

TERMS OF REFERENCE

Consultancy to carry out a study of the internal market of the apple sector in Lebanon, and more particularly for the apples from the cazas of Bcharré and Zgharta – (Study as part of the Qadisha Sustainable program)

I. CONTEXT AND CHALLENGES

1.1 History of cooperation program

The Auvergne-Rhône-Alpes Region (AuRA) has been supporting Bcharré Caza stakeholders since 2017 on different themes (energy, water sanitation, economic development, mountain development, etc.). During a mission by officials from Bcharré Caza to the AuRA region in 2018, they participated in the “mountain professions Festival”, organized in Chambéry. The partnership then expanded to include the city of Chambéry and Grand Chambéry. A memorandum of understanding was signed between the AuRA Region, the City of Chambéry, Bcharré Caza, the “Massif des Bauges” Regional Natural Park, the “Lumière and Montagne” clusters in September 2019, to formalize the partnership around the economic development of the Bcharré caza, through exchanges and transfers of practices.

Since 2020, several projects (touristic and agricultural development, water resources and climate change) have been implemented in Bcharré Caza with the support of French communities and technical partners, in particular the French INGOs Tétraktys and “Corail Development”.

The French Department of Aude, for its part, has been carrying out cooperation since 2012 with the municipality of Zgharta-Ehden and with the Federation of Municipalities of Zgharta Caza. Following the definition of a strategic development plan bringing together municipalities and civil society, 2 cooperation projects were initiated on global water management and sustainable tourism using local heritage resources as an economic lever. This last support program makes it possible to build an action plan in a participatory manner, particularly around the mountain economy, with the intervention of the “Campus des Métiers et Qualifications d’Excellence du Tourisme Pyrénéen” (CMQE TP), led by “l’Institut Supérieur de Tourisme Hôtellerie et Alimentation” (ISTHIA) of University Toulouse Jean Jaurès (UT2J). The expertise of the “Pays Cathare” brand allows the Department of Aude to support Zgharta Caza in its identity and in the promotion of professionals in the tourism sector.

In 2021, a common desire to articulate existing cooperation programs emerged. The Federations of the municipalities of Bcharré and Zgharta cazas have asked their partners to support them in the creation of a governance entity for the Qadisha valley, inspired by the French model of Regional Natural Park. This is how the “Qadisha Durable” program was created, aiming to create the conditions for sustainable economic and social development with benefits for local populations and businesses.

1.2 The pilotage scheme of the “Qadisha Durable” program

The “Qadisha Durable” program is co-funded by the French Development Agency (AFD) as part of a FICOL line. The project management of this decentralized cooperation is ensured by a consortium of communities which participate in financing the project:

- On the French side:
 - The Auvergne-Rhône-Alpes (AuRA) region
 - The Department of Aude
 - The city of Chambéry, leader of the consortium
 - The Community of cities « Grand Chambéry »

- On the Lebanese side:
 - The Federation of municipalities of Bcharré caza
 - The Federation of municipalities of Zgharta caza

The communities assume a political role (validation of the strategic axes of the project) so as a technical role (mobilization of expertise within the communities and territories, exchanges with technical partners, reception of political and technical missions on their territory).

The INGO “Chambéry Solidarité Internationale” (CSI) is the delegated project manager for the city of Chambéry. CSI coordinates the consortium and supervises the work of the project team on site in Lebanon.

The French INGO Tétraktys, the Chamber of Agriculture of the Auvergne Rhône-Alpes Region, the “Massif des Bauges” Regional Natural Park, the “Campus des Métiers et Qualifications d’Excellence du Tourisme Pyrénéen” and ISTHIA are the technical partners associated with the cooperation program.

1.3 The main objective of the “Qadisha Durable” program

The project plans to create an institutional structure of shared governance across the Qadisha valley by the end of 2025. This association between the Federations of Municipalities of Bcharré and Zgharta cazas aims to promote attractiveness of the territory and its economic and social development while protecting the existing natural and cultural heritage through the prefiguration of the “Qadisha Territory” entity, inspired by the French Regional Natural Park model.

The objective of the project is the strengthening of institutional capacities and the exchange of experience and good practices in terms of prefiguration and management of natural parks, sustainable development of agricultural and tourist practices and activities and the protection of water resources in the Qadisha Valley.

1.4 The Agricultural component of the Qadisha Durable program

Part 3 of the “Qadisha Durable” project aims more specifically to support and promote local production to secure farmers income and maintain populations in the valley. During a first cooperation project between the AURA region and the Bcharré caza in 2021-2022, a study of the apple sector highlighted the relevance of retaining apple growing as a pilot sector while production is developed in the two cazas, and in particular that of Bcharré (at least 60% of the cultivated agricultural area). This prioritization of the apple sector will make it possible to promote similar approaches in other agricultural sectors by example and outside the scope of this project.

The diagnosis highlighted the absence of governance in the apple sector, the lack of outlets, the inadequacy of the international market and the absence of management of production surpluses. Component 3 of the program (*strengthening the agricultural sector to revitalize the territory and generate economic and social benefits for the populations*), thus offers support for the structuring of apple growing for each link in the chain (production, processing and marketing) with the objectives of better governance, improving the economic situation of stakeholders, and adapting practices to climate change.

1.5 The importance of studying the internal market.

The diagnosis carried out in 2022 focused mainly on the export market, but to benefit from a global vision of the sector, it is fundamental to also study the domestic market.

The choice to carry out an internal market study is justified by several essential factors:

- Strengthen the production, processing and marketing of local agricultural products, particularly apples.
- Provide significant support to local farmers, offering them prospects for growth and sustainability for their activities.
- Understand that the internal market also offers significant development and growth potential for the region's farmers.
- Explore specific opportunities and challenges related to the domestic market, particularly in Lebanon's main cities.
- Understand in depth the dynamics of this market, including the players involved, their purchasing behavior, as well as the possibilities and levers to promote the Qadisha apple on this domestic market.
- Provide concrete tools and effective strategies to strengthen agricultural activity in the region.

The consultant will rely on the diagram of the sector which is currently being produced to identify the circuits to be investigated. It is therefore crucial to clearly identify the players in this sector and their weight to better understand the sales and commercial aspects. Thus, this approach constitutes the first link between the current diagnosis and the market study, allowing a contextualized and in-depth approach to commercial dynamics in the Qadisha valley.

In summary, this internal market study is of a strategic nature for agricultural development in the Qadisha valley, particularly apple value chain, by offering a clear and detailed vision of the specific opportunities and challenges linked to the marketing of local products in the apple sector, on the Lebanese domestic market. By providing precise data and strategic recommendations, this study will significantly contribute to the **growth and sustainability of the apple sector** in the region, and **the direct economic development of farmers**.

II. DESCRIPTION OF THE SERVICE REQUEST

2.1 Objectives of the service

2.1.1 A quantitative analysis of the apple sector

- Identify the varieties and market value of fresh and processed apples on the domestic market (identify sales channels > direct sale – sale through supermarkets, etc.), (based on data retrieve wholesalers of diagnostics in progress).

- Analyze the current demand for fresh and processed apples in the domestic market from the point of view of consumers and from the point of view of distribution points and the seasonal fluctuation of consumption and study the competition and provide an understanding of why distributors buy imported apples.
- Analyze geographic and socio-economic data of potential consumers.
- Analyze the distribution of fresh and processed apples on the market.

2.1.2 A qualitative analysis of the apple sector

- Evaluate the demand for fresh and processed apples such as chips, apple juice and vinegar, marmalade, jam, syrup and other products, etc. (depending on the level of consumption).
- Evaluate the reputation of the Qadisha apple and that of its competing varieties.
- Analyze consumer habits (Lebanese/foreign customers)
- Analyze distribution points, preferences and behaviors of distributors (Focus on large commercial structures which could provide opportunities (hotels, restaurants)
- Study the competition and understand why distributors buy imported apples.

2.2 The expected

- Quantitative and qualitative data which allows at least the different distribution/marketing channels to be clearly identified.
- An analysis of the strengths and weaknesses of the Lebanese domestic market sector.
- Recommendations for promoting the Qadisha apple (including in terms of marketing approach), maximizing its positioning on the market and seizing market growth opportunities.
- Levers and avenues of action to develop sales of fresh and processed apples from Qadisha, to Beirut and other Lebanese cities.

The consultant will work under the responsibility of the agriculture project manager and the coordinator of the Qadisha Durable project and will be required to collaborate with certain partners of the consortium: the Mediterranean relations manager of the Auvergne-Rhône-Alpes region and the Chamber technician of agriculture of Isère in charge of monitoring the agricultural component.

2.3 Possible methodologies and expected deliverables:

- Collection of primary and secondary data from reliable sources.
- Use of quantitative and qualitative analysis techniques.
- Carrying out consumer surveys (with proposals for focus group-type tools) and interviews with sector experts.
- Development of forecasting models to estimate future demand.

- **Expected delivery:**

The consultant must provide a detailed report including the results of the study, the analyses carried out and the strategic recommendations. The report will be the subject of an oral restitution.

III. CALENDAR

Start of Consultancy: **beginning of July**, the diagnosis is envisaged over a maximum period of **4 months**.

IV. REQUIRED QUALITIES

** In order to support local economic development, preference will be given to consultants from the Qadisha Valley territory. This preference does not, however, exclude applications from providers located outside this region, provided they meet all other selection criteria.

EDUCATION BACKGROUND

The consultant, with a higher education qualification, must have proven expertise in market research, preferably in the agri-food sector. Specific experience in the field of fruits and processed products would be an added advantage.

SKILLS

- Present the methodological and technical skills necessary to carry out the study.
- Present knowledge of the agricultural sector on a national scale.
- If possible, have a good knowledge of the project intervention area (Qadisha valley), and its social, economic, cultural and political realities.

LANGUAGES

Fluent in Arabic, Fluent in French OR English

ADDITIONAL

The consultant should have a private law status and must have a bank account in the country of intervention. It must be mobile and able to move around without constraints.

V. SELECTION CRITERIA

5.1 Technical Evaluation

The evaluation criteria will be as follows:

- Understanding of the terms of references
- Relevance and quality of the proposed methodology
- Experience and technical references.
- Candidate profile
- Only offers reaching at least 70% of the score will be declared technically valid.

5.2 Financial Evaluation

Only financial offers from candidates who have reached at least 70% of the technical evaluation score will be processed. A financial evaluation score will be calculated for each offer, starting from the lowest offer.

5.3 Final Evaluation

The final evaluation will be a combination of the two previous evaluations, it will be mixed at 70% regarding the technical proposal and 30% regarding the financial proposal. The candidate who obtains the highest score will be selected after an interview.

VI. NEEDED ELEMENTS TO CANDIDATE

6.1 Composition of the technical offer (in French or in English)

- A technical proposal (2-4 pages) including:

- A detailed methodology to achieve the expected deliverables.
- The candidate's curriculum
- The tax number of the consultant or his company or design office

6.2 Composition of the financial offer (in French or English)

- A financial proposal including:

- A detailed budget including consultancy compensation, travel costs, other costs.
- Payment terms
- A signed and stamped offer
- The validity period of the offer
- The date of the offer

6.3 Submission Deadline

The offer must be submitted by email only **no later than June 17, 2024.**

Any application arriving after this date, for whatever reason, will be considered invalid.

All documents making up the offer will be sent to the following address: gestion@gadishadurable.com

Only applications including all required documents (see points 6-1 and 6-2) will be processed.
