

Closing Date:	11/07/2011	at 11:00pm
Our Reference:	T14/2011	



Call for Tenders:

Socio-economic assessment of the marine waters under the 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)

Tender Document:

This is available for download free of charge from:
<http://www.mepa.org.mt/info-tender>

Terms of Reference

1. Background

The Marine Strategy Framework Directive (2008/56/EC) establishes a framework within which Member States shall take all the necessary steps to achieve or maintain Good Environmental Status (GES) in marine waters under their jurisdiction by 2020 at the latest. GES should be achieved through the development of marine strategies aimed at protecting and preserving the marine environment, prevent its deterioration or where feasible, restore marine ecosystems in areas where they have been adversely impacted. The marine strategies shall apply an ecosystem-based approach to the management of human activities, to ensure that such activities are compatible with the achievement of GES while enabling the sustainable use of marine goods and services by current and future generations. Article 3 of the Marine Strategy Framework Directive defines GES as that environmental status of marine waters that guarantees ecologically diverse and dynamic oceans and seas which are clean, healthy and productive within their intrinsic conditions.

Member States shall therefore, with respect to each marine region, develop a marine strategy for its marine waters in accordance with the following plan of action as outlined in Article 5 of the Marine Strategy Framework Directive:

By 15 July 2012, prepare:

- An initial assessment of the current environmental status of the waters concerned and the environmental impact of human activities thereon, in accordance with Article 8 of the Marine Strategy Framework Directive;
- A determination of good environmental status for marine waters, in accordance with article 9(1) of the Marine Strategy Framework Directive to be established by mid July 2015;
- Establish a series of environmental targets and associated indicators, in accordance with Article 10(1) of the Marine Strategy Framework Directive;

By 15 July 2014:

- Establish and implement a monitoring programme for ongoing assessment and regular updating of targets in accordance with Article 11 (1) of the Marine Strategy Framework Directive.

By 2015 (at the latest):

- Develop a Programme of Measures designed to achieve or maintain GES, in accordance with Article 13 (1), (2) and (3) of the Marine Strategy Framework Directive. This Programme of Measures is expected to be entered into operation by 2016 at the latest.

These Terms of Reference focus on the requirements of the initial assessment which is governed by Article 8 of the Directive, specifically on the social and economic analysis required by Article 8.1 (c). Article 8 of the Marine Strategy Framework Directive (2008/56/EC), states that Member States shall carry out an initial assessment of their marine waters comprising the following:

- (a) an analysis of the essential features and characteristics, and current environmental status of those waters, based on the indicative lists of elements set out in Table 1 of Annex III, and covering the physical and chemical features, the habitat types, the biological features and the hydro-morphology;
- (b) an analysis of the predominant pressures and impacts, including human activity, on the environmental status of those waters;

- (c) an economic and social analysis of the use of those waters and of the cost of degradation of the marine environment (hereinafter referred to as 'ESA'). **Only this analysis is being contracted through this call for tenders.**

In helping Member States reach the above objectives, the European Commission has established three Working Groups within its Common Implementation Strategy for 2010 – 2012. These Working Groups include:

- Working Group on Data, Information and Knowledge Exchange (WG DIKE),
- Working Group on Good Environmental Status (WG GES)
- Working Group on Economic and Social Analysis (WG ESA).

The latter two have been the most active. Discussions within the Working Group on Economic and Social Analysis resulted in the compilation of a guidance document on various approaches that can be used by Member States in fulfilling the requirements of the initial assessment for an economic and social analysis of the use of marine waters and the cost of degradation of the marine environment [Article 8.1(c)]. This non-legally binding guidance is entitled: 'Economic and Social Analysis for the Initial Assessment for the Marine Strategy Framework Directive: A guidance document - 21 December 2010 (hereinafter referred to as the WG ESA guidance document).

Malta's long term strategy towards the management of the marine environment is to ensure synergy in the implementation of related environmental legislation. In this regard, it is expected that the Initial Assessment for the MSFD takes into consideration the methodologies used for the Water Framework Directive (Directive 2000/60/EC) to ensure synergies and applicability of results to both regulations, as much as possible.

Scope of Work

The scope of this tender is the preparation of the Economic and Social Analysis in line with the requirements of the MSFD. Although the Directive does not specify what the analysis should entail, the WG ESA Guidance suggests that Member States should consider going beyond the mere description of economic and other activities taking place in their marine waters and actually try to quantify the environmental pressures of these activities.

The social and economic analysis requires constant cooperation between the economic experts and the officials working on the assessment of environmental status of marine waters and pressures and impacts thereon, as part of the MSFD Initial Assessment. The successful bidder is expected to undertake the work accordingly to ensure continuous communication with MEPA.

2. Objectives of this Tender

The main objective of the tender is to undertake an economic and social analysis of Malta's marine waters as specified in Article 8 of the Marine Strategy Framework Directive.

3. Results to be achieved

The Consultants are expected to deliver the following:

- (i) RESULT 1: A report outlining the possible approaches to the socio-economic analysis of the use of marine waters and costs of degradation, with a recommended way forward or preferred options and respective justification. To be delivered by Month 1.

- (ii) RESULT 2: A report on the economic and social analysis of the use of the marine waters around the Maltese Islands. To be finalised by Month 4 (last month).
- (iii) RESULT 3: A report of the economic and social analysis of the costs of degradation of the marine environment. To be finalised by Month 4 (last month).

Draft reports for RESULTS 2 and 3 must be submitted to the MEPA Assignment Leader at least 4 weeks prior to the contracting deadline to allow adequate time for MEPA to liaise with the Consultants and finalise the reports by Month 4. The contract will only be deemed as concluded once ALL THREE reports have been approved by MEPA and an official letter of acceptance has been issued to the Consultants.

4. Activities to be performed

To achieve the above results, the Consultants will carry out the following tasks:

Task A: Defining the methodologies

The consultants should perform a critical analysis of the possible approaches to the socio-economic analysis of the use of marine waters and costs of degradation, with a recommended way forward or preferred options and respective justification. The analysis should be mainly based on the different approaches outlined in the WG ESA guidance document referred to above. However, this analysis should also take into consideration the potential synergies between the economic analysis as required by the MSFD and that required by the EU Water Framework Directive (Article 5 of the WFD). Reference to the Common Implementation Strategy for the Water Framework Directive, Guidance Document No 1 – Economics and the Environment¹ is thus solicited.

The overall analysis and the identification of preferred options should be based on the following considerations:

1. Data requirements and availability;
2. Time constraints;
3. Potential links, particularly in terms of data requirements, between the different approaches proposed for the economic and social analysis of the use of marine waters and those proposed for the economic and social analysis of the costs of degradation as required by the MSFD;
4. Links to subsequent elements of economic and social analysis required by the Marine Strategy Framework Directive (refer to Articles 13, 14 and Annex IV of the Directive)
5. The degree to which the MSFD approaches to the social and economic analysis would contribute to the requirements of the economic analysis required by Article 5 of the EU Water Framework Directive. Synergies with the requirements for an update of the WFD economic analysis shall be sought.

The Consultants shall present the results of this task by the end of Month 1.

The outcome of Task A (RESULT 1) shall be discussed with MEPA in order to reach an agreement on the methodologies and/or approaches to be applied throughout the social and economic analysis (Task B).

¹ Available from DG ENV website – WFD Guidance Documents

Task B: Delivery of the economic and social analysis including the costs of degradation

The consultants shall carry out an economic and social analysis of the use of the marine waters around the Maltese Islands and an economic and social analysis of the costs of degradation of the marine environment in line with Task A above. The Consultants must deliver the final products of this analysis (RESULTS 2 & 3) by Month 4. It is hereby emphasised that the product of this delivery necessitates constant information exchange with MEPA and other relevant stakeholders and it is therefore the responsibility of the Consultants to provide good communication channels through which this can be achieved. **The contract must be completed within 4 months from latest signature.**

Reference documents:

- Directive 2008/56/EC establishing a framework for community action in the field of marine environmental policy (Marine Framework Directive).
- Economic and Social Analysis for the Initial Assessment for the Marine Strategy Framework Directive: A guidance document (21 December 2010).
- Common Implementation Strategy for the Water Framework Directive, Guidance Document No 1 –Economics and the Environment.

5. Location of engagement

The Consultants are expected to make themselves available to MEPA and other stakeholders as deemed necessary.

6. Languages

The reports and all presentation materials shall be delivered in the English language. However knowledge of Maltese by the Consultants is desirable for the performance of the study.

7. Reporting

The Senior MEPA official responsible for this contract is Dr. Petra Bianchi, Director Environment Protection. The Assignment Leader for this Contract is Ms. Stephania Baldacchino, Assistant Environment Protection Officer, Environment Protection Directorate. The Consultants will be required to report to the Assignment Leader.

8. Qualifications / Skills / Experience

The Consultants must be qualified professionals and have a demonstrated experience in economic and social assessments in environmental related fields. The Consultants should also have a track record in project management as well as excellent coordinating, reporting and communication skills.

9. Special Conditions

This contract is being offered on a global (lump sum) price basis.

Payment corresponding to 100% of the contract value will be made within 60 days from the receipt of an invoice submitted upon MEPA's written acceptance of the completion of the services stipulated in this tender.

This contract shall be completed within the deadline stipulated in the 'Results to be achieved' and 'Activities to be performed' sections above.

The Consultant will also be required to sign a confidentiality / non-disclosure agreement prior to the commencement of his / her engagement.

10. Submission Requirements

Interested and suitably qualified entities are invited to submit the following:

- A. A quotation for the provision of the above stated services on a global price contract basis. The global price offer must include VAT. However, VAT is to be quoted separately.
- B. An "Organisation and Methodology" proposal, describing how the bidder intends to deliver the requested tasks, if it is awarded the contract.
- C. Detailed CVs of the experts that may be mobilized for the performance of this Contract.
- D. Brief description of the consultants' background, relevant past assignments and portfolio of recent work.

Tenderers will be requested to either clarify/rectify any incorrect and/or incomplete documentation and/or submit any missing documents within five working days from notification.

The offer should be deposited in sealed envelopes entitled '**Socio-economic assessment of the marine waters under the 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)**' and referenced '**T14/2011**' to the tender box at the MEPA premises in Floriana, by Monday 11th July 2011 before 11.00a.m. A soft copy of the tender offer should be provided within the sealed envelope. Any questions concerning this call for tenders should be addressed to the Director of Corporate Services, Ing. Ray Piscopo on email ray.piscopo@mepa.org.mt by not later than Wednesday 6th July 2011.

Questions and answers, and alterations to the tender document will be published as a clarification note on the website of the Contracting Authority (<http://www.mepa.org.mt/info-tender>). Clarification notes will constitute an integral part of the tender documentation, and it is the responsibility of tenderers to visit this website and be aware of the latest information published online prior to submitting their Tender. **Late submissions will not be considered. Diversion from the specification will render the offer null and void.**

11. Criteria of Evaluation

The offers will be evaluated on the basis of the Most Economically Advantageous Tender (MEAT) approach. The following criteria will be used in the evaluation of submissions:

Quality of the technical proposal in terms of methodology and approach	60%
Past experience of the contractor in similar assignments	20%
Qualifications and experience of the key experts	20%

The total attainable score is 100 points. To be considered for this contract, bidders must score at least 65 points.

The contracting authority shall have the right to seek clarifications on points of a technical nature to enable a proper evaluation of any tender, which, however, would at that stage have already been declared to be basically compliant.

The Most Economically Advantageous Tender (MEAT) is established by weighing technical quality against price on a [80/20] basis respectively. This is done by multiplying:

- the technical scores awarded to the offers by 0.80
- the financial scores awarded to the offers by 0.20

MEPA reserves the right to refuse any offer, even the most advantageous.
