

Request for Proposals

Market Demand Research for West Coast Groundfish Products in California

Background

Wilderness Markets, with the support of the David and Lucile Packard Foundation, seeks to quantify market demand data for West Coast Groundfish ITQ fishery products in California and is seeking a qualified market research firm to assist in designing and implementing a targeted, channel specific, market research project.

The West Coast ITQ groundfish fishery in California is a management success. Of the 90 species in the fishery which includes Dover sole, petrale sole, sablefish, thornyheads and rockfishes, only 5 are currently considered overfished, and each of those species is considered to be “rebuilding”. The fishery’s legally mandated, scientifically informed and enforced quota system has helped restore a fishery declared a national disaster in 2000.¹ As a result of these efforts, thirteen trawl-caught species are now certified by the Marine Stewardship Council (MSC) and eight more, for a total of twenty-one trawl-caught species, rate as “Best Choice” or “Good Alternative” by the Monterey Bay Aquariums Seafood Watch Program. This management and recognition potentially presents a unique opportunity to differentiate the fishery in North American markets from the large volume of imported, often unsustainably sourced fish.

Despite this significant ecological progress, fishing and conservation communities continue to share concern about the financial viability of the fishery. Very little is known about the nature of the end market demand for groundfish, which inevitably competes with imported products to depress price. Based upon the outcome of an end market assessment, all value chain participants can develop appropriate strategies to evaluate investment options in order to improve product value for the full range of harvested species.

Purpose

Identification and selection of a research firm to conduct primary research to assess optimum channels of distribution and product forms for priority California groundfish species (see attached list).

Objectives

Research and analysis of market demand characteristics for priority California groundfish based on species, form, channels, volume and value requirements.

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Wilderness Markets seeks to identify and shortlist qualified firms capable of researching the following, with a specific focus on California:

1. Identifying key channels of distribution by product form for:
 - 1.1. Fish and seafood wholesale (institutional, commercial, animal food, fertilizers)
 - 1.2. Food service industry and institutions (restaurant chains, schools, hospitals)
 - 1.3. Fish and seafood markets
 - 1.4. Exports
 - 1.5. Other distributors

¹ *From a Federal Disaster to the World Series: West Coast trawl fishermen are turning their fishery around.* Retrieved September 25, 2015, from <http://blogs.edf.org/edfish/2014/10/31/from-a-federal-disaster-to-the-world-series-west-coast-trawl-fishermen-are-turning-their-fishery-around/>

2. Identifying primary participants in these channels by volume and value
3. Developing survey instruments to assess market demand and pricing parameters by channel and by product and/or species for priority channels
4. Executing survey instruments
5. Compiling, Analyzing and Reporting on results

Due to the nature of this market, it is anticipated that primary research will be required.

Interested firms are invited to submit their proposals to complete the above research to Wilderness Markets for review by a project advisory group who will identify and shortlist at least two (2) firms.

Shortlisted firms will be invited to present their anticipated technical approach, methodology, timelines and budgets for the above research to the project advisory group, and will negotiate a scope of work with Wilderness Markets.

Subject to the approval of the scope of work and budget, the selected firm is expected to carry out this research and to report on results by March 30 2016.

Deliverables

The selected firm will be expected to provide the following deliverables:

- Sample survey instruments
- Interim and Final report identifying key channels of distribution by product form and primary participants by channel, volume and value:
 - Excel files with original data and analysis
 - Explanation of methodology
 - Analysis, findings and recommendations
 - 60 minute presentation to advisory panel

Submission

Applicants and Interested firms are requested to submit the following documents:

- Name, address and primary contact details
- Technical application and scope of work – description of proposed methodology, anticipated research process and related timelines
- Budget
- Proof of qualifications to undertake such primary research
- Examples of similar or related primary research
- Names of two client firms as references

All submissions are to be made to: info@wildernessmarkets.com

Proposed Timeline

Nov 3, 2015	Request for proposals announced
Dec 18	Deadline for submissions
Jan 15	Shortlist selection and negotiation begins
Jan 30	Firm selection*(subject to contracting and budget approval)
April 15, 2016	Research results, analysis and recommendations presented

About the Organizations

David and Lucile Packard Foundation: "For more than 50 years, the David and Lucile Packard Foundation has worked with partners around the world to improve the lives of children, families, and communities—and to restore and protect our planet." —The David and Lucille Packard Foundation

Wilderness Markets is working with a range of philanthropic and impact investors to assess sustainable seafood markets in order to facilitate the development of conservation focused impact investment opportunities in fisheries globally.

Other Terms

Proposals will be reviewed by Wilderness Markets, its employees, representatives and agents. Such reviewers will not adhere to any specified process or review criteria. Wilderness Markets may limit the number of proposals evaluated. Wilderness Markets reserves the right to reject any and all proposals. Wilderness Markets may recall this RFP at any time prior to award announcement and may also reject proposals for deficiencies; waive technicalities, irregularities, and omissions; or solicit new proposals.

The issuance of this RFP and the submission of a response by a firm or the acceptance of such a response by Wilderness Markets does not obligate Wilderness Markets to award a contract or otherwise engage any party responding to this RFP, in any manner. Submission of or acceptance of a response to this RFP does not constitute an agreement or award. Wilderness Markets reserves the right to act in accordance with its own best interests in our interpretation of this RFP. Without limiting the foregoing, Wilderness Markets reserves the right to:

- amend, modify or withdraw this RFP;
- revise any requirement of this RFP;
- require supplemental statements or information from any responsible party;
- accept or reject any or all responses hereto;
- extend the deadline for submission of responses hereto;
- negotiate or hold discussions with any firm and to correct deficient responses which do not conform to the instructions contained herein;
- cancel, or reissue in whole or in part, this RFP, if it determines in its sole discretion that it is in its best interests to do so; and
- extend the term of any agreement on terms consistent with this RFP.

Wilderness Markets may exercise the foregoing rights at any time without notice and without liability to any responding firm or any other party for its expenses incurred in preparation of responses hereto or otherwise. All costs associated with responding to this RFP will be at the sole cost and expense of the responding firm.

Wilderness Markets reserves the right, in its sole discretion, without liability, to utilize any or all of the RFP responses, including late responses, in its efforts. Wilderness Markets reserves the right to retain and use all the materials and information, and any ideas or suggestions therein, submitted in response to this RFP (collectively, the "Response Information") for any purpose. By submitting a response, each respondent waives any and all claims against Wilderness Markets relating to its retention and/or use of the Response Information.

Key Species & Status:

Stock / Fishery	Impacts on the Stock	Impacts on other Spp.	Management	Habitat and Ecosystem	Overall Recommendation
Chilipepper rockfish California Pacific - Trawl, Bottom	Green (3.83)	Yellow (3.05)	Green (4.47)	Yellow (2.83)	Best Choice (3.487)
Dover sole California Pacific - Large mesh bottom trawl	Green (5.00)	Yellow (2.64)	Green (4.47)	Green (3.46)	Best Choice (3.783)
English sole California Pacific - Trawl, Bottom	Green (5.00)	Yellow (3.05)	Green (4.47)	Yellow (2.83)	Best Choice (3.728)
Longspine thornyhead California Pacific - Large mesh bottom trawl	Green (5.00)	Yellow (2.64)	Green (4.47)	Green (3.46)	Best Choice (3.783)
Pacific sanddab California Pacific - Trawl, Bottom	Green (5.00)	Yellow (3.05)	Green (4.47)	Yellow (2.83)	Best Choice (3.728)
Petrале sole California Pacific - Trawl, Bottom	Yellow (3.05)	Yellow (3.05)	Green (4.47)	Yellow (2.83)	Best Choice (3.295)
Sablefish California Pacific - Large mesh bottom trawl	Yellow (2.64)	Green (3.83)	Green (4.47)	Green (3.46)	Best Choice (3.539)
Sablefish California Pacific - Longline, Bottom	Yellow (2.64)	Green (5.00)	Green (4.00)	Yellow (3.16)	Best Choice (3.596)
Sablefish California Pacific - Trap	Yellow (2.64)	Green (5.00)	Green (4.00)	Yellow (3.16)	Best Choice (3.596)
Shortspine thornyhead California Pacific - Large mesh bottom trawl	Green (5.00)	Yellow (2.64)	Green (4.47)	Green (3.46)	Best Choice (3.783)

Source: Monterey Bay Aquarium Seafood Watch, California Groundfish Collective Fishery, October 3 2014