

# ANNEX A: TERMS OF REFERENCE

as of 11 April 2023

**I. PROJECT :** SERVICES OF A MARKETING AGENCY TO PROVIDE A TOURISM PROMOTIONS BOARD (TPB) MARKETING COORDINATOR FOR MALAYSIA AND SINGAPORE

**II. DURATION :** 8 months (Start of Services upon issuance of Notice to Proceed)

## **III. BACKGROUND**

As stated in Rule III, Chapter IV, Section 46 of the Implementing Rules and Regulations of R.A. 9593, otherwise known as the Tourism Act of 2009, 'As may be necessary, the Tourism Board shall determine and authorize the designation and assignment of marketing coordinators in the Department's foreign and regional offices to coordinate and implement the international and domestic tourism promotions programs.' In view of the above, the TPB would like to hire a Marketing Coordinator each for the Malaysia and Singapore markets for the implementation of the Work Program for 2023. The absence of a Marketing Coordinator in these markets is a challenge for TPB in implementing the work program, given the execution and executional timelines of projects.

This procurement activity aims to engage the services of a Consultant for the lots identified below:

**LOT 1: CONSULTING SERVICES FOR A MARKETING COMPANY TO PROVIDE A TOURISM PROMOTIONS BOARD (TPB) MARKETING COORDINATOR IN MALAYSIA**

**LOT 2: CONSULTING SERVICES FOR A MARKETING COMPANY TO PROVIDE A TOURISM PROMOTIONS BOARD (TPB) MARKETING COORDINATOR IN SINGAPORE**

## **IV. OBJECTIVES**

- To assist TPB in implementing the Work Program of Malaysia and Singapore for 2023;
- To support TPB in facilitating marketing and promotional projects in identified markets;
- To provide assistance in coordinating with Malaysian and Singaporean MICE & leisure, travel trade, and media counterparts;
- To support TPB in attracting tourists that are high-spending, long-staying, and looking for the optimal experience; and
- To positively highlight the Philippines as a travel destination for MICE and leisure.

## **V. ELIGIBILITY REQUIREMENTS**

1. Proof of membership in an international/local tourism association/organization for at least three (3) years; and
2. Must be a duly registered company in the Philippines or Malaysia or Singapore. Must be in operation for the last three years.

## VI. TECHNICAL REQUIREMENTS

The Marketing Company to provide a Tourism Promotions Board (TPB) Marketing Coordinator in Malaysia and Singapore must have the following qualifications:

A marketing company doing marketing functions including market intelligence and competitor analysis for the past 3 years;

B. Marketing Director work experience in the travel trade industry or in an NTO other than the Philippines is an advantage and Marketing Assistant must have relevant experience in marketing and/or tourism for at least two (2) years.

*Note: The winning bidder must be able to submit the **Securities and Exchange Commission (SEC) Registration Certificate ten (10) calendar days upon the receipt of the Notice of Award (NOA)**;*

### C. Key Personnel

#### 1. Marketing Director

- a. Bachelor's degree/college graduate. Master's degree is an advantage;
- b. Citizen or permanent resident or a legal immigrant of the country they are bidding for and must have resided in the said country for a minimum of three (3) years prior to his/her hiring;
- c. Proficient in written and spoken English and the major local language;
- d. Must have participated in at least five (5) international tourism events;
- e. With at least 3 years of relevant work experience in the travel and tourism industry particularly in destination management and marketing;

#### 2. Marketing Assistants (at least 2)

- a. Bachelor's degree (Tourism or Marketing degree)/college graduate;
- b. Citizen or permanent resident or a legal immigrant of the country they are bidding for and must have resided in the said country for a minimum of three (3) years prior to his/her hiring;
- c. Proficient in written and spoken English and the major local language;

## VII. SCOPE OF WORK

- A. Facilitate/implement PR and publicity, including media monitoring programs.
- B. Ensure publication of articles about Philippine tourism at least 2 per month and plus 2 (pre and post) more articles during months with PAPs implemented in the market
- C. Implement travel trade & MICE marketing activities/events and consumer promotion and activations for the TPB's Work Program for the markets.

1. Philippine tourism seminars such as workshops on new developments and on investment opportunities, Philippine specialist programs, online/web-based workshops;
  2. Travel trade, media and key opinion leaders/influencers, & MICE fair(s) participation and travel exhibitions that would provide increased exposure of the Philippines in the market to include other travel trade-related events like one-on-one business meetings/travel exchange with travel stakeholders (whether physical, virtual, or hybrid);
  3. Tactical Digital Marketing Campaign which includes, but is not limited to, online ads and social media marketing;
  4. Sales calls and sales presentations to tour operators, travel agencies (and front liners), general travel trade, corporate, associations, and other travel industry partners for the production of more tour packages to the country or to generate more sales of tour packages and/or increase market knowledge and equip sales people with in-depth know-how of the destinations (as allowed by the market's local government COVID-guidelines);
  5. Joint-promotional activities with the private sector on destination presentations, front-liner/sales team workshops, consumer activities, etc;
  6. PR and publicity activities as well as media monitoring reports;
  7. New marketing initiatives to be implemented by TPB; and
    - . Creation of a database of travel trade, media, and other relevant/significant companies, agencies, personalities, etc.
- D. Facilitate/implement projects by securing proposals/quotations from and advancing payments to suppliers, to be claimed as reimbursement to the TPB, subject to submission of supporting documents (e.g. official receipts, invoices, price quotations from suppliers, etc.);
- E. Provide monthly market research and intelligence reports that include competitor analysis and benchmarking.
1. Report on significant and current data to generate useful information to help in decision-making to include up-to-date market database of travel trade and MICE contacts;
  2. Report on current tourism trends as well as economic trends that may affect travel industry in general as well as travel patterns and decision to travel;
  3. Market research that includes competitor analysis and benchmarking;
  4. Tourism investment opportunity activities to include participating in activities/tie-ups with other government agencies and private sector.
    1. Submission of monthly reports (format to be prescribed by the TPB) to include:
      1. Analysis of effectiveness of activities conducted/engaged during the said month;
      1. Market Research, Market Intelligence and Travel Trade Activities and News;
      1. Sales leads and contact reports;

1. Press Releases and media/news monitoring reports;
  1. Other significant reports requested by DOT/TPB (if any);
  5. Targets and Terminal or Accomplishment Report/s for marketing projects and activities implemented during the said month (if any); and
  6. Market website and social media engagement.
- F. Other marketing services that may be required by the TPB as mutually agreed with the Consultant.

## **VIII. DELIVERABLES**

1. Market development strategy and action plan to include:
  - a. Annual market development plan;
  - b. Financial plan;
  - c. Media plan; and
  - d. Crisis management and other contingency plans.
2. Facilitation and implementation of the Travel Trade & MICE marketing activities and events (whether physical, virtual, or hybrid) of the 2023 Work Program for Malaysia and Singapore to include but not limited to:
  - a. Philippine tourism seminars such as workshops on new developments and investment opportunities, Philippine specialist programs, and online/web-based workshops;
  - b. Travel trade, media, and key opinion leaders/influencers, & MICE fair(s) participation and travel exhibitions that would provide increased exposure of the Philippines in the market to include other travel trade-related events like one-on-one business meetings/travel exchange with travel stakeholders (whether physical, virtual, or hybrid);
  - c. Tactical Digital Marketing Campaign which includes, but is not limited to, online ads and social media marketing;
  - d. Sales calls and sales presentations to tour operators, travel agencies (and front liners), general travel trade, corporate, associations, and other travel industry partners for the production of more tour packages to the country or to generate more sales of tour packages and/or increase market knowledge and equip salespeople with in-depth know-how of the destinations (as allowed by the market's local government COVID-guidelines);
  - e. Joint-promotional activities with the private sector on destination presentations, front-liner/sales team workshops, consumer activities, etc;
  - f. PR and publicity activities as well as media monitoring reports;
  - g. New marketing initiatives to be implemented by TPB; and
  - h. Creation of databases of the travel trade, media, and other relevant/significant companies, agencies, personalities, etc. within Malaysia and Singapore.
3. Facilitation and implementation of Consumer Promotion and Activations to include:
  - a. Consumer fair(s) and other similar exhibits that would reach out to consumers and travelers;

- b. Consumer activation activities like in-store promotions and mall promotions, cross-promo activities or joint promo activities with consumer products directly or indirectly related to travel; and
  - c. Innovative consumer branding activities like in-cinema promotions and branding, movie premieres promo and branding, talent search events, and tie-ups with consumer products manufacturers/stores like apparel stores to incorporate/feature locally-made textiles and products, culinary, etc.
  - d. Familiarization trips for the travel trade and media sector, if applicable.
- 4. Provision of market research and intelligence data, to include but not limited to:
  - a. Report on significant and current data to generate useful information to help in decision-making including an up-to-date market database of the travel trade, media, and MICE contacts;
  - b. Report on current tourism trends as well as economic trends that may affect the travel industry in general as well as travel patterns and decisions to travel;
  - c. Market research that includes competitor analysis and benchmarking;
  - d. Tourism investment opportunity activities include participating in activities/tie-ups with other government agencies and the private sector.
- 5. Submission of accomplishment reports per project (format to be prescribed by the TPB) to include:
  - a. Identified Estimated Economic Impact (Projected Return on Marketing Investment (ROMI)) measurement system for activities conducted/engaged during the said month;
  - b. Analysis of the effectiveness of activities conducted/engaged for the said project;
  - c. Market Research, Market Intelligence, and Travel Trade Activities, and News;
  - d. Sales leads and contact reports;
  - e. Press Releases and media/news monitoring reports;
  - f. Other significant reports requested by DOT/TPB (if any);
  - g. Targets and Terminal or Accomplishment Report/s for marketing projects and activities implemented during the said month (if any); and
  - h. Market website and social media engagement.
- 6. Identification of new activities aside from those already mentioned above, and development of new market segments that would be effective in raising awareness about the Philippines in the ~~Malaysian and/or Singaporean~~ market they are bidding for
- 7. Other activities that may be prescribed by the TPB.
- 8. Securing and facilitation of necessary documents that pertain to the implementation of the abovementioned activities and events such as:
  - a. Quotations and Proposals from pertinent suppliers;
  - b. Liquidation Report from and advancing payments to suppliers, to be claimed as reimbursement to the TPB, subject to submission of supporting documents (e.g. official receipts, invoices, price quotations from suppliers, etc.);

9. All outputs/reports/plans/research shall be subject to the TPB's approval. The said documents shall become the properties of the TPB.

#### **IX. APPROVED BUDGET FOR THE CONTRACT (ABC)**

**Total budget for the contract is SEVEN MILLION TWO HUNDRED SEVENTY-TWO THOUSAND PESOS (PHP 7,272,000.00) inclusive of all applicable taxes broken down as follow:**

| <b>LOTS</b>  | <b>PARTICULARS</b>   | <b>ABC</b>              |
|--------------|--|-------------------------|
| <b>1</b>     | CONSULTING SERVICES FOR A MARKETING COMPANY TO PROVIDE A TOURISM PROMOTIONS BOARD (TPB) MARKETING COORDINATOR IN MALAYSIA  | <b>PHP3,746,000.00,</b> |
| <b>2</b>     | CONSULTING SERVICES FOR A MARKETING COMPANY TO PROVIDE A TOURISM PROMOTIONS BOARD (TPB) MARKETING COORDINATOR IN SINGAPORE | <b>PHP3,526,000.00</b>  |
| <b>Total</b> |  | <b>PHP7,272,000.00</b>  |

#### **X. TERMS OF PAYMENT**

1. Payments shall be made upon complete delivery of all services specified in the schedule of payment by the Marketing Agency of the services procured.
2. Processing of payment shall be initiated upon the submission by the Marketing Agency of duplicate, itemized billing statements based on the actual services rendered accompanied by copies of received invoices, vouchers, and other appropriate supporting materials, of the amounts payable as remuneration and reimbursement. The billing statement shall distinguish that portion of the total eligible costs which pertains to remuneration from that portion which pertains to reimbursable expenditures.
3. Insofar as practicable; payment shall be subject to the General and Special Conditions of the Contract and shall be made in accordance with prevailing accounting and auditing rules and regulations.
4. Payment schedule is on a per-tranche basis, and will be settled upon submission of the following deliverables/milestones:

| <b>DELIVERABLES/MILESTONES</b>  | <b>PAYMENT TERMS</b>     |
|---|--------------------------|
| <b>1st Month</b><br>Deliverables / Milestones:<br>1. Market Strategy and Action Plan based on the 2023 Work Program<br>2. Market Research/Outlook, Market Intelligence, and Travel Trade/Consumer Activities news | <b>1st Tranche: 10 %</b> |

|   |                          |
|---|--------------------------|
| <ul style="list-style-type: none"> <li>3. Sales leads and contact reports</li> <li>4. Press Releases and media/news monitoring reports</li> <li>5. Identified Return on Marketing Investment (ROMI) measurement system for activities conducted/engaged during the said month</li> <li>6. Analysis of the effectiveness of activities conducted/engaged during the said month</li> <li>7. Other significant reports requested by DOT/TPB (if any)</li> <li>8. Terminal or Accomplishment Report/s for marketing projects and activities implemented (if any)</li> </ul>   |                          |
| <p style="text-align: center;"><b>2nd Month</b></p> <p>Deliverables / Milestones:</p> <ul style="list-style-type: none"> <li>1. Market Research/Outlook, Market Intelligence, and Travel Trade/Consumer Activities news</li> <li>2. Sales leads and contact reports</li> <li>3. Press Releases and media/news monitoring reports</li> <li>4. Identified Return on Marketing Investment (ROMI) measurement system for activities conducted/engaged during the said month</li> <li>5. Analysis of the effectiveness of activities conducted/engaged during the said month</li> <li>6. Recommend and/or monitor tactical marketing activities (if any)</li> <li>7. Other significant reports requested by DOT/TPB (if any)</li> <li>8. Terminal or Accomplishment Report/s for marketing projects and activities implemented (if any)</li> </ul> | <b>2nd Tranche: 10 %</b> |
| <p style="text-align: center;"><b>3rd Month</b></p> <p>Deliverables / Milestones:</p> <ul style="list-style-type: none"> <li>1. Market Research/Outlook, Market Intelligence, and Travel Trade/Consumer Activities news</li> <li>2. Sales leads and contact reports</li> <li>3. Press Releases and media/news monitoring reports</li> <li>4. Identified Return on Marketing Investment (ROMI) measurement system for activities conducted/engaged during the said month</li> <li>5. Analysis of the effectiveness of activities conducted/engaged during the said month</li> <li>6. Recommend and/or monitor tactical marketing activities (if any)</li> <li>7. Other significant reports requested by DOT/TPB (if any)</li> <li>8. Terminal or Accomplishment Report/s for marketing projects and activities implemented (if any)</li> </ul> | <b>3rd Tranche: 10 %</b> |
| <p style="text-align: center;"><b>4th Month</b></p> <p>Deliverables / Milestones:</p>   | <b>4th Tranche: 10 %</b> |

|   |                          |
|---|--------------------------|
| <ol style="list-style-type: none"> <li>1. Market Research/Outlook, Market Intelligence, and Travel Trade/Consumer Activities news</li> <li>2. Sales leads and contact reports</li> <li>3. Press Releases and media/news monitoring reports</li> <li>4. Identified Return on Marketing Investment (ROMI) measurement system for activities conducted/engaged during the said month</li> <li>5. Analysis of the effectiveness of activities conducted/engaged during the said month</li> <li>6. Recommend and/or monitor tactical marketing activities (if any)</li> <li>7. Other significant reports requested by DOT/TPB (if any)</li> <li>8. Terminal or Accomplishment Report/s for marketing projects and activities implemented (if any)</li> </ol>   |                          |
| <p style="text-align: center;"><b>5th Month</b></p> <p>Deliverables / Milestones:</p> <ol style="list-style-type: none"> <li>1. Market Research/Outlook, Market Intelligence, and Travel Trade/Consumer Activities news</li> <li>2. Sales leads and contact reports</li> <li>3. Press Releases and media/news monitoring reports</li> <li>4. Identified Return on Marketing Investment (ROMI) measurement system for activities conducted/engaged during the said month</li> <li>5. Analysis of the effectiveness of activities conducted/engaged during the said month</li> <li>6. Recommend and/or monitor tactical marketing activities (if any)</li> <li>7. Other significant reports requested by DOT/TPB (if any)</li> <li>8. Terminal or Accomplishment Report/s for marketing projects and activities implemented (if any)</li> </ol> | <b>5th Tranche: 10 %</b> |
| <p style="text-align: center;"><b>6th Month</b></p> <p>Deliverables / Milestones:</p> <ol style="list-style-type: none"> <li>1. Market Research/Outlook, Market Intelligence, and Travel Trade/Consumer Activities news</li> <li>2. Sales leads and contact reports</li> <li>3. Press Releases and media/news monitoring reports</li> <li>4. Identified Return on Marketing Investment (ROMI) measurement system for activities conducted/engaged during the said month</li> <li>5. Analysis of the effectiveness of activities conducted/engaged during the said month</li> <li>6. Recommend and/or monitor tactical marketing activities (if any)</li> <li>7. Other significant reports requested by DOT/TPB (if any)</li> </ol>  | <b>6th Tranche: 10 %</b> |



|   |                          |
|---|--------------------------|
| 8. Terminal or Accomplishment Report/s for marketing projects and activities implemented (if any)   |                          |
| <p style="text-align: center;"><b>7th Month</b></p> <p>Deliverables / Milestones:</p> <ol style="list-style-type: none"> <li>1. Market Research/Outlook, Market Intelligence, and Travel Trade/Consumer Activities news</li> <li>2. Sales leads and contact reports</li> <li>3. Press Releases and media/news monitoring reports</li> <li>4. Identified Return on Marketing Investment (ROMI) measurement system for activities conducted/engaged during the said month</li> <li>5. Analysis of the effectiveness of activities conducted/engaged during the said month</li> <li>6. Recommend and/or monitor tactical marketing activities (if any)</li> <li>7. Other significant reports requested by DOT/TPB (if any)</li> <li>8. Terminal or Accomplishment Report/s for marketing projects and activities implemented (if any)</li> </ol> | <b>7th Tranche: 10 %</b> |
| <p style="text-align: center;"><b>8th Month</b></p> <p>Deliverables / Milestones:</p> <ol style="list-style-type: none"> <li>1. Market Research/Outlook, Market Intelligence, and Travel Trade/Consumer Activities news</li> <li>2. Sales leads and contact reports</li> <li>3. Press Releases and media/news monitoring reports</li> <li>4. Identified Return on Marketing Investment (ROMI) measurement system for activities conducted/engaged during the said month</li> <li>5. Analysis of the effectiveness of activities conducted/engaged during the said month</li> <li>6. Recommend and/or monitor tactical marketing activities (if any)</li> <li>7. Other significant reports requested by DOT/TPB (if any)</li> <li>8. Terminal or Accomplishment Report/s for marketing projects and activities implemented (if any)</li> </ol> | <b>8th Tranche: 10 %</b> |
| <p><b>Final Payment upon submission of final reports/outputs</b></p> <p>*Provision of a 30 calendar day allowance to submit final reports/outputs</p>   | <b>Last Payment: 20%</b> |

## **XI. DURATION**

8 months upon acceptance of the supplier of the Notice to Proceed (NTP)

### **ELIGIBILITY CHECK AND SHORTLISTING CRITERIA AND RATING**

#### **TOURISM PROMOTIONS BOARD (TPB)**

**SERVICES OF A MARKETING AGENCY TO PROVIDE A TOURISM PROMOTIONS BOARD (TPB)  
MARKETING COORDINATOR FOR MALAYSIA AND SINGAPORE**

| <b>ELIGIBILITY CHECK AND SHORTLISTING CRITERIA AND RATING</b> |  | <b>%</b>  |    | <b>Rating</b> |
|---|--|-----------|----|---------------|
| <b>1</b>  | <b>Applicable experience of the bidder</b>   | <b>45</b> |    |               |
|   | a) More than 3 years                         |           | 45 |               |
|   | b) 3 years                                   |           | 35 |               |
|   | c) Less than 3 years                         |           | 0  |               |
| <b>2</b>  | <b>Years of Experience of Key Personnel</b>  | <b>35</b> |    |               |
|   | <b>Marketing Director (1)</b>                |           |    |               |
|   | a) More than 3 years                         |           | 20 |               |
|   | b) 3 years                                   |           | 15 |               |
|   | c) Less than 3 years                         |           | 0  |               |
|   | <b>Marketing Assistants/Executives (2)</b>   |           |    |               |
|   | a) More than 3 years                         |           | 15 |               |
|   | b) 3 years                                   |           | 10 |               |
|   | c) Less than 3 years                         |           | 0  |               |
| <b>3</b>  | <b>Current Workload Relative to Capacity</b> | <b>20</b> |    |               |
|   | a) 0 to 3 ongoing projects                   |           | 20 |               |
|   | b) 4 or more ongoing projects                |           | 10 |               |
|   |  |           |    |               |

Passing Rate = 80%

**CRITERIA FOR THE EVALUATION OF OFFERS  
TOURISM PROMOTIONS BOARD (TPB)  
SERVICES OF A MARKETING AGENCY TO PROVIDE A TOURISM PROMOTIONS BOARD (TPB)  
MARKETING COORDINATOR FOR MALAYSIA AND SINGAPORE**

Technical Proposal - 85%  
 Financial Proposal - 15%  
 Passing Rate = 85%

| <b>CRITERIA (Technical Proposal)</b>   | <b>% Weight</b> |
|--|-----------------|
| <b>I. Quality of Personnel to be Assigned to the Project (25 points)</b><br>Profile and expertise of key personnel who will be assigned to the project, showing areas of specialization (25 points)  | <b>25%</b>      |
| <b>II. The Firm's Experience and Capability (30 points)</b> <ol style="list-style-type: none"> <li>1. Minimum of five (5) similar projects implemented/organized/conducted for the past 3 years (10 points)</li> <li>2. Number of years of experience in PR, ad placements, etc.<br/>               3 years and above (10 points)<br/>               1 to 2 years (5 points)</li> <li>3. Three (3) years experience in market research and intelligence (10 points)</li> <li>4. Competitor Analysis</li> </ol> | <b>30%</b>      |
| <b>III. Plan of Approach and Methodology (45 points)</b> <ol style="list-style-type: none"> <li>1. Proposed work plans based on the Terms of Reference prescribed by TPB (20 points)</li> <li>2. Project plan approach to be utilized to achieve the deliverables/expected outputs within the specified timeframes (25 points)</li> </ol>  | <b>45%</b>      |
| <b>Total</b>   | <b>100%</b>     |

The bidder must be able to present the market strategy, media plan, and action plan based on the Terms of Reference / Scope of Services for a period of forty-five (45) minutes, to include a question & answer (Q&A) portion.

## **XII. PROJECT OFFICER'S CONTACT INFORMATION**

1. Ms. Micaela B. Ochoa  
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