

# Request for Proposals

**Title: Demand Driven Tourism Research Study for the Pekoe Trail in Sri Lanka**

**Issue Date:** 23rd March 2023  
**Closing Date For Proposals:** 24th April 2023  
**Closing Time:** 5:30 pm Sri Lanka time  
**Project Title:** Tourism Resilience in Sri Lanka Project (TRP)  
**Offer Reference Number:** (RFP-003-2023)

## 1. Disclaimer

The information contained in this request for proposals (hereinafter referred to as RFP) document is provided to the Offeror(s) by the Improving Economies for Stronger Communities (IESC) in anticipation of IESC's proposal in response to EU/Tourism Resilience in Sri Lanka/ ACA/2020/422-058.

IESC desires to receive proposals from companies (Offerors) to undertake a research study to produce detailed analytics and information on visitation forecasts to The Pekoe Trail in Sri Lanka.

IESC plans to award one contract.

The purpose of this RFP document is to provide Offeror(s) with information to assist them in the preparation of their proposal/s for the services that IESC seeks to source. This RFP document does not claim to contain all the information each Offeror may require. Each Offeror should conduct their own assessment and should check the accuracy, reliability, and completeness of the information in this RFP document, and where necessary obtain independent advice from appropriate sources.

IESC may cancel this RFP and is under no obligation to make an award as a result of this RFP, although IESC fully anticipates doing so, should IESC's proposal be selected. Activities are anticipated to begin in May 2023.

Note that EU determines proposal notification, award, and start dates, and they are subject to change at EU or IESC's discretion. Any activities under a final agreement are subject to and shall be carried out in accordance with the regulations promulgated by the donor, namely the practical guide on contract procedures for European Union external action (PRAG) which incorporates, and details applicable EU legislation and any clarification provided by the Court of Justice of the European Union and any other subsequently published rule or regulation governing the program.

IESC may, at its own discretion, but without being under any obligation to do so, update, amend, or supplement the information in this RFP document.

Interested offerors are responsible for all costs associated with preparation and submission of proposals and will not be reimbursed by IESC.

Any contract resulting from this RFP will be a firm fixed price contract.

## 2. Background

IESC is a leading U.S. nonprofit organization that fosters private sector development in the economically developing world. Since 1964, we have delivered lasting solutions that have resulted in more than 1.5 million jobs in 137 countries. We partner with businesses, cooperatives, entrepreneurs, jobseekers, and governments to sustainably build capacity, create jobs, and grow enterprises, sharing proven skills and experience that improve the lives of individuals, families, and communities around the world. Our major funders today are the U.S. Agency for International Development (USAID) and the U.S. Department of Agriculture (USDA), among others.

The European Union (EU)- funded Tourism Resilience in Sri Lanka Project (TRP) is a project aimed at (re)building a more resilient tourism industry in Sri Lanka, one that has been negatively impacted by the 2019 terrorist attacks, the COVID-19 pandemic, and the current economic/political crisis. It is designed to do so by developing and promoting new, innovative signature experiences starting with the Pekoe Trail. TRP's activities are expected to help retain jobs and create new employment opportunities, support small business development through capacity building and training as well as build the capacity of other strategic stakeholders.

Accordingly, in January 2022, in conjunction with the Sri Lanka Tourism Development Authority (SLTDA), the project officially announced the commencement of work on The Pekoe Trail, which is among the central activities of the project. The Pekoe Trail is a network of walking trails that have been created through the central highland districts of Kandy, Nuwara Eliya and Badulla in Sri Lanka. It is part of a larger concept to expand hiking and nature trails in the country and is meant to bolster the tourism industry's recovery. IESC hopes to ensure the trail offers experiences that are globally competitive and is a platform that offers new opportunities for business models and skills and will help form a new value chain in tourism in Sri Lanka in the future. Doing so will attract new investment to increase the extent and strength of accommodation, businesses, restaurants etc., to help to sustain the trail.

### **3. Period of Performance**

The anticipated period of performance, should offeror be selected, will be 2 months from the signing of the contract. Expected term: May 2023 to June 2023.

### **4. Scope Statement**

The vendor is expected to deliver specific research, as described in 5.2 below, to undertake a research study to produce detailed analytics and information on visitation forecasts to The Pekoe Trail in Sri Lanka. This information will inform project stakeholders of the potential demand for The Pekoe Trail and aid policy, planning, and investment decisions. The audience includes national and local policy makers, local businesses, and investors.

All quotations must be valid for 90 days.

### **5. Statement Of Work**

#### **5.1. Schedule of Authorities**

The contractor will report to the Tourism Resilience Project Director.

#### **5.2. Activities**

The contractor is expected to achieve the following broad objective by undertaking this study,

- Provide estimated projections in the total number of, as well as of the growth in travelers that can be expected to visit the Pekoe Trail in the short, medium and long term (in the next 1-5 and 5-10 years), based on the number of travelers that have visited similar long distance competitor trails across the globe in the past.

In doing so, the contractor is expected to provide answers to at least the specific research questions listed below,

1. What are the global trails that can be considered The Pekoe Trail’s closest peers/competitors?
2. What are the enablers and drivers behind the success and growth of these trails?
3. How many tourists can be expected to visit The Pekoe Trail (based on the number of travelers that have visited other long distance walking trails), in the next 1-5 years and 5-10 years thereafter, disaggregated across conservative, mid and aggressive scenarios in relation to,
  - o The Pekoe Trail being the primary purpose of visiting Sri Lanka
  - o The Pekoe Trail being a residual beneficiary of tourists coming to Sri Lanka

Projections to also be disaggregated by different market segments. Ideal segments include,

- a. Market origin (local/foreign travelers)
- b. Number of days spent
- c. Visitor spending
- d. Income/net worth
- e. Gender and age brackets
- f. Number of return visits
- g. Type of traveler (solo/families/couples etc.)

### 5.3. Deliverables

The Contractor will be responsible for the following deliverables:

**Table 1: Deliverables and Timeline**

DELIVERABLE	TIMING (from signing date)
1. <b>Workplan:</b> Participate in the initial meeting and submit analysis of comparison trails and the expected workplan and research design to conduct the study	Week 1
2. <b>Presentation of findings:</b> Present findings for projections on the total number of, as well as the growth in travelers that can be expected to visit the Pekoe Trail in the next 1-5 and 5-10 years, based on actual visitor trends seen among other global competitor trails. A revised slide deck to be submitted afterwards, incorporating any feedback/comments received from project stakeholders during the presentation.	Week 5

The delivery times of each deliverable of this contract must be established by the offeror but must not exceed two (2) months in total.

## 6. Contract Type

The contract is anticipated to be a firm fixed price contract, to be paid in stages based on the two deliverables.

## 7. Instructions to Offerors

### 7.1. Submission

Please note that RFPs received without the information below will not be considered. Responses must be organized in the following format:

1. Technical concept overview, no more than 10 pages in length, which includes the idea and a demonstration of the offeror's ability to achieve the objectives outlined. Concept should include research design, data collection methodology, tools to be used, and analysis methods, among other details necessary to achieve the noted objectives.
2. A quote that corresponds with the technical concept, using the attached Excel Budget Template (refer Annex 1). Costs should be broken down by individual cost element, include supporting information for the proposed costs. The Offeror must include the unit costs in its detailed description for each proposed cost. Offers must be in Sri Lankan Rupees (LKR) and be valid for at least 60 days.

In the event that the proposed rates are combined rates (which include tax payments, percentage of profits, indirect expenses, etc.), the offeror must break down said rates in such a way that it is clear for the evaluation committee to determine what the direct costs are. IESC will use the required detailed descriptive budget justifications to determine the reasonableness of costs and prices as required by US federal regulation.

In the event that an offeror proposes subcontractors to perform any part of the work, such subcontracting costs must be proposed separately, demonstrating a clear delineation between primary costs and subcontractors. Offerors must include a detailed fixed price budget and corresponding budget descriptions (including breakdown of combined rates if any) as described above for any proposed subcontract. The indirect cost instructions above also apply to any proposed subcontractor.

3. Offerors to send their RFP on or before **24th April 2023 at 5:30 pm (Sri Lanka Time)**, to the following email: [procurementteam@youlead.lk](mailto:procurementteam@youlead.lk) / [ssubasinghe@youlead.lk](mailto:ssubasinghe@youlead.lk), Samudra Subasinghe, Procurement Manager.

### 7.2. Clarification and Amendments

Offerors may request clarifications via email to **Samudra Subasinghe, Procurement Manager, [procurementteam@youlead.lk](mailto:procurementteam@youlead.lk) / [ssubasinghe@youlead.lk](mailto:ssubasinghe@youlead.lk)** not later than **5 p.m., Sri Lanka time, on the 24th of April 2023**. IESC will provide answers to these

questions and requests for clarification asked by all Offerors simultaneously via email and posted on the IESC website with the RFP before the close of business on/or before the **24th of April 2023 at 5:30 pm (Sri Lanka Time)**. IESC may not answer questions before the proposal submission deadline outside of the allotted response period for clarifications. No questions will be answered over the phone or in person.

### 7.3. Cover Page and Markings

In addition to the required proposal documents listed in sections 10 and 11 below, please include a cover page with your submission for the technical and the cost proposals (separate cover pages). The cover page should be on company letterhead and should contain the following information:

- 1) Project or Title (from the front page of this RFP document)
- 2) Offer Reference Number (from the front page of this RFP document)
- 3) Company Name
- 4) Company Address
- 5) Name of Company's authorized representative
- 6) Contact person if different that Company's representative
- 7) Telephone #, Cellular/Mobile Phone #, Email address
- 8) Duration of Validity of proposal
- 9) Payment terms
- 10) Sam.gov Unique Entity Identifier (UEI #) (Applies to companies, not to individuals)
- 11) Total Proposed Price (**cover page of cost proposal only**)
- 12) Signature, date, and time

## 8. Eligibility Requirements

The TRP project reserves the right to conduct an interview with the selected offeror after the technical and cost evaluations and before the award of the contract. The technical experience and background of work performed as a set of the main contractor and potential subcontractors will be considered.

Offeror may be required to present a business license and must have experience in:

- Should possess working experience (at least 8-10 years) in conducting research and analytical work in demand analysis and market research. Prior experience in tourism-related research and analysis is preferred including tourism investment research, tourism product development and sound knowledge on tourism industry developments, particularly in Sri Lanka. In the absence of tourism experience, then the ability to demonstrate how existing competencies could be applied to achieve the desired outcome would be important.
- Should have clear ability to access cross country travel data, engage in data analysis and/or visualization in tourism research, analysis and strategy related roles.

- An established network with local and foreign tourism stakeholders who combine to form substantial knowledge on destination development factors in an international context will be an added advantage.
- An understanding of new and emerging research methods in tourism will be an added advantage.
- Should have the ability to work efficiently, including managing time according to tight deadlines while maintaining product quality.

## 9. Basis for Award

IESC anticipates that the award will be based on best-value. Accordingly, an award will be made to the technically acceptable Offerors whose proposals provide the greatest overall value to IESC and the EU Tourism Resilience Program, price, and other factors considered. The winning proposal must conform to all solicitation requirements.

To determine the successful offer, proposals will be evaluated on the criteria below. The number of points assigned, totaling 100 points, indicates the relative importance of each individual criterion. Offerors should note that these criteria serve to: (a) identify the significant factors that Offerors should address in their proposals; and (b) set the standard against which all proposals will be evaluated.

## 10. Technical Proposal Evaluation

Please read carefully, the following are instructions for preparing proposals. Proposals must be organized into sections corresponding to the sections presented in **10.1 Technical Evaluation Criteria** and numbered accordingly. Please stay in the page limits given below. Only include the requested information and avoid submitting extra content. Any text or pages exceeding the page limitation for each section of the proposal may be redacted and not evaluated.

Proposals shall be written in English with each page numbered consecutively. Cover pages, dividers, and tables of contents are not subject to the page limit.

### 10.1. Technical Evaluation Criteria

Proposals will be evaluated according to the following criteria. Points will also reflect the overall presentation of the proposal, which should be clear, complete, well organized, and well written. Most importantly, proposals should address all the requirements listed in this RFP.

#### [1] Technical and management approach: 3 pg. limit; possible points 50

Proposals will be scored on the effectiveness of the proposal to meet the requirements of the monetization process for the program, as outlined in **Section 5.2**.

Proposals will be scored based on:

#### 1. Offer Verification

- a. IESC may contact the offeror to confirm contact person, address information and to confirm that the offer was submitted in response to this RFP.

## 2. Evaluation

- a. Submission materials will be reviewed and evaluated by a review committee. IESC reserves the right to change or cancel the requirement at any time during this RFP and/or future solicitation process, if any.

## 3. Accuracy of Information

- a. Offerors must provide full, accurate and complete information as required by this RFP. If at any time IESC determines that an offeror has provided false statements in the response, IESC may reject the response without further consideration.

### **[2] Offeror's past performance and references: 3 pg. limit (not including samples of previous work, which may be attachments and/or references); possible points 30.**

The proposal must provide a detailed account of the Offeror's record in implementing similar activities to those outlined in the tasks and activities. The technical proposal shall include a summary of past performance conducting section 8 Eligibility and requirements, in implementing similar activities to those outlined in section 5.2 Tasks. Offerors should provide experience in general, and specifically include experience in research studies to produce detailed analytics and information on visitation forecasts.

This part should include sufficient information to demonstrate the Offeror's performance for the above tasks and activities and include how the overall approach, is based on extensive prior experience in conducting research and analytical work in demand analysis and market research.

Offerors should provide a minimum of three (3) references, including the contact information of three prior or current clients for which similar tasks have been implemented. References must include contact information.

### **[3] Offeror's Personnel Experience and Capacities: 3 pg. limit (not including resumes or CVs, which are attachments); possible points 20**

The technical proposal must include a description (biographical sketch acceptable) of the individual, or for companies a minimum of one, but not more than two, senior management personnel, who would directly work on the activities in the contract. Resumes or CVs must be submitted as attachments for individuals submitted in this section and do not count within the page limitations of this section.

This section will be marked on the extent to which the Offeror's or its personnel have experience in experience in conducting research and analytical work in demand analysis and market research.

## 11. Cost Proposal Evaluation

The Offeror shall submit a separate cost proposal that complies in full with the "Demand Driven Tourism Research Study for the Pekoe Trail in Sri Lanka" budget template in **Annex 1**.

All proposed costs must be eligible costs as defined by the EU PRAG.

(Other)

## **12. Deviations**

IESC reserves the right to waive any deviations by offerors from the requirements of this solicitation that in IESC's opinion are considered not to be material defects requiring rejection or disqualification; or where such a waiver will promote increased competition.

## **13. Discrepancies**

Please read the instructions carefully before submitting your proposal. Any discrepancy in following the instructions or contract provisions may disqualify your proposal without recourse or an appeal for reconsideration at any stage.

## **14. Conflict of Interest Declaration**

The following steps outline IESC's contract selection process and should be understood by all Offerors to ensure the transparency of awards and avoid conflict of interest.

- 1) Request for Proposals (RFPs) are posted on IESC's website. The offer is open to all qualified offerors;
- 2) Clarifications will be emailed to all offerors submitting questions, as well as posted on IESC's website, simultaneously;
- 3) Once the proposals are received, an evaluation committee scores them;
- 4) Cost proposals are evaluated for reasonableness, accuracy, and completeness;
- 5) The best value proposal is selected based on a combination of the technical score and the cost;
- 6) No activity can be started until both IESC and the awardee have signed a formal contract; and,
- 7) IESC policy against fraud and code of business ethics exists throughout the life of the subcontract and beyond. Even if the contract is closed, if any party is found guilty of fraud, IESC will make a full report to the EU Office of Inspector General, which may choose to investigate and prosecute guilty parties to the fullest extent of the law.

Any contracts awarded will be required to comply with all administrative standards and provisions required by the Award made from the EU.

-END-

ANNEX 1: Excel Budget Template