



REFERENCE NUMBER: [GTA/01/2017]

**CALL FOR QUOTATIONS TO CARRY OUT STUDY EXAMINING THE HUMAN
RESOURCES SITUATION WITHIN
THE GOZO TOURISM INDUSTRY**

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CET/CEST

Tender Opening: [Thursday 28th September 2017] At 10:30am
CET/CEST



PARLIAMENTARY SECRETARY FOR YOUTH,
SPORT AND VOLUNTARY ORGANISATIONS



SEGRETARJAT PARLAMENTARI GHAŻ-ŻGHAŻAGH,
SPORT U GHAQDIET TAL-VOLONTARJAT

This project has been funded through the Voluntary
Organisations Project Scheme managed by the Malta Council
for the Voluntary Sector on behalf of Parliamentary Secretary
for Youth, Sport and Voluntary
Organisations

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## SECTION 1 - INSTRUCTIONS TO TENDERERS

### 1. General Instructions

- 1.1 In submitting a tender, the tenderer accepts in full and in its entirety, the content of this tender document, including subsequent Clarifications issued by the Non Governmental Organisation (NGO), whatever the economic operator's own corresponding conditions may be, which through the submission of the tender is waived. Tenderers are expected to examine carefully and comply with all instructions, forms, contract provisions and specifications contained in this tender document. These Instructions to Tenderers complement the General Rules Governing Tenders for NGOs Version 1.0.

No account can be taken of any reservation in the tender in respect of the procurement documents; any disagreement, contradiction, alteration or deviation shall lead to the tender offer not being considered any further.

Prospective tenderers must submit their offer by depositing it in the tender box, located at **Gozo Tourism Association, Flat 04 Ta' Mliet Court, Gorg Borg Olivier Street, Victoria, Gozo, Malta, VCT 2519**. Prospective tenders take full responsible to submit their offer by the set tender submission deadline.

**Note:**

Where in this tender document a standard is quoted, it is to be understood that the Contracting Authority will accept equivalent standards. However, it will be the responsibility of the respective bidders to prove that the standards they quoted are equivalent to the standards requested by the Contracting Authority.

- 1.2 The subject of this tender is the [STUDY EXAMINING THE HUMAN RESOURCES SITUATION WITHIN THE GOZO TOURISM INDUSTRY] of the following [services]:
- [A critical review of the existing literature on the research topic being studied]
  - [Market Research, Surveys and Public Consultation Meetings]
  - [Results Analysis/ Finalisation of Reports]
- 1.3 The place of acceptance of the services shall be [Victoria, Gozo], the time-limits for the execution of the contract shall be [14 (fourteen) weeks from the issue of commencement order], and the INCOTERM<sup>2010</sup> applicable shall be **Delivery Duty Paid (DDP)**.
- 1.4 This is a [global price] contract.
- 1.5 This call for tenders is being issued under an open procedure.
- 1.6 The beneficiary of this tender is *the Gozo Tourism Association*.
- 1.7 This tender is a reserved contract.

## 2. Timetable

2.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                            | DATE         | TIME    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|---------|
| <p>Deadline for request for any additional information from the NGO</p> <p>Clarification requests should be addressed to: <i>NGOs e-mail address: gtagozo@onvol.net</i></p> <p><i>Clarifications shall be uploaded online on: <a href="http://islandofgozo.org/">http://islandofgozo.org/</a></i></p> <p><i>It shall be the responsibility of prospective bidders to check if any clarifications have been issued, before making their submission.</i></p> | [20.09.2017] | [10.00] |
| <p>Last date on which additional information can be issued by the NGO</p>                                                                                                                                                                                                                                                                                                                                                                                  | [22.09.2017] | [10.00] |
| <p>Deadline for submission of tenders/Tender opening session (unless otherwise modified in terms of Clause 10.1 of the General Rules Governing Tendering for NGOs)</p>                                                                                                                                                                                                                                                                                     | [28.09.2017] | [10.00] |
| * All times Central European Time (CET) / Central European Summer Time (CEST) as applicable                                                                                                                                                                                                                                                                                                                                                                |              |         |

## 3. Lots

- 3.1 This tender is not divided into lots, and tenders must be for the whole of quantities indicated. Tenders will not be accepted for incomplete quantities.

## 4. Variant Solutions

4.1

Variant solutions are not permissible.

## 5. Financing

- 5.1 This project has been funded through the Voluntary Organisations Project Scheme managed by the Malta Council for the Voluntary Sector on behalf of Parliamentary Secretary for Youth, Sport and Voluntary Organisations

## 6. Clarification Meeting/Site Visit/Workshop

- 6.1 No clarification meeting/site visit is planned.

## **7. Selection and Award Requirements**

In order to be considered eligible for the award of the contract, economic operators must provide evidence that they meet or exceed certain minimum criteria described hereunder.

### **(A) Eligibility Criteria**

- (i) No Bid Bond is required. <sup>(Note 1)</sup>
- (ii) Declare agreement, conformity and compliance with the provisions of the Statement on Conditions of Employment by completing and submitting the form with title Statement on Conditions of Employment.
- (iii) Declare agreement, conformity and compliance with the provisions of the Statement on Conditions of Employment by completing and submitting the form with title Statement on Conditions of Employment. Please also attach the minimum hourly workers' costs involving the provision of the employees' services. <sup>(Note 2)</sup>
- (iv) Power of Attorney (if applicable) <sup>(Note 2)</sup>
  
- (vi) Information re Joint Venture/Consortium

(B) Exclusion (including Blacklisting) and Selection Criteria - information to be submitted through the completion of the following declaration forms:

- (i) Declaration concerning exclusion grounds
- (ii) Declaration concerning *Selection Criteria* (if any)

### **(B) Exclusion (including Blacklisting) and Selection Criteria** <sup>(Note 2)</sup>

- (i) Declaration concerning exclusion grounds (as per tender structure) <sup>(Note 2)</sup>
  
- (ii) Declaration concerning selection criteria (if any)
  - a) A list of the key experts and other staff proposed for the execution of the contract <sup>(Note 2)</sup>

As part of the Key Experts the economic operator must include:

KEY EXPERT 1 - In possession of a relevant recognized minimum qualification at MQF level 7 or equivalent in Business Management

KEY EXPERT 2 - In possession of a relevant recognized minimum qualification at MQF level 7 or equivalent in Tourism Studies;

Public employees may be recruited as experts as long as it is ascertained through the attached self-declaration; that they do not fall in any of the provisions laid down in the Public Administration Act - Chapter 497 of the Laws of Malta (First Schedule Code of Ethics Article 5). This self-declaration is to be endorsed by all Key Experts (who are also Public Employees).<sup>(Note 2)</sup>

The Evaluation Committee reserves the right to request the tenderers to substantiate their claims in respect to the staff proposed by requesting CVs of key staff, signed Declarations of Exclusivity and Availability and signed Se This information shall be included in the Selection Criteria Declaration Form in Question Reference number 2 under the Suitability Section<sup>(Note 2)</sup>

b) *Provide data concerning subcontractors and the percentage of works to be subcontracted to be submitted online through the tender response format. This information shall be included in the Selection Criteria Declaration Form in Question Reference number 10 under the Technical and Professional Ability Section.* <sup>(Note 2)</sup>

*The maximum amount of sub-contracting must not exceed [30%] of the total contract value.*

*The main contractor must have the ability to carry out at least [70%] of the contract works by his own means.*

### (C) Technical Specifications

- (i) Tenderer's Technical Offer in response to specifications. <sup>(Note 3)</sup>

### (D) Financial Offer

- (i) The Tender Form and Tenderer's Declaration are to be completed and submitted with the offer; a separate Tender Form is to be submitted for each option tendered, each form clearly marked 'Option 1', 'Option 2' etc.; <sup>(Note 2)</sup>
- (ii) A financial offer is to be submitted by filling in **Financial Bid Form**, and is to be calculated on the basis of **Delivered Duty Paid (DDP)<sup>2010</sup> (Grand Total)** for the **services** tendered. <sup>(Note 2)</sup>

#### Notes to Clause 7:

1. *Tenderers will be requested to clarify/rectify, within five (5) working days from notification, the tender guarantee only in the following circumstances: either incorrect validity date, and/or incorrect value. Rectification is subject to a non-refundable administrative fee of €50.*

2. *Tenderers will be requested to either clarify/rectify any incorrect and/or incomplete documentation, and/or submit any missing documents within five working days from notification. Rectification is subject to a non-refundable administrative fee of €50.*
3. *No rectification shall be allowed. Only clarifications on the submitted information may be requested.*

## **8. Tender Guarantee (Bid bond)**

- 8.1 No tender guarantee (bid bond) is required.

## **9. Criteria for Award**

- 9.1 The contract will be awarded to the tenderer submitting the offer with the Best Price/Quality Ratio (BPQR) in accordance with the below.

Each technical offer will be evaluated in accordance with the award criteria and the associated weighting as detailed in the evaluation grid of this tender document (Article 9.3). No other award criteria will be used. The award criteria will be examined in accordance with the requirements as indicated in the Technical Specifications.

- 9.2 The evaluation process

At this step of the evaluation process, the Evaluation Committee will analyze the administratively-compliant tenders' technical conformity in relation to the published Terms of Reference/Technical Specifications (Section 4).

When evaluating technical offers, each evaluator awards for each criterion/sub-criterion a score out of a maximum of 100 in accordance with the technical criteria and any sub-criteria as outlined in the evaluation grid (Article 7.3). The score given to the criterion/sub criterion (out of 100) will be multiplied by the weighting indicated against each criterion/ sub criterion.

If thresholds are set for each/any of the criteria/ sub criteria by setting a value out of 100. Those offers that do not obtain the set threshold for the individual criterion/ sub criterion will be eliminated\*

Tenderers must achieve an average technical score of (60)\*\*. The average technical score is arrived at by adding the individual weighted scores of each evaluator divided by the number of evaluators. Those tenderers that do not obtain the minimum set average technical score will be eliminated.

The offer achieving the highest technical score will be awarded 100% of the technical weight. The other offers will be awarded scores in proportion to the offer with the highest technical score as per below formula;

Technical score =  $\frac{\text{Average Technical Score of the Respective Offer}}{\text{Highest average Technical Score}} \times \text{Technical Weight}$

The financial offers for tenders which were not eliminated during the technical evaluation (i.e., those which have achieved an average technical score of (60)\*\* or more and/or those which have achieved the set threshold for individual criterion/ sub criterion) will be evaluated. The Evaluation Committee will also check that the financial offers contain no arithmetical errors.



Version 1.0 NGO e-procurement document

The offer with the lowest price will be awarded 100% of the financial weight. The other offers will be awarded scores in proportion to the offer with the lowest price as per below formula;

$$\text{Financial score} = \frac{\text{Lowest Priced Offer}}{\text{Financial Offer of the Tender Being Considered}} \times \text{Financial Weight}$$

The BPQR will be awarded to the offer that has obtained the highest score after adding the respective technical and financial scores as visualized below;

## Overall Best Price Quality Ratio (BPQR) evaluation

Conclusion of tender evaluation under BPQR:

$$\text{Score}_i = \left( \left( \frac{\text{Tech}_i}{\text{Tech}_{\max}} \times W_{\text{Tech}} \right) + \left( \frac{\text{Fin}_{\min}}{\text{Fin}_i} \times W_{\text{Fin}} \right) \right)$$

Where:

- ◆  $\text{Tech}_i$  is the technical score of the supplier
- ◆  $\text{Tech}_{\max}$  is the maximum technical score achieved amongst all suppliers
- ◆  $\text{Fin}_{\min}$  is the minimum financial price offered amongst all suppliers
- ◆  $\text{Fin}_i$  is the financial price of the supplier
- ◆  $W_{\text{Tech}}$  is the weight of the technical envelope
- ◆  $W_{\text{Fin}}$  is the weight of the financial envelope

### 9.3 Evaluation Grid

| Criteria/ Sub Criteria                                                                                                                                                                                                             | Weighting (%) |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| Any comments on the Terms of reference of importance for the successful execution of activities, in particular its objectives and expected results, thus demonstrating the degree of understanding of the contract.                | 20            |
| An explanation of the risks and assumptions affecting the execution of the contract                                                                                                                                                | 10            |
| Submission of a detailed description outlining the proposed strategy for the achievement of the set contract objectives                                                                                                            | 30            |
| A list of the proposed activities considered to be necessary to achieve the contract objectives                                                                                                                                    | 10            |
| The timing, sequence and duration of the proposed activities, taking into account the given timeframes                                                                                                                             | 10            |
| The identification and timing of major milestones in execution of the contract, including an indication of how the achievement of these would be reflected in any reports, particularly those stipulated in the Terms of reference | 10            |
| The qualities of the Project Team identified for the execution of contract objectives                                                                                                                                              | 10            |
| <b>Total Criteria Weight</b>                                                                                                                                                                                                       | <b>100</b>    |

## SECTION 2 - EXTRACTS FROM THE PUBLIC PROCUREMENT REGULATIONS

### Part X of the Public Procurement Regulations

270. Any tenderer or candidate concerned, or any person, having or having had an interest or who has been harmed or risks being harmed by an alleged infringement or by any decision taken including a proposed award in obtaining a contract, a rejection of a tender or a cancellation of a call for tender after the lapse of the publication period, may file an appeal by means of an objection before the Review Board, which shall contain in a very clear manner the reasons for their complaints.

271. The objection shall be filed within ten calendar days following the date on which the NGO has by fax or other electronic means sent its proposed award decision or the rejection of a tender or the cancellation of the call for tenders after the lapse of the publication period.

272. The communication to each tenderer or candidate concerned of the proposed award or of the cancellation of the call for tenders shall be accompanied by a summary of the relevant reasons relating to the rejection of the tender as set out in regulation 242 or the reasons why the call for tenders is being cancelled after the lapse of the publication period, and by a precise statement of the exact standstill period.

273. The objection shall only be valid if accompanied by a deposit equivalent to 0.50 per cent of the estimated value set by the NGO of the whole tender or if the tender is divided into lots according to the estimated value of the tender set by the NGO for each lot submitted by the tenderer, provided that in no case shall the deposit be less than four hundred euro (€400) or more than fifty thousand euro (€50,000) which may be refunded as the Public Contracts Review Board may decide in its decision.

274. The Secretary of the Review Board shall immediately notify the Director and/or the NGO as the case may be that an objection had been filed with his authority thereby immediately suspending the award procedure.

275. The NGO involved, as the case may be, shall be precluded from concluding the contract during the period of ten calendar days allowed for the submission of appeals. The award process shall be completely suspended if an appeal is eventually submitted.

276. The procedure to be followed in submitting and determining appeals as well as the conditions under which such appeals may be filed shall be the following:

- (a) any decision by the General Contracts Committee or the Special Contracts Committee or by the NGO shall be made public by affixing it to the notice-board of the same NGO as the case may be or by uploading it on Government's e-procurement platform prior to the award of the contract if the call for tenders is administered by the NGO;
- (b) the appeal of the complainant shall also be affixed to the notice-board of the Review Board and shall be communicated by fax or by other electronic means to all participating tenderers;
- (c) the NGO and any interested party may, within ten calendar days from the day on which the appeal is affixed to the notice-board of the NGO and uploaded where applicable on the Government's e-procurement platform, file a written reply to the appeal. These replies shall also be affixed to the notice-board of the Review Board and where applicable it shall also be uploaded on the Government's e-procurement platform;

- (d) within three working days of the publication of the replies, the Secretary of the Review Board shall prepare a report (the Analysis Report) analysing the appeal and any reply to it. This report shall be circulated to the persons who file an appeal and to all parties who submitted a reply to the appeal;
- (e) after the preparatory process is duly completed, the Director or the Head of the NGO shall forward to the Chairman of the Review Board all documentation pertaining to the call for tenders in question including files, tenders submitted, copies of deposit receipts and any motivated letter;
- (f) The secretary of the board shall inform all the participants of the call for tenders, the NGO of the date or dates as the case maybe when the appeal will be heard;
- (g) When the oral hearing is concluded, the Public Contracts Review Board, if it does not deliver the decision on the same day, shall reserve decision for the earliest possible date to be fixed for the purpose, but not later than six weeks from the day of the oral hearing:  
Provided that for serious and justified reasons expressed in writing by means of an order notified to all the parties, the Public Contracts Review board may postpone the judgment for a later period.
- (h) The secretary of the board shall keep a record of the grounds of each adjournment and of everything done in each sitting;
- (i) After evaluating all the evidence and after considering all submissions put forward by the parties, the Review Board shall decide whether to accede or reject the appeal.

## SECTION 3 - SPECIAL CONDITIONS

These conditions amplify and supplement, if necessary, the General Conditions governing the contract. Unless the Special Conditions provide otherwise, those General Conditions remain fully applicable. The numbering of the Articles of the Special Conditions is not consecutive but follows the numbering of the Articles of the General Conditions. Other Special Conditions should be indicated afterwards.

For the purposes of contracts issued by NGOs, the term 'approval from the Central Government Authority' shall be substituted by the term 'approval by the Head responsible for that NGO'; Furthermore, any references to the Contracting Authority throughout the General Conditions shall be deemed to be referring to the NGO responsible for that procurement.

### Article 2: Notices and Written Communications

- 2.2 The Chief Executive Officer  
Gozo Tourism Association  
Flat 04 Ta' Mliet Court,  
Gorg Borg Olivier Street,  
Victoria, Gozo, Malta  
VCT 2519  
Telephone: +356 21565171  
E-mail: gtagozo@onvol.net

### Article 5: Supply of Information

- 5.1 As per General Conditions.

### Article 6: Assistance with Local Regulations

- 6.1 As per General Conditions.

### Article 7: Obligations of the Contractor

- 7.8 The Contractor shall, within 15 calendar days of receipt of the contract, sign and date the contract and return it together with a copy of the Performance Guarantee. The Contractor is further obliged to forward the original performance guarantee to the NGO. The NGO will not affect any payment to the contractor until the performance guarantee is submitted. The amount of the guarantee shall be 4% where the amount of the total contract value is between €10,000 and €500,000 ex VAT, and 10% where the amount of the total contract value is €500,001 or above.

### Article 13: Medical, Insurance and Security Arrangements

- 13.3 As per General Conditions.

### Article 14: Intellectual and Industrial Property Rights

- 14.3 Any results or rights thereon, including copyright and other intellectual or industrial property rights, obtained in performance of the Contract, shall be the absolute property of the Gozo Tourism Association, which may use, publish assign or transfer them as it deems fit, without geographical or other limitation, except where intellectual or industrial property rights already exist.

### **Article 15: Scope of the Services**

- 15.1 The scope of the services is defined in Section 4 (Terms of Reference)

### **Article 16: Personnel and Equipment**

- 16.3 As per General Conditions.

### **Article 18: Execution of the Contract**

- 18.1 The performance period for services will be a maximum of 14 weeks, from the date of issue of the commencement order.

### **Article 19: Delays in Execution**

- 19.2 A daily penalty of Fifty Euro (€50), up to a limit of 20% of the total price, shall be charged to the contractor if the contractor fails to satisfactorily provide the requested services as stipulated in this Tender Document, and/or the service is found to be seriously lacking in quantity, quality or efficiency and/or the Contractor breaches any of the conditions stipulated in this Tender document.

### **Article 20: Amendment of the Contract**

- 20.2 As per General Conditions.

### **Article 24: Interim and Final Progress Reports**

- 24.1 Not applicable.

### **Article 26: Payments and Interest on Late Payment**

- 26.1 This is global-price contract.

The payments will be made according to the following schedule, subject to the provisions of Articles 28 to 33 of the General Conditions:

**Payment will be made in full upon presentation of the report and relevant research data and approval of the same report by the Gozo Tourism Association Committee.**

- 26.2 As per General Conditions.

### **Article 27: Pre-Financing Guarantee**

- 27.2 Not applicable.

## SECTION 4 -SPECIFICATIONS/TERMS OF REFERENCE (Note 3)

# Terms Of Reference

**Note:**

Where in this tender document a standard is quoted, it is to be understood that the NGO will accept equivalent standards. However, it will be the responsibility of the respective bidders to prove that the standards they quoted are equivalent to the standards requested by the NGO.

### 1. Background Information

#### 1.1 - Beneficiary Country

Malta

#### 1.2 - NGO

Gozo Tourism Association

#### 1.3 - Relevant Country Background

Malta is a small island in the Mediterranean with a population of approximately 400,000 inhabitants. Tourism in Malta is an important sector of the country's economy, contributing to about 15 per cent of the nation's gross domestic product (GDP). Malta features a number of tourism attractions encompassing elements of the island's rich history and culture, as well as aquatic activities associated with the Mediterranean Sea.

Gozo is the second Largest island of the Maltese Archipelago, roughly circular in shape, 14 km by 7km in area. Millions of years ago the Maltese island were the elevated regions on a mass of land extending southwards from nearby Sicily. This continental shelf was submerged when the sea level rose during the interglacials leaving those land tips exposed in the centre of the Mediterranean Sea.

Gozo, is reachable within 20 minutes by the ferry, the only link between the two islands is by sea transport. Given its Mediterranean weather, the Maltese Islands are blessed with good weather all year round. Thus, most of the activities can be enjoyed throughout the year, giving the opportunity to reduce seasonality and balance the consumption of the limited resources of the islands.

Gozo is rural and simple, its culture and way of life rooted in fishing, and in primitive pastoral and agricultural activity. Tomatoes, potatoes, onions, melons, grapes, figs, oranges, and tangerines are the island's prime agricultural produce.

## 1.4 - Current State of Affairs in the Relevant Sector

Small Island States face a number of challenges which impinge upon their economic competitiveness. These challenges are mainly the result of constraints that are inherent on the resource capacity that is available to stimulate growth.

(Brigulio 1995)<sup>1</sup> lists a number of challenges affecting Small Island States:

- Productive sectors that are heavily dependent on their limited resource base
- High dependency on flows and changes in international trade
- High transportation and telecommunications costs
- Scarce land resources
- Limited ability to develop economies of scale
- High import content
- Limited economic diversification possibilities
- Limited extent to which domestic competition policies can be applied
- Dependence on a narrow range of export products
- Inability to influence international prices
- Uncertainty of supply due to remoteness or insularity.

In addition to this the problems faced by Gozitan entrepreneurs could be further accentuated by the fact of being establishing on an island which forms part of a larger island, the latter being the administrative centre of the Archipelago, therefore suffering from what is coined as double insularity.

In fact business in Gozo complain about a number of issues, such as the fact that the island is experiencing a 'brain drain' and hence the difficulty in fulfilling recruitment needs, seasonality issues which apart from threatening financial stability, leads to issues related to workforce retention and the development of a skilled workforce, whilst others question the economic strategy of the island, with concern about the long term policy being adopted, where many are concerned about the way the island is marketed, and hence the need to focus on quality, rather than numbers.

The issue of policy and development is also the subject of divergent opinions by the different stakeholders with an interest in the island, where certain stakeholders advocate the need for further investment such as the need of a permanent link with mainland Malta and the diversification of the economy, whilst others resist such initiatives, fearing that the unique characteristics and the distinctiveness of the island would be lost, hence eroding the island's competitiveness when compared to other tourist destinations

## 2. Contract Objectives and Expected Results

### 2.1 - Overall Objectives

The overall objectives of the project of which this contract will be a part are as follows:

- To carry out study examining the human resources situation within the Gozo Tourism Industry

### 2.2 - Specific Objectives

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<sup>1</sup> Briguglio, L., 1995. Small Island Developing States and Their Economic Vulnerabilities. *World Economic Development*, 23(9), pp. 1615-1632.

## 2.3 - Results to be Achieved by the Consultant

This research should focus mainly on organisations that operate within the tourism industry and that are based in Gozo.

The purpose of this research is to explore the dynamics that shape organisations operating in a region of restricted space and resource, and to determine if and how, in such an environment growth could be achieved

The main research should be analysed in detail through three main sub-themes;

- namely through the role of culture and how this could possibly act both as a catalyst and a barrier towards the achievement of growth objectives,
- the focus on quality and how this aspect could be used to overcome physical resource constraints,
- and finally through an analysis pertaining to the sector's human resource base and how people development could support growth and organisational sustainability in the current scenario.

The main sources of data to be used will be interviews and the analysis of secondary data which will serve both to corroborate interview findings, as well as an additional source of information. The findings should aim to reveal possible solutions to underlying problems that are common to every organisation operating within the tourism sector such as seasonality and the difficulty in finding staff. In this regard, having identified prevailing issues as well as best practices in response to the general operational context surrounding the studied organisations, the research should conclude with possible recommendations addressing elements such as management, human resources and talent development and finally suggest other areas where further research could be undertaken such as expanding this study to other sectors.

## 3. Assumptions and Risks

### 3.1 - Assumptions Underlying the Project Intervention

- The Contractor understands the requirements and objectives of this tender.
- The Contractor will be able to deliver the output indicators and results indicated above in the stipulated timeframes.
- There is excellent communication throughout the whole duration of the project between the Contractor and the Contracting Authority.
- The Contractor has the technical capacity and human resources to deliver within tight deadlines and adopt contingency proposals as necessary.

### 3.2 - Risks

- Technical issues that may hinder the execution (in full or part) of the contract activities.
- Time limits may not be used as a justification for sub-standard work. It is expected that the key experts have the sufficient organisational capacity to handle pressure, maintain high quality work standards and deliver on time.

Apart from the above assumptions and risks, the Contractor is requested to indicate any assumptions/ risks considered relevant to this project and which have not been mentioned in these Terms of Reference or in any of the other document of this tender dossier. These assumptions and risks are to be submitted at bidding stage.

## 4. Scope of the Work



## 4.1 – General

### 4.1.1 *Project Description*

The purpose of this Call for Quotation (CfQ) is to carry out a research that will focus mainly on the owners of the tourist establishments, employees, students and other stakeholders that have a direct interest in the tourist industry on Gozo. Previous studies carried out analysing the current tourism economic environment focused mainly on the establishments' owners or managers, leaving out the primary industry stakeholder, being mainly the human resources element. This element when analysed together with the views of business owners, could help the Gozo Tourism Association develop a holistic strategy towards the implementation of a long term action plan aimed at mitigating and addressing the brain drain that organisations within the sector are faced with. Ultimately the project will enhance the knowledge of the Gozo Tourism Association with regards to this important subject by building the necessary capacity to assist all the relative stakeholders with an interest in furthering the tourism sector in Gozo through the enhancement of its human recourse base. Hence creating more employment opportunities for the younger generation which due to current scenario is opting to settle and work in Mainland Malta. This situation is leading to a chronic brain drain which unless addressed will become irreversible. The results of this study will also lead to further co-operation between the Gozo Tourism Association (NGO) and key stakeholders, especially government entities with a direct interest in the Tourism Industry who will certainly reap value from this study, and utilise its findings in the development of a holistic strategy aimed at the long term development and sustainability of the Island of Gozo. Finally the Gozitan touristic offer is strongly dependent upon the availability of a diverse and skilled workforce. Scarcity of this precious resource is definitely effecting the sustainability of tourism industry on Gozo. Hence the need for this study.

### 4.1.2 *Geographical Area to be covered*

Gozo

### 4.1.3 *Target Groups*

Locals and international tourists, Gozitan Students and Youngsters, Tourism Stakeholders including Government Entities with a direct interest in Gozo's Tourism Industry, businesses engaged within the tourism sector, the general public.

## 4.2 - Specific Activities

The the objectives of this research project undertaken can be summarized as follows:

- To familiarize with tourism related businesses based in Gozo and understand their approach and challenges emanating from the fact of being located on Gozo.
- To map the characteristics of organisations operating in a region with limited resources.
- To determine if there is a particular pattern which could map particular best practices which could serve to overcome the prevailing resource limitations.
- To determine if organisations operating in a region characterized by resource and space limitations are faced with the same problems.
- To obtain a wider sectoral view, incorporating the views of all key stakeholders, especially those which relate to the human resource element, and hence obtain a holistic view which does not only take into account establishment owners but also employees and potential sector entrants.
- Propose an action plan and recommendations, incorporating private, public and non-government stakeholders in order to ensure that current employees within the sector benefit from more interesting and meaningful jobs, whilst also attracting new entrants who at present find no interest in the tourism sector or working in Gozo in general and are opting to relocate to Malta.
- Bridge the gap between the needs of the industry, the educational system and the final beneficiaries of employment (HR).

- Ensure that employers fully understand the benefits of adopting human resource development and key human resource practices which are aimed at providing better careers to their employees.
- Proposed recommendations which are aimed at addressing Gozo's youth de-population (brain drain).
- The research also has the aim of bringing together all key stakeholders which are relevant to the sector, and therefore promote collaboration between public, private and non-governmental entities when tackling common issues.

This research should focus mainly on organisations that operate within the tourism industry and that are based in Gozo.

The purpose of this research is to explore the dynamics that shape organisations operating in a region of restricted space and resource, and to determine if and how, in such an environment growth could be achieved

The main research should be analysed in detail through three main sub-themes;

- namely through the role of culture and how this could possibly act both as a catalyst and a barrier towards the achievement of growth objectives,
- the focus on quality and how this aspect could be used to overcome physical resource constraints,
- and finally through an analysis pertaining to the sector's human resource base and how people development could support growth and organisational sustainability in the current scenario.

The main sources of data to be used will be interviews and the analysis of secondary data which will serve both to corroborate interview findings, as well as an additional source of information. The findings should aim to reveal possible solutions to underlying problems that are common to every organisation operating within the tourism sector such as seasonality and the difficulty in finding staff. In this regard, having identified prevailing issues as well as best practices in response to the general operational context surrounding the studied organisations, the research should conclude with possible recommendations addressing elements such as management, human resources and talent development and finally suggest other areas where further research could be undertaken such as expanding this study to other sectors.

### 4.3 - Project Management

#### 4.3.1 *Responsible Body*

Gozo Tourism Association

#### 4.3.2 *Management Structure*

The Project is being implemented by the GTA. The CEO of the GTA is in charge of the overall progress of the project (project leader).

For the day to day running of the project GTA Staff will be the liaison between the GTA and the contractor.

Final approval of works shall be approved by the GTA committee.

The contractor will be expected to meet and discuss his ideas and findings with the parties involved as well as answer any queries / questions these might have

#### 4.3.3 *Facilities to be provided by the NGO and/or other parties*

As appropriate.

## 5. Logistics and Timing

### 5.1 – Location

The project will cover the area of Gozo. Contractor will need to carry out meetings with different suppliers who might operate in Malta and Gozo. No extra transport or logistic fees will be paid apart from the global sum quoted in the bill of quantities.

Contractor will be expected to deliver presentation and findings to GTA in Gozo as well as to deliver the presentations during a conference that will be held to present the study results.

### 5.2 - Commencement Date & Period of Execution

The intended commencement date is [from the issue of the commencement notice] and the period of execution of the contract will be [14 (fourteen)] weeks from this date. Article 19.1 of the Special Conditions will determine the actual commencement date and period of execution.

## 6. Requirements

### 6.1 – Personnel

#### 6.1.1 Other Experts

CVs for experts other than the key experts are not examined prior to the signature of the contract. They should not have been included in tenders.

The Consultant shall select and hire other experts as required according to the profiles identified in the Organisation & Methodology <and/or these Terms of Reference>.

All experts must be independent and free from conflicts of interest in the responsibilities accorded to them.

The selection procedures used by the Consultant to select these other experts shall be transparent, and shall be based on pre-defined criteria, including professional qualifications, language skills and work experience. The findings of the selection panel shall be recorded. The selection of experts shall be subject to approval by the NGO.

#### 6.1.2 Support Staff and Backstopping

As appropriate.

### 6.2 – Accommodation

Office accommodation of a reasonable standard and of approximately 10 square metres for each expert working on the contract is to be provided by the contractor.

### 6.3 - Facilities to be provided by the Consultant

The Consultant shall ensure that experts are adequately supported and equipped. In particular it shall ensure that there is sufficient administrative, secretarial and interpreting provision to enable experts to concentrate on their primary responsibilities. It must also transfer funds as

necessary to support its activities under the contract and to ensure that its employees are paid regularly and in a timely fashion.

If the Consultant is a consortium, the arrangements should allow for the maximum flexibility in project implementation. Arrangements offering each consortium partner a fixed percentage of the work to be undertaken under the contract should be avoided.

## 6.4 – Equipment

No equipment is to be purchased on behalf of the NGO / beneficiary country as part of this service contract or transferred to the NGO / beneficiary country at the end of this contract. Any equipment related to this contract which is to be acquired by the beneficiary country must be purchased by means of a separate supply tender procedure.

## 7. Reports

### 7.1 - Reporting Requirements

*Reports shall be submitted as follows:*

- 1<sup>st</sup> Report upon completion of Phase 1*
- 2<sup>nd</sup> Report upon completion of Phase 2*
- 3<sup>rd</sup> Report as a draft upon completion of Phase 3*
- 4<sup>th</sup> and Final Report upon approval of the Phase 3 draft copy.*

### 7.2 - Submission & approval of progress reports

[1] soft copy of the progress reports referred to above must be submitted to the Project Manager identified in the contract. The progress reports must be written in English. The Project Manager is responsible for approving the progress reports.

## 8. Monitoring and Evaluation

### 8.1 - Definition of Indicators

#### *a. Phase 1*

A critical review of the existing literature on the research topic being studied

#### *b. Phase 2*

Market Research & Surveys, Based on the Literature review findings, the appropriate research methodology will be identified. Relevant primary and secondary data will be used. Primary data shall be obtained through surveys, using both qualitative and quantitative methods. Relevant data should include key stakeholders such as government entities, tourists visiting the island and business operators. Depending upon the project necessity, at least two public consultation meetings to gather feedback from relative stakeholders should be organised.

#### *c. Phase 3*

Results Analysis/ Finalisation of Reports. The findings will be analysed and the results are presented and discussed with reference to theories and ideas outlined in the literature review

The report presented should be structured in the following manner:

- Introduction

- Study Background
- Problem Identification
- Research Purpose
- Research Hypotheses
- Literature and Theoretical Background
- Methodology
- Study Design
- Research Methods
- Method Analysis
- Findings
- Recommendations
- Conclusions

- d. Finally research findings will be discussed with all related stakeholders through a series of meetings, to increase collaboration and presented to the public during a formal activity

## 8.2 - Special Requirements

As appropriate.

## SECTION 5 - SUPPLEMENTARY DOCUMENTATION

### *5.1 - Draft Contract Form*

### *5.2 - Glossary*

### *5.3 - Specimen Performance Guarantee*

### *5.4 - Specimen Tender Guarantee*

These are available to view and download from the 'Resources Section' at:

[www.etenders.gov.mt](http://www.etenders.gov.mt)

### *5.4 - General Conditions of Contract*

The full set of General Conditions for Services Contracts (Version 2.0) can be viewed/downloaded from the 'Resources Section' at:

[www.etenders.gov.mt](http://www.etenders.gov.mt)

It is hereby construed that the tenderers have availed themselves of these general conditions, and have read and accepted in full and without reservation the conditions outlined therein, and are therefore waiving any standard terms and conditions which they may have.

These general conditions will form an integral part of the contract that will be signed with the successful tenderer/s.