

TERMS OF REFERENCE

- I. BIDDER** : Market Research and Consulting Services
- II. PROJECT TITLE** : Procurement of Market Research and Consulting Firm to Formulate the Ten-Year Education Tourism Roadmap
- III. IMPLEMENTATION PERIOD:** Six (6) months from the receipt of the Notice to Proceed

IV. BACKGROUND

Education Tourism is a form of travel with a learning or educational element undertaken outside of the home geographical environment within a duration limit between 24 hours and 12 consecutive months. (Source: Maga and Nicolau P (2018) Conceptualizing Education Tourism Potential Evidence for ASEAN countries. Advance in Economic, Business and Management Research (AEBMR), volume 39

As one of the tourism products identified in the National Tourism Development Plan, there is a need to formulate a roadmap and action plan to facilitate the planning and coordination of efforts and resources to promote Edu tourism as a strategic tourism product of the country. A roadmap is a vital tool to provide the basis for the integrated planning of initiatives and allocation of resources in the next ten (10) years. It provides a clear and concise plan of action for the Department of Tourism and the different education and tourism stakeholders.

To ensure that the Roadmap responds to the challenges of developing the sector, an Action Plan must be formulated to coordinate the efforts of different government agencies and stakeholder groups in promoting Edu-Tourism. The Edu-Tourism Action Plan will articulate the priorities to guide the DOT and different agencies from the National to the Local Government in developing and promoting Edu-Tourism.

V. OBJECTIVES

- To come up with a Roadmap and Action Plan for the development of Philippine Education Tourism within the next ten (10) years.
- To gather and strengthen the partnership of the Department with the concerned government agencies, public and private stakeholders, industry experts and practitioners to discuss best practices, insights, and recommendations on the plans and programs for the development of the country's Education Tourism.
- To identify and present the priority programs, policies, and activities and steps to initiate Edu-tourism development activities to generate high-value and deep and meaningful connections.

VI. MINIMUM ELIGIBILITY REQUIREMENTS

1. Must be a market research and/or consulting agency specializing in the conduct of custom research for local and international organizations with five (5) or more years of experience in the field;
2. Must have undertaken two to three (2-3) market research and/or study on Education Tourism or any related fields; and
3. Must be registered/accredited with the Philippine Government Electronic Procurement Systems (PhilGEPS) with a valid Platinum membership.

**** Note: Bidders must meet minimum eligibility requirements.**

VII. SCOPE AND DELIVERABLES

This project requires a team that will formulate the ten-year Philippine Strategic Education Tourism Roadmap and Action Plan. This will involve organizing a national workshop gathering representatives from various stakeholder groups including DOT regional offices, higher education institutions, professional organizations, travel and tour organizers, tourism sites and venue managers. The workshop will facilitate data collection and analysis to understand the current state and conceptualization of Education Tourism in the Philippines, culminating in the development of a strategic roadmap and action plan. The documentation of the current understanding of Education Tourism in the Philippines shall encompass a comprehensive review of literature and policy documents, along with insights gathered from the national workshop, to provide a nuanced understanding of Education Tourism in the country. It will articulate different perspectives on Education Tourism, identify target market segments, and explore potential development pathways.

The Philippine Strategic Framework and Education Tourism Roadmap shall be meticulously crafted outlining specific programs, policies, and activities (PPAs) aimed at promoting Education Tourism in the Philippines over the next ten (10) years. It will include impact statements aligning with the National Tourism Development Plan, descriptions of target outcomes and outputs, performance indicators, recommended PPAs and inputs, and an assessment of risk factors and critical assumptions. The roadmap will serve as a strategic guide for the DOT and relevant stakeholders to coordinate efforts and allocate resources effectively towards the development of Education Tourism in the country.

A. SCOPE OF WORK

The Team should be able to conduct or implement the following activities:

Activities	Description
Review of Literature and Relevant Education Tourism Policies	A review of relevant policy documents and literature will be done to provide context for the analysis and recommendations. The review also serves as the basis for developing the data-gathering instruments for the stakeholder workshops.
Stakeholder Workshops	Inputs will be gathered through a series of workshops with stakeholders/ representatives of the following groups: <ul style="list-style-type: none"> • DOT regional offices supervising Edu-Tourism activities in the past five years • Education and Learning institutions handling relevant exchange and /or similar short-term programs for international students, learners, gap year travelers, and participants of Edu-tourism programs • Professional organizations and regulatory institutions that regularly hold professional development activities for their members

	<ul style="list-style-type: none"> • Travel and tour organizers offering Edu-tourism, immersion activities, voluntourism, and similar tourism activities with learning elements • Tourism site and venue managers that host Edu-Tourism, immersion activities, voluntourism, and similar tourism activities with learning elements
	<p>Separate workshops will be organized for the following Edu-tourism products:</p> <ul style="list-style-type: none"> • English as Second Language • Gap Year Travel Activities • Voluntourism for Life-Long Learning • Non-degree aviation and maritime training Programs • Non-degree International Student Exchange Programs • Conference and Similar professional development events involving International Academic Communities and Professional Organizations • Other emerging Edu-Tourism programs that international guests may participate in visa-free or through tourist or special study permit visas issued in the Philippines <p>Workshops shall be done remotely (i.e., via Zoom to facilitate documentation and processing of inputs in a timely manner.</p>
<p>Formulation of the Draft Ten-Year Roadmap and Action Plan</p>	<p>The Education Tourism Roadmap and Action Plan will provide the strategic direction and strategies to direct the DOT and facilitate the coordination of various stakeholders. It shall also serve as a design and monitoring framework to enable performance monitoring to align different Edu-Tourism initiatives with potential sources of financing and other forms of support.</p> <p>The Education Tourism Roadmap and Action Plan shall have the following elements:</p> <ul style="list-style-type: none"> • Impact statements-shall align the Education Tourism development strategies and targets with the goals of National Tourism Development Plan 2023-2028 • Results Chain-series of expected achievements that show the

	<p>connections between inputs, activities, outputs, and outcomes.</p> <ul style="list-style-type: none"> • Direct Project Results-comprised of Statement of Target Outcomes, Description of Outputs and Performance indicators for measuring the results. • Action Plan will include a description of recommended PPAs and inputs to cover a ten (10) year development period. The Action Plan shall consist of: <ol style="list-style-type: none"> 1. Project, Programs and Activities (PPAs) that refer to the initiatives to be undertaken by DOT and relevant stakeholders to produce the desired outputs. 2. Input descriptions which are the primary resources to undertake the PPAs and produce the outputs.
Validation to Finalize the Roadmap and Action Plan	Feedback must be gathered after the stakeholder validation event to be assessed and incorporated in the draft to finalize the Education Tourism Roadmap and Action Plan
Mobilization of Resource Persons and Facilitators	<p>The consulting firm will mobilize a team of resource persons who will lead the following activities over a six (6) month period:</p> <ul style="list-style-type: none"> • Preparation of the research design • Data collection and analysis • Formulation of the Philippine Edu-Tourism Roadmap and Analysis 2024-2034
Presentation to the Department of Tourism	Present all workshop outputs and recommendations to DOT for approval and endorsement
Portfolio Curation	Compile a Portfolio of Education Tourism based on inputs gathered from partners and stakeholders throughout the formulation process

B. MILESTONES

PHASE	MILESTONES	TIMELINE
Phase 1	<p>INCEPTION REPORT</p> <p>After the signing of the Contract and receipt of the Notice to Proceed (NTP), an Inception Report (IR) shall be submitted to DOT OPMD to describe the research design and methodology to prepare the (1) Research Report on the state of Edu-Tourism in the Philippines and (2) the Edu-Tourism Roadmap and Action Plan.</p>	Month 1

Phase 2	<p>REVIEW OF LITERATURE AND RELEVANT EDUCATION TOURISM POLICIES</p> <p>In Month 2, a Research Report shall be submitted to DOT OPMD to provide information about the Edu-Tourism landscape and the basis for undertaking problem analysis and solution development to develop Edu-Tourism in the Philippines. The Report shall be based on a review of the literature covering relevant policy documents and scholarly works on Edu-Tourism.</p>	Month 2
Phase 3	<p>RESEARCH REPORT ON STAKEHOLDER WORKSHOP FINDINGS</p> <p>In Month 4, a Research Report shall be submitted to the DOT OPMD to present the data and describe the findings from the stakeholder workshops organized by the consulting firm. The results shall be the basis for formulating a ten (10) year Education Tourism Roadmap and Action Plan for DOT.</p>	Months 3 to 4
Phase 4	<p>SUBMISSION AND PRESENTATION OF DRAFT EDUCATION TOURISM ROADMAP AND ACTION PLAN</p> <p>On Month 5, the DOT OPMD shall be furnished with the draft Education Tourism Roadmap and Action Plan. The draft must also be presented to the DOT OPMD and representatives of the different stakeholder groups for feedback and validation.</p>	Month 5
Phase 5	<p>SUBMISSION OF REVISED EDU-TOURISM ROADMAP AND ACTION PLAN</p> <p>On Month 6, the DOT OPMD shall be furnished with the revised Edu-Tourism Roadmap and Action Plan. The Roadmap and Action Plan must consider the final comments from DOT officials.</p>	Month 6

C. REQUIRED PERSONNEL

REQUIRED PERSONNEL	MINIMUM YEARS OF EXPERIENCE
<p>Team Leader</p> <p>The team leader shall set the project's overall direction and ensure the effective and timely delivery of outputs. The team leader must have:</p> <ul style="list-style-type: none"> • At least a Master's degree. Doctorate or doctorate units are an advantage • At least 10-years participation in tourism and related project • At least one (1) research project completed on any education tourism program • Research management or related experience in at least one (1) research/technical 	Ten (10) years

<p>assistance project involving the preparation of a road map and action plan in tourism</p>	
<p>One (1) Tourism Education Administration Expert</p> <p>The expert shall provide inputs in defining the education and learning components of the Education Tourism offerings and information on potential linkages with education tourism partners in the Philippines, Southeast Asia and East Asian regions.</p> <ul style="list-style-type: none"> • At least a Master's degree. Doctorate or doctorate units are an advantage. • At least 10-years participation in tourism and related project • At least five (5) years of relevant experience in education administration • Must have experience in Research Management or related field in at least one (1) research/technical assistance project involving the preparation of a road map and action plan in tourism 	<p>Five (5) years</p>
<p>One (1) Tourism Product and Market Development Expert</p> <p>The expert shall provide inputs in developing the design of the Education Tourism programs as tourism products of the DOT. The expert must also provide insights on the marketing and promotion of Education Tourism in the next five (5) years. The Tourism Product and Market Development Expert must have:</p> <ul style="list-style-type: none"> • At least a Master's degree in Tourism • At least five (5) years of experience in the development and design of a tourism and related project • At least one (1) research project completed on any education tourism program • Relevant experience as an expert in tourism marketing and product development 	<p>Five (5) years</p>
<p>One (1) Lead Workshop Facilitator shall lead the gathering of inputs during the Workshop activities.</p> <ul style="list-style-type: none"> • At least MS degree in Social Science, Sociology, Community Development, or related fields • At least one (1) research project completed on tourism • Relevant experience as a socio-cultural specialist in tourism planning and product development 	<p>Three (3) years</p>

VIII. PROJECT DURATION AND BUDGET

1. The research shall commence upon the receipt of the Notice to Proceed and should be completed within six (6) months.
2. The Approved Budget for the Contract (ABC) for the Project is PHP2,450,000.00, inclusive of all applicable government taxes and charges, professional fees, bank charges, and other fees that may be incurred in the process.
3. The consulting contract shall be a fixed-price contract.
4. All manuals, reports, materials, databases, questionnaires, references, etc., acquired through the conduct of the survey research shall be turned over to DOT after the undertaking.

IX. PAYMENT SCHEME/SCHEDULE

Payment for the services will be on a send-bill arrangement and shall be made in tranches based on the following milestones and upon the submission of complete billing and supporting documents. Billing Statement/Statement of Account must be addressed to the Department of Tourism.

REPORT PHASE	PERCENTAGE OF TOTAL BUDGET
Upon acceptance of the Inception Report (Phase 1)	10%
Upon acceptance of the report on findings from the Review of Literature and Edu-Tourism Policies (Phase 2)	15%
Upon acceptance of the Research Report on Stakeholder Workshop Findings (Phase 3)	25%
Upon submission and presentation of the draft Edu-Tourism Roadmap and Action Plan (Phase 4)	25%
Upon submission of the revised Edu-Tourism Roadmap and Action Plan (Phase 5)	15%
Upon receipt of the Certificate of Completion of the Project	10%
TOTAL	100%

Note: The contracting party/consultant agrees that the project shall be governed by and construed in all respects in accordance with the existing laws, rules and regulations of the Republic of the Philippines. Dispute resolutions shall likewise be governed and conducted within the Republic of the Philippines.

XI. CRITERIA FOR RATING

Stage 1 – Submission of eligibility documents

Stage 2 – Shortlisted bidders must submit brief company credentials and a proposed research plan together with the technical and financial proposal

- A. Eligibility Check and Shortlisting Criteria for Rating
- Applicable Experience and Past Clients of the Consultant
 - Quality of Personnel Assigned
 - Current Workload Relative to Capacity
- B. Technical Bid Criteria for Rating
- Qualification of Personnel Assigned
 - Professional Experience
 - Plan of Approach and Methodology
 - Experience and Capability of the Firm

I.	Applicable Experience of the Consultant	
A.	Relevance of the Company Portfolio to the Project (25)	
1.	Bidder has conducted at least three (3) research projects	20 pts.
2.	Bidder has conducted at least one to two (1-2) research projects	10 pts.
3.	Additional – Bidder has conducted at least two (2) tourism-related research project	5 pts
B.	Years of Experience (20)	
1.	Bidder has more than five (5) years of experience conducting research or consulting projects.	20 pts.
2.	Bidder has five (5) years of experience conducting research or consulting projects.	10 pts.
C.	Past Clients (15)	
1.	Bidder has completed two (2) or more education tourism and/or any related research/planning projects for the past five (5) years with a contract cost equal to or greater than the ABC	15 pts.
2.	Bidder has completed one (1) education tourism and/or any related research/planning project for the past five (5) years with a contract cost equal to or greater than the ABC	10 pts.
II.	Quality of Personnel Assigned (30)	
	All of the assigned personnel must have experience in at least two (2) research/technical assistance projects	20 pts.
	One (1) of the assigned personnel has research management or related experience in at least one (1) research/technical assistance project	10 pts.
	Additional with tourism related projects	10 pts.
III.	Current Workload Relative to Capacity (10)	.
	Bidder has one to three (1-3) ongoing projects with contract costs equal to or greater than the Approved Budget for the Contract (ABC).	10 pts.
	Bidder has no ongoing projects with contract costs equal to or greater than the ABC.	5 pts.

	Total	100 pts.
	Passing score	70 pts.

*Need supporting documents for additional points (Certificate of Completion)



C. Technical Bid Criteria for Rating

- Qualification of personnel to be assigned.
- Plan of approach and methodology.
- Experience and capability of the firm



I.	Qualifications of Personnel to be Assigned	
A.	Educational Background (35)	
1.	The Team Leader has a Master's Degree	15 pts.
2.	The Team Leader has a Doctorate Degree	5 pts.
3.	All assigned personnel (aside from Team Leader) have Master's Degrees	10 pts.
2.	Additional- At least one of the assigned has a Doctorate Degree or Doctorate Units	5 pts.
B.	Professional Experience (35)	
1.	At least two (2) of the assigned personnel have been involved in the implementation of at least one (1) research/study/survey on voluntourism	20 pts.
2.	Only one (1) of the assigned personnel has been involved in the implementation of at least one (1) research/study/survey on voluntourism	15 pts
3.	At least three (3) assigned personnel have membership in a least one (1) research-related professional society or association	15 pts.
4.	One to two (1-2) assigned personnel have membership in at least one (1) research-related professional society or association	10 pts.
II.	Plan of Approach and Methodology (15)	
1.	The proposal discusses the proposed project framework, workshop design, data collection, and methodologies to be used in the study	15 pts
III.	Experience and Capability of the Firm (15)	
1.	Bidder has implemented at least three (3) similar contracts that involve market research/surveys/studies in any sector	10 pts.
2.	Bidder has implemented at least two (2) similar contracts that involve market research/surveys/studies in any sector	8 pts.
2.	ADDITIONAL – Bidder has implemented one (1) market research/survey/study contract for LGU or government agencies. *	5 pts.
	Total	100 pts.
	Passing score	70 pts.

*Need supporting documents for additional points (Certificate of Completion)

X. CONTACT PERSON

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