

Request for Proposal (RFP)

Consultancy to Develop a National Aquaculture Strategy for Rwanda

1. About Msingi East Africa Limited

Msingi is an independent industry development organization that supports the transformation of high potential industries in East Africa (Kenya, Uganda, Tanzania, and Rwanda) through a range of initiatives such as support to pioneer businesses, technical assistance, policy support, or development of key industry institutions.

One of Msingi's focus industries is aquaculture; Msingi aims to develop a competitive, inclusive and resilient aquaculture industry over the long term. Msingi believes that East Africa has a strong comparative advantage in aquaculture, with good natural water resources and climate, genetic resources, and a rapidly growing population leading to increasing demand for protein

2. Objective of this consultancy

Msingi has been working closely with a range of aquaculture industry players since 2016. These players include hatcheries, grow-out farms, aqua feed producers, government authorities and industry associations. Msingi has partnered with the Ministry of Agriculture and Animal Resources (MINAGRI) in Rwanda and The Rwanda Agriculture and Animal Resources Development Board (RAB) with the aim of supporting them to achieve the ambition to transform the aquaculture industry and promote the sustainable growth of the industry.

This request for proposal is intended to seek a suitably qualified consultant(s) to assist in drafting a 10-year National Aquaculture Strategy for Rwanda. The selected consultant(s) will lead the project while working collaboratively with the MINAGRI, RAB and Msingi teams.

The scope of this project is reasonably broad. As such, Msingi is open to contracting different entities for different components of the work to enable an optimal matching of capabilities to different tasks/requirements.

3. Background of Rwanda Aquaculture Ambition

Through its National Strategy for Transformation, 2017-2024 (NSTI), Rwanda intends to stimulate decades of accelerated transformation and sustained economic growth. This agenda comes at a unique period when the country is transitioning from vision 2020 to vision 2050 (vision 2020 and vision 2050 are frameworks for Rwanda's development that set out the key priorities to achieve ambitious development targets by the stated timelines). By the year 2035, the country targets to achieve high standards of living and high-quality livelihoods for its people and transform from a low-income to an upper middle-income economy.

With nearly 70% of the workforce still in agriculture, the potential for productivity gains from structural transformation, urbanization and industrialization is significant.¹ Agriculture is therefore a key pillar of Rwanda's plan to drive economic growth and contribute to poverty eradication and food security. NSTI therefore prioritizes agriculture and sets out interventions to modernize and increase productivity of agriculture and livestock sectors.

To accelerate agricultural transformation, the Ministry of Agriculture and Animal Resources (MINAGRI) devised a Strategic Plan for Agriculture Transformation, 2018-2024 (PSTA4) under the general framework of NSTI. PSTA4 sets out the priority areas that provide strategic direction toward achieving transformation of Rwandan agriculture from a subsistence sector to a value creating sector that contributes more to the national economy.

¹ National Strategy for Transformation (NSTI)

PSTA4 recognizes that aquaculture has the potential to make a significant contribution to the agriculture sector. MINAGRI estimates that aquaculture production stood at 1,600MT in 2016 and approximately 3,000MT in 2020². MINAGRI aspires to spur aquaculture production through promoting sustainable growth, especially over the long term. Rwanda possesses the fundamentals necessary to build a thriving aquaculture industry – there are abundant water resources, and the climate is considered favourable for aquaculture.

However, to catalyse the growth of aquaculture in Rwanda, there is need for proper planning without which the industry may not achieve its potential. Planning will guide the evolution of the sector by exploiting opportunities, minimising threats, providing incentives and safeguards, attracting investment, and boosting development. Moreover, it will help to ensure the long-term economic, environmental, and social sustainability of the sector, and its ultimate contribution to economic growth and poverty alleviation

As a first step towards planning for aquaculture, MINAGRI/RAB with the support of Msingi, therefore desires to develop this 10-year strategy to guide the ambition of moving towards a thriving Rwandan aquaculture industry.

4. Scope of the Consultancy

The scope of this consultancy will include the preparation of a National Aquaculture Strategy for Rwanda. It will entail primary and secondary data compilation and analysis, stakeholder engagement and preparation of an Action Plan and recommendation of programs/interventions in support of the Action Plan. The work shall be performed in close coordination with the Msingi team, RAB officials and officials of MINAGRI. The specific activities will include:

Project design and coordination

1. Taking a steering role including designing a work plan to undertake the consultancy, coordinating all activities for the preparation of the 2035 National Aquaculture Strategy for Rwanda and reporting progress to Msingi, RAB and MINAGRI as will be mandated.

Review of existing strategies

2. Reviewing all Government of Rwanda and MINAGRI strategic planning documents including the National Strategy for Transformation, Strategic Plan for Agriculture Transformation (and any other strategic documents) and ensuring that this Strategy brings alignment with the ambitions set out in those strategic documents and the previous aquaculture and fisheries strategies.
3. Reviewing pre-existing aquaculture development master plans and appraisal of prior key aquaculture development programs implemented in Rwanda (whether by the government/government agencies, private sector, or donor organisations) to draw lessons, and assess their potential for future impact.

Research into current status, characteristics and dynamics of the Rwandan aquaculture sector

Including (but not limited to) the following areas, which will require a combination of secondary and primary research:

4. Analysis of the market for aquaculture products including a demand volume and fish (mainly tilapia) price analysis and forecasting this to the future in line with projected changes in demographics (population, food preferences, incomes etc) and competing industries. This analysis should consider all major addressable markets and include both domestic and regional/export markets. The analysis should include;
 - a. Consumer behaviour and perceptions associated with eating fish

² MINAGRI Statistics

- b. Frequency of fish consumption
 - c. Mode of consumption of fish
 - d. Assessment of the re-export market
5. Aquaculture production analysis:
 - a. Sizing and segmentation of the aquaculture industry, including by production system, species, and approximate number and size of farms
 - b. Assessment of leading private sector fish, and constraints and opportunities faced by these farms
 6. Assessment of the nature and suitability of Rwanda's key water resources and climatic conditions (including dissolved oxygen issues, water temperatures and depths) for different types of aquaculture. This will include but not be limited to collection of key water quality parameters at multiple sites across Rwanda's major lakes, and analysis of these with respect to their potential suitability for commercial aquaculture operations.
 7. The status of supporting functions in the aquaculture value chain such as:
 - a. Feed availability, quality and price
 - b. Seed availability, quality and price
 - c. Availability of skills for commercial aquaculture
 - d. Available structures for farms to coordinate and organise
 - e. Status of other public investments and infrastructure in aquaculture
 8. Fish health capabilities; such as diagnostic or veterinary services, including a risk profile, case studies of good and bad disease management
 9. The status of existing regulations and government policy relating to the aquaculture industry

Feasibility analysis for existing pond infrastructure

10. Commercial feasibility analysis for 3,000 earthen aquaculture ponds previously constructed across the country for small holder farmers with the support of the Rwandan government. This should include assessing:
 - a. The viability of the infrastructure for commercial aquaculture including water quality and temperature,
 - b. Soil types
 - c. The size and condition of the ponds
 - d. Location of the ponds with respect to access to inputs
 - e. Access to markets and fish price and demand in rural markets local to the ponds
 - f. The viability of different management models for the ponds including an outgrower-type model
 - g. Skills; analysis of skills gap in the management of ponds
 - h. Availability and access to inputs i.e. feed and seed for ponds farmers as well as optimal feeding strategies

Analysis of constraints and opportunities

11. Identifying specific aquaculture farming systems and approaches that would be of high potential in the major environmental conditions prevalent in Rwanda
12. Based on and synthesising the above research, a future looking analysis of the constraints/risks, opportunities and trajectory of the Rwandan aquaculture industry. This will be focused on identifying where the areas (geographies, farming systems, species, etc.) where there may be the highest potential for growth, and the major constraints to this growth.
13. Assessment of the potential social outcomes from the development and growth of the aquaculture industry in Rwanda – including at least a (where possible quantitative) assessment of the impact on job and income creation, and nutrition.

Strategy consultation and development

14. Identifying and engaging key members of the private sector to discuss and obtain input on the constraints, opportunities and obtain feedback to incorporate into the development of the Strategy.
15. Leading workshops to discuss and develop the Strategy with key members/agencies of the Rwandan public sector, including RAB officials and officials of MINAGRI, alongside representatives of Msingi.
16. Development of the National Aquaculture Strategy for Rwanda, which should include:
 - a. An ambitious but realistic target for the growth of the Rwanda aquaculture industry, and the social outcomes that may derive from this.
 - b. Assessment of the key areas of opportunity that may fuel this growth
 - c. Assessment of the key constraints and threats that need to be addressed to achieve this growth
 - d. An Action Plan including a timeline and budgetary requirements for achievement of the aquaculture growth ambitions. This Action Plan should include identification of specific programs/interventions necessary to catalyse the desired growth of the industry.
 - e. Supporting Reports documenting the above research contributing to the development of the strategy, including at least:
 - End Market Analysis (based on #4 above)
 - Production Analysis (based on #5-7 above)
 - Regulatory and policy analysis (based on #8 above)
 - Feasibility analysis for existing pond infrastructure (based on #9 above)
 - Summary of high potential fish farming systems for the Rwandan conditions
 - Summary of feedback received from stakeholder consultation
 - Risk analysis including disease and bio-security contingency plan
17. Presentation of the National Aquaculture Strategy for Rwanda to Msingi, government and other stakeholders for feedback.
18. Finalisation and submission of the National Aquaculture Strategy for Rwanda to Msingi, RAB, MINAGRI and other Government Officials.

5. Deliverables

Deliverables will be discussed and agreed with the selected consultant(s) but are likely to include:

1. Inception report, detailing an in-depth work plan, research and analysis design, data collection tools and stakeholder engagement plan including timelines.
2. The Supporting Reports documenting the research conducted as per above
3. Draft Strategy for review and validation by key stakeholders
4. The National Aquaculture Strategy for Rwanda, as per above

6. Eligibility Criteria

This Request for Proposal is open to all legally constituted firms/companies/agencies and individual expert consultants (National or International) who can provide the stipulated services.

As mentioned above, given the broad scope, Msingi is open to both contracting one entity for the whole project, or contracting different entities for different components of the work to enable an optimal matching of capabilities to different tasks/requirements.

To be eligible:

1. The consultant must have high quality and demonstrable international and local (Rwanda) experience and educational background in the area(s) of the project for which they are submitting a proposal

2. The consultant must have strong understanding and experience of working with nascent aquaculture sectors in developing countries over the last 5 – 10 years.
3. Strong understanding and experience of African aquaculture (ideally in Rwanda, although this is not necessary)

7. Proposals

Completed proposals consisting of the following information must be submitted by **Friday, October 25, 2021, at 1700hrs East Africa Time** to all the contacts below.

1. A write up detailing the understanding of the terms of reference and proof of experience with similar assignments.
2. A brief description of the consultant(s) that will be undertaking the work and an outline of their qualifications, capabilities and experience on assignments of a similar nature.
3. A technical proposal which should include a detailed workplan (including timelines and methodology) and any technical input requirements for performing the consultancy.
4. A financial proposal of the fee for delivery of this assignment.

Please submit proposals to all three of the following contacts:

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