

**Open Call for Consulting Services
Tourism and Travel Industry Assessment:
Diagnostic and Future Prospects for the Western Balkan Region**

TERMS OF REFERENCE:	Conduct comprehensive assessment to support the national policies and recovery plans by economies during and post COVID19 pandemic crisis.
Title:	Western Balkans Six Tourism and Travel Industry Assessment: COVID 19 Diagnostic and The Future Prospects
RCC Department:	Programme Department Project: Triple P Tourism in SEE: Promotion, Policy and Pilots
Eligible:	Individual consultant/ respective consulting companies or individual consultants within bidding consortia
Reporting to:	RCC Secretariat
Duration:	16 July – 16 November 2020 Expected level of effort (LOE) is indicated in the text below, along with respective deliverables
Deadline for Application:	10 July 2020, at 16.00 CET
Reference number:	051-010
Price ceiling:	€ 25,000.00

1. GENERAL INTRODUCTION:

Regional Cooperation Council (RCC), through its Triple P Tourism project, is seeking to make a tourism diagnosis associated with the development and enhancement of regional and cross-border

tourism involving the 6 IPA II beneficiaries in the Western Balkans (WB6: Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia, Serbia).

The RCC's Triple P Tourism project (Promotion, Policy and Pilots) is a €5m, European Union funded initiative, which aims to improve the quality of the tourism offer in the WB6 by: creating joint offer/product(s) to foster regional integration in the tourism sector and its joint global promotion; diversifying the tourism offer of the region; alleviating policy barriers to development of tourism industry and easing of administrative procedures; improving the level of services related to tourism; and supporting small-scale infrastructure projects to support the development of the regional tourism offer/product. It is aligned with the aims of the South East Europe 2020 Strategy which has four interlinked development pillars: integrated growth; smart growth; sustainable growth; inclusive growth and; governance for growth (RCC, 2013).

2. BACKGROUND:

Tourism is a powerful driver of economic growth and job creation, particularly for emerging economies[†]. Worth US \$7 trillion and growing, tourism is the largest service sector in the world and accounts for 10.4 percent of global Gross Domestic Product (GDP). The predictions for tourism growth over the next 10 years, before the breakout of the COVID19, were of a continuous growth at the average rate of 3.8 percent per year. As an effective engine for employment generation, the sector supported 313 million people worldwide, or one in ten jobs.

In the Western Balkan region, the tourism contribution accounted for 10.2 %[‡] of regional GDP (almost at global average), with Montenegro and Albania leading the region with, respectively, 32.1% at 21.2% of total GDP for their economies. The sector supported around 0,6 million people regionally or one in ten jobs. Again the contribution is higher in Montenegro and Albania with respectively 3 in 10 jobs in Montenegro and 2 in 10 jobs in Albania. Other economies reported lower rates both in GDP contribution and in employment[§]. .

Growth in tourist international arrivals continued to outpace the Western Balkan overall economy, defining tourism sector as a critical driver for the social and economic development of the region. Montenegro^{**} registered 21% growth of international tourist arrivals through November 2019, benefitting from increased tourism investments. Bosnia and Herzegovina

* *"This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence"*

[†] United Nations World Tourism Organization (UNWTO). (Tourism Report 2017)

[‡] World Travel and Tourism Council (WTTC)

[§] T&T to GDP: (WTTC): Albania 21.2%, Bosnia and Herzegovina 9.2%, Montenegro 32.1%, North Macedonia 6.2%, Serbia 5.9%; Kosovo 1.6% ^{Kosovo* Institute for Statistics}; T&T to employment (WTTC): Albania 22.2%, Bosnia and Herzegovina 9.6%, Montenegro 32.8%, North Macedonia 6.6%, and Serbia 6.2%; Kosovo* Institute for Statistics – Kosovo* 6.9%

^{**} United Nations World Tourism Organization (UNWTO) Tourism Barometer January 2020

recorded double-digit growth for 2019. Albania and North Macedonia also saw increases in arrivals, as well as Serbia which has become a fast growing destination for Chinese travellers thanks to visa-free policy (UNWTO World Tourism Barometer January 2020).

Looking into the future – all of the WB6 economies have recognized sustainability as the prerequisite for tourism development. In most economies, valorisation of cultural and natural assets has been proposed as the main approach to tourism development, some of the economies have further recognised the tourism value through its inclusion in the Government development strategies.

This positive outlook for the T&T industry in the Western Balkans has, same as with the T&T industry worldwide, been interrupted by the outbreak of the COVID19 pandemics. The pandemic has caused complete standstill to travel and tourism activities globally. The UNWTO (United Nations World Tourism Organisation) and WTTC (World Travel and Tourism Council) in April 2020 predicted that the drop in international tourism arrivals for 2020 might be as high as 30%, and the latest messages from these world tourism authorities indicate that it might be even higher. A drop of 25%, reflected in the number of jobs means 12-14% jobs lost worldwide (WTTC). In international tourism receipts (exports) this would mean loss of US\$300-450 billion, almost one third of the US\$ 1.5 trillion generated in 2019. Taking into account past market trends, this would mean that between five and seven years' worth of growth will be lost to COVID-19.

It is clear that COVID19 and related border closures, restricted travel and transport, quarantines, trade and market disruptions have caused devastating social and economic disturbances in the Western Balkans too. Currently, no analysis or projections of the scope of the COVID19 impact exist for the WB tourism industry, although knowing the tourism contribution to GDP and employment, as well as taking into account the indirect effects of tourism this impact is expected to be significant.

To mitigate the negative impact this assignment aims to (i) assess the multiple impacts of COVID-19 on tourism industry as well as summarize the respective national actions and measures taken for coping with the crisis and for mitigating their effects in the immediate and mid to long-term, and (ii) to propose respective strategic approaches and policies, as well as joint regional actions that would stimulate accelerated recovery and facilitate building resilience for future disturbing events.

The major outcomes of the assignment are:

- summary the issues and consequences of COVID19 pandemic for tourism industry in the Western Balkans, organised by economy and region overall;
- summary of policy measures taken and their effects, organised by economy;

- recommendation for overcoming the negative impact of COVID19 in the Western Balkans, through regional cooperation.

II. DESCRIPTION OF RESPONSIBILITIES

Objectives and scope of the assignment:

The tourism industry in the Western Balkan region is, same as tourism and travel worldwide, under enormous strain caused by the COVID19 pandemics and is expected to undergo significant changes driven by the new normal that is still to be clearly defined. The Western Balkans Six Tourism and Travel Industry Assessment: COVID 19 Diagnostic and The Future Prospects study is to assist the RCC - Triple P Project to identify the impact the COVID19 crisis has had on the Western Balkans tourism industry and recommend policies and strategies to guide industry recovery and increase its resilience in case of crisis in the future. The report is to provide a holistic approach to the measures recommended in order to support competitive, sustainable, and inclusive destination(s) that will aid the six economies to achieve their development objectives.

For this purpose, a consultancy will be engaged to provide a clear, evidence-based assessment of the COVID19 impact, and recommend policies and strategies that will guide industry recovery as well as increase its resilience in future cases of natural or economic crisis. This assignment targets six Western Balkan.

Specific Tasks:

The Assessment Study will:

- **Assess the impact the COVID19 pandemics** has had on the Western Balkans tourism industry, including but not limited to the adventure travel and cultural tourism segments, as well as the ways in which local communities, good-neighbourly relations and social cohesion may have been affected. The full assignment is to include two tiered data collection. Stage one will include full assessment of the COVID19 impact and recommendations for mitigation measures. The second stage of data collection will happen at end of the assignment period and will include indicative data as defined by the agreed methodology;
- Identify, review and provide an overview of the strategies, policies and actions implemented by the economies, and consequently **define recommendations for key policies** needed to mitigate negative impacts (i.e. financial stimuli, public investment, promotion of new jobs and skills development, mainstreaming sustainability) and adjust the industry approach to respond to current challenges in regard to markets and trends (i.e. digitalisation). The recommendations proposed need to incorporate solutions that support

inclusion of youth in the tourism supply chain (i.e. supply-chain linkages, skills development, adoption of new technologies) and ensure **gender equality**;

- Propose **crisis management mechanisms** and **resilience strategies** to be developed through regional protocols and unified responses;
- Incorporating pre-COVID19 assessment and strategies developed by Triple P Tourism project, define the **competitive positions** of the Western Balkan 6 economies, recognise barriers to growth; and identify new opportunities to strengthen product offerings and re-establish sustainable growth;
- Identify the top five **market opportunities**, appraising destination image (traveller confidence), business investment opportunities and business readiness for market exposure;
- Define measurable indicators for recommended actions and, through above assessment, collect baseline data.

Specific Tasks

The services under this assignment will require tourism diagnostic as well as information dissemination to national stakeholders and other interested parties. Specifically the Consultant is required to carry out the following key tasks:

- Inclusion and collaboration with the Tourism Expert Group members composed of line ministries, national promotion boards, private and civil sector (associations, unions and chambers) as well as other interested national public institutions, national agencies and private sector;
- Data collection through mixed methodology approach including desk and field research, data collection through surveys and key stakeholder interviews;
- Data analysis and interpretation of results
- Report preparation including the summary version of the full report
- Information dissemination including presentation of present research findings to TEG members to be organized in conjunction with the RCC Triple P
- Propose approaches for communication and dissemination of the research findings to national stakeholders and other interested parties.

Special consideration: The data collected in the WB region to be disaggregated by sex on employment in the tourism sector and, where possible, formal and informal tourism employment, gender pay gaps, entrepreneurship, situation on education and training, leadership and decision-making, time use and work-life balance;

Deliverables

The following deliverables will be produced and transferred to the RCC Triple P Tourism project during the course of the assignment, in the following timeline:

Deliverable	Deadline	Expected Level of Effort (LOE)
Initiation meeting	16 July	1 day
Methodology and work plan	23 July	5 days
Stage 1 first interim report to include full findings for the initial assessment	20 August	19 days
Stage 1 second interim report to include full recommendations for actions to mitigate impact and guide future development, including comments provided by RCC Triple P Tourism in SEE and covering all aspects defined in this Terms of Reference	2 September	6 days
Stage 2 interim report including key data collected at the end of the season and reflecting the 2020 summer season information (data collection as per agreed methodology).	10 November	10 days
Final activity report incorporating all comments provided by the RCC Triple P Tourism in SEE and reflecting the full length of the activities as per the defined in this Terms of Reference	16 November	3 days

Reference documents:

- Western Balkans Tourism Policy Assessment and Recommendations
- Western Balkans Crossroads of Civilisations Concept and list of locations
- Illyricum Trail of the Roman Emperors and Danube Wine Route Concept and list of locations
- Balkan Monumental Trail Concept and list of locations
- Via Dinarica Concept

Methodology

The Consultant is expected to propose the best methodological approach for undertaking this task. However, the following guiding principles should be taken into consideration:

- i. Desk research of primary and secondary information;
- ii. Communication with private sector, academia, CSOs, etc and relevant regional and international organizations;
- iii. Any other methods applicable.

Lines of Communication

The Consultant/s will work in close coordination and under guidance of the staff of RCC Triple P Tourism in SEE project and RCC Secretariat. Each deliverable will be sent within the set deadlines. RCC Triple P Tourism in SEE project will conduct a quality assessment and approval of each deliverable.

Timeframe

The engagement is expected to start on 16 July 2020 and end on 16 November 2020.

III. COMPETENCES

Lines of communication

The consultants will report to the RCC TripleP Tourism in SEE project and the RCC Secretariat. After completion of activities as defined in the timeframe for the deliverables under this Terms of Reference, a detailed report will be prepared and sent to the Triple P Tourism in SEE project for review and approval.

Education and Experience

The Consultant shall provide CV's of the team members. The key professional staff and relevant requirements regarding work experience and skills are provided below:

Relevant expertise and qualifications for key staff:

Team Leader/ Economist

Education:	<ul style="list-style-type: none">▪ Degree in tourism management, economics, business administration, management studies or other area directly related to the economic analysis and the subject of work;
-------------------	---

Experience:	<ul style="list-style-type: none"> ▪ Minimum of 10 years of relevant experience in strategy development, policy analysis, etc. ▪ Minimum of 7 years of research experience with emphasis on tourism policy and development, as well as experience in statistical analysis ▪ Experience in working with government institutions on developing strategic frameworks, strategies, programmes dedicated to economic policies, in particular; ▪ Proven analytical skills and ability to conceptualise and write concisely and clearly; <ul style="list-style-type: none"> • In depth and current knowledge of Western Balkan's tourism sector and tourism value chain analysis and development including in-depth understanding of procurement practices within the industry ▪ Demonstrable experience in writing and reporting on complex multi-sector development and implementation per economy and at the regional level; ▪ Proven communication and presentation skills and ability to work in an environment requiring liaison and collaboration with multiple actors including government representatives, businesses, civil society institutions, donors and other stakeholders.
Language requirements:	<ul style="list-style-type: none"> ▪ Fluency in written and spoken English, as the official language of the RCC; ▪ Knowledge of other RCC languages is an advantage.
Other:	<ul style="list-style-type: none"> ▪ N.A.

Core Values

- Demonstrates integrity and fairness by modelling RCC values and ethical standards;
- Displays cultural, gender, religion, race, nationality and age sensitivity and adaptability.

Core Competencies

- Possesses strategic vision, understanding of fundamental concepts and principles of a professional discipline or technical specialty;

- Demonstrates professional competence to meet responsibilities and post requirements and is conscientious and efficient in meeting commitments, observing deadlines and achieving results;
- Strong analytical capabilities and writing skills;
- Result-oriented; plans and produces quality results to meet the set goals, generates innovative and practical solutions to challenging situations;
- Communication: Excellent communication skills, including the ability to convey complex concepts and recommendations clearly;
- Team work: Ability to interact, establish and maintain effective working relations in a culturally diverse team and with a multitude of diverse stakeholders; flexibility to change and openness to receiving/integrating feedback;
- Ability to establish and maintain productive partnerships with regional and national partners and stakeholders.

IV. QUALITY CONTROL

The Consultant should ensure internal quality control during the implementing and reporting phase of the assignment. The quality control should ensure that the draft reports comply with the above requirements and meet adequate quality standards before sending them to stakeholders for comments. The quality control should ensure consistency and coherence between findings, conclusions and recommendations. It should also ensure that findings reported are duly substantiated and that conclusions are supported by relevant judgment criteria.

The views expressed in the report will be those of the expert and will not necessarily reflect those of the Regional Cooperation Council. Therefore, a standard disclaimer reflecting this will be included in the report. In this regard, the Consultant may or may not accept comments and/or proposals for changes received during the above consultation process. However, when comments/proposals for changes are not agreed by the expert, he/she should clearly explain the reasons for his/her final decision in a comments table.

V. APPLICATION RULES

The application needs to contain the following:

For individual consultants:

- Letter of Interest specifying the Consultancy under which the application is made (max one A4 page);
- CV including relevant knowledge and experience;

- An action plan, up to 2 pages, indicating the individual tasks to be undertaken against a timeframe;
- A concept note, up to 5 pages, elaborating proposed methodology for addressing and undertaking individual consultancy tasks; an additional page can be included, where relevant, indicating key stakeholders to be included in the proposed approach;
- Reference list including contact details (e-mail addresses) of at least 3 referees;
- Application Submission Form, Annex 1
- Financial offer, Annex 2

For companies and consortia:

- Company profile including a brief description (up to 2 pages) of the company. In case of a bidding consortium, the team leader should submit the profile of the consortium;
- Copy of Company's Registration Certificate (in case of consulting companies). In case of a bidding consortium a corresponding written authorisation, power of attorney is accordingly treated;
- Financial records - company's balance sheet and profit-and-loss statement for the past 2 years (only in case of a bidding of consulting companies);
- CV(s) of expert(s), outlining relevant knowledge and experience as described in Annex I Terms of References, along with contact details of referees;
- An action plan, up to 2 pages, indicating the individual tasks to be undertaken against a timeframe;
- A concept note, up to 5 pages, elaborating proposed methodology for addressing and undertaking individual consultancy tasks; an additional page can be included, where relevant, indicating key stakeholders to be included in the proposed approach;
- List of references for relevant activities implemented over the past 5 years demonstrating relevant experience in the subject matter;
- Service Tender Submission Form (Annex I);
- Financial offer, as per Budget Breakdown (Annex II);
- Signed Statements of Availability (Annex III).

When preparing the financial offer, the applicant should take into account the following:

- The proposed budget should be stated as a lump sum and broken down by key tasks;
- Costs of travel within the WB6, if planned and proposed, should be budgeted and borne by the consultant;
- The fee rates should be broadly consistent with the EU framework rates for these types of professional services for international and national consultants;
- VAT amount, if any, needs to be clearly identifiable.

Applications need to be submitted via e-mail to ProcurementforRcc@rcc.int by 10 July 2020, 16.00 CET.

When applying, please identify your submission as response to this call by naming the subject line of your message as: Open Call for Consulting Services -Western Balkans Six Tourism and Travel Industry Assessment: COVID 19 Diagnostic and The Future Prospects
RCC Triple P Tourism – 051-020 (stating the number and title of the consultancy you are applying for).

Please make sure that the application is submitted in two separate folders one containing Technical Offer and the other Financial Offer. The documents should be submitted in a form of copies of the originals.

VI. EVALUATION AND SELECTION

The assignments will be awarded to the highest qualified applicant based on the skills, expertise, and the quality of the concept note(s) and the cost-effectiveness of the financial offer.

Applications will be evaluated on the basis of the profile and competencies of the candidate and the responsiveness to the terms of reference of Consulting Services.

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

The applications are evaluated following these criteria:

EVALUATION GRID	Maximum Score
A. Technical Offer (A.1+A.2+A.3)	100
A.1. Work experience, references list: Relevant work experience; evidence of other contracts of the nature comparable to that of the Call; experience with clients comparable to the Contracting Authority.	35
A.2. Quality and professional capacity of the consultants: CVs satisfy the criteria set forth in the ToRs, education and experience demonstrates professional capacity and experience required.	35
A.3 Quality of the concept note and Action Plan: Relevance and applicability within the WB6 regional framework; Methodologically sound concept/ plan, achievable within the defined time frame	30
B. Financial Proposal/ lowest price has maximum score	100

--	--

Score for offer X =

A: [Total quality score (out of 100) of offer X / 100] * 80

B: [Lowest price / price of offer X] * 20

In addition to the results of the technical and financial evaluation, competency-based interview may be held with the selected bidder.

Only shortlisted candidates will be contacted for the competency based interview.

Information on selection of the most favourable bidder

The RCC Secretariat shall inform candidates and bidders of decisions reached concerning the award of the contract as soon as possible, including the grounds for any decision not to award a contract for which there has been competitive tendering or to recommence the procedure.

Standard letter of thanks for participation to unsuccessful bidders shall be sent within 15 days after the contract is signed with the awarded bidder.

The candidates and bidders wishing to receive a feedback may send a request within 15 days after receipt of the standard letter of thanks.

The request may be sent to the e-mail address ProcurementforRcc@rcc.int or to the address of the RCC Secretariat:

Regional Cooperation Council Secretariat
 Attention to: Administration Department
 Building of the Friendship between Greece and Bosnia and Herzegovina
 Trg Bosne i Hercegovine 1/V
 71000 Sarajevo
 Bosnia and Herzegovina

Appeals procedure

Bidders believing that they have been harmed by an error or irregularity during the award process may petition the RCC Secretariat directly. The RCC Secretariat must reply within 15 days of receipt of the complaint.

The appeal request may be sent to the e-mail address ProcurementforRcc@rcc.int or to the address of the RCC Secretariat:

Regional Cooperation Council Secretariat
 Attention to: Administration Department
 Building of the Friendship between Greece and Bosnia and Herzegovina
 Trg Bosne i Hercegovine 1/V
 71000 Sarajevo
 Bosnia and Herzegovina

ANNEX I:**APPLICATION SUBMISSION FORM****REF: 051-020****Western Balkans Six Tourism and Travel Industry Assessment: COVID-19 Diagnostic and Future Prospects**

One signed copy of this Call for Consultancy Submission Form must be supplied.

1 SUBMITTED by:

	Name(s) and address(es) of the Entity submitting this Application
Full Name of the Entity	

2 CONTACT PERSON

Name	
Address	
Telephone	
Fax	
e-mail	

3 STATEMENT

[Name of the Authorised person representing the Entity] _____ hereby declares that we have examined and accepted without reserve or restriction the entire contents of the Open Call for Experts, Grounds for Exclusions and Conflict of Interest as such:

Grounds for exclusion

Candidates or bidders will be excluded from participation in a procurement procedure if it is known that:

- (a) They are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- (b) They have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;
- (c) They have been guilty of grave professional misconduct proven by any means which the Contracting Officer can justify;
- (d) They have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the Contracting Officer or those of the country where the contract is to be performed;
- (e) They have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity.

Contracts may not be awarded to candidates or bidders who, during the procurement procedure, are:

- (a) Subject to a conflict of interest;
- (b) Guilty of misrepresentation in supplying the information required by the Contracting Officer as a condition of participation in the contract procedure or fail to supply this information.

Conflict of Interest

- a) The Contractor shall take all necessary measures to prevent or end any situation that could compromise the impartial and objective performance of the contract. Such conflict of interests could arise in particular as a result of economic interest, political or national affinity, family or emotional ties, or any other relevant connection or shared interest. Any conflict of interests which could arise during performance of the contract must be notified in writing to the Contracting Authority without delay.
- b) The Contracting Authority reserves the right to verify that such measures are adequate and may require additional measures to be taken if necessary. The Consultant shall ensure that their staffs, including its management, are not placed in a situation which could give rise to conflict of interests. The Consultant shall replace, immediately and without compensation from the Contracting Authority, any member of its staff exposed to such a situation.
- c) The Contractor shall refrain from any contact which would compromise its independence or that of its personnel. If the Contractor fails to maintain such independence, the Contracting Authority

may, without prejudice to compensation for any damage which it may have suffered on this account, terminate the contract forthwith.

- d) The Contractor shall, after the conclusion or termination of the contract, limit its role in connection with the project to the provision of the services. Except with the written permission of the Contracting Authority, the Contractor and any other contractor or supplier with whom the Contractor is associated or affiliated shall be disqualified from the execution of works, supplies or other services for the project in any capacity, including tendering for any part of the project.
- e) Civil servants and other agents of the public administration of the RCC Participants, regardless of their administrative situation, shall not be recruited as experts in contracts financed by the RCC Secretariat.
- f) The Contractor and anyone working under its authority or control in the performance of the contract or on any other activity shall be excluded from access to RCC Secretariat financing available under the same project unless they can prove to the Contracting Authority that the involvement in previous stages of the project does not constitute unfair competition.

We offer to provide the services requested in the Terms of Reference on the basis of supplied documentation subject to this Open Call for Consultancy Services, which comprise our technical offer, and our financial offer.

This Open Call for Consultancy Services is subject to acceptance within the validity period stipulated in the Terms of Reference.

Name	
Signature	
Date	

ANNEX II: BUDGET BREAKDOWN

REF: 051-020

No	Cost categories	Unit	Total Cost
2	TOTAL COSTS		

ANNEX III: STATEMENT OF AND AVAILABILITY

REF: 051-020

By representing the Entity_____ we agree to participate in the above-mentioned tender procedure. We further declare that we are able and willing to work for the period(s) foreseen for the position for which our CVs have been included in the event that this tender is successful, namely:

[illegible]