

Terms of reference for consultancy on economic profitability analysis on the Western Mediterranean multiannual plan

February 2025

Aim of the consultancy: Provide an economic profitability analysis of the impact of the Western Mediterranean multiannual plan (West Med MAP) on the French, Italian and Spanish fleets.

Duration and deadlines: From mid-April to December 2025. Report submission by no later than 26 September 2025.

Budget: Budget for this consultancy is capped at 23 000 EUR before VAT to include all costs associated with the service (taxes included).

Submission of proposals: Deadline for submitting consultancy proposals is 21 March 2025.

Contact persons: Giulia Guadagnoli gguadagnoli@oceana.org and Javier López jlopez@oceana.org.

ABOUT OCEANA

Oceana is the largest international advocacy organisation dedicated solely to ocean conservation. Oceana is rebuilding abundant and biodiverse oceans by winning science-based policies in countries that control one-quarter of the world's wild fish catch. With more than 300 victories that stop overfishing, habitat destruction, oil and plastic pollution, and the killing of threatened species like turtles, whales, and sharks, Oceana's campaigns are delivering results. A restored ocean means that 1 billion people can enjoy a healthy seafood meal every day, forever. Together, we can save the oceans and help feed the world. Visit [Oceana.org](https://www.oceana.org) to learn more. For more information about Oceana in Europe visit www.eu.oceana.org.

1. BACKGROUND AND CONTEXT

Oceana campaigned for sustainable fisheries in the reform of the Common Fisheries Policy (CFP) in 2013 and for a clear legal requirement to restore and maintain fish populations above levels which can produce the maximum sustainable yield (MSY).

Regulation (EU) 2019/1022 establishing a multiannual plan (MAP) for the fisheries exploiting demersal stocks in the western Mediterranean Sea, commonly referred to as the West Med MAP, was officially published on 26 June 2019 and entered into force on 16 July of the same year, as a key tool to implement the objectives of the CFP in this sea basin.

The area covered by the West Med MAP encompasses EU waters of France, Italy, and Spain, that correspond to GFCM geographical sub-areas (GSAs) 1 (Northern Alboran Sea), 2 (Alboran Sea), 5 (Balearic Islands), 6 (Northern Spain), 7 (Gulf of Lion), 8 (Corsica Island), 9 (Ligurian and North Tyrrhenian Sea), 10 (South Tyrrhenian Sea), and 11 (Sardinia Island). The MAP includes six demersal species: blue and red shrimp, deep-water rose shrimp, giant red shrimp, European hake, Norway lobster, and red mullet.

The main objectives of the MAP (Article 3) are to implement the objectives laid out in previous legislation such as the Common Fisheries Policy (CFP) basic regulation and the Marine Strategy Framework Directive (MSFD), among others. These objectives include:

- Ensuring that the exploitation of marine biological resources restores and maintains populations of harvested species above levels that can produce the maximum sustainable yield (MSY)¹;
- Contributing to the elimination of discards by avoiding and reducing unwanted catches and implementing the landing obligation;
- Applying precautionary and ecosystem-based approaches to fisheries management to ensure that negative impacts of fishing activities on the marine ecosystem are minimised.

2. PURPOSE AND OBJECTIVES OF THE CONSULTANCY

Oceana is commissioning an economic profitability analysis of the French, Italian, and Spanish fleets, in relation to the five years of implementation of the West Med MAP. While the MAP aims to address overfishing and ensure the long-term sustainability of fish stocks in the Western Mediterranean, its economic impact on fleets from France, Italy, and Spain remains a point of contention.

This consultancy seeks to assess this impact by analysing the economic profitability trend of the three fleets over the last decade. The assessment will serve as a basis for providing evidence-based recommendations to policymakers.

THE CONSULTANT will:

1. **Conduct a comprehensive economic profitability analysis** of fishing fleets in France, Italy, and Spain operating under the West Med MAP. This analysis will examine **the economic performance of different trawling fleet segments in response to external shocks** (e.g. public spending, fishing effort reductions and technical measures implementation under the West Med MAP, COVID-19, the energy crisis), **interdependencies within and between these segments, and the role of governmental subsidies** in shaping fleet viability. Based on this analysis, THE CONSULTANT will categorise vessels into:
 - **Economically viable without subsidies,**
 - **Dependent on subsidies for profitability,** and
 - **Non-viable even with subsidies.**

¹ MSY is defined in Article 4 of the CFP as “the highest theoretical equilibrium yield that can be continuously taken on average from a stock under existing average environmental conditions without significantly affecting the reproduction process”.

2. **Examine the relationship between fleet capacity (number of vessels) and fishing intensity (number of fishing days)** to assess how each Member State has managed its fleet in the context of the MAP. The analysis will **compare trends in France, Italy, and Spain**, assess whether the gap between capacity and intensity has changed, **and examine whether these trends are related to the economic profitability of each fleet segment (see above point 1)**.
3. **Analyse potential spillover effects on fleet segments that use other fishing gears**, assessing whether the MAP's impact on trawlers has led to changes in activity and profitability in alternative gears such as longlines and gillnets.
4. **Produce a comprehensive economic report summarising the findings from the aforementioned analyses.**
5. **Support Oceana in the dissemination of the analysis to key decision-makers**, particularly the European Commission. The distribution will also include French, Italian and Spanish national administrations, Members of the European Parliament, NGOs, and the French, Italian, and Spanish fishing industries. Additionally, it will be disseminated broadly to journalists and European citizens, including by means of infographics on social media and other communications products.
6. **Present the analysis in an in-person meeting with the European Commission DG MARE, as well as in a relevant forum**, potentially the Mediterranean Advisory Council (MEDAC). The estimated cost of this activity should be reflected and included in the proposed budget.

3. ACTIVITIES

THE CONSULTANT will be responsible for:

- **Gathering, processing and producing data related to the:**
 - **Economic profitability** of trawling fleet segments operating under the West Med MAP, dividing the fleet segments into three categories (economically viable without subsidies, dependent on subsidies for profitability, and non-viable even with subsidies), controlling for West Med MAP measures and other external shocks;
 - **Relationship between fishing capacity** (number of trawling vessels) **and fishing intensity** (fishing days), highlighting the impact of national measures on the trawling fleet segments; and
 - **Potential economic spillover effects of the MAP on fleet segments using other fishing gears**, such as longlines and gillnets, to determine whether these fleets have benefited from the plan.
- **Preparing a comprehensive report** with data-driven findings, conclusions, and actionable recommendations to inform future policy decisions.

- **Supporting Oceana in disseminating the report**, by presenting findings in:
 - An in-person meeting with DG MARE (European Commission); and
 - One relevant policy forum (e.g. Mediterranean Advisory Council - MEDAC).

While the information above is expected to be delivered by THE CONSULTANT, Oceana gives the opportunity to THE CONSULTANT to comment and suggest (add and delete) specific elements on this section “Activities” and agree on final chapters/indicators. The agreement on the final report structure and content will be set in a specific meeting at the beginning of the assignment.

The report should be based mostly on official data (e.g. STECF, ISTAT, CNR, INSEE, IFREMER, INE, IEO, CSIC), and all information should be properly referenced. However, THE CONSULTANT is also encouraged to use other reliable sources as appropriate. THE CONSULTANT is requested to share their underlying analyses (e.g. Excel files, etc.) with Oceana.

THE CONSULTANT is encouraged to illustrate the report with charts, infographics, info-boxes, etc., to present the information above in a visually appealing way. To the extent that is possible and convenient for ensuring the quality of the deliverables, Oceana branding guidelines will be followed.

4. DURATION AND COORDINATION

The **contract** will be **signed by the first half of April 2025**. THE CONSULTANT will be required to **deliver** the agreed activities and submit **the final report** electronically by **no later than 26 September 2025**. Throughout the consultancy period, the consultant is expected to provide interim reports for review and feedback by Oceana. The number, timing, and content of these interim reports will be jointly agreed by Oceana and THE CONSULTANT once there is a clear understanding of the consultant’s work programme.

Detailed instructions, ongoing guidance and feedback will be provided to THE CONSULTANT by the contact persons at Oceana. THE CONSULTANT will communicate on a regular basis, at least once a fortnight, about the progress of the report drafting and will participate in meetings and/or videocalls.

Oceana will have full permission to use or share any information included in the report. Likewise, Oceana will hold all the rights to the partial or total reproduction and publication of the report. Oceana, with prior notification, will hold all the rights on the decision of disclosing or not withholding /concealing the identity of THE CONSULTANT. Other contractual details will be provided and agreed with THE CONSULTANT once the candidate is selected.

5. TIMELINE

- 17 February – 21 March: Submission of applications
- 24 – 28 March: Selection of consultant
- 31 March – 18 April: Hiring of consultant

- 21 April: Project kick-off meeting with Oceana
- 21 April – 22 August: Coordination, submission of interim drafts, and adjustments based on feedback (according to agreed timeline)
- 5 September: Delivery of draft final report
- 6 – 26 September: Feedback exchanges with consultant for final adjustments, sign-off, and delivery
- October [Date TBD, first half of October]: Presentation at in-person meeting in Brussels with DG MARE (European Commission)
- 14 – 15 October: Presentation at a relevant forum (e.g. MEDAC - October meeting of Working Group 1 in Slovenia – TBD precise location)

6. REQUIRED QUALIFICATIONS

THE CONSULTANT is expected to hold:

- Proven expertise in fisheries economic assessments.
- Demonstrated experience in producing analytical reports for policymakers.
- Excellent writing skills and experience in stakeholder engagement.
- Familiarity with EU fisheries regulations, particularly the West Med MAP.
- Fluency in English (mandatory); proficiency in French, Italian, or Spanish is desirable.

7. BUDGET AND PAYMENT SCHEDULE

The total budget for this consultancy is capped at **€23 000 before VAT**, inclusive of consultant fees, field trip expenses (if required), and associated costs..

8. APPLICATION PROCESS

THE CONSULTANT who wishes to participate in this call for tender is asked to **draft and submit a proposal (see Annex II) to Oceana by 21 March 2025 at the latest** (by 23h59 Brussels time). The submitted proposal should include:

- A comprehensive proposal outlining their approach, key data sources, and methodology.
- A calendar of the workplan.
- A portfolio of relevant past projects or reports.
- A budget proposal broken down by the main components of the project or tasks to be carried out.
- CV of THE CONSULTANT(s).

The proposal should clearly reflect the scope of the analysis, deliverables, and experience of THE CONSULTANT, which together with the budget will be the main criteria used to assess and select the proposal.

Applications must be submitted using Annex II below **by 21 March 2025** to gguadagnoli@oceana.org and jlopez@oceana.org with the subject line: *“Application: Economic Profitability Analysis Consultant – West Med MAP”*.

9. CONTACT INFORMATION

For any queries regarding this Terms of Reference, please contact:

Giulia Guadagnoli

Senior Policy Advisor

gguadagnoli@oceana.org

We look forward to receiving your proposal and working together to advance sustainable fisheries management in the Western Mediterranean.

ANNEX I – DATA SOURCES

Proposed sources of data for the report. The list is not exhaustive and is subject to discussion with THE CONSULTANT.

Indicators	Main sources of data
Management indicators	<p>Regulation (EU) 2019/1022 of the European Parliament and of the Council of 20 June 2019 establishing a multiannual plan for the fisheries exploiting demersal stocks in the western Mediterranean Sea and amending Regulation (EU) No 508/2014. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R1022</p> <p>General Fisheries Commission for the Mediterranean. (2009). Resolution GFCM/33/2009/2 on the establishment of geographical subareas in the GFCM area of application, amending Resolution GFCM/31/2007/2. https://www.fao.org/gfcm/data/maps/gsas/es/</p> <p>Regulation (EU) 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy, amending Council Regulations (EC) No 1954/2003 and (EC) No 1224/2009 and repealing Council Regulations (EC) No 2371/2002 and (EC) No 639/2004 and Council Decision 2004/585/EC. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32013R1380</p> <p>Directive 2008/56/EC of the European Parliament and of the Council of 17 June 2008 establishing a framework for community action in the field of marine environmental policy (Marine Strategy Framework Directive). https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32008L0056</p> <p>Council Regulation (EU) 2019/2236 of 16 December 2019 fixing for 2020 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Mediterranean and Black Seas. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R2236</p> <p>Council Regulation (EU) 2021/90 of 28 January 2021 fixing for 2021 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Mediterranean and Black Seas. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021R0090</p> <p>Council Regulation (EU) 2022/110 of 27 January 2022 fixing for 2022 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Mediterranean and Black Seas. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32022R0110</p> <p>Council Regulation (EU) 2023/195 of 30 January 2023 fixing for 2023 the fishing opportunities for certain stocks and groups of fish stocks applicable in the Mediterranean and Black Seas and amending Regulation (EU) 2022/110 as regards the fishing opportunities for 2022 applicable in the Mediterranean and the Black Seas. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32023R0195</p>

	<p>Council Regulation (EU) 2024/259 of 10 January 2024 fixing for 2024 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Mediterranean and Black Seas. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=OJ:L_202400259</p> <p>Council Regulation (EU) 2025/219 of 30 January 2025 fixing for 2025 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Mediterranean and Black Seas. https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX:32025R0219</p>
Biological indicators	<p>Scientific, Technical and Economic Committee for Fisheries. (2024). Stock assessments in the Western Mediterranean Sea. STECF 24-10. Ligas, A., Mannini, A., Pierucci, A. (Eds). Publications Office of the European Union. https://stecf.jrc.ec.europa.eu/documents/d/stecf/stecf_24-10_stock-assess-west-med</p> <p>Scientific, Technical and Economic Committee for Fisheries. (2024). 75th Plenary Report (STECF-PLN-24-01). Pinto, C., Doering, R., Kupschus, S., & Pierucci, A. (Eds). Publications Office of the European Union. https://stecf.ec.europa.eu/document/download/ea521d84-02e3-41d3-a5e1-b5197ec088fa_en?prefLang=es</p> <p>General Fisheries Commission for the Mediterranean. (n.d.). Validated stock assessment forms (SAFs). https://www.fao.org/gfcm/data/safs/en/.</p>
Socio-economic indicators	<p>Scientific, Technical and Economic Committee for Fisheries. (2024). The 2024 Annual Economic Report on the EU Fishing Fleet (STECF 24-03 & 24-07). Prellezo, R., Sabatella, E. C., Virtanen, J., Tardy Martorell, M., Guillen, J. (Eds). Publications Office of the European Union. https://publications.jrc.ec.europa.eu/repository/handle/JRC139642.</p> <p>Scientific Technical and Economic Committee for Fisheries. (2024). Fishing effort regime for demersal fisheries in West Med - advancement to a unified bio-economic model (STECF 24-01). Pinto, C., Doering, R., Kupschus, S. (Eds). Publications Office of the European Union. https://stecf.jrc.ec.europa.eu/documents/d/stecf/stecf_24-01</p> <p>Scientific, Technical and Economic Committee for Fisheries. (2023). Evaluation of economic indicators and closure areas in the western Mediterranean (STECF-23-01). Pinto, C., Doering, R., Kupschus, S., & Pierucci, A. (Eds). Publications Office of the European Union. https://data.europa.eu/doi/10.2760/29623.</p> <p>Scientific, Technical and Economic Committee for Fisheries. (2023). Evaluation of the fishing effort and catch regime for demersal fisheries in the western Mediterranean Sea (part XI). (EWG-23-11). Pinto, C., & Doering, R. Presentation at Mediterranean Advisory Council (MEDAC). https://www.med-ac.eu/files/documentazione_eventi/2024/04/4_pinto_evaluation_of_the_western_med_map_ewg2311.pdf</p>

	<p>Scientific, Technical and Economic Committee for Fisheries. Economic and Social analyses. https://stecf.ec.europa.eu/reports/economic-and-social-analyses_en.</p> <p>Scientific, Technical and Economic Committee for Fisheries. Reports. https://stecf.ec.europa.eu/reports_en</p>
<p>Oceana reports: additional data & interesting facts</p>	<p>Guadagnoli, G. and López, J. (2024). Rebuilding western Mediterranean fisheries: has the western Mediterranean multiannual plan delivered? Oceana. https://europe.oceana.org/wp-content/uploads/sites/26/2024/05/Report-Rebuilding-Western-Mediterranean-fisheries-OCEANA.pdf</p> <p>Oceana. (2024). Rebuilding western Mediterranean fisheries: status and policy recommendations for 2025. Oceana. https://europe.oceana.org/wp-content/uploads/sites/26/2024/11/factsheet2024-web-v2.pdf</p>

ANNEX II: PROPOSAL FORM

Please fill in and submit to Giulia Guadagnoli gguadagnoli@oceana.org and Javier López jlopez@oceana.org by 21 March 2025.

Contact data (name, address, e-mail, telephone number, VAT number)
Outline of the work and proposed calendar for delivery of the report's chapter
Staff involved, CV and relevant previous experience
Quotation in EUR (tax excluded) breakdown by main activities and payment schedule.
Availability to travel and present the report on events in the EU and the UK
Any other considerations