



REQUEST FOR PROPOSAL

CONSULTANCY TO DIAGNOSE THE STATE OF TOURISM STATISTICS AND NATIONAL ACCOUNTS AND , MAKE RECOMMENDATION ON A ROAD MAP TO DEVELOP TOURISM SATTELITE ACCOUNT IN CARIFORUM STATES

Contract reference no.: 10th EDF/ R1.1.1.8 b/SER /2016

The technical requirements and instructions for submitting proposals are included in this **Request for Proposal (RFP)**

When submitting tenders, tenderers must follow the instructions, forms, terms of reference, and specifications contained in this RFP and submit a tender containing the required information within the deadline specified in the RFP.

INSTRUCTIONS TO TENDERERS

1. Content of tenders

Offers, all correspondence and documents related to the tender exchanged by the tenderer and the CARICOM Secretariat must be written in English.

The tender must be comprised of a combined **Technical offer** and a **Financial offer**, which should be submitted electronically, using the instructions provided in **Clause 5** below.

1.1 Technical offer

The Technical offer must include the following documents:

- (1) **Tender submission form** (Annex II) using the format attached to the tender submission form. The tender submission form should indicate the name of the **individual or firm that** is making the submission.
- (2) **Organisation and methodology** to be drawn up by the tenderer using the format in **Annex III** .The ‘Estimated number of working days’ worksheet must be included in the Organisation and methodology.

- (3) **Key experts** (see **Annex IV**) the key experts are those whose involvement is considered to be instrumental to achieve the contract objectives. Their positions and responsibilities are defined in Section 6.1.1 of the Terms of Reference in **Annex I** and are subject to evaluation according to the evaluation grid, which is included in this RFP.

Annex IV contains the templates that tenderers must use, including:

- a) a list of the names of the key experts;
- b) the CVs of each of the key experts. Each CV should be no longer than 2 pages and only one CV must be provided for each position identified in the Terms of Reference. Note that the CVs of non-key experts must not be submitted.

The qualifications and experience of each key expert must clearly match the profiles indicated in the Terms of Reference.

Tenderers must provide the following documents for any key experts proposed:

- a copy of the diplomas mentioned in their CVs,
- a copy of employer certificates or references proving the professional experience indicated in their CVs.

Only diplomas and documented experience will be taken into account.

- (4) Non key experts may also be instrumental to achieve the contract objectives. However, they are not subject to evaluation.

2.2. Financial offer

The Financial offer must be presented as an amount in **Euro** and must be submitted using the template for the global-price version of **Annex V**.

The global price should be broken down by outputs, as indicated in the Terms of Reference.

Consultants are reminded that the maximum budget available for this contract, is **Euro 45,000** . Payments under this contract will be made in the currency of the tender.

3. Period during which tenders are binding

Tenderers are bound by their tenders for 90 days after the deadline for submitting tenders or until they have been notified of non-award. In exceptional cases, before the period of validity expires, the CARICOM Secretariat may ask tenderers to extend the period for a specific number of days, which may not exceed 40.

The selected tenderer must maintain its tender for a further 60 days. A further period of 60 days is added to the validity period irrespective of the date of notification.

4. Additional information before the deadline for submitting tenders

Tenderers may submit questions in writing to the following address up to 7 days before the deadline for submission of tenders, specifying the publication reference and the contract title:

Programme Manager, Administrative Services

CARICOM Secretariat

Turkeyen, Greater Georgetown

Guyana

Fax: 592-222-0080

Email: procurement@caricom.org

The CARICOM Secretariat has no obligation to provide clarification after this date (i.e. 7 days before the closing date).

Any clarification of the RFP will be communicated simultaneously in writing to all tenderers at the latest, 4 calendar days before the deadline for submitting tenders.

5. Submission of tenders

5.1 Tenderers are expected to submit a combined Technical and Financial Proposal (i.e. both proposals should be submitted together, using the forms referred to in Clauses 1.1 and 2.2 .Tenders may be submitted **electronically**, on or before **4th October, 2016 at 16:00 hrs**, for the attention of the :

Programme Manager, Administrative Services

CARICOM Secretariat

Turkeyen, Greater Georgetown

Guyana

Email: procurement@caricom.org

6. Amending or withdrawing tenders

Tenderers may amend or withdraw their tenders by written notification prior to the deadline for submitting tenders. Tenders may not be amended after this deadline.

7. Costs for preparing tenders

No costs incurred by the tenderer in preparing and submitting the tender are reimbursable. All such costs must be borne by the tenderer, including the cost of interviewing proposed experts.

8. Ownership of tenders

The CARICOM Secretariat retains ownership of all tenders received under this tender procedure. Consequently, tenderers do not have the right to have their tenders returned to them.

9. Evaluation of tenders

9.1 Evaluation of technical offers

The quality of each technical offer will be evaluated in accordance with the award criteria and the weighting detailed in the evaluation grid, which is provided below:

	Maximum	Assessment
Organisation and methodology		
Rationale	5	
Strategy	35	
Timetable of activities	10	
Key Expert(Maximum Score 30)		
Qualifications	10	
General Experience	10	
Specific Experience	30	
Overall total score	100	

The award criteria will be examined in accordance with the requirements indicated in the Terms of Reference

9.2 Evaluation of financial offers

Upon completion of the technical evaluation, the financial offers for tenders that were not eliminated during the technical evaluation will be considered (i.e. those with an average score of 75 points or more).

10. Choice of selected tenderer

The best value for money is established by weighing technical quality against price on an 80/20 basis.

11 Ethics clauses / Corruptive practices

- a) Any attempt by a tenderer to obtain confidential information, enter into unlawful agreements with competitors or influence the Evaluation Committee or the CARICOM Secretariat during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of its tender and may result in administrative penalties.
- b) The tenderer must not be affected by any conflict of interest and must have no equivalent relation in that respect with other tenderers or parties involved in the project.
- c) The CARICOM Secretariat reserves the right to suspend or cancel project financing if corrupt practices of any kind are discovered at any stage of the award process or during the execution of a contract. For the purposes of this provision, 'corrupt practices' are the offer of a bribe, gift, gratuity or commission to any person as an inducement or reward for performing or refraining from any act relating to the award of a contract or execution of a contract already concluded with the CARICOM Secretariat.
- d) Tenders will be rejected or contracts terminated if it emerges that the award or execution of a contract has given rise to unusual commercial expenses. Such unusual commercial expenses are commissions not mentioned in the main contract or not stemming from a properly concluded contract referring to the main contract, commissions not paid in return for any actual and legitimate service, commissions remitted to a tax haven, commissions paid to a payee who is not clearly identified or commissions paid to a company which has every appearance of being a front company.

Consultants found to have paid unusual commercial expenses on projects funded by the CARICOM Secretariat are liable, depending on the seriousness of the facts observed, to have their contracts terminated or to be permanently excluded from contracts of the CARICOM Secretariat. The CARICOM Secretariat reserves the right to suspend or cancel the procedure, where the award procedure proves to have been subject to substantial errors, irregularities or fraud. If substantial errors, irregularities or fraud are discovered after the award of the Contract, the CARICOM Secretariat may refrain from concluding the Contract.

10. Signature of contract(s)

11.1. Notification of award

The successful tenderer will be informed in writing that its tender has been accepted.

11.2. Signature of the contract(s)

Within 20 days of receipt of the contract signed by the CARICOM Secretariat, the selected tenderer shall sign and date the contract and return it to the CARICOM Secretariat.

12. Cancellation of the tender procedure

In the event of cancellation of the tender procedure, the CARICOM Secretariat will notify tenderers of the cancellation. If the tender procedure is cancelled before the outer envelope of any tender has been opened, the unopened and sealed envelopes, may be returned to the tenderers, if requested.

Secretariat cannot be liable for any damages whatsoever including, without limitation, damages for loss of profits, in any way connected with the cancellation of a tender procedure, even if the CARICOM Secretariat has been advised of the possibility of damages. The publication of a RFP does not commit the CARICOM Secretariat to implement the programme or project announced.

**CONSULTANCY TO DIAGNOSE THE STATE OF TOURISM STATISTICS AND
NATIONAL ACCOUNTS AND , MAKE RECOMMENDATION ON A ROAD MAP TO
DEVELOP TOURISM SATTELITE ACCOUNT IN CARIFORUM STATES**

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Title: Consultancy to Diagnose the State of Tourism Statistics and National Accounts and Make Recommendations on a Roadmap to Develop Tourism Satellite Accounts in CARIFORUM States

1. BACKGROUND INFORMATION

1.1 Beneficiary Countries

All sixteen (16) participating Member States of the Forum of the Caribbean Group of African, Caribbean and Pacific (ACP) States (CARIFORUM) , namely:

- Antigua and Barbuda
- The Bahamas
- Barbados
- Belize
- Dominica
- Dominican Republic
- Grenada
- Guyana
- Haiti
- Jamaica
- Suriname
- Saint Lucia
- St. Kitts and Nevis
- St. Vincent and the Grenadines
- Suriname
- Trinidad and Tobago

1.2 Contracting Authority

The CARICOM Secretariat is the Contracting Authority.

1.3 CARIFORUM Context

The CARIFORUM group comprises fifteen (15) small open developing countries which are nevertheless very different in terms of level of development and economic structure. This group includes the Anglophone Caribbean countries of **Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Jamaica, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines and Trinidad and Tobago. It also includes the Dominican Republic, Haiti and Suriname.** The total population of the group was 27.5 million in 2012 with the Dominican Republic, Haiti, Jamaica and Trinidad and Tobago accounting for approximately 90% of the population. The land mass of the group is approximately 511,000 square kilometres, with the Dominican Republic, Guyana, Haiti and Suriname, accounting for approximately 90% of the total land area. The total GDP at current market prices was US\$131.3 billion in 2012 with The Bahamas, Dominican Republic, Jamaica and Trinidad and Tobago accounting for approximately 80% of the income. These structural dynamics mean that the total market of the CARIFORUM group is still relatively small and is comparable in size to Peru which had a population of 27.9 million and GDP at current market prices of US\$205.4 billion in 2012.

The small open nature of all CARIFORUM countries means that the international economic environment in many respects drives the performance of these economies. This general economic feature of CARIFORUM countries does not however do justice to the tremendous heterogeneity inherent in this group of countries. This is highlighted by the fact that the group includes two (2) countries that rank with the highest and lowest *per capita* income in Latin America and the Caribbean (The Bahamas and Haiti, respectively), countries with credit ratings which range from selective default to investment grade, countries which are commodity-based economies to economies dominated by the Services Sector and countries with a very high score in the Human

Development Index (Barbados), as well as countries which rank among the lowest (Haiti) in this index. This diversity which is reflected in large differences in economic performance over time, is driven by factors such as –

- (i) initial factor endowment;
- (ii) productivity and competitiveness;
- (iii) policy choices over time;
- (iv) strategic economic diversification;
- (v) vulnerability; and
- (vi) political and social stability.

The Services Sector

The Services Sector covers a wide range of economic activities involving the input of human resources ranging from Business Services (Professional, Computer and Related Services, and Real Estate Services), Communication Services (Telecommunication Services, Postal and Courier Services), Construction Services, Distribution Services, to Tourism Services to Transport Services (Air, Maritime, and Riverain). The Sector also includes some activities in the agricultural and manufacturing sectors especially the value-added of labour and management.

The average economic growth performance of CARIFORUM States has been moderately successful over the last four (4) decades. Over this period they have undergone tremendous change in terms of a general move away from dependence on agriculture to more service-based economies, the greater integration into the world economy and the attendant increased vulnerability to external shocks and increased competition from more efficient producers. Over the period 1960 to 2012, the rate of growth of these states as a group has been consistently better than Latin America with growth of *per capita* GDP averaging 2.4% compared to 1.45% in Latin America but lower than the 5.2% recorded by the more dynamic economies in the East Asia and

Pacific region. Very important, however, is the fact that relative to East Asian countries, the growth in CARIFORUM States has been driven more by consumption and less by net exports and investment. This has implications for the sustainability and improvement of the growth trajectory as net exports in particular has been a platform on which the robust growth in East Asia has been built.

In most CARIFORUM countries trade is increasingly driven by services exports reflecting the changing structures of these economies with tourism being the main sector. There is still a great deal of diversity however, with the Dominican Republic, Guyana, Haiti, Suriname and Trinidad and Tobago being economies where the Services Sector accounts for less than 50% of total exports of goods and services. For these five (5) countries merchandise exports accounted for 70% of total exports in the 1990s and 74% in the period 2000-2005. The remaining countries are dominated by services exports, particularly tourism with The Bahamas, Barbados, Belize, Jamaica and the OECS countries recording services exports amounting to 66.6% of total exports in the 1990s and 70.3% in the period 2000-2005. The exports of the Dominican Republic and Trinidad and Tobago, the two (2) largest exporters in CARIFORUM, are still dominated by merchandise exports thus on average, the greater value of exports from the region is still accounted for by merchandise exports.

The Policy Situation

CARIFORUM States have been implementing diverse but interlocking strategies to enhance the growth and competitiveness of their private sectors. These include –

- (i) the CARICOM Single Market and Economy;
- (ii) the Revised Treaty of Basseterre establishing the OECS Economic Union and the OECS Growth and Development Strategy;
- (iii) the CARICOM–Dominican Republic Free Trade Agreement;

- (iv) the Dominican Republic Central America-United States Free Trade Agreement (CAFTA-DR);
- (v) the CARIFORUM – European Union Economic Partnership Agreement (EPA);
and
- (vi) the General Agreement on Tariffs and Trade (GATT) and General Agreement on Trade in Services (GATS) of the World Trade Organisation (WTO).

They are severely constrained in their ability to take advantage of the opportunities for long-term economic development created through these numerous trade agreements because they have inadequate policies and regulatory regimes for the Services Sector. They are also unable to effectively plan and implement strategies for growth and market penetration in the Services Sectors due to the existing data gaps with respect to services statistics for planning and marketing analyses.

The regulatory environment for the provision of services in CARIFORUM States is mixed. In some CARIFORUM States regulations already exist, however, this is not necessarily the case for all. It is therefore necessary to establish the required regulatory frameworks, where they do not exist, and proceed to harmonise across the Region. In order to implement the obligations of Title II Investment, Trade in Services and E-Commerce of the CARIFORUM-EU EPA, it will be necessary for there to be an assessment of the regulatory framework in place in the Signatory CARIFORUM States. It will therefore be necessary to identify and list all legislation in place affecting the sectors and the changes that will be required to facilitate trade in services.

The CARICOM Context

The Caribbean Community and Common Market was established in 1973 by the Treaty of Chaguaramas. In 1989, the Heads of Government of the Caribbean Community (CARICOM) declared their intention to deepen the integration process and to strengthen the Caribbean Community in all its dimensions through the establishment of the CARICOM Single Market and Economy (CSME). The CSME was supposed to be one aspect of the response to the challenges and opportunities presented by the changes in the global economy. For this purpose the Revised Treaty of Chaguaramas Establishing the Caribbean Community including the CSME was signed by the Heads of Government in 2001. The fundamental objective of the CSME is to achieve a single economic space that will foster growth and result in sustained development of the standard of living of all Caribbean peoples. The Single Market was established in 2006 and comprises all Member States except The Bahamas, Montserrat and Haiti. Key elements of the CSME are - **Free Movement of Capital, Labour, Goods, the Provision of Services and the Right of Establishment within Member States of the CSME.**

Services cover Free Movement of Capital and Labour, the Provision of Services and the Right of Establishment.

1.2.3 The OECS Context

Within the construct of CARICOM, the OECS is advancing a deeper integration process, through the refashioning of the original Treaty into the Revised Treaty of Basseterre Establishing the OECS Economic Union which enables the OECS Region to move into a more integrated policy and functional space. The Revised Treaty of Basseterre is essentially founded on mutual reinforcement of the rules and obligations of the two (2) regional Treaties thereby enabling the OECS Region to be effective partners in the CSME and the Community.

1.2.4 The Dominican Republic Context

1.3 Current State of Affairs in the Services Sector

Notwithstanding the significant economic contribution of the Services Sector, a regional regime for Services, which fosters the formation of a single economic space for Services and responds to the rapidly changing global economy, is still in its formative stage.

In July 2009, officials and stakeholders from a wide cross-section of the Services Sector within the CSME identified nine (9) broad elements which should be addressed in a Regional Strategic Plan for Services. During that year, also, the Council for Trade and Economic Development (COTED) established the national and regional institutional arrangements: **National Focal Points (NFP)**, **National Focal Point Persons (NFPP)**, **National Coordinating Committees (NCC)** and the **Regional Services Project Steering Committee (RSPSC)** respectively, for the Preparation of the Plan. The Plan is expected to cover all Services.

In 2010, the COTED, based on recommendations of the Regional Steering Committee, approved eleven (11) elements which should be addressed by the Plan, namely –

- (i) **External Environment;**
- (ii) **Goal;**
- (iii) **Policy Framework;**
- (iv) **Legislative Framework;**
- (v) **Incentives;**
- (vi) **Human Resource Requirements;**
- (vii) **Financial Requirement;**
- (viii) **Technological Needs;**
- (ix) **Cross-Sectoral Linkages;**
- (x) **Constraints;**
- (xi) **Other.**

The COTED also identified seven (7) sub-sectors for which priority attention would be given:

- (i) Financial Services;**
- (ii) Information and Communication Technology Services;**
- (iii) Professional Services;**
- (iv) Tourism Services;**
- (v) Education Services;**
- (vi) Health and Wellness Services;**
- (vii) Recreational, Cultural and Sporting.**

In 2014, the Dominican Republic adopted these core elements, priority sectors and administrative arrangements. As a result CARIFORUM States have agreed to prepare and implement a Regional Strategic Plan for Services as a group.

1.4 Situation with Tourism Satellite Accounts

The Tourism Satellite Account (TSA) developed by the World Tourism Organization (UNWTO) is the internationally recognised framework for the economic measurement of tourism activity. It measures the value of goods and services demanded by tourists according to international standards of concepts, classifications and definitions which allows for valid comparisons with other industries and from country to country. Notably, tourism is not defined as an industry within the system of national accounts (SNA); hence, a satellite account was developed to measure the economic contribution of tourism. Indeed, tourism is an amalgam of related industries which covers accommodation, transportation, food and beverage, recreation and entertainment and travel agency services.

TSA's are used for advocacy, planning and awareness; marketing; investment, operations and management; and manpower, education and training. TSA's provide answers to a number of fundamental questions about tourism: What is the contribution of tourism in the economy? How much direct value added is generated from satisfying

tourism demand? Which industries directly benefit from tourism? What are the main goods and services purchased by visitors and how important is that tourism demand to the total demand?

Even though it is often argued that the Caribbean is the most tourism dependent region in the world, the development of TSAs with the region has been minimal and lagged that of less tourism dependent regions. The paucity of financial and human resources coupled with the lack of prioritization given to it by regional policy makers are identified as the key reasons for the failure to progress more rapidly in this area.

In response to this inadequacy the Caribbean Tourism Organization (CTO) is seeking to further coordinate the preparation of Tourism Satellite Accounts in the region. Reflecting this interest in the preparation of the TSA, the CTO was mandated in 2006 by its constituent membership led by the region's Ministers of Tourism, to pursue the promotion and coordination of the TSA system to scientifically determine the true contribution of tourism to the economic growth and development of the region.

1.4.2 Current Situation of TSAs in CARIFORUM States

The Bahamas, Dominican Republic and Jamaica are the only three CARIFORUM States to developed and produce TSAs. The remaining CARIFORUM States have been encountering various challenges in developing TSAs, including completing the basic framework for Supply and Use Tables on which TSAs are generated.

In June 2016, the CTO and the CARICOM Secretariat agreed to collaborate in executing a Tourism Satellite Account project, financed by the 10th European Development Fund for the amount of 70,000 Euros. This project will provide direct technical assistance to four CARIFORUM States and CTO member countries (Belize, Haiti, Guyana, Trinidad and Tobago). The primary goal of the project is to improve the planning and policy-making competencies of the beneficiary countries by strengthening the ability of regional governments to estimate the direct contribution of tourism to their economies. This will be pursued through use of UNWTO's harmonized methodological

framework that allows the participating countries to collate, organize, report and use the statistical data necessary for preparing TSAs.

1.5 Work on the Related Programmes and Other Donor Activities

Under the 10th European Development Fund (EDF), a consultancy is being undertaken to prepare a Draft Regional Strategic and Implementation Plan for Tourism Services in CARIFORUM States. This project is jointly managed by the CARICOM Secretariat and the Directorate of External Trade in the Ministry of Commerce of the Government of the Dominican Republic in collaboration with the Caribbean Tourism Organization (CTO).

Work is also being at the level of the OECS to prepare Tourism Satellite Accounts in ----
OBJECTIVE, PURPOSE AND EXPECTED RESULTS

2.1 Overall Objective

The overall objective is to measure the contribution of tourism services to investment, employment, output and trade of selected CARIFORUM States.

2.2 Purpose

The purpose of the project is to assess the current status of the collection, processing and use of basic statistics necessary for the construction of the TSA and develop a roadmap to build capacity to construct TSAs in selected CARIFORUM States.

2.3 Results to be achieved:

Overall Result:

Capacity to develop Tourism Satellite Accounts in four additional CARIFORUM States strengthened through:

- (i) Obtaining all the information included in the World Tourism Organization (UNWTO) Methodological Questionnaire;
- (ii) Creating a knowledge base about each country's weaknesses (resource gap analysis) and possible corrective course of action;
- (iii) Sharing of the experiences of the three CARIFORUM States currently producing TSAs with the operators of the four selected Member States;
- (iv) Identifying and documenting best practices among the three CARIFORUM States currently producing TSAs;
- (v) Preparing a report on the status of tourism statistics and National Accounts in four CARIFORUM States;
- (vi) Preparing a roadmap to build capacity to develop TSA in four CARIFORUM States;
- (vii) Assisting four CARIFORUM States with the design and /or fine-tuning of standardized questionnaires, forms and documents for obtaining all the information in accordance with the UNWTO Methodological recommendations;
- (viii) Assisting four CARIFORUM States with the compilation of a preliminary TSA, where possible; and
- (ix) Sensitising targeted officials in CARIFORUM States on the importance of TSAs.

1. ASSUMPTIONS AND RISKS

3.1 Assumptions underlying the project intervention

The assumptions and risks associated with this contract are those attributed to the project of which the contract is a part, viz:

- (i) Member States facilitate country visits by the Consultant(s) in an organised and timely manner;
- (ii) The assigned National Focal Point Persons in Member States are available to work with the Project Coordinators and the consultant as agreed;
- (iii) Member States are able to undertake the relevant preparatory and follow up work before and after the technical consultation missions and regional stakeholder consultations in order to realise the project results;
- (iv) Consultants are able to work individually in country to deliver the required reports and roadmap.

3.2 Risks

- (i) National Focal Point Persons are not supplied with the requisite resources to participate in the oversight of the work at the national level;
- (ii) Lack of timely response by Member States;
- (iii) Scheduling of vacation by counterparts in Member States during planned country missions may affect the execution of these missions;
- (iv) The occurrence of natural disasters in the Region may inhibit the implementation of the project as planned.

4. SCOPE OF THE WORK

4.1 General

4.1.1 Project description

The project will utilise the services of a consultant to provide the required technical expertise to assist the selected CARIFORUM Member States and the Project Coordinators in the preparation of (i) diagnostic report on the status of Tourism Statistics and National Accounts; and (ii) a Draft Roadmap to build capacity in those states to produce TSAs. The Consultant will be required to work individually in the selected Member States to gather and disseminate information, including data on professional services, facilitating national consensus building in the application of the technical assistance. A regional workshop will be convened to facilitate the sharing of best practices among existing and intended producers of TSAs.

It is anticipated that at the national level the intervention will target staff of national statistical administrations and the central banks.

4.1.2 Geographical area to be covered

Member States of CARIFORUM are to be covered in this Project.

4.1.3. Target group

The target group comprises persons engaged in collecting, collating and distributing data on tourism statistics in the selected CARIFORUM States.

4.2 Specific Activities

The consultant(s) are expected to:

- (i) **Engage** in a briefing meeting with the project coordinators;
- (ii) **Prepare and Submit** an Inception Report and a detailed Work Plan with timelines for completing the activities under the consultancy;
- (iii) **Obtain** all the information included in the World Tourism Organization (UNWTO) Methodological Questionnaire;

- (iv) **Conduct** through desk research and enquiries, an in-depth assessment of member states' capacity to collect, process and use basic statistics necessary to construct a TSA;
- (v) **Assess** the status of Tourism Satellite initiatives to determine the specific resource gaps with respect to preparing TSAs within four selected Member States;
- (vi) **Evaluate** the Member states' tourism expenditure surveys and systems of national accounts;
- (vii) **Create** a knowledge base about each country's weaknesses (resource gap analysis) and possible corrective course of actions;
- (viii) **Facilitate** the conduct of a best practice workshop for current and intended producers of TSAs within CARIFORUM States;
- (ix) **Undertake** in-country technical assistance capacity building missions in four CARIFORUM States – Belize, Haiti, Guyana and Trinidad and Tobago;
- (x) **Assist** in fine tuning the action plans as included in the diagnostic report;
- (xi) **Develop** an indicative schedule of key TSA activities to be undertaken in the short and medium term, especially highlighting those activities which are threatened by a shortfall of human and/or financial resources;
- (xii) **Develop** an action plan with specific quantification of the extent of the shortfall for securing resolution;

- (xiii) **Prepare and submit** reports of the technical assistance missions to the four CARIFORUM States;
- (xiv) **Assist** participating countries with the design and/or fine-tuning of standardized questionnaires, forms and documents for obtaining all the information in accordance with the UNWTO Methodological recommendations;
- (xv) **Assist** those selected countries with the compilation of a preliminary TSA, where possible;
- (xvi) **Prepare and submit** diagnostic report of the status of Tourism Statistics and National Accounts in the selected CARIFORUM States; and
- (xvii) **Prepare and submit** a road map to build capacity to prepare TSAs in the selected CARIFORUM States.

4.3 Project Management

4.3.1 Responsible body

The **CARICOM Secretariat Trade and Economic Integration Directorate** and DICOEX will be responsible for managing the project.

4.3.2 Management structure

The Deputy Programme Manager Services Sector Development, will be the Project Manager and will have overall responsibility for the project. The Head of the Legal Department DICOEX will have counterpart responsibility for the project on the behalf of the Dominican Republic. The Acting Director of Research and IT, Caribbean Tourism

Organisation will be responsible for the quality of the consultancy and provide technical support to the project manager and DICOEX.

The Deputy Programme manager will be supported by the Senior Project Officer Services Sector Development of the CARICOM Secretariat. The Head of the Legal Department DICOEX will be supported by the relevant staff at DICOEX. The Acting Director of Research and IT CTO will be supported by the relevant staff at the CTO.

The consultancy will be overseen by Regional Services Project Advisory Committee (RSPAC) and progress reports will be presented to this body during the lifetime of the project. The RSPAC makes recommendations to the COTED and the Government of the Dominican Republic which finally determine whether or not to accept the proposals.

CTO is expected to carry out the necessary follow-up with its board and relevant organs to ensure approval of the recommendations emanating from the consultancy.

4.3.3 Facilities to be provided by the Contracting Authority and/or other parties

The Contracting Authority will provide reasonable office accommodation in accordance with the schedule of activities required by these terms of reference. The boundaries of the office accommodation will be delineated at the inception meeting. Office accommodation in Member States will also be the subject of clarification at a later date.

5. LOGISTICS AND TIMING

5.1 Location

The operational base of the consultants(s) will be the home base. The consultant(s) is/are expected to visit periodically, the CARICOM Secretariat, CTO and the National Focal Point Persons in the selected CARIFORUM member States through the duration of the contract. Regular interaction is expected with the Deputy Programme Manager Services Sector Development, the Acting Director Research and IT CTO, and the Head of the Legal Department DICOEX, either directly or by email and other electronic

communication. However, the nature of the project requires the presence of the Consultant(s) on a frequent consistent basis in Member States during its execution to engage in the national and regional consultations and to facilitate a regional workshop.

5.2 Commencement date and Period of execution

The intended commencement date is **15 October 2016** and the period of execution of the contract is 47 person days for the implementation of the programme in countries over a total period of **two (2) months**.

6. REQUIREMENTS

6.1. Personnel

6.1.1. Key expert(s)

All experts who have a crucial role in implementing the contract are referred to as key experts. The profiles of the key experts for this contract are as follows:

Key Expert: Professional Services Specialist / Specialist in Strategic Planning

Qualifications

An advanced university degree (Masters or PhD) in Economics or Statistics or related field

General professional experience

- (i) Should have adequate knowledge in TSA methodology as defined by the UNWTO;
- (ii) Excellent computer skills;
- (iii) Excellent written and oral communication skills in English and Spanish.

Specific professional experience

- (i) At least ten (10) years working in the areas of sustainable development of National Statistics Systems in general and tourism statistics and National Economic Accounts in particular;
- (ii) At least five (5) years experience in a statistical agency and statistical programmes;

6.1.2. Other experts

CVs for experts other than the key experts are not examined prior to the signature of the contract. They should not have been included in the tender. The Consultant shall select and hire other experts as required according to the profiles identified in the Organisation and Methodology. These profiles must indicate whether they are to be regarded as key/non-key experts and senior/junior so that it is clear which fee rate in the budget breakdown will apply to each profile. All experts must be independent and free from conflicts of interest in the responsibilities accorded to them. The selection procedures used by the Consultant to select these other experts shall be transparent, and shall be based on pre-defined criteria, including professional qualifications, language skills and work experience. The findings of the selection panel shall be recorded. The selection of experts shall be subject to approval by the Contracting Authority.

Note that civil servants and other staff of the public administration of the beneficiary country cannot be recruited as experts, unless prior written approval has been obtained from the European Commission.

6.1.3. Support staff and backstopping

Backstopping costs are considered to be included in the fee rates. The costs of support staff must be included in the fee rates of the experts.

6.2 Office Accommodation

The Consultant would provide office accommodation and services for his/her activities in his/her country of origin for work done other than during visits to the Member States of the Caribbean Community. However, wherever possible, when working in Guyana, office accommodation will be provided by the CARICOM Secretariat and when working in the Dominican Republic by DICOEX].

E-mail contact for continuous communication with the Trade and Economic Directorate of the CARICOM Secretariat [and DICOEX] must also be provided as well as a contact person for follow up in the event that the Consultant will not be available to respond to the CARICOM Secretariat [and DICOEX] during the period when the contract is in force.

6.3 Facilities to be provided by the Consultancy

The Consultancy shall ensure that experts are adequately supported and equipped. In particular the Consultancy shall ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities. The Consultancy must also transfer funds as necessary to support its activities under the contract and to ensure that its employees are paid regularly and in a timely fashion.

If the Consultancy is a consortium, the arrangements should allow for the maximum flexibility in project implementation. Arrangements offering each consortium member a fixed percentage of the work to be undertaken under the contract should be avoided.

6.4 Equipment

No equipment is to be purchased on behalf of the Contracting Authority / beneficiary country as part of this service contract or transferred to the Contracting Authority / beneficiary country at the end of this contract. Any equipment related to this contract which is to be acquired by the beneficiary country must be purchased by means of a separate supply tender procedure.

7. REPORTS

7.1 Submission and Approval of Progress Reports

Three (3) copies of the required reports must be submitted to the Deputy Programme Manager, Acting Director, Research and IT CTO, and Head Legal Department DICOEX identified in the contract. The Deputy Programme Manager and Acting Director are responsible for approving all reports.

7.2 Reporting Requirements

The contractor must submit all reports in English: one original and two copies. The country report for Haiti and the final Diagnostic Report and Roadmap must be translated into French and Spanish for Haiti and the Dominican Republic.

- (i) **Preparation and submission** of an Inception Report – not later than 5 days after the commencement of the contract;
- (ii) **Preparation and submission** of a detailed Draft Work Plan to complete all of the activities in the Terms of Reference 5 days after commencement of the contract;
- (iii) **Completion and submission** of report on regional best practices workshop 15 days after the commencement of the contract;
- (iv) **Completion and submission** of a report on Status of Tourism Statistics and National Accounts in four Belize, Guyana, Haiti and Trinidad and Tobago 30 days after commencement of the contract;
- (v) **Completion and submission** of Draft Roadmap to develop Tourism Satellite Accounts in Belize, Guyana, Haiti, and Trinidad and Tobago 40 days after the commencement of the contract;
- (vi) **Submission** of the Final Report no later than 47 days after the commencement of the contract.

7.2 Submission and approval of progress reports

Three (3) copies of the required reports must be submitted in English, French and Spanish, to the Deputy Programme Manager, Acting Director, Research and IT CTO, and Head Legal Department DICOEX identified in the contract. The Deputy Programme Manager and Acting Director are responsible for approving all reports.

8. MONITORING AND EVALUATION

8.1 Definition of indicators

- (i) Workshop Report on Best Practices of Bahamas, Dominican Republic and Jamaica;
- (ii) Diagnostic Report on Status of Tourism Statistics and National Accounts;
- (iii) Reports on technical assistance missions;
- (iv) Report outlining roadmap to develop TSAs in Belize, Guyana, Haiti, and Trinidad and Tobago;

8.2 Special requirements

None

APPENDIX 1

LIST OF CARIFORUM MEMBER STATES

Antigua and Barbuda

The Bahamas

Barbados

Belize

Dominica

Dominican Republic

Grenada

Guyana

Haiti

Jamaica

Montserrat

Saint Lucia

St. Kitts and Nevis

St. Vincent and the Grenadines

Suriname

Trinidad and Tobago

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ANNEX II- TENDER SUBMISSION FORM

Ref:

Contract title:

1 SUBMITTED by (i.e. the identity of the Tenderer)

	Name(s) and address(es) of legal entity or entities submitting this tender	Nationality ⁱ
Leader ⁱⁱ		
Member ²		
Etc ...		

2 CONTACT PERSON (for this tender)

Name	
Organisation	
Address	
Telephone	
Fax	
E-mail	

3 STATEMENT

I, the undersigned, being the authorised signatory of the above tenderer, hereby declare that I have examined and accept without reserve or restriction the entire contents of the Request for Proposal for the tender procedure referred to above.

I am fully aware that, in the case of a consortium(for e.g. a group of individuals), the composition of the consortium cannot be modified in the course of the tender procedure, unless prior approval is given in writing. I am also aware that the consortium members would have joint and several liability towards CARICOM concerning participation in both the above tender procedure and any contract awarded to me as a result of it.

Signed on behalf of the tenderer

Name	
------	--

Signature	
Date	

ANNEX III - ORGANISATION & METHODOLOGY

To be completed by the tenderer

Please provide the following information:

Rationale

- Any comments you have on the Terms of Reference for the successful execution of activities, in particular regarding the objectives and expected results, thus demonstrating the degree of understanding of the contract. Your opinion on the key issues related to the achievement of the contract objectives and expected results.
- An explanation of the risks and assumptions affecting the execution of the contract.

Strategy

- An outline of the approach proposed for contract implementation.
- A list of the proposed tasks you consider necessary to achieve the contract objectives.
- Inputs and outputs.

Involvement of all members of the team

- If a tender is submitted by a consortium, a description of the input from each member of the consortium and the distribution and interaction of tasks and responsibilities between them. Furthermore, the involvement of all members of the consortium will be considered added value in the tender evaluation. If the tender is submitted by a single company, the total of available points for this part in the evaluation grid will be allocated.

Timetable of work

- The timing, sequence and duration of the proposed tasks, taking into account travel time.
- The identification and timing of major milestones in executing the contract, including an indication of how the achievement of these would be reflected in any reports, particularly those stipulated in the Terms of Reference.

ANNEX IV- KEY EXPERTS

Name of expert	Proposed position	Years of experience	Age	Educational background	Specialist areas of knowledge	Experience in beneficiary country	Languages and degree of fluency (VG, G, W)

CURRICULUM VITAE

Proposed role in the project:

Family name:

First names:

Date of birth:

Nationality:

Civil status:

Education:

Institution (Date from - Date to)	Degree(s) or Diploma(s) obtained:

Language skills: Indicate competence on a scale of 1 to 5 (1 - excellent; 5 - basic)

Language	Reading	Speaking	Writing

Membership of professional bodies:

Other skills: (e.g. Computer literacy, etc.)

Present position:

Years within the firm:

Key qualifications: (Relevant to the project)

Specific experience in the region:

Country	Date from - Date to

Professional experience

Date from - Date to	Location	Company & reference person ¹ (name & contact details)	Position	Description

Other relevant information (e.g., Publications)

¹ The Caribbean Community reserves the right to contact the reference persons. If you can not provide a reference, please provide a justification.

ANNEX V: BUDGET

Global price:< currency> <amount>

Please include a price breakdown based on the outputs/deliverables in the Terms of Reference.

ⁱ Country in which the legal entity is registered.

ⁱⁱ Add / delete additional lines for consortium members as appropriate. If this application is being submitted by an individual legal entity, the name of that legal entity should be entered as 'Leader' (and all other lines should be deleted).