



# Mekong River Commission

## For Sustainable Development

### TERMS OF REFERENCE

#### 1. CONSULTANCY SUMMARY:

<b>Consultancy Title:</b>	International Consultant for assessment of fisheries-related value chains and alternative livelihood options to support implementation of the GEF Mekong Fisheries Project
<b>Consultancy type:</b>	Special Service Agreement (SSA)
<b>Division:</b>	Environmental Management Division (ED)
<b>Duration:</b>	35 working days (1 May 2026 to 28 February 2027)
<b>Duty station:</b>	Home-based with possibility for travel to Mekong countries.
<b>Reporting to:</b>	The Consultant will work under the overall supervision of the Director of ED and the direct supervision of the Fisheries Management Specialist/Project Manager.
<b>Expected Key Deliverables:</b>	<ul style="list-style-type: none"> <li>• Report on fisheries value chain assessment and market analysis.</li> <li>• Investment and business plans for fisheries related value chains.</li> <li>• Strategy and solutions for the development of the capture fisheries sector.</li> <li>• Report on baseline assessment of household income and well-being.</li> </ul>

#### 2. INTRODUCTION AND BACKGROUND:

##### 2.1. Introduction

The Mekong River Commission (MRC) was established by the 1995 Agreement on Co-operation for the Sustainable Development of the Mekong River Basin, between the governments of Cambodia, Lao PDR, Thailand, and Viet Nam. The role of the MRC is to coordinate and promote cooperation in all fields of sustainable development, utilization, management and conservation of the water and related resources of the Mekong River Basin.

The MRC Secretariat (MRCS) is the operational arm of the Mekong River Commission (MRC) and its four Member Countries (MC). It provides technical and administrative services to the Joint Committee and the Council to achieve the MRC's mission.

The Environmental Management Division (ED) is responsible for environmental monitoring, assessment, planning and management to support basin planning management and development for sustainable development of the Mekong River.

The ED is executing "Enhancing Transboundary Fisheries Management in the Lower Mekong Basin" project (hereafter referred to as the Mekong Fisheries Project) from 2026 – 2030, with financial support from the Global Environment Facility (GEF IW-8), in collaboration with the International Union for Conservation of Nature (IUCN). The project is implemented under the framework of MRC and contributes directly to the MRC Strategic Priority 2026–2030.

## 2.2. Project summary

The Lower Mekong Basin (LMB) is home to the most productive inland fisheries on the planet, and one based on the most diverse range of species, generating an annual value of \$8-\$9 billion in fish and other aquatic animals. These fisheries contribute significantly to the GDP of Cambodia, Laos, Vietnam, and Thailand, while supporting food security, cultural identity, and local economies. Freshwater fish provide a major share of national animal protein intake and play a vital role in child nutrition and health.

The LMB's extraordinary productivity stems from a complex mosaic of dynamic freshwater ecosystems, with fish species diversity per unit area of catchment roughly three times that of the Amazon. These ecosystems rely on interconnected wetland landscapes that serve as crucial habitats for fish to complete their life cycles. The resilience of these biodiversity hotspots is a critical indicator of ecosystem health, sustainable livelihoods, and economic stability.

However, the LMB's fisheries face a growing crisis, which all riparian countries acknowledge. Since 2018, fishery harvests and incomes have declined considerably, driven by habitat fragmentation, degradation, and loss. Dams and irrigation structures have disconnected the Mekong River from its tributaries, disrupting fish migration and reproductive cycles, and impacted nutrient flows. Wetland conversion has reduced fish habitat. Unsustainable agriculture, forestry and urban development practices have diminished water quality, nutrient flows, and wetland recharge.

The “**Enhancing Transboundary Fisheries Management in the Lower Mekong Basin**” project addresses these challenges by increasing the connectivity, productivity, and resilience of transboundary capture fisheries, aquatic biodiversity, and other ecosystem services the LMB provides. The project will strengthen fisheries co-management, fisheries value chain development, and income diversification, and through the Mekong River Commission (MRC) integrate fisheries conservation into sectoral policies, especially hydropower, irrigation and agriculture.

The project supports the GEF's International Waters, Biodiversity, and Land Degradation focal areas, aligns with the GEF IW Advancing Sustainable Fisheries Management objective in the GEF 8 Programming Direction, and makes a major contribution to the MRC Basin Development Strategy (2021-2030) and MRC Mekong Basin-wide Fisheries Management and Development Strategy (2018-2022).

Field activities focus on six landscapes covering 2.7 million hectares: Lower Songkhram River Basin and Ing River Mouth in Thailand; Siphandone in Lao PDR; Kratie-Stung Treng and Eastern Tonle Sap in Cambodia; and the Upper Mekong Delta in Vietnam. These areas were selected based on their importance for regional fisheries and the opportunity to rapidly scale up successful community fisheries models. Work in these landscapes will provide the information needed to increase public investment in capture fisheries. They also incentivize the active participation of national fisheries agencies.

The project is structured around four components, each guided by a theory of change:

**Component 1, Implementation of Transboundary Fisheries Solutions**, will conserve, restore and manage critical fish habitats and implement ecosystem-based fisheries solutions, including co-management whereby rights and responsibilities are shared between government and fishers. By maintaining connectivity and protecting swimways, the project will increase fish numbers, size, and diversity, resulting in healthier fish stocks and improved livelihoods. Activities include restoring habitats, operationalising co-management, and removing barriers to fish migration.

**Component 2: Economic and Financial Incentives for Transforming Fisheries-Based Livelihoods** support the development of fisheries-related value chains that add value to the sector and potentially reduce pressure on fishing as a primary livelihood. By demonstrating the attractive return on investment from

capture fisheries, the project will encourage government and development bank investment in the sector, which has historically been ignored in terms of government spending. Activities include establishing cooperatives, promoting ecotourism linked to fish conservation, and establishing mini-trust funds, saving and loan schemes, and other sustainable financing mechanisms.

**Component 3: Mainstreaming Ecosystem-Based Fisheries into Sectoral Policies and Plans** will integrate the results of this and other fisheries projects into policy and planning at the national and regional levels. By demonstrating the full economic value of inland fisheries, the project will encourage governments to institutionalize and scale-up improved capture fisheries. This will include ensuring that investments in hydropower and irrigation are selected that have optimal co-benefits for, and the lowest impact, on fisheries and freshwater biodiversity, e.g., through regional energy planning and investment. Activities include updating nexus studies on water-food-energy, aligning policies with sustainable development goals, and strengthening governance frameworks.

**Component 4: Knowledge-Sharing of Outcomes and Lessons** will establish a robust knowledge-sharing and learning platform. It will strengthen knowledge capture and sharing through participation in IW:LEARN.

The project's outcomes align with its theory of change, aiming to restore fish stocks and fish habitat, conserve or restore biodiversity, improve livelihoods through sustainable value chains, and embed ecosystem-based fisheries management into policy. By reconnecting habitats, incentivizing sustainable practices, and fostering knowledge-sharing, the project provides a replicable model for transboundary fisheries management.

### 3. OBJECTIVES OF THE CONSULTANCY:

The main objective of this assignment is to support implementation of the project activities by assessing and prioritising fisheries-related value changed based on market analyses, in line with the approved concept note.

### 4. EXPECTED OUTPUTS

- A synthesis report including (1) analyses of the value chains of capture fisheries, OAAs and related fisheries products and other fisheries related business in the LMB and in particular the six project landscapes and (2) a strategy and solutions for the further development of the capture fisheries sector.
- Investment and business plans for fisheries related value chains for 4 community in each country to strengthen community-based producer organizations to manage fisheries and fisheries related VCs.
- A baseline assessment related to fishing household income and subjective well-being based on contributions from new/improved VCs.

### 5. DELIVERABLES AND CONCRETE TIMELINES

The International Consultant will produce the following key deliverables starting the work from 1 May 2026 to 28 February 2027.

No	Deliverables	Number of working days	Deadline
1.	An inception report that highlights methodologies for data collection and strategies for implementation.	10	30 May 2026
2.	A supervision report to local team produced that summary the main outcomes from the field	5	1 October 2026

3.	A first draft synthesis report including (1) baseline analyses of the value chains of capture fisheries, OAAs and related fisheries products and other fisheries business in the LMB and in particular the six project landscapes and (2) a strategy and solutions for the further development of the capture fisheries sector and (3) Investment and business plans for fisheries related value chains for 4 community in each country and (4) A baseline assessment related to fishing household income and subjective well-being based on contributions from new/improved VCs	14	30 October 2026
4.	Meeting materials for national and regional workshops for and attendance in regional meetings (online/offline TBD)	1	30 December 2026
5.	A Final synthesis report including (1) baseline analyses of the value chains of capture fisheries, OAAs and related fisheries products and other fisheries business in the LMB and in particular the six project landscapes and (2) a strategy and solutions for the further development of the capture fisheries sector and (3) Investment and business plans for fisheries related value chains for 4 community in each country and (4) A baseline assessment related to fishing household income and subjective well-being based on contributions from new/improved VCs	5	28 February 2027
	<b>Total</b>	35	

## 6. REQUIRED TASKS AND RESPONSIBILITIES

The International Consultant is required to meet with the Project Team immediately after the contract is signed in order to become familiar with the project design and the activities outlined in the attached concept note.

Detail required tasks and responsibilities to achieve each key deliverable include, but are not limited to, the following:

- Conduct a comprehensive review and synthesis of relevant existing datasets from national and regional sources, including prior research, monitoring programs, and outputs from projects to identify data gaps and develop methodologies for fisheries market analysis and assessments, fisheries value chain baseline assessment and other dependent livelihoods;
- Design a survey strategy including criteria, methodology, guidelines and questionnaires to guide the work of national survey teams to (i) using criteria for likely success of VC interventions, identify priority areas within each landscape where VC improvements stand the greatest chance of success; and (ii) once identified to undertaken surveys to identify the most appropriate strategies to improve VCs in each site.
- Lead 4 local team in each country to

- conduct field data collection and comprehensive market analysis for both catch and non-catch fisheries business within the project landscapes. This includes baseline data and analysis on fisheries incomes, fisheries value chains and other related fisheries business. This finding, together with data and information collected above, will be used to identify investment opportunities to improve incomes for fisheries communities. All data collection efforts must be gender-sensitive and ensure inclusive participation.
  - develop a strategy and solutions for the further development of the capture fisheries sector and for implementing priority VCs in each landscape in order to upgrade of the value chains of captured fisheries, as well as enhancing food security, job creation, and marketing of fish products in the LMB.
  - identify an initial investment and business plans for fisheries related value chains for 4 community in each country to strengthen community-based producer organizations to manage fisheries and fisheries related VCs.
- The international consultant will not be required to participate in the field survey but will provide assistance and guidance to the local team in each country to collect data based on the approved methodology outlined in the inception report. However, a short visit to observe the survey process and to participate in national and regional meetings may be required.
  - The international consultant will also be required to cooperate with other survey teams under the project operating in the same areas to maximize synergies.

## **7. PAYMENT MODE:**

Since there will be several milestones to be completed and to avoid many administrative works, payment by instalment will be selected for this assignment, and it is shown below.

- The 1<sup>st</sup> payment upon signing of the Contract (10 working days corresponding to 28.5% of the total budget);
- The 2<sup>nd</sup> payment upon submission and acceptance by the Environmental Management Division of key deliverables 1,2,3 (19 working days corresponding to 54.3% of the total budget); and
- The final payment upon submission and acceptance by Environmental Management Division of key deliverables 4,5 (6 working days corresponding to 17.2% of the total budget).

The MRC reserves the right to annul the contract in case of non-performance according to the required key deliverables and timelines of Section 5.

## **8. INTELLECTUAL PROPERTY RIGHTS:**

Intellectual property rights - IPR: Information, data, database, knowledge resources in the forms of briefings, reports, proceedings, articles, essays, etc. issued by and for the MRCS will be the MRCS property.

Any utility, announcement and disclosure that are without MRCS highest levels of authority' permission is considered illegal and will be charged by relevant local and international legal procedures.

## **9. DECLARATION OF NON-FRAUDULENCE AND PROTECTION OF PERSONAL DATA:**

The Consultant shall adhere to the MRC's relevant rules and regulations of the MRC on personal data protection, business exclusion, and fraud prevention and anti-corruption principles, and shall be under strict disciplinary measures should any violation occurs.

## **10. WORKING ARRANGEMENT:**

- Overall supervision: The consultant will be working under the overall supervision of the Director of the Environmental Management Division.
- Communication line: The consultant will be working under the direct supervision of Fisheries Management Specialist/Project Manager of the Environmental Management Division.

**11. QUALIFICATIONS AND REQUIREMENTS:**

- University degree (Doctoral degrees or equivalent minimum) in Economics, Agricultural Economic, Natural Resource Management, Fisheries Management, or related fields.
- Minimum 25 years experiences in designing, formulating and evaluating national/regional resource management strategy in relation to fisheries market analysis assessment and fisheries value chains.
- Extensive experiences in reviewing and documenting economic value of fisheries, fisheries and agricultural products value-chain, economic valuation of ecosystem services, wetland management projects, strategy including co-management, community-based management, community lead ecosystem restoration initiatives.
- Minimum 10 years of experiences in fisheries, wetland and environment of Mekong River Basin.
- Extensive experiences in the application of social and environmental safeguard measures in alignment with international standards such as GEF/IUCN.
- Specific knowledge and experiences with relevant international agreements and practices such as the FAO Code of Conduct for Responsible Fisheries, technical guidelines, action plans and approaches for inland fisheries management, ecosystem-based approach, and precautionary approach are advantageous.
- Experiences with GEF funded project is preferable
- Excellent inter-personal skills and able to negotiate constructively in a Mekong/Southeast Asia institution and cultural context.
- Fluent in English, verbal and writing and strong analytical skills.

**12. SIGNATURE BLOCK**

MRCS:

Name and Title: Theerawat Samphawamana

Incumbent's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_



## CONCEPT NOTE

### On Activity 2.1.1.1

#### Assess and prioritise fisheries-related VCs based on market analyses

20 March 2026

## 1. BACKGROUND

### 1.1. Project Summary

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However, the LMB's fisheries face a growing crisis, which all riparian countries acknowledge. Since 2018, fishery harvests and incomes have declined considerably, driven by habitat fragmentation, degradation, and loss. Dams and irrigation structures have disconnected the Mekong River from its tributaries, disrupting fish migration and reproductive cycles, and impacted nutrient flows. Wetland conversion has reduced fish habitat. Unsustainable agriculture, forestry and urban development practices have diminished water quality, nutrient flows, and wetland recharge.

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## **1.2. Component and Activity description**

### **Component 2: Economic and financial incentives for transforming fisheries-based livelihoods.**

Component 2 adopts a 2-fold approach aimed at: (1) strengthening fisheries value chains (VCs) and other fisheries related livelihood options to increase economic return to fisheries communities and (2) securing long-term public financing to conserve and manage key ecosystems protected under Outcome 1. Simply put, whereas Component 1 aims to increase the volume of fish, Component 2 aims to increase the

economic value of the fish catch and fisheries-related VCs. VC is defined as the full lifecycle of a product or process, including material sourcing, production, and consumption.

The fisheries sector in the LMB is predominantly smallholder and highly fragmented, seasonally catch, which limits bargaining power of fisheries in the markets and along value chains. The difference between landing point value and retail value can reach 400%, highlighting the potential for fishers to capture a larger share of the value. Enhancing their share of profits would help align economic incentives with sustainable fisheries management. This component will focus on developing improved VCs, enabling fairer profit distribution and incentivizing sustainable practices. Additionally, diversifying catch and non-catch livelihood alternatives will help reduce solely dependence on fishing, creating opportunities for other ecosystem-based business for future generations.

- ❖ Sustainable Fish, OAAs and OAC<sup>1</sup> VCs - The aim is to strengthen and transform capture fishery markets by increasing the demand for and supply of sustainable freshwater capture fish products by linking a top-down market-driven approach to a bottom-up approach to build supply of sustainable freshwater capture fishery products. The top-down mechanisms aim to build demand in national markets to "pull" the supply of sustainable products, working with major traders and buyers to increase awareness, provide sound information, implement responsible purchasing policies, and facilitate constructive dialogue through government-led co-management platforms (supply chain roundtables) to facilitate multi-level stakeholder dialogue, including concrete action to improve fisheries management for specific species that are threatened and others like OACs that can generate alternative incomes to take pressure off capture fisheries. The activity will also look into creating additional added value through diversifying fisheries related products such as fermented or smoked fish and increasing processing technique, sanitation, and green label initiatives to promote sustainable and environmental friendly consumption.
- ❖ Sustainable non-catch business – These will be established in communities that are deemed viable and with demand through the market studies that aim to increasing fisheries co-benefits such as tourism from fishery habitat conservation and restoration.
- ❖ Other financial mechanisms – these include community membership fees, license fees for community operated commercial gears or from outside fishers (provided they accrue to communities not local authorities) and small percentage charges on fish sales.<sup>2</sup>

A second aspect is the need for public financing to support the management and restoration of the critical ecosystems identified and protected under Component 1. Public investment will focus on securing sustainable habitats for fisheries, such as wetlands, rivers, and floodplains, which play vital roles in maintaining biodiversity and ecosystem health.

Governments are reluctant to borrow for nature, including capture fisheries, because the return on investment is less clear than for infrastructure. Partnerships with initiatives like the ADB's Nature-based Solution Finance Hub (NSFH) will be leveraged to secure financing. NSFH could complement these efforts

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<sup>1</sup> OACs are other aquatic commodities like riverweed, which has purported health benefits, and which has a growing market thanks to a women's group driving this emerging market in Thailand.

by lending \$5 billion by 2030 for NbS, improving cost-benefit analyses to highlight the economic value of healthy ecosystems, and incentivizing governments to invest in capture fisheries.

NSFH will incentive investments in nature by combining more grant financing and improve cost-benefit analyses that consider the positive externalities of healthy ecosystems, including the rivers, lakes, and wetlands that sustain the LMB's fisheries. NSFH is looking for opportunities and this project will work with the ADB and like-minded donors to increase both public and private investment in capture fisheries. IUCN is the lead non-financial partner in NSFH, in addition to WWF, TNC, CI, and other NGOs.

This component includes two outcomes are measured by four indicators, three outputs, and six activities.

OUTCOME	RESPONSIBLE ACTORS	INDICATORS
<b>Outcome 2.1.</b> Fisheries and non-catch VCs improved	EAs, District and Provincial Governments and FCoM villages, Fisher Associations and private sector; MRC-support	<i>OI 2.1.a:</i> Increased community fishing household well-being (Fish Bio, 2022) based on contributions from new/improved VCs <i>OI 2.1.b:</i> Economic and financial well-being: % annual income contributed to focal landscapes from sustainable inland aquatic resource value chains.
<b>Outcome 2.2.</b> Long-term public financing secured for improved fisheries management	EAs, National, District and Provincial Governments; Fisher Associations. Executing Agencies, National, District and Provincial Governments; Fisher Associations	<i>OI 2.2.a:</i> Long-term public or public-private financing mechanisms to improve ecosystems-based capture fisheries management and stock protection identified and effectively implemented <i>OI 2.2.b</i> Investments mobilized (USD) from public entities, banks, privates and others to improve ecosystems-based capture fisheries management and stock protection

### Assumptions

<b>A2.1</b>	Adequate National counterpart & MRC Technical support, oversight and continuous accompaniment.	<i>MRCs, Executing Agencies and Fisheries Directorates</i>
<b>A2.2</b>	Private investments in supporting Landscape Demonstration Site user associations' active participation in Roundtable governance mechanisms and providing a sanitary certification (at a minimum) process for value chain products produced by the project.	<i>Competent National &amp; Provincial Authorities</i>
<b>A2.3</b>	Ecosystem-based freshwater resource co-management giving full weight to Landscape Demonstration Site ecosystem services institutionalized and applied in all new transboundary fishery co-management projects in MCs.	“ “ “ “ “ “
<b>A2.4</b>	Formal recognition of incentive structures for strengthening sustainable capture fisheries and non-fishery livelihoods.	“ “ “

<b>A2.5</b>	Willingness to provide loan guarantees and need to identify the guarantors (banks, national institution, environmental funds, etc.).	<i>MRC and MCs</i>
<b>A2.6</b>	Profits from the new Value Chains will be distributed equitably among all stakeholders.	<i>District and Provincial Governments</i>

The following risks are noted:

- Resistance or lack of buy-in from local communities and stakeholders.
- Conflicts between priorities and competencies of different institutional levels (national and states).
- Risk of insolvency or loans not repaid.
- Bank interest rates are too low to make the approach sustainable.
- That the profits from the VC will NOT be distributed equitably. It is imperative that the business and management plans clearly describe where that money is going and how it is re-distributed.

**Outcome 2.1.** Fisheries value chains (VCs) improved and other fisheries related livelihood options created

The aim of Outcome 2.1 is to add value to fish (and OAA) catch by developing new and improved fisheries VCs and other fisheries related livelihood options. These include dried and smoked fish and fish paste, bird watching (which depends on healthy fish stocks), village homestays that support ecotourism. There are also opportunities for fishers to capture a larger share of the retail fish price through joint sales to middlemen or direct sales to restaurants in urban areas.

The Outcome 2.1 also aims to diversify income for fishing communities through other fisheries related livelihood options such as post-harvest technology, ecotourism (i.e., Community-based tourism involving fisheries communities, River or lake tours, Cultural experiences related to fishing communities) and other options to reduce pressure on wild fish stocks and promote sustainable fisheries management.

**Output 2.1.1:** New and improved VCs developed in 16 communities<sup>3</sup> by the end of the project

The purpose of adding value to fish catch and the capture fisheries sector is to provide a financial incentive to communities to sustainably manage fisheries and over the long-term diversify livelihoods and reduce pressure on fish stocks. Developing new/improved fisheries-based VCs will require assessing their market demand and investment needs.

The project will explore the possibility of developing certified supply chains between fishing communities and more affluent urban centers such as Phnom Penh and HCMC. Because of food safety concerns, there is a trend of buying from trusted suppliers even if the price is slightly above market rate. This trend is pronounced when it comes from sea food. The potential for freshwater fish needs to be assessed.

**The Activity 2.1.1.1. Assess and prioritise fisheries-related VCs based on market analyses.**

Current market analyses in the capture fisheries sector just collect information on retail and wholesale prices. There is no recent, comprehensive value-chain analysis for capture fisheries in the Lower Mekong

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<sup>3</sup> The MCs agreed on this number in each country Validation Workshop.

Basin (LMB); existing studies are either unavailable or outdated<sup>45</sup>. This gap is often justified by the assumption that capture fisheries are small scale and generate minimal value. However, recent MRC 2023 publication showed that the value of capture fisheries in the LMB is \$2-3 billion based on the first sale value and \$7-8 billion based on end user consumption value<sup>6</sup>. Initial analysis showed that the difference between landing point value and retail value can reach 400% for some species, highlighting the potential for fishers to capture a larger share of the profits. **Therefore, this activity will conduct baseline survey and analyse the value chains of capture fisheries, OAAs and related fisheries products and business in 6 project landscapes to propose major solutions for the further development of the capture fisheries sector and to develop a strategy for implementing priority VCs in each landscape in order to upgrade of the value chains of captured fisheries, as well as enhancing food security, job creation, and marketing of fish products and related business in the LMB.**

It is expected that this activity will improve our understanding of 3-5 fisheries-related VCs that could be developed in ways that increase fishers' income and incentivize good fisheries management. The most obvious VCs is fresh fish from catch to consumption. Other related VCs include dried/smoked fish, fish paste, etc. These VCs will be assessed to understand where opportunities for improvement lie using a 3-step approach: (1) identify VC activities that go into a goods (e.g., fresh fish); (2) determine the value that each business activity adds to the process, along with costs involved; and (3) identify competitive advantage opportunities.

Other fisheries related livelihood options, which aim to diversify income for fishing communities, reduce pressure on wild fish stocks and promote sustainable fisheries management, such as post-harvest technology, ecotourism (i.e., Community-based tourism involving fisheries communities, River or lake tours, Cultural experiences related to fishing communities) and their value chains will also be explored under this activity.

For each VC, this process will identify what kinds of investments are needed to reduce costs, improve quality, capture a larger share of the end price, and what kinds of government policies need to be in place to drive successful VCs. This will build on the One Commune One Product (OCOP) programs in Thailand and Vietnam.

Some of these VCs will be require minimal investment or capacity building, e.g., improved cold storage, boat to transport fish to landing site. Others are more complex, e.g., establishing an ecotourism business. The kinds of VC that communities could engage in will depend critically on their level of organizational capacity and leadership. A key element of the VC analyses is impact on gender. Typically, men fish and women process and sell fish. New/improved VCs therefore have the potential to improve the status of women but can also their workload. VC selection will take this trade-off into account to ensure that new/improved VCs are both economically and socially sustainable.

Based on the market analysis and strategy developed, investment and business plans for fisheries related value chains will be developed for 4 community in each country to strengthen community-based producer organizations to manage fisheries and fisheries related VCs.

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<sup>4</sup> Chea et al., "Fish Consumption Patterns and Value Chain Analysis in North-Western Cambodia."

<sup>5</sup> Loc et al., "High and Low Value Fish Chains in the Mekong Delta."

<sup>6</sup> MRC, "Assessment of Fisheries Yield in the Lower Mekong River Basin 2020."

In addition to the market analysis and VC strategy development, a baseline study (based on the samples) related to fishing household income and subjective well-being based on contributions from new/improved VCs will be conducted to measure the project impacts.

These outputs will take the form of a synthesis report, detailing the following:

- (i) An inception report that includes, but not limited to, (1) methodologies and approaches for collecting information, sample size, sample sites and analysis, (2) questionnaires for collecting information from chain actors (fishers, traders, companies, wholesalers, retailers and users, etc), experts, local facilitators.
- (ii) A synthesis report on (1) analyses of the value chains of capture fisheries, OAAs and related fisheries products and other fisheries related business in the LMB and in particular the six project landscapes and (2) a strategy and solutions for the further development of the capture fisheries sector.
- (iii) Investment and business plans for fisheries related value chains for 4 community in each country to strengthen community-based producer organizations to manage fisheries and fisheries related VCs.
- (iv) A baseline assessment related to fishing household income and subjective well-being based on contributions from new/improved VCs.

## 2. OBJECTIVES

The overall objective of this Concept Note is to set out an approach for a joint development and implementation of Project Management Unit, International Consultants and National Mekong Committee Secretariats, National Consultants/Line Agencies to implement **Activity 2.1.1.1. Assess and prioritise fisheries-related VCs based on market analyses** and achieve its outputs. As such, this Concept Note outlines key steps to be implemented including:

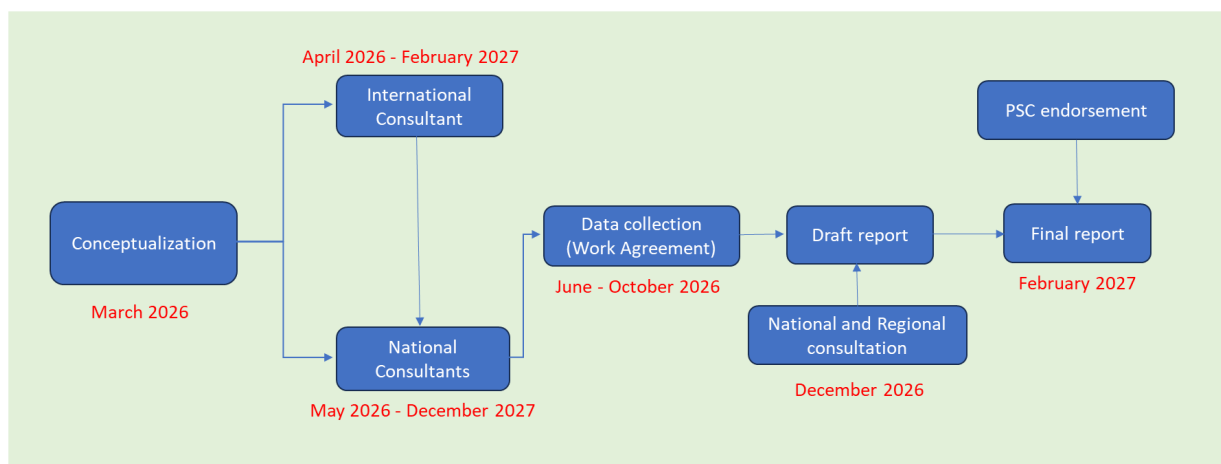
- Conduct a comprehensive review and synthesis of relevant existing fisheries, fisheries value chain and related fisheries business and fisheries-dependent livelihoods datasets from national and regional sources. This includes previous research, publications, monitoring programs, and outputs from related projects where overlaps exist with the targeted landscapes. This step will produce inception reports that identify data gaps and propose (1) methodologies and approaches for data collection, including sampling design and analytical methods; (2) questionnaires for collecting information from chain actors (fishers, traders, companies, wholesalers, retailers and users, etc), experts, local facilitators to fill these gaps.
- Conduct field data collection and comprehensive market analysis for both catch and non-catch fisheries business within the project landscapes. This includes baseline data and analysis on fisheries incomes, fisheries value chains and other related fisheries business. This finding, together with data and information collected above, will be used to identify investment opportunities to improve incomes for fisheries communities. All data collection efforts must be gender-sensitive and ensure inclusive participation.
- Develop a strategy and solutions for the further development of the capture fisheries sector and for implementing priority VCs in each landscape in order to upgrade of the value chains of captured fisheries, as well as enhancing food security, job creation, and marketing of fish products in the LMB.
- Identify an initial investment and business plans for fisheries related value chains for 4 community in each country to strengthen community-based producer organizations to manage fisheries and fisheries related VCs.

### 3. APPROACH FOR IMPLEMENTATION

International and national consultants will be recruited to lead the collection and synthesis of scientific data and local knowledge required to produce the synthesis report outlined in this concept note. The international consultant will serve as the team lead, supervising a group of four national consultants from Cambodia, Lao PDR, Thailand, and Viet Nam under this assignment.

The international consultant will be responsible for preparing the inception report, developing the data collection methodology, and producing the synthesis report, with timely support from the national consultants.

Depending on the scope defined in the inception report, a local team may also be recruited to carry out additional data collection. This local team will work under the direct supervision of the national consultants.



### 4. DELIVERABLES AND TIMELINES

No	Deliverables	Deadline
1.	Recruitment of consultants	30 May 2026
2.	Inception report	30 May 2026
3.	Field survey and assessment and consultation	30 September 2026
4.	Draft reports (English and local languages)	30 October 2026
5.	Validation/National/Regional workshops	15 December 2026
6.	Final report	28 February 2027