |
| Multidisciplinary, iterative, interactive, participatory and innovative methodology | Support informed decision making by policymakers at the regional and national level |
| Combination of qualitative and quantitative methods including literature reviews and analysis, qualitative fieldwork and surveys, participatory diagnosis, value chain and gender transformative approaches. | Understand drivers and trends in fish trade and volume on intra-regional trade, paying particular attention to policy and institutional issues, access to markets for different stakeholders, and implications for livelihoods and poverty reduction. |
| Research approaches and overall process to support capacity building among African fisheries stakeholders and networks. | Go beyond markets alone, and consider the wider contextual dynamics. |
| Mixed- methods approach to not only the economic, but also the social and political impacts of fish trade. | Focus on the gendered, social, nutritional and policy implications of fish trade. |
| Apply gender transformative approaches in the research design which seek to engage with both women and men, addressing power relations and unequal power dynamics across social groups, challenging oppressive norms, practices and structures. | Representative and reflective of the trade context along the length of the corridor, but not exhaustive or defintive |
| Reflective of priorities and differences within and between corridors e.g. ( informal trade, REC priorities, gender transformative opportunities, value-chain analysis of specific species/products/trade routes, fish consumption issues, success stories in terms of trade enhancement, specific geographic areas) | Foster ownership of CA process for sustainablity. |
| Logical explanations for inclusion and exclusion from the research process, but will not be expected to provide 100 percent coverage of the entire corridor. |  |
| Use semi-structured interviews, key informants interviews and questionnaires, focus group discussions and Participatory Rural Appraisals. |  |
| Semi-structured interviews with policymakers will be conducted to understand policy and institutional processes within the sector and likely links to food security and poverty reduction.  Active participation of key stakeholders, inclusive of fish traders, governments, women’s groups and private sector institutions in designing and implementing the activities |  |
| Participatory action approaches to ensure sense of ownership of the findings and recommendations |  |
| Consideration as to how data will be analyzed in the reporting prior to beginning the research process., including how qualitative and quantitative data will be compared or combined, how quantitative data of differing quality from different national sources will be collated, and how data collected during primary research will be reconciled with data from the secondary review. |  |

**Research Questions and Objectives**

In support of the project results listed above, the objective of the Corridor Analysis process is:

**Using an interactive, participatory and innovative methodology, develop comprehensive Corridor Analyses for fish trade in four priority corridors across the African continent, to support informed decision making by policymakers at the regional and national level.**

Research Questions to be addressed in the CA process include:

1. What are the key characteristics of the trade corridors? How are they defined in political, social, economic and geographic terms?
2. How is fish trade defined along these corridors? Who are the key actors, what are the main challenges?
3. What is the role of fish in supporting food security and poverty alleviation?
4. What policy improvements can be made to improve fish trade along the corridor?

**Problem Statement**

As a result of the literature and policy review process conducted in Dec 2014-March 2015, eight major themes emerged across all policy sectors which are of particular relevance to the CA process.

* **Data Gaps are widespread and extensive**

It is widely acknowledged that data on the role of fisheries in the social, economic and cultural context of African states is incompletely understood, and that available qualitative and quantitative data is incomplete and/or of low quality. The most obvious example of this may the lack of data on fisheries’ contribution to national development or GDP. Because the economic value of fisheries are not well presented, fisheries are therefore not perceived as a priority for national economic development. Of particular interest in the context of promoting fish trade, is the lack of data on demand. Estimates of demand are based on modeling and extrapolations, not country specific data. This absence of data is felt not only by policy makers, but also by the private sector, with trade monitoring and market information systems incomplete or nonfunctioning in many contexts. At the community level, what information is available tells us that women generally play a huge role in small-scale fisheries, primarily as processors and traders, yet remain marginalized both in terms of their fishing related activities and their role in decision-making processes.

* **Improving Regional Infrastructure**

The overall functionality of fish trade in Africa is contingent on both hard and soft infrastructure, including transport, communications, storage and handling facilities, electricity and water supplies, as well as taxation, tariffs, customs, gender equity, labour laws, social protection, veterinary care (as it pertains to standards and guidelines on animal health and their implications of trade), border controls and certification regimes. These challenges are multiplied at the intra-regional level, where a lack of standardized or coordinated regulations or procedures act as disincentives to trade. With the focus of the project on promoting intra-regional trade, the Fish Trade project represents an opportunity to identify options for greater harmonization at the regional and sub-regional level to promote fish trade, which may in turn promote broader export possibilities, both for fish and other products.

* **Integrating fisheries in National Policy Processes**

Partly because the value of fisheries is not well quantified, the role of fisheries is not well articulated and compared to agriculture, it receive little attention in WTO discussions, national development plans, including agriculture (especially CAADP) and poverty alleviation strategies. The interface between trade policy and natural resource management policy needs to be examined, to ensure that promotion of trade does not bear unsustainable environmental costs. Furthermore aquaculture and fisheries should be mainstreamed into climate change adaptation strategies at national and subnational levels. As part and parcel of these actions, regional collaboration via RECs, RFBs and transboundary water organizations will both support and reinforce actions taken at the national level.

* **Promote fish for human consumption in Africa**

Fish from both marine and inland sources represents an irreplaceable source of protein, fats and micronutrients for populations across the continent. Simultaneously, food and nutrition security remain major development challenges, with the MDG goals on hunger going unmet. With this in mind, there is a need to better incorporate fish in the center of the food and nutrition security agenda. As part of that, there is need to better articulate the role of fish in national diets. Especially considering that the role of fish as a component of food consumption is generally poorly understood, particularly in relation to low-income consumers. Better understanding is required of the pathways between fish, gender and the nutritional status of individuals and households.

* **Recognize small scale fisheries as a market and fisherfolk a priority population**

Small scale fishers, traders and processors (especially women) have not been adequately engaged in policy processes, despite their vital role in fishing and fish trade. Fishing is often understood as a low status, low return livelihood. This perception needs to be reversed, with fisherfolk understood not only as contributors to the development of their countries, but as a key group of stakeholders to be engaged in policy processes, incorporating local knowledge into policy planning. In order to improve the economic performance of the fisheries sector, greater efforts are needed to understand fisherfolk not just as producers, but also as a market for goods and services; hence the need for strategies to improve their income levels by making fish trade markets work for them.. There is a need for better engagement with small scale fisherfolk in the research, management, and conservation of the fishing grounds they live by.

* **Expanded Aquaculture**

Countries in Africa have natural resources and assets which suggest the potential for aquaculture expansion. Over the past decade Africa has experience significant growth in aquaculture growth with production in rising from 399,000 tons in 2000 to 1.49 million tons in 2011, accounting for 2.2% of the global production; and the fastest growing continent (11.7%) (FAO 2014). However, the production levels in the sector are relatively lower in the sub-Saharan part of the continent, compared to North Africa. Of the total 1.49 million tonnes, the actual production in Sub-Saharan Africa was only 454,691 tonnes or 30.6% of the total African production and 0.68% of the global total. This variation in growth is also significant within the sub-Saharan region, indicating that there is potential for improvement in growth that could be achieved by simply getting countries within the region to each other. Increased aquaculture would have the advantage of providing a more constant supply of fish, but considerable investments and a supportive business environment (including start-up capital, access to credit, essential infrastructure, and access to feed stocks and inputs, sanitation and certification methods, integration of aquaculture into sustainable agricultural systems) will be required. Economies of scale suggest that aquaculture is likely to grow if small-scale producers are encouraged to adopt a demonstrable business model; and are committed to apply a professional approach at every link in the business chain (NRI *et al*. 2014). Where countries wish to develop large-scale production model, this could focus on high value species for middle and upper income urban markets.

* **Co-management first, increased production second**

It is recognized that increases in production should come from better management of existing systems, rather than the introduction of more efficient harvesting methods and gear. An immediate and necessary step in this regard is to ensure that co-management works in addressing sustainable fisheries management; hence the notion of “co-management first, increased production second”. Improving the management of fisheries will ensure its full potential value is realized from catching fish and throughout the value chain. Thereafter, steps to reduce post-harvest losses, which represent 30 percent of the total catch, should be initiated. While it is recognized that this a complex process, potential points of entry for this can be at the point of landing, through improving storage, processing and handling facilities (for some fisheries, it may be as simple as introducing insulated containers and ice) and improving bycatch utilization.

**Significance of the research**

As was acknowledged at the Nairobi launch and confirmed by the background review process, data on fish trade is partial and incomplete. For certain regions (such as Corridor D), large data gaps are common.

With capacity building one of the key foci for the FishTrade project, the CA process provides an excellent opportunity to develop the technical, analytical and research approaches of CA partners, in order to develop the capabilities of fish trade stakeholders at the national level. All work planning and research approaches are therefore expected to include a component for human development and capacity building, including involvement of national universities (especially students) and research institutions in all aspects of FishTrade research.

Finally, with increasing global interest in promoting corridor level planning as a means to promoting regional integration (Gálvez Nogales, E. 2014), this process represents a methodological innovation that will be of interest and utility in understanding trade flows in fish or other products in other parts of the world.

**Basic Parameters & Working Definitions**

Recognizing that the CA process remains evolving and iterative, the working definition offered below as subject to further discussion. Even so, recalling that there will be need to consolidate the findings and recommendations of the various CA reports in the later stages of the process, it is important to ensure that common approaches to the core concepts are shared and agreed upon. This section summarizes discussions on these key parameters to date.

Furthermore, it is to be underscored from the outset that the intention of the Corridor Analysis is to provide a sample of fish trade, and that for a wide variety of reasons, it will not be feasible or desirable to include all information related to all forms of fish trade for all countries along all corridors. While the CA process is expected to be representative and reflective of the trade context along the length of the corridor, it cannot be exhaustive or definitive. CA partners will be expected to provide explanations for inclusion and exclusion from the research process, but will not be expected to provide 100 percent coverage of the entire corridor.

Throughout the CA process, ‘Corridor’ is applied as a basic organizing concept, but it is part of the work of the CA process to more fully explore this, in order to render it meaningful. Developing the working definitions of the Corridor are therefore an integral part of the theoretical framing of the analysis itself, and should be included in reporting on the CA process by partners.

*Defining the Corridors*

In developing the CA methodology guidelines, and in the early phases of project implementation, there has been considerable discussion at every level as to how the Corridors are to be defined. This question is itself one of the key questions to be answered as part of the CA process, but some basic working assumptions are restated here, based on discussions during meetings in Nairobi, Lusaka and elsewhere. This section is also informed by Gálvez Nogales’ work for FAO on economic corridors (2014).

* As a basic starting point, a corridor can be defined as ‘a linear agglomeration of population and economic activities along existing transportation infrastructure’ (Healey 2004 quoted in Gálvez Nogales 2014), but this definition should not be considered definitive.
* In the context of fish trade, Corridors are not limited to the specific route or main transportation networks only, but includes the region serviced by the corridor. In this regard, Corridors can be considered to have a fluid boundaries, which are subject to interpretation.
* It is anticipated that corridors may include main arteries, shorter sub-corridors, and important transects. This process should include mapping of these contributing routes.
* Trade flows may be over short distances, involving neighbouring provinces or states, or along the whole length of the Corridor, from one terminus to the other. It is to be recalled that for the purposes of the Fishtrade project, the focus should be on intra-regional trade, rather than domestic trade.
* Corridors may include land (both road and rail), inland water, marine and air routes.

*Defining Trade*

Recognizing that ‘trade’ has many dimensions, at the corridor level, the CA process should give due consideration to multiple aspects, including:

* Volume: Total tonnages caught, grown, processed and purchased
* Values: Overall monetary worth of trade in fish, and where in the value chain these values accrue
* Number of participants: Gender disaggregated data, including Estimates of the number of men, women and youth engaged in catching, processing and trading fish. Consideration should also be given to the implications of increasing (or decreasing) numbers of market entrants.
* Margins: return to capital, noting that capital being only one of the factors of production. Returns on labour, opportunity costs, price linkage analysis and overall productivity levels should also be considered.
* Value-added: income share along the value chain links based on transformations as a result of processing[[3]](#footnote-3)
* Price linkages analysis: value accruing to different actors in the chain based on trade in fish.

As the analysis is elaborated, all of the above aspects of trade should be considered, independently and collectively. It will important for this process to indicate not only how trade is evolving, but in which particular ways that evolution is occurring.

Having said this, it is worth recalling that the CA process is not a purely financial exercise, interested only in calculating the net worth of a fish market, but is also necessarily focused on the gendered, social, nutritional and policy implications of fish trade. Understanding of trade therefore must go beyond markets alone, and consider the wider contextual dynamics. How to do this will be elaborated in more detail in the Methodology section below.

*Fish Species*

Given the tremendous diversity of fish species traded across the continent, it is suggested that initially the corridor analysis consider range of species being traded in the corridor, but that this will be analyzed to identify species of economic and food security value. With possible exceptions for important species in particular locations, it is anticipated that in broad terms, the CA process will focus primarily on a) high-volume small pelagic species which are important for food and nutrition security, and are widely traded by small scale fisherfolk and b) high-value fish such as tilapia and demersal species, which are of relevance to aquaculture, export markets and some urban populations. More detailed species data may be contained in annex documents attached to the main report.

**Methodology**

As a preface to this section, it should be noted that a separate document entitled *Trade Corridor Analysis Toolbox: Background and Methods* has been drafted, which elaborates methodological approaches relevant to specific data (such as trade volumes, certification and standardization, etc). The Toolbox document should be reviewed in detail, as this gives some indication of the overall scope of work expected in the CA process. The summary Matrix table has been included here as an Annex, but prospective partners are encouraged to consider the Toolbox document as a whole.

As a general rule, it is to be recalled that the CA process is not simply an elaborate value chain exercise, but is necessary a mixed- methods approach to not only the economic, but also the social and political impacts of fish trade. Multidisciplinary approaches to the CA process are considered a prerequisite, and CA partners will be expected to demonstrate their ability to bring expertise from various disciplines to contribute to the process.

With this in mind, the CA process allows room for case studies which reflect priorities and differences within and between corridors. The process should be developed to capture both the diversity and similarities along Corridors. Such case studies could include specific topics (informal trade, REC priorities, gender transformative opportunities, value-chain analysis of specific species/products/trade routes, fish consumption issues, success stories in terms of trade enhancement), or highlight specific geographic areas.

**Research Components**

A number of research and capacity building approaches and methods will be used to deliver the Corridor Analysis. It is expected that a systematic combination of qualitative and quantitative methods will be employed in the collection of primary and secondary data, including literature reviews and analysis, qualitative fieldwork and surveys, participatory diagnosis, value chain and gender transformative approaches. What follows is not intended as a prescriptive list of approaches to be adopted in every location, but rather indicates the mix of methodologies which are likely to be of utility to the overall process. CA partners will be expected to submit detail workplans indicating methodological choices for every data component required for the final analytical report.

**Desk Literature Reviews and Analysis**

The implementation of the proposed action will be dependent on qualitative and quantitative secondary data and information sources, from national, regional and global sources. Using the Scoping survey and policy recommendations documents and their source materials as a starting point, desk reviews and analysis of existing documents will be conducted. Information generated from this review process will inform the field work and activities planned for this action. Literature review planning processes and analytical approaches to secondary data should be shared with the project team to ensure consistency of approach across corridors.

As part of the preparation process leading to the Fish Trade project launch, a review of available policy documents, research and related literature was undertaken in early 2015. The objective was to develop an overview of the existing information related to fish trade relevant to the four corridors.

In all, some 55 documents from a wide range of sources were reviewed. Recognizing the importance of policy recommendations for the design of the Fish Trade project, a more detailed review of 31 documents was carried out of those documents containing specific recommendations.

As an initial step in the CA process, partners are expected to review those documents included the Scoping Review and Policy Recommendations summary documents. In addition, partners should carry out additional reviews to identify other documents that might have not been included to date, expanding the Corridor-specific document repository on a rolling basis. This may also entail working with World Fish communications staff who will be developing a shared resource library online.

This work can begin in the immediate term, as documents are already available to all Nairobi launch participants in the shared dropbox folders.

**Fieldwork and Surveys**

Fieldwork, a process of observing and collecting data on the structure, products, and value of fish trade will be at the centre of the method of implementation of the action. This is aimed at generating rich data from selected trade corridors focused on understanding dynamics, drivers and trends in fish trade and volume on intra-regional trade, paying particular attention to policy and institutional issues, access to markets for different stakeholders, and implications for livelihoods and poverty reduction. A number of survey techniques, inclusive of qualitative and quantitative methods will be used to gather different but complementary data on various aspects of fish trade. Data on livelihoods of fish traders and structure and operations of private sector associations will be obtained through semi-structured interviews, key informants interviews and questionnaires, focus group discussions and Participatory Rural Appraisals**.** Secondary data obtained from records of income from fish trade activities will also be analysed, where relevant. An examination of policy documents on fish trade combined with semi-structured interviews with policymakers will be conducted with the view to understand policy and institutional processes within the sector and likely links to food security and poverty reduction.

**Participatory and Iterative Approach**

Ownership is of importance if the CA process is to be sustainable. An iterative approach ensures that there is adaptive management and progress is built on previous achievements and lessons learned. Active participation of key stakeholders, inclusive of fish traders, governments, women’s groups and private sector institutions in designing and implementing the activities of this action is critical. Participatory action approaches will ensure that there is also a sense of ownership of the findings and recommendations resulting from the CA process.

**Geographical Information Systems (GIS)**

Geographical Information Systems (GIS) will be used to collate, analyze and present different types of information relevant to the action, such as information relating to movement of fish and fish products. Using GIS technology, maps representing a diversity of themes relevant to the action will be generated, forming one of the key outputs of the CA process. Focus will be placed on Participatory Geographical Information Systems (P-GIS) with the full involvement of individual traders and associations who will provide inputs to the mapping of fish trade along the Corridor.

**Value Chain Approaches**

Value chain approaches will be relevant for the collection of certain data and may be useful in developing a fuller profile of the fish trade structure at key nodes, including fish landing and processing sites, at border crossings and in urban markets. A value chain approach to intra-regional fish trade will involve addressing the major constraints and opportunities faced by fish traders and associations of fish processors, traders and private associations, at multiple levels and points along the marketing chain. Understanding of the structure of the value chainallows for better understanding of the constraints and opportunities within each segment, as well as the broader operating context in which the chain functions. It should be noted that value chain analyses have been conducted for various fisheries across Africa, and this experience should be built upon in developing FVC approaches for the CA process.

**Gender Transformative Approaches**

Considering gendered roles in the fisheries sector, especially in informal fish trade, the CA process is expected to be aware of and apply gender transformative approaches in the research design. A gender transformative approach seeks to engage with both women and men, addressing power relations and unequal power dynamics across social groups, challenging oppressive norms, practices and structures. Gender mainstreaming is a first approach towards gender transformative approach. Particular attention should therefore be paid to how proposed CA approaches will incorporate gender into all aspects of the research.

**Data Analysis**

Given the scale, range and complexity of data to be included in the CA process, it will be important to consider how data will be analysed in the reporting prior to beginning the research process. At a minimum, consideration needs to be applied to how qualitative and quantitative data will be compared or combined, how quantitative data of differing quality from different national sources will be collated, and how data collected during primary research will be reconciled with data from the secondary review. Different analytical approaches will be required for different data domains, but will also be needed to reconcile disparate findings. For instance, data on post-harvest losses will require one set of analytical tools, data on women’s role in processing a second, and policy implementation yet a third, but the final report will be expected to bring together information from all three sources and more. This needs to be considered from the outset, and will need to be presented and discussed in the early stages of the project with colleagues from World Fish, to ensure continuity across corridors.

**Capacity Building**

With capacity building and institutional strengthening identified as activity two within Result III, the CA process represents an opportunity to redress capacity shortfalls in the immediate term. CA partners should therefore indicate how what is proposed will improve capacity within institutions and among stakeholders, and this process should be carefully recorded and presented in the final report. Support from World Fish and the project team will be available to promote this, but it is the responsibility of the CA partners to suggest specific proposals for capacity building, including expected impacts, monitoring and budget implications.

Summing up this section, given the action’s goal and objectives, the implementation of the CA will require an interactive, participatory and innovative methodological framework. A detailed matrix of how research approaches may be specifically applied to data domains of interest to the CA process is included in Annex I. Additionally, the Corridor Toolbox document contains extensive detail on all the topics covered here, and should be reviewed during the research preparation process. Also, a useful overview of practical qualitative field methods/tools can be found [here](http://www.fao.org/docrep/x5307e/x5307e00.HTM).

**Methodology checklist**

TO BE COMPLETED

**Research team composition**

CA research teams are expected to include the following members:

**Team Leader**

A named manager, who will be a senior member of the team, directly responsible for all issues regarding the CA for the Corridor. He/she is expected to have more than 10 years of experience in African fisheries, and be deeply knowledgeable on research in the field. Knowledge and experience in qualitative research and statistical analysis will be an added value. The team leader will be the primary focal point for communications between the CA partner and World Fish (on behalf of the project team). Any change in the lead must be approved by World Fish.

With four CA being conducted simultaneously, the team leader will also be responsible for networking and co-planning with team leaders in other corridors, ensuring consistency of approach and identifying cross- regional possibilities for capacity building.

**Team professional staff**

A multidisciplinary team of professionals with a minimum of 5 years of professional experience in multisecotral research in fields related to fish trade, including: agriculture, climate change, finance, gender, nutrition, statistics, veterinary care, trade, transport at both national and regional levels.

Within these fields, team members are expected to have demonstrable competency in:

* Qualitative and quantitative research skills, including familiarity with mixed methods approaches
* Experience with quantitative and qualitative survey design and implementation
* Management and analysis of data, including development of databases for both quantitative and qualitative data
* Statistical analytical skills

Overall, the team should demonstrate:

* Nationally and regionally specific and relevant knowledge of fisheries and fish trade
* Ability to work in multiple locations simultaneously, in multiple languages and across different cultures.
* Ability to manage field teams remotely without compromising results
* Process management skills, such as facilitation
* Appropriate gender mix, with a minimum of two female team members required
* Strong analytical and report writing skill
* For Corridors A and D, French language proficiency.
* Fluency in written and spoken English is required

**General Conditions**

The successful institution should provide their own place of work and equipment. In-country and regional travel costs, including inbound travel by technical experts identified by WorldFish should be specified as part of the proposed budget. The selected institution should be able to arrange/supply their own transport arrangements in- country for all team members.

WorldFish and the project team hold no liability for any injuries, fatalities or legal claims arising from this work. Selected CA partners are expected to demonstrate that they can provide insurance cover for all team members in line with prevailing working environment norms and expectations in the host country. CA partners are not expected to take security risks in the process of conducting the CA, and are expected to exercise all due caution.

Both parties should be aware that:

* A working month is defined as 22 working days.
* Overtime is to be paid on an exceptional basis only, and is permissible only within the proposed budget line item, subject to prior approval at the time of partner agreement. Working on weekends or public holidays is to be discouraged.
* Flight costs will be paid at economy rate only
* No equipment or office supplies will be provided by WorldFish
* All outputs shall be the absolute property of the FishTrade project, AU-IBAR, NEPAD and WorldFish

**Workplan**

Performance evaluation of the CA partner will be based on the quality of methodology, field work, reporting and crucially, on the partner’s ability to deliver in accordance within the timelines and budget proposed. The table below indicates the schedule of key events as proposed in Midrand and thereafter.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Indicative Timing | Location | Participants | Notes |
| Corridor Methodology Circulated to Project Team | 03/04/2015 | Lusaka, Nairobi, Midrand | WFC, AU-IBAR, NEPAD | Includes:   1. Guidance notes 2. Methodology Checklists 3. Primary Data Collection Criteria |
| Feedback, comments on CA methodology | 10/04/2015 | Lusaka, Nairobi, Midrand | AU-IBAR, NEPAD | All changes incorporated by 17/04/2015. Skype with project team members as required. |
| CA Partners ‘Writeshop’ | 31/04- 01/05 2015 | Lilongwe | WFC, AU-IBAR, NEPAD, Universities of Dakar, Dar, Douala, Lilongwe, Makerere, consultants | Objectives of the meeting to include:   * Finalization of CA methodology * Selection of CA Team Members * Identification of key data gaps, field testing sites, pre-testing methodologies * Preparations for May Think Tank. |
| CA data collection begins | Week of 04/05/2015 | Dakar, Dar, Douala, Lilongwe, Makerere | CA partner institutions, WFC project manager, consultants, | During this phase, project management and supporting consultants will remain hands on to ensure smooth commencement of CA data collection |
| Primary data collection pre-testing | Week of 10/05/2015 | Various Locations | CA partner institutions | In order for this step to be initialized, field data collection tools and instruments will need to have been developed during the Writeshop |
| Summary of data collection activities (Stage I) | Week of 17/05/2015 | Various Locations | CA partner institutions, WFC consultants | This phase brings together:   * All data collected to date * Preliminary results and findings from pretesting * Completed methodological approach for Stage II Corridor Analysis * Stage II workflow planning |
| Presentation at FishGov Think Tank | 18-20 May 2015 | Entebbe, Uganda | WFC, AU-IBAR, NEPAD, Universities of Dakar, Dar, Douala, Lilongwe, Makerere, consultants | Engage partners in seeking feedback/approval of steps taken to date, recommendations for next steps. |
| Project Team Presentation to EU | May 2015? | Brussels, Belgium | WFC Project Team Leaders | Update donor counterparts on project progress to date, CA products generated (maps and narrative), discuss planning for 2015. |

**ANNEX I:**

**Draft Annotated Document Outline**

While it is acknowledged that the Corridor Analysis is iterative and evolving, the following draft document outline is provided for indicative purposes, in order to give partners some indication of the key deliverable expected at the end of this process. Any report not including all of the sections below may be considered incomplete, subject to revision, and payment may be withheld pending revisions.

Also it is to be recalled that the final report is one of two major outputs of this project, the second being the collaborative mapping of key data. This will be undertaken on an ongoing basis, but should be considered of equal importance with the CA narrative outlined below

**Title Page**

**Copyright Page**

**Abstract**

**Acknowledgments**

**Table of Contents**

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**Executive Summary (two pages maximum)**

**Introduction**  
*(This should be as broad as possible, applicable to the entire corridor, and not specific to fish- that comes later in the Findings section.)*

* Includes Corridor Description: countries, populations, GDP, trade, major agricultural production, poverty, etc. Include how long the corridor has been in existence (links to policy context.)

Sample Table:

**Corridor Summary Data**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Corridor | # of Sub corridors  (describe) | # of countries | Population | Surface Area | GDP (billions) |
| A |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Corridor | Fisheries contribution to GDP (%) | Fisheries % of total Budget/Ag budget | Major production areas | Marine/Inland | Aquaculture/capture (%) | Exports/Imports |
| A |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

* Geography and biocharacteristics: Water systems, transport links, infrastructure, climate, key ecosystems
* Policy context: RECs, FTAs, SPS standards regimes, subregional bodies (RFBs, etc)
* Discussion of cross border trade: who are the key drivers for the Corridor? Who are the real and potential stakeholders? Who is pushing cross border trade?

**Methodology**

* Include both secondary and primary research methodologies.
* Discuss capacity building processes developed as part of CA process.

**Findings**

* *Cross border Trade flows: volumes, values, species*
  + Current situation of key trade routes – who, what, where, why & when
  + Major production areas, processing zones, and markets
  + Include discussion of ex-regional import/export flows as a proportion of overall trade
* *Value Chains*: Observations on Structure and Performance
* *Policy, Institutional and Regulatory Framework* 
  + Policy Implementation, Successes and Challenges
  + Role of RECs and member state govts in establishing and implementing policies
  + Status of fisheries and fish trade in wider policy initiatives (i.e. national development plans)
  + Transboundary commissions and regional fisheries boards
  + Include research centres and other centres of innovation as applicable
* *Role and Status of Small scale fishers, both fish farmers and capture fisheries.*
  + Gender and power dynamics along the value chains, with reference to marginalized populations, youth/children and women
  + Role of women as fish traders and processors
  + Organzational arrangements among small scale fishers (i.e trade unions, associations, cooperatives, etc.)
* *Food Security, Nutrition and Consumption*
  + Prevalence of food insecurity, chronic and acute malnutrition
  + Role of fish in national diets (Kcal, protein, dietary diversity, frequency of consumption, etc)
  + Cultural factors affecting fish consumption
  + Preferred product forms
* *Post-Harvest Losses*
  + Physical, Quality and Market Forces
* *Infrastructure*
  + Fisheries specific (processing, storage, handling, transport)
  + General (communications, water, electricity, transport)
* *Status of Aquaculture*
  + Quantities being produced and traded
  + Product form (processing)
  + Issues specific to Aquaculture
* *Certification, Standards and Enforcement*
  + Includes food safety measures

**Discussion**

* Challenges in Policy implementation
* Key points of entry to ameliorate intraregional fish trade: What the consensus issues?
* Key data lacking, strategies to address this
* Major policy trajectories, how to integrate fisheries into ongoing processes
* How to identify potential points of engagement, or areas for growth?
* Risks and Assumptions: who stands to benefit from improved corridor trade? Who stands to lose?

**Recommendations**

*(For all of these, include timeframes and planning*. *Recommendations should be per the four result areas for the FishTrade project and specific to institutions, i.e. RECS, RFBs etc.)*

* How to address policy implementation gaps.
* What can be done immediately: Quick wins and low hanging fruit.
* Key partners who are ready to collaborate.
* Key locations suitable to investment and/or co-location of key services/enterprises.
* How to widen the Corridor? How do develop last-mile infrastructure, off-corridor nodes.
* For infrastructure: given that infrastructure tends to require additional infrastructure, where to begin? Which infrastructure project already begun need particular/additional support?
* Develop scenarios and forecasts based on three options: low growth, high growth and status quo ante.

**Annex II: Corridor Analysis Toolbox Matrix**

|  |  | **HOW?** Research Approaches to be considered | **WHO?** Research participants and Stakeholders to be engaged |
| --- | --- | --- | --- |
| **A** | **VALUE, VOLUMES , DEMAND & SUPPLY** **OF SPECIFIC MARKET CHAINS** | MAPPING  FOCUS GROUP DISCUSSIONS IN KEY PRODUCTION AREAS, WHOLESALE MARKETS & BORDER POINTS  CORRIDOR ANALYSIS TOOLKIT PRIORITISATION OF KEY ROUTES | TRADERS  MARKET MANAGEMENT  BORDER STAFF  FISHERIES STAFF  LOCAL & NATIONAL GOVT |
| **B** | **CURRENT SITUATION OF KEY TRADE ROUTES – WHO, WHAT, WHERE, WHY & WHEN** | FOCUS ON PRIORITISED ROUTES  STAKEHOLDER ANALYSIS  SUB-SECTOR ANALYSIS/VALUE-CHAIN ANALYSIS  SUB-SECTOR LIVELIHOODS APPROACH  FOCUS GROUP DISCUSSIONS  KEY INFORMANT CASE STUDIES | FISHERS  GEAR / CANOE OWNERS  PROCESSORS  TRADERS  MARKET MANAGEMENT  FISHERIES STAFF  BORDER STAFF  COMMUNITY LEADERS  LOCAL GOVT |
| **C** | **MARGINALISED, TRADE & CONSUMPTION** | FOCUS ON PRIORITISED ROUTES  PARTICIPATORY POVERTY ASSESSMENTS  KEY INFORMANT CASE STUDIES  POST-HARVEST LIVELIHOODS ANALYSIS TOOL | COMMUNITY LEADERS  FISHERIES STAKEHOLDERS AS ABOVE  BENEFICIARY TARGET GROUPS  LOW INCOME CONSUMERS – RURAL & URBAN |
| **D** | **POST-HARVEST LOSSES** | FOCUS ON PRIORITISED ROUTES  FAO PHFLA TOOLS | FISHERS  GEAR / CANOE OWNERS  PROCESSORS  TRADERS  FISHERIES STAFF  BORDER STAFF  COMMUNITY LEADERS |
| **E** | **CERTIFICATION, STANDARDS & ENFORCEMENT** | AUDIT – FOOD LAW, STANDARDS, CERTIFCATION PROCEDURES/CHECKS AT BORDERS  SEMI-STRUCTURED INTERVIEWS | NATIONAL GOVT AUTHOROTIES E.G. BUREAU OF STANDARDS, FISH INSPECTION, MIN OF HEALTH, FISHERIES STAKEHOLDERS |
| **F** | **CHANGES – CAUSES & EFFECTS** | FOCUS GROUP DISCUSSIONS | ALL OF ABOVE |
| **G** | **CONSTRAINTS & BARRIERS & BENEFITS OF REMOVAL** | FOCUS GROUP DISCUSSIONS | ALL OF ABOVE |
| **H** | **FISH CONSUMPTION & FOOD SECURITY, INSECURITY & LOW INCOME CONSUMERS** | RAPID QUESTIONNAIRE SURVEY WITH TARGET GROUPS SMARTFISH EXAMPLE  CASE STUDIES | COMMUNITY & MARKET LEADERS  CONSUMERS |
| **I** | **CAPACITY DEVELOPMENT & ACCESS TO TECHNOLOGIES & INFORMATION** | TRAINING NEEDS ANALYSIS | SMES  LOCAL GOVT |
| **J** | **POLICY AND REGULATORY CONSTRAINTS AND INCENTIVES** | POLICY AUDIT/ANALYSES | MULTI-AGENCIES RESPONSIBLE FOR POLICY FORMULATION & IMPLEMENTATION RELATED TO FISH TRADE |

1. As preliminary work undertaken during the project launch in Nairobi 2-6 March, 2015 indicates, there are considerable refinements and adjustments to the structure, routing and composition of these corridors to be made. Defining the corridors will therefore be one of the key considerations for the Corridor Analysis process and outputs. For indicative purposes, Corridor ***A*** runs from Dakar to N’djamena, passing through Senegal, Mali, Burkina Faso, Niger, Ghana, Nigeria and Chad. Corridor ***B*** runs from Dar es Salaam [Tanzania] to Durban [South Africa], passing through Zimbabwe, Botswana, Zambia, Malawi, Mozambique, and Democratic Republic of Congo. Corridor ***C*** runs from Mombasa to Goma, passing through Kenya, Uganda, Burundi, Rwanda and Democratic Republic of Congo. Corridor ***D*** runs from Libreville to N’djamena via Yaoundé, passing through Gabon, Cameroon and Chad. [↑](#footnote-ref-1)
2. Give the highly technical specifics of the certification study, separate Terms of Reference will be developed for this activity, and will be circulated under separate copy. [↑](#footnote-ref-2)
3. There is a need to distinguish between value-added processing and the economic value that is used to calculate GDP. Econometric formulae for both of these processes, based, on the work undertaken by FAO & NEPAD in 2014 can be found in the Corridor Analysis Toobox document. [↑](#footnote-ref-3)