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| Name and address of the contracting authority: **René Moawad Foundation**  Contact person: Carla Hammoud (email: [chammoud@rmf.org.lb](mailto:chammoud@rmf.org.lb)) (tel.: +961 1 613 367/8/9)  Title of the tender: **Study and analysis of adventure tourism in Lebanon**  Reference number: MEDU-T-001 |

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| **PART A: INFORMATION FOR THE TENDERER** |

1. **INFORMATION ON SUBMISSION OF TENDERS**

Subject of the contract:

The subject of this tender is:

* Provision of **services**, as indicated in the technical information in point 2 of this section

Deadline for submission of the tenders:

The deadline for submission of tenders is **13, December, 2019 until 17:00h**. Any tender received after this deadline will be automatically rejected.

Address and means of submission of the tenders:

The tenderers will submit their tenders using the **standard submission form available in Part B of this tender dossier**. The tender will be submitted in 1 (one) original. In case of e-mail submission, the tenderer may provide a scanned original. Any tenders not using the prescribed form shall be rejected by the contracting authority.

**If delivery by post or courier**, the tenders will be submitted in two separate envelopes:

* **envelope** **one** for the tenderer’s information, the tenderer’s statement and the technical offer and
* **envelop two** for the financial information.

An envelope including both envelopes will contain the following information at the external part:

Name and address of the contracting authority

Contact person

Title of the tender

Reference number

Name and address of the tenderer

**If delivery by e-mail**, the message will clearly indicate:

Title of the tender

Reference number

Name and address of the tenderer

The tender submission form and any supporting documentation will be provided as attachment to the e-mail.

1. **TECHNICAL INFORMATION**

The tenderers are required to provide services as indicated below. In the technical offer, the tenderers will indicate more details on the deliveries, referring back to the below terms of reference:

**Background information**

The Mediterranean (MED) region is one of the world’s leading tourist destinations, which makes tourism a key driver for socio-economic progress & a key income source for many of its countries. Faced by growing competition & a deterioration of the political & security situation in the region, the destination has demonstrated symptoms of a slowdown, which makes the recovery of the sector an economic priority. This downturn may also present an opportunity to transform the tourism model into a sustainable & competitive one, addressing current sectorial challenges as the predominance of mass seaside tourism, dependence on the European market & territorial imbalances.

The hereby proposed initiative (MEDUSA project) is led by a mix of public/private/non-governmental organizations across the region with proven track record in the tourism & business development field. MEDUSA will tackle these joint challenges via targeted & inter-related capacity building & cross-border interventions to develop & promote Adventure Tourism (AT) in the region. Between 2010 & 2014, this tourism niche grew by 195%. The MED has every opportunity to become part of this international trend, which properly managed can make tourism more sustainable, providing a strong incentive for conservation, while creating jobs & more income for local communities. These major expected changes will occur in the medium/long-term. Also, the multiplier effect will be higher in comparison to other forms of tourism. The main results of the project are cross-border routes & itineraries, in the form of new and/or improved AT products, revealing lesser-known destinations & attracting tourists throughout the year. A long-term (LT) strategy is envisaged for the promotion & management of these destinations in a sustainable way with the participation of a wide array of stakeholders. The main beneficiaries are SMEs (Tourism Service Providers, Tour Operators (TOs), Travel Agencies, etc.), public authorities & the communities.

MEDUSA project is co-financed by the European Union under the European Neighbourhood Instrument cross-border cooperation program “Mediterranean Sea Basin” 2014-2020 (ENI CBC MED). It started on 1st September 2019 and has a duration of 36 months (until 31st August 2022). It counts on an overall budget of 3,317,314 EUR, which are co-financed at a 90% rate by the ENI CBC Med program.

It includes the following project partners:

* Barcelona Chamber of Commerce (Spain) – Lead Beneficiary
* Rene Moawad Foundation (Lebanon)
* Association of the Mediterranean Chambers of Commerce and Industry (Spain)
* Jordan Inbound Tour Operators Association – JITOA (Jordan)
* Royal Society for the Conservation of Nature – RSCN (Jordan)
* Puglia Region – Department of tourism, economy of culture and valorization of territory (Italy)
* WWF Mediterranean North Africa (Tunisia)

More information is available at: <http://www.enicbcmed.eu/projects/medusa>

**Objective, purpose and expected results**

The overall objective is to provide an insightful analysis of the current position of Lebanon within the Adventure Tourism market and what opportunities exist for future development of the sector.

In specific, the purpose is as follows:

* To provide an **assessment** that examines both existing attractions that already draw visitors interested in Adventure Tourism and assets that have the potential for future development in the targeted territories. This includes wilderness, leisure & recreational attractions (hiking, biking, climbing, etc. and other outdoor pursuits), historic monuments & cultural events, evaluated against several criteria including product development potential. It uncovers available infrastructure & services & human capacity of the destinations;
* To identify for each territory the **complementary relationship** between the host communities and tourism from a socio-economic context, incorporating gender perspectives in the discussion. It reviews institutional support for tourism development, mapping key stakeholders (government, tourism boards, investment promotion offices, park & wildlife services, local tourism associations) and estimates the potential impacts, both negative and positive, of tourism on the environment.

The results to be achieved by the Consultant or the firm are:

* **RESULT Nº1:** Mapping and Database of Adventure Tourism Assets in the target territories;
* **RESULT Nº2:** Socio-economic, legal and environmental profile of the target territories.

**Description of the assignment**

The Consultants’ service is expected to provide a **comprehensive analysis of the current situation of Adventure Tourism** in the territorial areas targeted determining its current and future opportunities as well as limitations.

The approach followed encompasses a comprehensive and participatory assessment process of the socio-economic, environmental and legal context, and a territorial and local asset mapping, which uncovers existing attractions drawing visitors to the area as well as less known areas that have the potential for future development.

All the resources that visitors consume should be also considered, not only the resources that are located in the immediate area around the tourist attraction, but also the resources that are located in the influence area (expanded area) that can be attractive in order to enhance visitors flow to the territory.

The analysis of resources will be carried out, therefore, on two territorial levels:

1. **Immediate area** (resources located in the territory);
2. **Expanded area** (resource located in the region or neighbouring regions, but also susceptible to be incorporated or linked to the offer of the territory targeted).

By employing a participatory approach throughout this assessment, the René Moawad Foundation aims to engage key beneficiaries at an early stage of the MEDUSA project and identify further organisations and individuals needed to support and implement the project. To this end, it is expected that the Consultants will analyse the **destination management organisation’ surveys** collected by René Moawad Foundation and organise interviews with key stakeholders as suggested by René Moawad Foundation.

**Geographical area to be covered**

All Lebanese territories.

**Specific work**

## The Consultant’s or firm services will include but not necessarily be limited to the following:

1. Present the proposed organisation and methodology to key stakeholders during a local kick-off workshop organised by René Moawad Foundation in Lebanon.
2. Update the proposed **organisation and methodology** according to the local workshop conclusions, and include it in the Inception Report;
3. Send, collect and analyse the **destination management organisation’surveys** (following **Annex 1**) and organise interview with key stakeholders.

**To achieve RESULT Nº1:**

1. Identification of **adventure tourism activities[[1]](#footnote-1)** in the targeted territories such as rafting, Canyoning, Paragliding, Tree climbing, Surfing, Regatta, Marathon, Mountaineering, Hiking trail, Hiking and Cycling paths, Speleology, Climbing, Diving, Biking, etc.;
2. Identification of the **resources** in the targeted territories, consisting of cultural and historical assets, as well as natural and agricultural heritage of potential interest, that could be associated to the identified adventure tourism activities, and provide information on the level of use, the current and future tourism value, and add any links to promotional or any other material with relevant information;
3. Identification of (mobility) **infrastructures** in the targeted territories and description of: a) how to get to the attractions doing reference to external accessibility (highways, roads, railways, airport, etc.); b) how to move around to do the activities and complementary visits, doing reference to internal mobility (road network, country transport systems, etc.);
4. Identification of other **services** of interest such as sanitary and medical offer, security, etc.;
5. Identification of **tourist support** **services** in the targeted territories, consisting of: the accommodation[[2]](#footnote-2), and restoration and gastronomic offer[[3]](#footnote-3); tourism offices, local and incoming travel agencies, traveller services and other services such as local guides or hosts excursions or experiences, and car rental;
6. Identification of activities related to adventure tourism that can be carried out in the targeted territories, valuing their importance according to the number of companies offering the activity, the existing demand, or the interest and/or growth potential;
7. Identification of the elements to support adventure tourism and discovery of the territory, including amongst other: Museums, visitor and interpretation centres of the territory, tourism routes of interest, visit to local artisans, producers and cooperatives;
8. Identification of **stakeholders and agents** involved in adventure tourism for the targeted territories.

**To achieve RESULT Nº2:**

1. General description of the territory, doing reference to the most remarkable tourism elements, as well as cities and towns interesting from a tourism and/or from a service provision perspective.
2. Environmental profile of the targeted territories, doing reference to flora and fauna, biodiversity areas, water and energy sources, waste management systems, protected areas and their governance, and other environmental considerations.
3. Legal framework affecting tourism activities in relation with nature and adventure;
4. Socio-economic profile of the targeted territories and the role of tourism, consisting of understanding the economic and social system of the territory, and the role played by tourism (and in specific adventure tourism activities) as a driving force for economic development. The list of variables to explore (non-exhaustive list) are:

* Economic structure;
* Demographic evolution;
* Occupation;
* Engines of local economy;
* Weight and general dynamics of tourism;
* Gender dimension of tourism.

## In addition, the Consultants will:

1. Present the results of consultancy (RESULT Nº1 and Nº2) to key stakeholders during a local closure workshop organised by René Moawad Foundation in Lebanon
2. Prepare all the reports as specified under the section on ‘’Reporting requirements’’.

In undertaking the tasks described under this section, the Consultants must comply with the latest Communication and Visibility Manual for EU External Actions concerning acknowledgement of EU financing of the project. See <https://ec.europa.eu/europeaid/communication-and-visibility-manual-eu-external-actions_en>.

**Start date and period of implementation of the tasks**

The intended start date is January 2, 2020 and the period of implementation of the contract will be 3 months from this date.

**Reporting requirements**

The contractor will submit the following reports in English in Electronic format:

* **Inception Report** of maximum 10 pages to be produced within one week after the local kick-off workshop organised with key stakeholders. In the report, the contractor shall describe the updated **organisation and methodology** proposed according to the local workshop conclusions. The contractor should proceed with his/her work unless the contracting authority sends comments on the inception report.
* **Draft Final Report** in the format given in **annex 2**. This report shall be submitted no later than two weeks before the end of the period of implementation of tasks.
* **Final report** with the same specifications as the draft final report, incorporating any comments received from the parties on the draft report. The deadline for sending the final report is 7 days after receipt of comments on the draft final report. The report shall contain a sufficiently detailed description of the different options to support an informed decision on the touristic potential of the targeted territory within the niche of adventure tourism, understanding the opportunities and threats ahead. The detailed analyses underpinning the recommendations will be presented in annexes to the main report. The final report must be provided along with the corresponding invoice.

**Special requirements**

## The Contractor should place special emphasis on ensuring a wide consultation among key stakeholders, especially, local communities, tourism industry and government. While conducting the tourism assessment, it is important for the Contracting Authority to brainstorm about who to specifically consult with, and how to best engage those individuals or groups in the MEDUSA project.

The Contractor must ensure that adequate visibility of the EU under the programme of which the project is part through its implementation.

1. **ADDITIONAL INFORMATION**

The selection criteria are:

**Economic and financial standing:**

* The operating profit of the candidate must not have been negative over the past year;
* The candidate must have at least one year of existence.

**Technical Capacity:**

* At least 1 contract of similar nature undertaken in the past 3 years;
* At least 5 years of professional experience in sustainable tourism development;
* Graduated Studies in Tourism & Hospitality, Economics or similar;
* Excellent reporting skills in English.

The award criterion is:

* Best value for money, weighting **60% technical quality** and **40% price** (select in case of services)

The successful and unsuccessful tenderers will be informed of the results of the evaluation procedure in written.

The estimated time of response to the tenderers is 5 working days from the deadline for submission of the tenders.

1. **FORMAT OF CONTRACT**

**CONTRACT TITLE**: **Study and analysis of adventure tourism in Lebanon**

**REFERENCE**: MEDU-C-001

Concluded between:

René Moawad Foundation

Mejdlaya Zgharta North Lebanon

Represented by: Mr. Nabil Moawad – General Director

AND

Name of the contractor>

Address of the contractor>

Represented by: name of legal representative position

**Article 1: Subject of the contract**

The subject of the contract are the services as indicated in the contractor’s offer.

**Article 2: Contract value**

The total contract value for implementation of services indicated in the Article 1 is: <XXX EUR >

**Article 3: Contracting documents**

The documents which form the part of this contract are (by the order of precedence):

* + Contract agreement
  + Contractor’s offer as provided in the tendering phase
  + Any other supporting documentation if applicable (in case of request for registration of company, compliance with tax obligations or other documentation)

**Article 4: Deliveries and payments**

The contractor will deliver without reservation the services indicated in the contractor’s offer. The deliveries will be implemented within the indicated dates.

The contracting authority will pay to the contractor the services in the amount indicated in the Article 2 of this contract document. The payments will be issued by the following time schedule.

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| Month |  | < EUR > |
| 1 | Initial pre-financing payment | 30% of the contract value |
| 2 | Interim payment | 40% of the contract value |
| 3 | Balance payment subject to the approval of the Final Report | 30% of the contract value |
| **Total** | | <Total contract value> |

The contractor will provide contracting authority with the reports on execution of the services.

**Article 5: Duration of the contract**

The duration of the contract is 3 months.

**Article 6: Cancellation of the contract**

The contract can be suspended by the Contractor if the contracting authority does not fulfil payment and other obligations.

The contract can be terminated by the contracting authority due to one of the following reasons:

* + The Contractor is in serious breach of the contract, failing to meet contractual obligations
  + The Contractor is bankrupted or being wound up, is having its affairs administrated by courts, has entered into arrangements with creditors, has suspended business activities, is the subject of proceedings concerning those matters, or is in any analogous situations arising from a similar situation provided for in national legislation or regulations.

**Article 7: Resolving of disputes**

Any disputes arising out of or relating to this Contract which cannot be settled otherwise shall be referred to the exclusive jurisdiction of Beirut Courts.

For the Contractor For the contracting authority

Name: Name:

Position: Position:

Signature: Signature:

Date: Date :

1. **Definition of Adventure tourism** shall follow the definition by the **Adventure Travel Trade Association (ATTA)**. [↑](#footnote-ref-1)
2. The accommodation must be a legal accommodation according to tourism regulations in the territory. [↑](#footnote-ref-2)
3. The slow food trend and the traditional recipes will be a differentiating factor, so agriculture of local agricultural cooperatives that work on the sustainability concept (products of proximity, season and zero kilometre) are essential values to be taken into consideration. [↑](#footnote-ref-3)