



CARIBBEAN TOURISM ORGANIZATION

AFRICAN CARIBBEAN PACIFIC – EUROPEAN UNION – CARIBBEAN DEVELOPMENT
BANK NATURAL DISASTER RISK MANAGEMENT IN CARIFORUM MEMBER
COUNTRIES

SUPPORTING A CLIMATE SMART AND SUSTAINABLE CARIBBEAN TOURISM INDUSTRY (CSSCTI) PROJECT

CONSULTANCY TO DEVELOP CLIMATE PRODUCTS AND SERVICES FOR THE CARIBBEAN TOURISM INDUSTRY (FEASIBILITY STUDY)

REQUEST FOR EXPRESSIONS OF INTEREST

The Caribbean Tourism Organization (CTO), has received financing from the Caribbean Development Bank (CDB), through the African Caribbean Pacific European Union Caribbean Development Bank, Natural Disaster Risk Management (ACP-EU-CDB NDRM) in CARIFORUM Countries Programme, towards implementing the Supporting a Climate Smart and Sustainable Caribbean Tourism Industry (CSSCTI) Project. The CTO intends to apply a portion of the proceeds of this financing to eligible payments under a contract for which this invitation is issued. Payments by CDB will be made only at the request of CTO and upon approval by CDB, and will be subject in all respects to the terms and conditions of the Financing Agreement. The Financing Agreement prohibits withdrawal from the financing account for the purpose of any payment to persons or entities, or for any import of goods, if such payment or import, to the knowledge of CDB, is prohibited by a decision of the United Nations Security Council taken under Chapter VII of the Charter of the United Nations. No party other than CTO shall derive any rights from the Financing Agreement or have any claim to the proceeds of the Financing.

The CTO, the Executing Agency now wishes to procure consultancy services for implementation of the component related to a feasibility study on **Developing Climate Products and Services for the Caribbean Tourism Industry**. The aim of this research Consultancy is to support the design, development and application of climate smart products and services for the use and benefit of both public and private sector entities in the Caribbean Tourism Industry. The duration of the assignment is expected to be for a period of 50 days spread over 5 months and is expected to commence from **June 2018**.

The CTO now invites interested **eligible consulting firms** to submit Expressions of Interest for the provision of this consultancy service, indicating qualifications and experience.



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Eligible countries are outlined in **Appendix 1** below.

Consultants shall be eligible to participate if:

- (a) in the case of a body corporate, it is legally incorporated or otherwise organised in an eligible country, has its principal place of business in an eligible country and is more than 50 per cent beneficially owned by citizen(s) and/or *bona fide* resident(s) of eligible country(ies) or by a body(ies) corporate meeting these requirements;
- (b) in the case of unincorporated firms, the persons are citizens or *bona fide* residents of an eligible country; and
- (c) in all cases, the consultant has no arrangement and undertakes not to make any arrangements, whereby any substantial part of the net profits or other tangible benefits of the contract will accrue or be paid to a person not a citizen or *bona fide* resident of an eligible country.

The attention of interested Consultants is drawn to paragraph 1.9 of CDB's Guidelines for the Selection and Engagement of Consultants (2011), setting forth CDB's policy on conflict of interest.

The consulting firm is required to have substantive experience in conducting research in climate and related fields utilising both qualitative and quantitative research methods. Knowledge of and/or experience conducting research particularly in the area of the development of tourism and climate indices are essential, and knowledge of the Caribbean and/or experience working in the Caribbean or other developing nations to implement projects of a similar nature would be an advantage.

The Terms of Reference for the consultancy is attached as **Appendix 2** to this document.

Three (3) hard copies of the Expressions of Interest should be mailed to the Caribbean Tourism Organization (CTO) and One (1) electronic copy must be sent simultaneously to the Caribbean Development Bank (CDB) at the requisite addresses indicated below, to reach no later than **11:59PM Atlantic Standard Time (AST), on Friday May 11th, 2018**. The sealed envelope containing each submission should include the name and address of the applicant and shall be clearly marked **"EXPRESSION OF INTEREST – CONSULTANCY SERVICES TO DEVELOP CLIMATE PRODUCTS AND SERVICES FOR THE CARIBBEAN TOURISM INDUSTRY (FEASIBILITY STUDY)"**. In the assessment of submissions, consideration will be given to technical competence, qualifications and experience, local and regional experience on similar assignments, financial capability and existing commitments. All information must be submitted in English.

The selection method shall be Consultants' Qualifications selection. Therefore, following the assessment of submissions, firms shall be assessed and compared, and the best qualified and experienced firm shall be selected. Only the selected firm shall be asked to submit a combined



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technical and financial proposal and, if such proposal is responsive and acceptable, be invited to negotiate a contract.

CTO reserves the right to accept or reject late applications or to cancel the present invitation partially or in its entirety. It will not be bound to assign any reason for not selecting any applicant and will not defray any costs incurred by any applicant in the preparation and submission of Expressions of Interest.

Further information may be obtained from **Amanda Charles**: acharles@caribtourism.com, and at the first address below between 9:00am and 5:00pm AST Monday to Friday.

Address for Submission of Expressions of Interest:

Attn: Ms. Amanda Charles
Caribbean Tourism Organization
7th Floor, Baobab Tower
Warrens, St. Michael
Barbados W.I
Tel: (1-246) 427-5242 Ext 2247
Fax: (1-246) 429 3065

Attn: Procurement Officer
Caribbean Development Bank
Willey, St. Michael
BARBADOS, W.I.
Tel: (1-246) 431-1600
Fax: (1-246) 426-7269
Email: procurement@caribank.org



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EUROPEAN UNION ELIGIBILITY RULES
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NATURAL DISASTER RISK MANAGEMENT

PARTICIPATION IN PROCEDURES FOR THE AWARDING OF
PROCUREMENT CONTRACTS OR GRANT CONTRACTS

1. Participation in procedures for the award of procurement contracts financed under the EU Contribution Agreement for the Implementation for the Action entitled: “Africa Caribbean Pacific – European – Caribbean Development Bank (ACP-EU-CDB) Natural Disaster Risk Management in CARIFORUM Countries” (ACP – EU NDRM Resources)”, is open to international organisations and all natural persons who are nationals of, or legal persons who are established in, an eligible country.

2. Eligible countries¹ are deemed to be:

(a) Caribbean Development Bank member countries:

Anguilla, Antigua and Barbuda, Barbados, Belize, Brazil, British Virgin Islands, Canada, Cayman Islands, China, Columbia, Dominica, Germany, Grenada, Guyana, Haiti, Jamaica, Italy, Mexico, Montserrat, St Kitts and Nevis, Saint Lucia, St Vincent and the Grenadines, Suriname, The Bahamas, Trinidad and Tobago, Turks and Caicos Islands, the United Kingdom and Venezuela.

(b) Members of the “African, Caribbean and Pacific (ACP) Group of States”²:

Africa:

South Africa³, Angola, Benin, Botswana, Burkina Faso, Burundi, Central African Republic, Cameroon, Cape Verde, Chad, Comoros Islands, Congo, Côte d'Ivoire, Democratic Republic of the Congo, Djibouti, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Equatorial Guinea, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritius, Mauritania, Mozambique, Namibia, Niger, Nigeria, Uganda, Rwanda, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, Sudan, Swaziland, Tanzania, Togo, Zambia and Zimbabwe.

¹ Note some countries may be eligible by virtue of more than one category

² Cotonou Partnership Agreement of 23 June 2000 (as amended by the provisional application of Decision No 1/2000 of the ACP-EC Council of Ministers of 27 July 2000, Decision No 1/2000 of the ACP-EC customs cooperation committee of 18 October 2000, Decision No 1/2001 of the ACP-EC customs cooperation committee of 20 April 2001, Decision No 2/2001 of the ACP-EC customs cooperation committee of 20 April 2001, Decision No 3/2001 of the ACP-EC customs cooperation committee of 10 May 2001, Decision No 4/2001 of the ACP-EC customs cooperation committee of 27 June 2001, Decision No 5/2001 of the ACP-EC customs cooperation committee of 7 December 2001, Decision No 2/2002 of the ACP-EC customs cooperation committee of 28 October 2002, Decision No 1/2003 of the ACP-EC Council of Ministers of 16 May



2003, Council Decision (EC) of 19 December 2002, Decision No 1/2004 of the ACP-EC Council of Ministers of 6 May 2004, Decision No 2/2004 of the ACP - EC customs cooperation committee of 30 June 2004 and Decision No 4/2005 of the ACP-EC customs cooperation committee of 13 April 2005).

- ³ Natural and legal South African persons are eligible to participate in contracts financed by the 10th/11th EDF. However, the 10th/11th EDF does not finance contracts in South Africa.

Caribbean:

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

Pacific:

Cook Islands, East Timor, Fiji, Kiribati, Marshall Islands, Micronesia, Nauru, Niue, Palau, Papua New Guinea, the Solomon Islands, Western Samoa, Tonga, Tuvalu, Vanuatu.

Overseas Countries and Territories:

Anguilla, Antarctic, Netherlands Antilles, Aruba, British Indian Ocean Territory, British Virgin Islands, Cayman Islands, Falkland Islands (Malvinas), French Polynesia, French Southern Territories, Greenland, Mayotte, Montserrat, New Caledonia, Pitcairn, Saint Helena, Saint Pierre and Miquelon, South Georgia and South Sandwich Islands, Turks and Caicos, Wallis and Futuna Islands.

- (c) A Member State of the European Union:

Austria, Belgium, Bulgaria, Croatia, Czech republic, Cyprus, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom.

An official candidate country of the European Union:

The Former Yugoslav Republic of Macedonia, Turkey, Iceland, Montenegro.

A Member State of the European Economic Area: Iceland, Lichtenstein, Norway.

- (d) All natural persons who are nationals of, or legal persons who are established in, a Least Developed Country as defined by the United Nations:

Afghanistan, Angola, Bangladesh, Benin, Bhutan, Burkina Faso, Burundi, Cambodia, Central African Republic, Chad, Comoros, Dem. Rep. Congo, Equatorial Guinea, Eritrea, Ethiopia, Guinea, Guinea-Bissau, Haiti, Kiribati, Lao PDR, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mozambique, Myanmar, Nepal, Niger, Rwanda, Sao Tome and Principe, Senegal, Sierra Leone, Djibouti, Solomon Islands, Somalia, South Sudan, Sudan, Tanzania, The Gambia, Timor-Leste, Togo, Tuvalu, Uganda, Vanuatu, Yemen, Rep. and Zambia.

- (e) Participation in procedures for the award of procurement contracts or grants financed from the Facility shall be open to all natural persons who are nationals of, or legal



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persons established in, *any country other than those referred to in paragraph 1, where reciprocal access to external assistance has been established.* Reciprocal access in the Least Developed Countries as defined by the United Nations (UN) shall be automatically granted to the OECD/DAC members: Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Japan, Korea, Luxembourg, Netherlands, New Zealand, Norway, Portugal, Spain, Sweden, Switzerland, United Kingdom, United States.

3. Services under a contract financed from the Facility may be provided by experts of any nationality, without prejudice to the qualitative and financial requirements set out in the Bank's procurement rules.

4. Supplies and materials purchased under a contract financed from the Facility must originate in a State that is eligible under paragraph 1. In this context, the definition of the concept of 'originating products' shall be assessed by reference to the Bank's prevailing procurement guidelines/procedures, and supplies originating in the EU shall include supplies originating in the Overseas Countries and Territories.

5. Whenever the Facility finances an operation implemented through an international organisation, participation in procedures for the award of procurement contracts or grants shall be open to all natural and legal persons who are eligible under paragraphs 1, care being taken to ensure equal treatment of all donors. The same rules apply for supplies and materials.

6. Whenever the Facility finances an operation implemented as part of a regional initiative, participation in procedures for the award of procurement contracts or grants shall be open to all natural and legal persons who are eligible under paragraph 1, and to all natural and legal persons from a country participating in the relevant initiative. The same rules apply for supplies and materials.

7. Whenever the Facility finances an operation co-financed with a third entity, participation in procedures for the award of procurement contracts or grants shall be open to all natural and legal persons eligible under paragraph 1, and to all persons eligible under the rules of the third entity. The same rules shall apply to supplies and materials.

Caveat: The Bank and EU eligibility requirements are subject to change by the Bank and the EU. The applicant is responsible for checking whether there have been any updates on the eligibility requirements, as well as the UN's list of Least Developed Countries.



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TERMS OF REFERENCE
**CONSULTANCY TO DEVELOP CLIMATE PRODUCTS AND SERVICES FOR THE
CARIBBEAN TOURISM INDUSTRY (FEASIBILITY STUDY)**

1. BACKGROUND

1.01 The Caribbean tourism product depends largely on the natural environment. The viability and sustainability of the tourism industry are being threatened by various challenges, foremost of which are natural hazards, including extreme weather events, which are becoming more frequent and severe, as a result of climate variability and climate change (CVC). CVC has already impacted water resources availability, agricultural productivity and fisheries, which are inextricably bound with the tourism sector in the Region. The development of a Caribbean sustainable tourism industry entails a broad approach that focuses, *inter alia*, on the formulation of adequate policies incorporating the management of climate risk for the tourism sector, developing plans and strategies to reduce the vulnerability of key tourism sub-sectors and stakeholders to CVC, and implementing practical actions to increase the resilience of the sector through institutional strengthening for mitigation and adaptation to CVC and its impacts.

1.02 The climate of the Caribbean is characterised predominantly by two seasons (the Wet and Dry seasons); and generally small temperature changes. Tourism, which is a principal income earner for the socio-economic development of Caribbean States, is very reliant on its climatological pattern. For example, touristic offerings are promoted as being available year-round due to average annual temperatures usually being in the range of 24°C - 32°C - ideal for recreation and visitor comfort.

1.03 However, the sector is also sensitive to climate variability and extremes. One key reason for this relates to the fact that the annual tourism high season (December to March) typically coincides with the Dry season (December to May). In the extreme case of drought, insufficient water supplies have led to the industry's inability to provide adequate water resources to meet the water use demands of tourists. In addition, there will be difficulty to cater to guest demand for local cuisine using local ingredients since agricultural production may have decreased and goods may not be available and/or may have to be bought at a higher price. Warmer than normal conditions also have implications for beach-loving tourists, particularly the elderly and the young, who are likely to be vulnerable to the health effects of higher than normal temperature and humidity levels. In addition, coral reefs, which are a key tourist attraction, risk bleaching due to unusually high sea surface temperatures. At the other end of the spectrum, extreme cases



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of precipitation have led to floods, causing damage to coastal hotel property and also the closure/unserviceability of critical infrastructure such as airports, roads and bridges.

1.04 While climate can pose a risk to tourism, there are also climate-related opportunities, for marketing and revenue generation, which can arise from unfavourable climate conditions in tourist-generating regions, as well as, from adverse climate and weather conditions in extra-regional tourist-receiving regions. Similarly, forecasts for favourable or unfavorable regional climate conditions presents an opportunity for proper tourism planning and strategic marketing.

1.05 The above highlights the need for a climate-sensitive sector such as tourism to engage in climate risk management - a systematic and coordinated process in which climate information is used to reduce the risks associated with climate variability and change, and to take advantage of opportunities, in order to improve the resilience of social, economic and environmental systems. The use of seasonal climate forecast products (SCFs) form a first-hand approach to climate risk management as such forecasts provide early warning for potential impacting climate events within a few months following their issuance. SCFs can therefore unlock the opportunity for tourism operators to manage the risks associated with the forecast, as well as, explore and exploit possible opportunities for marketing that can increase tourism productivity.

1.06 A preliminary review of the academic literature revealed that climate-tourism research is mainly focused on the impact (particularly negative versus positive) of climate on tourism and less on how the use of seasonal climate forecasts (SCFs) can help tourism hoteliers and policymakers to manage the risks and benefit from opportunities associated with climate. Moreover, there is little evidence of early warning climate information product support for tourism suppliers. However, preliminary results gleaned from a 2016 survey of Caribbean tourism supplier climate information needs suggest that policy-makers and hoteliers in 10 countries see value in being able to access a climate early warning information product that forecasts the effect of intra- and extra-regional climate on tourist arrivals to the Caribbean.

1.07 A range of Caribbean-centric seasonal climate forecast products are currently developed by the National Meteorological and Hydrological Services (NMHS) and the Caribbean Climate Outlook Forum (CariCOF) led by the Caribbean Institute for Meteorology and Hydrology (CIMH), but many of these products are generic in nature. Collaborative efforts between the CIMH and the tourism sector has produced the Caribbean Tourism-Climatic Bulletin (launched in June 2017), which seeks to offer tourism suppliers tailored climatic information that can meaningfully impact their decision-making. However, more can be done to provide the sector with probabilistic scientific products which integrate tourism and climate variables. Research and development around tourism-specific seasonal climate information products and services that can provide tourism suppliers, particularly hoteliers and tourism policymakers, with early warning of adverse or favourable climate conditions on seasonal timescales, is therefore a priority for the Caribbean.

1.08 The focus of this Terms of Reference is to conduct a feasibility study on the need for and the potential benefits regarding the development and use of tourism-climate productivity index/indices and validate an approach for operational tourism-climate modelling for the Caribbean. It is proposed to use a participatory approach to integrate tourism-climate research into practical implementation. This will



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demand close collaboration between tourism specialists, climate scientists, and mathematical modellers to incorporate real-time seasonal climate forecast and tourism yield data as a means of modelling tourism-climate information several months ahead. Towards this end, the CTO will be partnering with CIMH, the Caribbean Hotel and Tourism Association (CHTA) and the University of the West Indies for said purpose. The Consultant will be responsible to liaise with and coordinate the engagement of all partners in the context of the project.

2. ABOUT THE CARIBBEAN TOURISM ORGANIZATION

2.01 The Caribbean Tourism Organization (CTO) officially established in 1989, is an intergovernmental development agency specialising in tourism for the Caribbean region. Headquartered in Barbados and with offices in New York and London, the primary objective of the CTO is to provide to and through its members the services and information necessary for the development of sustainable tourism for the economic and social benefit of the Caribbean people. The CTO's membership reflects the diversity of the Region, with Government membership extending to over 30 Dutch, English, French and Spanish speaking countries and territories, as well as a myriad of private sector allied members in tourism related and ancillary sectors.

2.02 The scope and reach of the CTO covers various activities at the regional and international level, to support and promote Tourism in the Caribbean. The main areas of focus include: Sustainable Tourism Product Development; Regional Destination Marketing; Communication; Advocacy and Promotion; Human Resource Development; Research and Information Technology, all essential areas in which the CTO has implemented programs since its inception. The concept of the Caribbean as One United Region is at the core of all CTO's efforts, and a key criterion in this regard to ensure the holistic, integrated growth and enduring sustainability of tourism in the Caribbean.

3. OBJECTIVES

3.01 The aim of this research Consultancy is to support the design, development and application of climate smart products and services for the use and benefit of the Caribbean Tourism Industry, to fulfill the following objectives:

- (a) To conduct an empirical investigation of the historical relationship between intra- and extra-regional climate and Caribbean tourist arrivals;
- (b) To assess climate and tourism modelling capacity, including but not limited to data availability, accessibility and quality; modelling software availability; as well as key skill sets for climate tourism modelling at regional and national levels;
- (c) Validate an approach for intra- and extra-regional tourism-climate modelling for the Caribbean through the development and/or recommendation and application of a tourism-climate index/indices;
- (d) Enhance knowledge on the availability, management and use of climate information, tools and services to enhance Caribbean tourism performance.



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4. SCOPE OF WORK

4.01 The consulting firm will be tasked to support the design and development of climate smart products and services for the Caribbean Tourism Industry. Activities will entail the following:

- (a) Produce an implementation plan for approval by the CTO;
- (b) Conduct a feasibility study on the need for and the potential benefits regarding the development and use of operational tourism-climate productivity index/indices that explains the effect of intra- and extra- regional climate on Caribbean tourism arrivals, estimating the long-term value of the intra- and extra- regional tourism-climate productivity index/indices to the Caribbean;
- (c) Conduct an empirical investigation of the historical relationship between intra- and extra-regional climate and Caribbean tourist arrivals;
- (d) Validate an approach for intra- and extra-regional tourism-climate modelling for the Caribbean through the development and/or recommendation and application of a tourism-climate index/indices that estimates the influence of: 1) intra-regional climatic conditions on tourist arrivals to the Caribbean; and 2) climatic conditions in the Caribbean's main tourist-generating regions (e.g., the UK, US and Canada) on tourist arrivals. At a given point in time and following the approach used by the CIMH's CariCOF, the modelling framework should be capable of providing an outlook of the potential influence and impacts of climate on tourist demand for at least up to three months with a zero month lead time. The outputs of the modelling framework should provide probabilistic risk maps that can be used for planning and marketing by Caribbean tourism suppliers;
- (e) Evaluate regional institutional capacity (CTO, CIMH, CHTA) to manage and use the tourism-climate index/indices for the long term sustainability needs of the Caribbean tourism sector;
- (f) Make recommendations for integrating outputs of the research into the CTO-CHTA-CIMH Caribbean Tourism-Climatic Bulletin, illustrating on an operational level, the opportunities and options to enhance the content of this communication tool;
- (g) Deliver to the CTO relevant project deliverables and reports related to the consultancy.

5. QUALIFICATIONS AND EXPERIENCE

5.1 The consulting firm is required to have persons with recognised credentials Masters Degree or higher in Environmental Science, Climate Science, Sustainable Development, Economics or related disciplines. In addition, the firm must demonstrate:

- (a) Ten years or more experience conducting research in tourism, climate and related fields with excellent analytical skills for qualitative and quantitative research purposes;
- (b) Knowledge of and/or experience conducting quantitative tourism-climate research particularly in the area of the development of tourism and climate indices;
- (c) Knowledge of the Caribbean and/or experience working in the Caribbean or other developing nations to implement projects of a similar nature would be an advantage;



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- (d) Excellent written and oral communication skills in English. Fluency in French will be considered an asset.

6. **DELIVERABLES**

6.1 The firm will deliver the following:

- (a) An inception report (inclusive of initial analysis and work plan);
- (b) Feasibility Study Report on the need for and institutional capacity gaps in developing and operationally applying Caribbean intra- and extra-regional tourism-climate index/indices. This will include a valuation estimate to determine the long-term value of the tourism-climate productivity index/indices to the Caribbean;
- (c) A report showing the results of the validation of the tourism-climate index/indices;
- (d) Conduct a webinar to present the research and outcomes to the CTO and designated partners and stakeholders;
- (e) Participate and present outcomes at a CTO regional training and sensitisation workshop for the tourism sector post completion;
- (f) A final report on project activities and outcomes.

7. **DURATION**

7.01. The consultancy is expected to last for 50 days, spread over a 5 month period.



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