TANZANIA SCALING UP SUSTAINABLE MARINE FISHERIES AND AQUACULTURE MANAGEMENT (TASFAM) PROJECT (P179969)

Terms of Reference on Economic and Financial Feasibility Study for the Construction of a Fish Landing Site and Market Facility at Kizimkazi Mkunguni Unguja and Wete Pemba

Issued by

Project Coordinating Team,

Ministry of Blue Economy and Fisheries, Zanzibar

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1. BACKGROUND

The Government of the United Republic of Tanzania has developed a five-year (2024 - 2029) Tanzania Scaling-Up Sustainable Marine Fisheries and Aquaculture Management (TASFAM) Project (P.179969) financed by the World Bank. This project aims *to enhance the management of Tanzania's coastal and marine fisheries and aquaculture to strengthen livelihoods*. The Project is prepared to build on the achievements obtained under the Southwest Indian Ocean Fisheries Governance and Shared Growth (SWIOFish) Project. The three agencies implementing this project are the Ministry of Livestock and Fisheries (MLF) – Fisheries Sector, the Ministry of Blue Economy and Fisheries (MBEF), and the Deep-Sea Fishing Authority (DSFA).

The main Project beneficiaries are the artisanal fishing communities, fish farmers, and the private sector in the Tanzanian coastal areas, including fishers, fish workers, aquaculturists, traders, investors, women and youth, and other vulnerable groups in the project areas. These groups, especially women, are the main contributors to fish processing, marketing, fish and fisheries product collection, and seaweed farming. Also, women constitute about half of the workforce in the fishing industry and manage household finances, credit, and savings. Several businesses and industries would benefit from the increased availability of fish and other fish products, which are important raw materials.

The TASFAM project is designed to address immediate needs identified in Tanzania's Development Vision 2025, Zanzibar Development Vision 2050, and the Third National Five-Year Development Plan 2021/2022 - 2025/2026. The proposed project will also contribute directly to the Government's National Strategy for Growth and Reduction of Poverty (NSGRP) and Zanzibar Strategy for Growth and Reduction of Poverty III (ZSGPR), which aim to (a) reduce poverty through increased and improved effective and efficient social assistance for poor and vulnerable Tanzanian; (b) enhance employment opportunities through the promotion of productive inclusion and decent work for human development and communities, and (c) increase access to social security and social insurance; through ensuring peace, political and economic stability, good governance, the rule of law and inclusion economy.

The fisheries sector plays a vital role in supporting livelihoods, food security, and economic growth in the project area. However, existing fish landing and market infrastructure is inadequate and fails to meet the required hygienic, operational, and regulatory standards. This leads to high post-harvest losses, inefficient marketing, and limited income generation for fisherfolk.

In this context, the Ministry of Blue Economy and Fisheries therefore seeks to undertake a feasibility study to assess the technical, economic, environmental, and social viability of constructing a modern fish landing site and market facility.

2. OBJECTIVES OF THE CONSULTANCY

2.1 Overall Objective

To conduct an economic and financial feasibility study and preparation of a comprehensive 5-year business management plan that evaluates the viability of establishing a fish landing site and market facility at Kizimkazi Mkunguni Unguja and Wete Pemba, and to provide detailed recommendations for their sustainable management.

2.2 Specific Objectives

- To evaluate the financial and economic viability of the proposed investments, using the parameters listed in the Annex related to landings/production and planned investments, costs, revenues and interest rates on bank loans.
- To develop an implementation strategy for each site, including operations and management models, as well as risk mitigation measures.

  To prepare a Five-Year Management Plan for the efficient, sustainable, and financially viable operation and maintenance of each landing site.

3. SCOPE OF WORK

The consultant shall be required to undertake, but not limited to the following tasks:

3.1 Baseline Assessment

- Review existing policies, reports, and regulatory frameworks governing fish markets and landing sites.
- Carryout stakeholder consultations on how best the fish landing site should be operated.
- Assess the current fish landing practices, market infrastructure, and supporting services.
- Assess current and projected demand for landing and market services.
- Analyzing existing challenges or gaps affecting fish markets and landing sites.

3.2 Institutional and Management Assessment

- Review existing management structures in fisheries infrastructure.
- Based on the economic and financial analysis undertaken above, propose suitable operational and governance models, such as public, private, or PPP arrangements, for each of the fish markets and landing sites.
- Outline sustainability mechanisms and community participation approaches.

3.3 Economic and Financial Analysis

- Assess the expected demand for services at the proposed landing sites and markets, including projected utilization rates of key infrastructure (e.g., landing facilities, cold storage, market spaces), and incorporate these assumptions into the financial and economic analysis.
- Carry out an economic cost-benefit analysis of each fish market and landing site, assessing incremental costs and benefits under “with-project” and “without-project” scenarios, including social benefits and costs, and capturing impacts along the value chain such as reductions in post-harvest losses, improvements in product quality, and increased revenues for fishers and market actors, in accordance with the parameters specified in the Annex and any additional ones deemed necessary by the consultant.

- Assess the distribution of costs and benefits across different stakeholder groups, including fishers, traders, processors, women, and youth, and identify potential equity implications
- The economic analysis shall estimate the economic internal rate of return (EIRR) and economic net present value (ENPV), incorporating all relevant economic costs and benefits, including externalities and value chain impacts, and shall include sensitivity analysis on key variables such as discount rate, production volumes, prices, and costs.
- Conduct the financial analysis on each proposed fish market and landing site to inform a sustainable management model. This will be done according to the parameters specified in the Annex and any additional ones the consultant deems necessary.
- The financial analysis shall estimate the financial internal rate of return (FIRR), net present value (FNPV), and cash flows, assessing the financial viability and sustainability of the proposed investment under realistic revenue and cost assumptions, and shall include sensitivity analysis on key parameters such as discount value, tariffs, operating costs, and utilization rates.
- Prepare financial projections to identify revenue opportunities, including projections which the Ministry can use in establishing the collection fees from tenants aligned with the recommendations from the Temporary relocation plan and other safeguard instruments.
- Assess the financial sustainability of each facility, including the ability of projected revenues (e.g., user fees, service charges) to cover operation and maintenance costs, and identify any funding gaps or need for public support.
- Incorporate costs and implications arising from relevant safeguard instruments (e.g., temporary relocation plans and other social or environmental measures) into the financial and economic analysis.

3.4 Risk Assessment

- Identify and assess technical, financial and operational potential risks associated with each fish market and landing site.
- Identify and assess climate and environmental risks that may affect the performance and sustainability of the proposed infrastructure (e.g., climate variability, extreme weather events), and their implications for costs, revenues, and long-term viability.
- Propose mitigation and monitoring strategies.

4. DELIVERABLES

The consultant shall submit the following deliverables:

1. **Inception Report**

This initial report will outline a comprehensive understanding of the assignment's objectives and scope. It will include a refined methodology tailored to the specific context, detailed descriptions of data collection tools and techniques to be used, and a proposed itinerary for fieldwork activities.

2. **Draft Feasibility Study Report**

   The draft report shall include, at a minimum, the following: -

- Baseline results and description of the methodology used
- Financial and Socio-economic analysis
- The financial and economic analysis shall include an editable Excel format with clearly structured sheets for all relevant data, assumptions, costs, revenues, and cash flow projections. It shall allow for scenario and sensitivity analysis.
- Proposed operational and governance models

3. **Stakeholder Workshop Presentation**

A structured workshop will be organized to present the findings of the draft assessment report to key stakeholders, including representatives from the Ministry of Blue Economy and Fisheries (MBEF), Project Coordination Team, development partners, and other relevant actors. The objective of this workshop is to validate findings, solicit stakeholder feedback, and build consensus around priority issues and recommendations. Inputs received during the workshop will inform the finalization of the feasibility report.

4. **Final Feasibility Study Report**

- Revised and validated version with all inputs incorporated
- Final financial and economic analysis (including an Excel file consolidating all relevant data, hypotheses and parameters used and the detailed calculations of the analysis and the financial model)
- Final operational and governance models

All reports must be submitted in both hard copy and digital (PDF and editable) format.

The consultant shall be required to present the final economic and financial feasibility study report to stakeholders and incorporate the comments provided during the presentation.

5. DURATION OF THE ASSIGNMENT

The total duration of the assignment is estimated to be ninety (90) calendar days, starting from the effective date of contract signing. This timeframe encompasses the full scope of work to be completed by the consultant, including planning, execution, reporting, and delivery of all outputs.

6. CONSULTANT QUALIFICATIONS

6.1 Firm Qualifications

The firm shall have the following qualifications

The Consultant shall have the following minimum qualification requirements:

A. Shall be a registered consulting firm by a relevant authority with a valid certificate of incorporation/registration or any other statutory registrations required under the applicable laws of its country.

B. The Consultant shall have a minimum of **Ten (10) years** of general experience in providing consultancy services.

C. The firm shall demonstrate experience in successfully completing **at least three (3) consultancy assignments** during the last **five (5) years** involving one or more of the following areas: Costing and pricing models; Financial and economic feasibility studies; Cost-benefit analysis; Participatory market assessments; Benefit-sharing models; Governance and institutional assessments; Needs assessments; and Market operations and management.

D. The firm shall demonstrate that it has successfully completed **at least three (3) assignments** during the last **five (5) years** involving socio-economic and financial feasibility studies.

E. The Consultant shall have successfully completed **at least two (2) assignments** during the last **five (5) years** related to the feasibility, planning, design, or establishment of fisheries infrastructure, fisheries facilities, fish landing sites, fish markets, aquaculture facilities, or other fisheries-related operations.

F. The firm shall be required to provide acceptable (documentary) evidence for the above-named qualifications which shall cclient references, completion certificates, or other acceptable proof of satisfactory completion.

Qualification of Key Personnel

The consultant shall demonstrate that it has necessary and competent staff for this assignment and in particular shall have the following key personnel.

a) Team Leader

The proposed team leader should have the following minimum qualifications

- At least Master's degree in economics, Fisheries economics/Management, agribusiness, project management, civil engineering, Business administration, financial management, or any other related field
- Should have at least 15 years of professional experience in planning, managing, and implementing consultancy assignments related to infrastructure development, economic analysis, or development projects.
- Experience as a Team Leader, Project Manager, or Deputy Team Leader in at least three (3) assignments involving economic and financial feasibility studies carried out within the last ten (10) years, including demonstrated experience in leading multidisciplinary teams and coordinating technical, financial, engineering, environmental, and social inputs.
- Demonstrated experience in undertaking or supervising investment appraisals, financial modelling, cost-benefit analysis, implementation planning, and stakeholder engagement for infrastructure or public investment projects.
- Should indicate adequate knowledge in the field of fisheries management or marine products management.
- Have worked in a similar environment, including sub-Saharan Africa, EAST Africa or Tanzania.

- Fluent in English or Swahili is an added advantage

b) Fisheries Expert

- Bachelor degree in Fisheries or related disciplines from a recognized university. Master degree in fisheries or related field would be an added advantage.
- She/he must have at least three (3) years' cumulative experience related to fisheries.
- She/He must have served as fisheries expert in at least two similar assignments.
- Proficiency in English and Kiswahili is an added advantage

c) **Financial Analyst**

- Master's or PHD in degree in Economics from recognized University.
- She/he must have a minimum of 5 years cumulative experience related to economic and financial analysis.
- She/he must have served as economist or financial analyst in at least three similar assignments.
- Experience in fisheries sector is an added advantage.
- Proficiency in English and Kiswahili is an added advantage

d) Marketing expert

- Should have a masters degree in either fisheries economics, Economics, Business administration, marketing, Agribusiness or any other closely related field.
- He she shall have a minimum of 7 years' experience in marketing, market development, value chain analysis, business development and marketing research.
- The expert should have participated in at least two assignments relating financial and economic feasibilities, value chain analysis and market operations.

e) Social Development Specialist

- Bachelor degree in Sociology, Social Development, Community Development, Development Studies, Anthropology, Economics, or another relevant social science discipline.
- At least **seven (7) years** of professional experience in social development, socio-economic assessments, stakeholder engagement, community participation, and social impact analysis.

- Successfully participated as a Social ddevelopment Expert in at least **three (3) assignments** undertaken within the last **ten (10) years** involving socio-economic studies, stakeholder consultations, needs assessments, social impact assessments, or feasibility studies for infrastructure or development projects.

- She/he must have served as Economist or Financial Analyst in at least three similar assignments.

- Experience in the fisheries sector is an additional advantage

- Proficiency in English and Kiswahili is an added advantage

7. REPORTING AND COORDINATION

The consultant shall address all reports to the Principal Secretary, Ministry of Blue Economy and Fisheries, Zanzibar; however, for day-to-day communication about the assignment the consultant will be reporting to the TASFAM Project Coordinator at all times during the performance of this assignment, and regular progress updates shall be provided in accordance with the inception report.

The client shall approve each report within seven (7) days of receiving it from the consultant.

8. PAYMENT SCHEDULE

Payments shall be made upon satisfactory delivery of outputs as follows:-

- First Instalment: Twenty per cent (20%) shall be paid upon submission and approval of the inception. This report must outline the detailed methodology, work plan, and timelines for the assignment, and its approval will signify the official commencement of the project.

- Second Instalment: Forty per cent (40%) of the total contract value shall be paid upon submission and approval of the Draft Assessment Report.

- Final Payment: Forty per cent (40%) shall be disbursed upon successful completion of the Validation Workshop and submission and approval of the Final Report.

9. TIME INPUT FOR KEY STAFF.

The total duration is 90 calendar days distributed to all the key staff in the following ratio

Position/staff	**Time input /person month**
Team leader	2.5
Fisheries expert	1.5
Marketing expert	1.0
Financial and economic analyst	2.0
Social development expert	0.5
Total	7

CLIENTS' INPUT

During the execution of the consultancy the client shall provide the following input to facilitate the consultant;

- Data and background information. The Client will provide the Consultant with access to all available data, information, drawings (if needed), reports and documents relevant to the consulting services.

- Access to the sites: The Client will arrange for site visits and meetings with stakeholders as the Consultant deems necessary to visit and conduct field surveys/analysis in connection with performing the services. The Client will also assist with providing contacts and coordination with key government officials, local authorities and other stakeholders as needed.

- Focal point: The Client will nominate a focal person to facilitate the Consultant's activities including providing guidance to the Consultant during the project duration.

- **Counterpart staff:** The Client will provide two technical staff (1 for Unguja and 1 for Pemba site) who will work with the consultant during the whole duration of the assignment. The consultant shall be required to include the cost of logistical requirements for the two-counterpart staff in their financial proposals.

9. CONSULTANT'S SELECTION METHOD

A consultant shall be selected in accordance with Consultant's Qualification Selection (CQS) procedures prescribed in the World Bank procurement regulations for the employment and selection of consultants.

10. CONFIDENTIALITY

All data, documents, and reports produced shall remain the property of the Ministry of Blue Economy and Fisheries. They may not be used for any other purpose or disclosed without written authorization from the Client.

11. ETHICAL AND LEGAL COMPLIANCE

The consultant shall comply with national laws, environmental and social standards, occupational safety rules, and ethical guidelines during the execution of the assignment.

ANNEX: Parameters to use for the Economic and Financial Analysis

1. Landings/Productions:

- Number of fishing units, detailing:
    - Type and technical characteristics (fishing gears, length, propulsion system, and, where applicable, engine power) and target species.
    - Average number of fishing trips per year and seasonality.
    - Number of crew members.
- Landings per fishing trip and average first-sale prices for each species group: small and medium pelagic species, reef fish, tuna, octopus, and prawns.
- Estimates on losses*, auto-consumption and non-food use.
- Processing: techniques, costs and sale prices (live weight equivalent)
- Final destination (local consumption, national, export)
- Socio-Economic contributions: quantification of jobs (e.g., 5,000 direct jobs across sites), revenue (e.g., USD 10 million annually), and community benefits, with a focus on women (50% of processors) and youth and socio-economic dynamics, including gender roles, youth participation, and income distribution.
- To estimate the economic impact throughout the value chain, information will be provided on the direct added value at each stage: fishing, primary distribution, processing, transport, retail distribution, consumption in restaurants and hotels and, where applicable, the volume and value of exports.

*This information will be available through a separate study to be conducted titled "QUALITATIVE AND QUANTITATIVE POST-HARVEST LOSS (PHL) OF TUNA, OCTOPUS, PRAWNS, REEF FISH, AND SMALL AND MEDIUM PELAGICS IN MAINLAND TANZANIA AND ZANZIBAR."

2. Investments, costs, revenues:

- Planned investments
- Investment costs
- Services to be provided
- Number of employees and average salaries by job category
- Annual running costs: labour, maintenance, energy, other (ie., purchase of fuel, water for ice…)
- Detailed prices of the services
- Expected revenues
- Direct and indirect taxes and administrative fees.
- Other costs and income related to the activities

This information will be collected by the Consultants from the Ministry of Blue Economy and Fisheries, as well as other sources as needed.