

INTERNATIONAL COMMISSION FOR THE
CONSERVATION OF ATLANTIC TUNAS



COMMISSION INTERNATIONALE POUR LA
CONSERVATION DES THONIDES DE L'ATLANTIQUE

COMISION INTERNACIONAL PARA LA
CONSERVACION DEL ATUN ATLANTICO

Madrid, 17 June 2024

ICCAT CIRCULAR # 06203 / 2024

SUBJECT: CALL FOR TENDERS – TERMS OF REFERENCE – EXTERNAL REVIEW OF THE OVERALL ICCAT MSE PROCESS

In 2015, the Commission directed the SCRS to develop MSEs for 8 priority stocks as the basis for providing management advice (*Recommendation by ICCAT on the development of Harvest Control Rules and of Management Strategy Evaluation (Rec. 15-07)*). Following the recommendation of the SCRS, the Commission, at its 23rd Special Meeting, provided funding to carry out an external review of the Management Strategy Evaluation (MSE) process. Currently the SCRS is undertaking five simultaneous but separate MSE efforts: (1) northern albacore, (2) bluefin tuna, (3) northern swordfish, (4) western Atlantic skipjack, and (5) multi-stocks of tropical tunas.

Each of the five MSE efforts are being led by their own respective Species Groups, some of which share the same members. Furthermore, each of the MSEs commenced in different years and have progressed at their own rates. This situation has led to separate approaches, all at varying degrees of completion, but with a sharing of ideas and methodology across them all. In 2021 the ICCAT Working Group on Stock Assessment Methods (WGSAM) stated that although there is some cross-referencing of MSE activities between species, thus far, each MSE process has been largely conducted independently. WGSAM saw the potential benefits as well as the potential liabilities in both the dependence and independence of the efforts.

The main objective of this Call for Tenders is to conduct an overall review of ICCAT MSE activities by an external expert. This overall review would serve to identify potential improvements, highlight any missing components or shortcomings of the current process, achieve efficiencies across species and promote standardization of the MSE process across species/stocks, where appropriate, refine and standardize MSE communication and stakeholder engagement, and provide guidance on what the future of MSE will look like within ICCAT. This could include the way the MSE processes are supported and how resources are divided, and how the MSE processes should be structured and supported after Management Procedure (MP) adoption. This review would not include the computer code used anywhere in the processes.

Therefore, ICCAT is kindly requesting proposals for such work, which shall be developed according to the Terms of Reference herein attached. The detailed offer shall be submitted **only to the attention of Mr Camille Jean Pierre Manel**, the Executive Secretary of ICCAT, and Cc'ing Ms. Stasa Tensek, at the following addresses: camille.manel@iccat.int and stasa.tensek@iccat.int, by **5 July 2024 (18:00h Madrid time) at the latest**.

I would be grateful if you could distribute this announcement to qualified individuals who might be interested.

Please accept the assurances of my highest consideration.

Executive Secretary



Camille Jean Pierre Manel



COMISION INTERNACIONAL PARA LA
CONSERVACION DEL ATUN ATLANTICO

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Attachment: Terms of Reference (only provided in English).



Terms of reference

External review of the overall ICCAT Management Strategy Evaluation (MSE) process

1. Background and objectives

In 2015, the Commission directed the SCRS to develop MSEs for 8 priority stocks as the basis for providing management advice (*Recommendation by ICCAT on the development of Harvest Control Rules and of Management Strategy Evaluation (Rec. 15-07)*). Following the recommendation of the SCRS, the Commission, at its 23rd Special Meeting, provided funding to carry out an external review of the MSE process.

Currently the SCRS is undertaking five simultaneous but separate MSE efforts: (1) northern albacore, (2) bluefin tuna, (3) northern swordfish, (4) western Atlantic skipjack, and (5) multi-stocks of tropical tunas.

The development/implementation of five MSE frameworks simultaneously has led to an increase on the demands of all SCRS resources as well as the ICCAT Secretariat and the Panels it supports. These increases have been met by both increased funding as well as a shifting of resources away from other areas deemed critical to the SCRS. The migration from traditional stock assessments to MSE-based approaches for fisheries management has changed the manner in which the SCRS develops scientific advice to the Commission and involves new ways to convey management advice.

Each of the five MSE efforts are being led by their own respective Species Groups, some of which share the same members. Furthermore, each of the MSEs commenced in different years and have progressed at their own rates. This situation has led to separate approaches, all at varying degrees of completion, but with a sharing of ideas and methodology across them all. Furthermore, although all five efforts have been contracted to different individual scientists, some of these contractors work for the same consulting firm and share computer code and other in-common resources. In 2021 the ICCAT Working Group on Stock Assessment Methods (WGSAM) stated that although there is some cross-referencing of MSE activities between species, thus far, each MSE process has been largely conducted independently. WGSAM saw the potential benefits as well as the potential liabilities in both the dependence and independence of the efforts.

Critical to the success of any MSE effort is the effective communication of the management results, trade-offs and implications. The SCRS discussed broad themes among the ICCAT MSEs. There was a strong emphasis on the importance of clear communication between scientists, managers, and other stakeholders throughout the process, for example via a standard set of terminologies and trade-off visualizations. It was noted that clear and consistent communication was an important recommendation in other RFMO MSE reviews (e.g. International Council for the Exploration of the Sea, ICES). The SCRS discussed the continued need for strong Committee and Secretariat support for communication (e.g., workshops at the Commission meetings, MSE training courses for scientists and managers, Ambassador sessions, etc.). The SCRS noted that a [new website](http://www.harveststrategies.org) (www.harveststrategies.org) is compiling communications tools on MSE, including "Slick". It was suggested that ICCAT workplans include very clear and explicit goals for communication progress within each step of the MSE process. The intended audience of each of all five efforts are their respective species Panels (Panels 1, 2 and 4). However, all efforts ultimately need to be communicated to the Commission Plenary sessions, as well. Of those efforts that have reached the stage of communicating results, some have developed their own individual html-based interface. These interfaces include graphical and tabular representations of the MSE products that have both their similarities as well as their differences.

In 2022 the SCRS formally recommended an overall review of ICCAT MSE activities by an external expert. This overall review would serve to identify potential improvements, highlight any missing components or shortcomings of the current process, achieve efficiencies across species and promote standardization of the MSE process across species/stocks, where appropriate, refine and standardize MSE communication and stakeholder engagement, and provide guidance on what the future of MSE will look like within ICCAT. This



could include the way the MSE processes are supported and how resources are divided, and how the MSE processes should be structured and supported after MP adoption. This review would not include the computer code used anywhere in the processes.

2. Contractor tasks

2.1 Meeting with the Technical Working Group and Species Group Chairs

At the beginning of the contract the contractor shall meet with each of the relevant Species Group rapporteurs individually (either in person or virtually) to discuss their approaches and methodology. At the end of the contract, the contractor will meet with the Species Group rapporteurs again, as a group, to discuss practical recommendations for moving forward with a common front.

2.2 Available resources

Evaluate if the available resources (human and financial) were sufficient to accomplish the overall MSEs as expected.

2.3 Review the Inclusiveness of the MSEs

Does the process include the input of the appropriate stakeholders (scientists, industry, NGOs, managers) adequately?

2.4 Assess the appropriateness of the degree of consistency between MSEs

Is there an appropriate degree of overlap between MSEs such that they are different enough to address their unique concerns while at the same time recognizing the fact they are all ultimately communicated to the same Commission and should share common approaches to communication?

2.5 Evaluate the communication of the MSE processes to stakeholders

Do the methods and approaches of communication of MSE strike the appropriate balance between simplicity and complexity. Is the communication process frequent enough (i) graphics, (ii) tables and (iii) text being used effectively easy to understand and foster trust in the process?

2.6 Did all MSEs undergo equivalent levels of review and quality control (e.g., code review)?

2.7 What are the overall conclusions of the review and where can improvements be made?

3. Deliverables

1. Draft final report. The successful bidder shall provide a [SCRS document](#) to the Secretariat no later than **29 November 2024** and describe, in detail, the methodology of the work conducted and the preliminary recommendations obtained during the study. The draft report shall include:

- a) Executive summary (limited to 180 words);
- b) Full description of the work carried out;
- c) Detailed description of final conclusions;
- d) List of references and literature cited.



#2. Final report. Comments on the above mentioned SCRS document may be provided to the contractor by the SCRS Chair, the WGSAM rapporteur and/or the Secretariat, within 5 days, and shall be taken into consideration by the contractor. The final report ([formatted as an SCRS document](#)) shall be updated taking into account these comments and submitted to the Secretariat by **15 December 2024** at the latest.

4. Contractor minimum qualifications

- Multi-year experience in MSE
- University degree in one of the following: fisheries science, marine biology, statistics, natural sciences, biological sciences, environmental sciences or closely related fields (in case of individual scientists).
- Excellent working knowledge of at least one of the three official languages of ICCAT (English, French or Spanish). A high level of knowledge of English is desirable.

5. Payment details

Disbursements will be made according to the following schedule:

- 1) 30% of the total amount of the contract upon signing of the contract and after receiving a regular invoice which may be submitted at the latest **30 days after the signature** of the contract;
- 2) 50 % of the total amount of the contract after the provision of **Deliverable #1** (Draft final report), after receiving a regular invoice.
- 3) 20% after the approval of **Deliverable #2** (Final report) upon incorporation of comments made by ICCAT (if requested) and after receiving a regular invoice according to work proposal and a complete set of the documents concerning the expenses incurred under the contract (if applicable), no later than **15 December 2024**.

6. Submission of proposals

The proposals should be developed according to the Terms of Reference herein attached. The detailed offer(s) shall be submitted **only to the attention of Mr Camille Jean Pierre Manel** (camille.manel@iccat.int), the Executive Secretary of ICCAT, and Cc'ing Ms Stasa Tensek (stasa.tensek@iccat.int), by **5 July 2024 (18:00, Madrid time)**, including:

- a) A detailed offer that shall include: i) a detailed description of the activities to be carried out; and ii) a detailed (breakdown) budget.
- b) The *curriculum vitae* of the tenderer (in the case of individual scientists) and of any collaborator (sub-contractor).
- c) The *curriculum vitae* of the institution (if an institution is the service provider), with any relevant documented experience.
- d) The name, address, and telephone number of the tendering person/entity.
- e) The institutional and administrative background of the tendering person/body (e.g., statutes, type of institution, annual budget, budget control procedures, etc. (if applicable)).
- f) A list of any relevant subcontracting activities.
- g) The declaration that the offering person/entity shall follow the ICCAT procedures and formats for the provision of data.
- h) A declaration that all the comments eventually made will be incorporated into the final reports prior to submission to the ICCAT Secretariat.
- i) Acknowledgment of this Call for Tenders (if applicable).



- j) A statement specifying the extent of agreement with all terms, conditions and provisions included in the attached Terms of Reference.

7. Selection of proposals

The ICCAT Secretariat will review the offer(s). Following the revision process, the ICCAT Executive Secretary will notify the entity selected for the contract as soon as the selection process is completed. The contract will be awarded on the basis of competitive tendering and the evaluation of proposals will be undertaken objectively, consistently and without bias towards particular suppliers.

Proposal(s) will be evaluated against a pre-determined set of criteria, which include: i) cost (30%); ii) proven track record (30%); iii) technical merit based on workplan (30%); and iv) flexibility as regards future changes in requirements (10%).

8. Logistics

The text report shall be in MS Word or compatible software. All other documents provided by the Contractor must be in Open Office, Latex or compatible software. All documents submitted must be in English.

9. Copyright

All the material produced by the Contractor will remain the property of ICCAT. If applicable, all software written by the Contractor will be licensed under GLP or similar open-source licence.