

**TERMS OF REFERENCE**  
**CONSULTANCY SERVICES FOR THE MARKET INTELLIGENCE LEARNING/TRAINING PROGRAM FOR**  
**TOURISM PROMOTIONS BOARD MEMBERS**

**I. GENERAL INFORMATION**

**Service/Work Description:** Market Intelligence Learning/Training Program

**Project/Program Title:** Procurement of Services of a Consultancy Firm for the Market Intelligence Learning/Training Program for the Tourism Promotions Board Members

**Post Title:** Consultancy Services

**Duty Station:** Industry Relations and Services Division – Domestic Promotions Department, Tourism Promotions Board

**Duration:** Three (3) Batches for Approximately 4 Man-months

**II. BACKGROUND**

With the significant growth and contribution of the tourism industry to the Philippine economy, there is a need to effectively and efficiently administer tourism promotions through careful analysis of market intelligence data resulting in plans, policies, programs, and projects being anchored on sound information generated from data analytics.

As the driving force of Philippine tourism, the private sector must be equipped with the skills and knowledge to harness market intelligence effectively as a tool to develop innovative business strategies allowing them to maintain competitiveness, foster collaboration through joint initiatives and ultimately drive sustainable growth in the industry.

It is for this reason that the Tourism Promotions Board (TPB), an attached agency of the Department of Tourism (DOT) seeks to establish a partnership with a reputable academic institution in conducting Market Intelligence Learning/Training Program (MILTP) to contribute to the advancement of the tourism industry anchored on sound market data analysis. It is deemed appropriate that the full utilization of research studies from policymaking up until its implementation will pave the way to achieving the above-mentioned vision.

The MILTP shall be a capacity-building program for the Members of TPB, comprising of registered DOT-accredited establishments, which generally aims to build their competency to effectively analyze and interpret market intelligence data, enabling them to make informed, strategic decisions that optimize resource allocation and improve overall operational efficiency.

**III. LEGAL BASIS**

1. Pursuant to Republic Act (RA) No. 9593, otherwise known as the Tourism Act of 2009, which was enacted into law on 12 May 2009 with its implementing Rules and Regulations (IRR) promulgated by the Secretary of Tourism last 10 November 2009, the Philippine Convention and Visitors Corporation (PCVC) was reorganized as the Philippine Tourism Promotions Board. As an attached agency of DOT, the TPB is primarily responsible for implementing an integrated domestic and international promotions and marketing program for the Philippines as a tourism destination as well as for tourism investments. As such, the Industry Relations and Services Division – Domestic Promotions Department of TPB shall provide technical assistance to its Members in equipping them with the skills and knowledge to effectively analyze and interpret market intelligence data, enabling them to make informed, strategic decisions that optimize resource allocation and improve overall operational efficiency.

2. TPB Board Resolution No.207, Series of 2019 approved the proposed TPB Membership Program. Among the benefits outlined in the Program are:

*Network and Capacity-Building Opportunities*

- a. Discounted tourism training programs, business development, and marketing workshops
- b. Participation in programs that will enhance business development

*Access to Information*

- a. Targeted market information
- b. Latest tourism statistics and analysis

3. TPB Board Resolution No. 421 Series of 2023 approved the Enhanced TPB Membership Program. Among the benefits outlined under the Program are:

- a. Access to training on digital marketing, capacity building and skills development
- b. Access to market intelligence

4. Following the strategic directions of the National Tourism Development Plan (NTDP) 2023-2028 to establish a sustainable, resilient, Filipino-centered, and globally competitive tourism industry, more key tourism managers in the national and local government would need to be provided with immediate technical assistance in ensuring the maximization of tourism benefits.

#### **IV. OBJECTIVES**

The MILTP aims to:

1. Equip stakeholders in the tourism industry with the skills and knowledge to effectively analyze and interpret market intelligence data, enabling them to make informed, strategic decisions that optimize resource allocation and improve overall operational efficiency.
2. Empower stakeholders to identify new market opportunities, tailor market offerings, and develop innovative business strategies that maintain competitiveness and drive sustainable growth in the tourism sector.
3. Facilitate a common understanding of market dynamics among stakeholders, fostering collaboration through joint initiatives, partnerships, and collective efforts to advance the growth and sustainability of the Philippine tourism industry.

#### **V. EXPECTED RESULTS**

By the end of the contract period under this TOR, the Consultancy Firm is expected to have successfully conducted and facilitated the Market Intelligence Learning/Training Program for TPB Members in which the participants should be able to:

- Understand and apply data analysis and market intelligence in forming good business strategies and decisions;
- Develop a market-driven business strategy or project that leverages new market opportunities; and
- Present a comprehensive implementation plan for their proposed business strategy, ensuring it aligns with current market dynamics and promotes competitiveness.

## **VI. SCOPE OF WORK**

The Consultant will undertake various tasks but not limited to the following stages and deliverables:

1. Design an online and onsite, in-person market intelligence learning/training program for TPB Members and select TPB Personnel.

### **ONLINE:**

2. Conduct a maximum of one-hour online onboarding session with TPB Members and select TPB Personnel, at an agreed date and time, to present the training rationale, objectives, expected learning outcomes, expected output, and timeline. This will be followed by 3 scheduled one-hour online training sessions to be conducted within 1 month prior to the onsite training sessions.
3. Agree with TPB on specific dates and time for participants to complete the 3 one-hour online training sessions with schedules to be confirmed at least two weeks before the actual program runs. Topics shall include basic market intelligence concepts, data management, and data analytics tools so participants are on the same level during onsite sessions.
4. Host the one-hour online onboarding and the 3 one-hour online sessions via online platform.
5. Allow participants to formulate their capstone project within 30 days within the duration of the onsite and online modules.

### **ONSITE:**

6. Conduct 3 full-day in-person training sessions for TPB Members and select TPB Personnel.
7. Assign faculty experts to handle each of the in-person modules.
8. Provide hybrid-ready venue airconditioned, classroom/seminar-style within Metro Manila.
9. Provide meals during the in-person sessions and training materials during onboarding to all participants.
10. Provide photo and video documentation during the in-person sessions.
11. Conduct a formal closing ceremony after the presentation of expected output.
12. Organize a panel presentation comprising the faculty identified in this section (Item 7) and at least three experts from the tourism industry to provide feedback on the outputs.

### **OTHERS:**

13. Provide Certificates of Learning and Completion to the participants who shall comply with all academic requirements of MILTP – completion of three (3) online modules; completion of three (3) days onsite sessions; attendance in all onsite sessions; and presentation of expected output to the faculty.
14. Provide Certificates of Participation to participants who would not be able to comply with all academic requirements.
15. Provide Certificates of Appearance to all participants.

The Consultant shall be responsible for all the necessary documents and information pertinent to the conduct of the training program. They shall likewise submit any other related data or report that may be requested by TPB.

## **VII. DELIVERABLES**

The Consultant is expected to run this program in 3 batches with 45 people per batch. The Consultant will be required to submit progress reports on the major activities required during

the implementation, as well as a terminal report capturing the entire duration of the program. It shall include the following outputs during the engagement:

#### Learning/Training Program Components

- a. Development of Training Program Designs
  - Training Programs, Modules, Licenses, and Certification
  - Training Kits
  - Online platform/system
  - Facilitator/Resource person/s
- b. Provision of Project Reports and Documentation
- c. Provision of Venue and Meals during the on-site/in-person training
  - Inclusive of full board meals for 45 pax
  - With consideration of guests with dietary restrictions (i.e. vegetarian, food allergies, diabetics, etc.)
  - Must be able to accommodate approximately fifty (50) persons during the in-person/on-site training per program.
  - Must include the following services and amenities in the function room:
    - Classroom setup
    - Secretariat table
    - Free-flowing coffee and tea
    - Mint/candies/chips
    - Complimentary conference Wi-fi access
    - AVP system
    - Widescreen Projector/LED
    - 3 wireless microphones
    - Whiteboard, flipchart, marker, and eraser
    - Paper/notepad and pencil

### **VIII. PROJECT DURATION**

The program will run for at least four (4) man-months for the whole course of implementation of the market intelligence learning/training program and formulation of the necessary materials.

The project duration or schedule is based on working days and shall exclude the client's review and approval. The Industry Relations and Services Division (IRSD) shall be provided with a copy of each deliverable for review and comments.

### **IX. IMPLEMENTATION ARRANGEMENTS**

The Consultant will be contracted under the TPB terms and conditions and undertake the assigned tasks and responsibilities under the direct supervision of the Domestic Promotions Department (DPD) of the TPB. The Consultants will also be working closely with the TPB, specifically the IRSD, the TPB's Corporate Planning and Business Development Department, Local Government Units, Academic Institutions, TPB Members, and other tourism stakeholders. The IRSD will provide the necessary administrative support. All local travel costs, professional fees, and logistical arrangements of the Consultants relative to the assignment, as well as the indicated costs of the participants shall be covered by the Consultants following the above deliverables and scope of work.

### **X. CONSULTANT QUALIFICATIONS AND EXPERIENCE**

The consultancy firm should be an academic institution that has extensive experience in the formulation and preparation of modules, learning materials, tourism development plans, and tourism marketing strategies on an international or national scale.

The consultancy firm must likewise be highly competent technical experts with recognized international or national experience in local and overseas projects, as well as relevant education and training in tourism planning, marketing, sustainable tourism, product development, standards setting, local governance, and economic, environmental, and socio-cultural planning. The consultancy firm must have at least five (5) years of prior experience and a track record in undertaking similar or relevant projects within the context of the tourism industry.

Most importantly, the consultancy firm shall provide a team of tourism or multi-disciplinary experts/faculty who will be facilitating the training, which shall include but not be limited to the following key personnel:

1. One (1) Project Manager / Team Leader
  - To plan, organize, direct and manage the planning, execution, reporting, production and communication of the Market Intelligence Learning/Training.
  - Must have a Doctoral degree in Business Administration, Economics, Statistics, Tourism, Tourism Development and Management, or other related courses.
  - Must have a minimum of ten (10) years of professional experience in tourism planning and strategic development planning projects similar to or with greater magnitude and complexity.
  - Has previous experience in training adult learners.
  
2. One (1) Training Development Manager/Facilitator
  - To plan, organize, and direct the execution of the development of project design and modules as well as derive strategies for the client.
  - Must have at least a Masteral degree in Business Administration, Economics, Statistics, Tourism, Tourism Development and Management, or similar qualifications.
  - A minimum of five (5) years of experience in tourism planning, training/module development, socio-economic impacts, and tourism promotions at a country level.
  
3. One (1) Technical Support Staff
  - To assist the development and execution of MILTP as well as to prepare reports/documentation.
  - Must have a degree in Business Administration, Economics, Statistics, Tourism, Tourism Development and Management, or similar qualifications.
  - Must have a minimum of two (2) years of experience in tourism planning and development, socio-economic impacts, technical writing, and project management.

## **XI. PROJECT BUDGET AND TERMS OF PAYMENT**

The total allocation for the consultancy services for Market Intelligence Learning/Training Program is **THREE MILLION PESOS ONLY (PHP3,000,000.00)**. The amount shall include Value-Added Tax (VAT) and all other applicable government taxes and charges, and all professional, incidental, administrative costs incurred by the Consultants arising from the performance of the activities covered by the Scope of Work and Services such as but not limited to the cost of conducting meetings, training, and administrative costs such as printing and reproduction costs, transportation and all other expenses.

Payable in tranches based on the submitted milestone report on a send-bill arrangement (Government Procedure):

TRANCHE	MILESTONE	PAYMENT %
1 <sup>st</sup> Tranche Payment	After the approval of an inception report and conduct of the online onboarding session	15% of the total
2 <sup>nd</sup> Tranche Payment	After the conduct of the program for the first batch and submission of the approved progress report for the first batch	35% of the total
3 <sup>rd</sup> Tranche Payment	After the conduct of the program for the second batch and submission of the approved progress report for the second batch	35% of the total
4 <sup>th</sup> Tranche Payment	After the conduct of the program for the third batch and submission of the approved terminal report	15% of the total

## XII. RATING GUIDE FOR TECHNICAL PROPOSAL (80% PASSING SCORE)

PARTICULARS		%	RATING
<b>I. Applicable Experience of the Firm</b>			<b>40%</b>
a.	<p>Bidder must have been in operation as a consultant firm for at least 5 years</p> <ul style="list-style-type: none"> <li>• More than 8 years of experience (25%)</li> <li>• More than 5 years to 8 years of experience (20%)</li> <li>• Exactly 5 years of experience (15%)</li> <li>• Less than 5 years of experience (0%)</li> </ul>		
b.	<p>Successfully implemented similar projects within the last 5 years (minimum of 8 projects with at least 2 government clients)  <i>*Bidder to provide Certificate of Satisfactory Completion</i></p> <ul style="list-style-type: none"> <li>• Minimum of 8 projects, with 4 or more government clients (15%)</li> <li>• Minimum of 8 projects, with 2 government clients (10%)</li> <li>• Minimum of 8 projects and no government client (0%)</li> </ul>		
<b>II. Qualification of personnel who may be assigned to the project</b>			<b>25%</b>
<p>All key personnel have the minimum number of years of relevant experience in the conduct of similar work, as follows:</p> <p><b>One (1) Project Manager / Team Leader</b> with at least a Doctoral degree in Business Administration, Economics, Statistics, Tourism, Tourism Development and Management, or other related courses (at least 10 years relevant experience).</p> <p><b>One (1) Training Development Manager/Facilitator</b> with at least a Masteral degree in Business Administration, Economics, Statistics, Tourism, Tourism Development and Management, or similar qualifications (at least 5 years relevant experience).</p> <p><b>One (1) Technical Support Staff</b> with a minimum of two (2) years of experience in tourism planning and development, socio-economic impacts, technical writing, and project management (at least 2 years relevant experience).</p> <ul style="list-style-type: none"> <li>• Key personnel have more than the required number of years of relevant work experience (25%)</li> <li>• All key personnel have the minimum number of years of relevant work experience (20%)</li> <li>• One or more key personnel have less than the minimum number of years of relevant work experience (0%)</li> </ul>			
<b>III. *Current Workload Relative to Capacity</b>			<b>5%</b>
<ul style="list-style-type: none"> <li>• Currently handling 5 or less projects (5%)</li> <li>• Currently handling 6 – 9 projects (3%)</li> </ul>			

<ul style="list-style-type: none"> <li>Currently handling more than 10 projects (0%)</li> </ul> <p><i>*Refers to the implementation dates based on the contracts. Projects for implementation shall be construed as “currently handling”</i></p>			
<b>IV. Plan of Approach and Methodology</b>			<b>30%</b>
a.	Feasibility of the planned execution of the overall scope of work (15%)		
b.	Relevance of the concept, proposed topics, and speakers. Profiles of speakers and list of topics to be submitted (10%)		
c.	Adherence of the proposal to all the required components of the training program as mentioned in this bid (5%)		
<b>TOTAL</b>			<b>100%</b>

Qualified Bidders will be required to make a presentation (maximum of 20 minutes) of their Plan of Approach and Methodology.

The winning bid must attain a hurdle rate of 80% based on the following set of selection criteria with their corresponding weight assignment:

<b>Proposal</b>	<b>Weight</b>
Technical Proposal	85%
Financial Proposal	15%

### **XIII. CONTACT PERSONS**

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