Terms **of Reference**

Marketing Training service provider for the Sustainable Mountain tourism products and services

**A section in Charge:** Austrian Development Age

GRETA project | Green Economy: Sustainable Mountain Tourism and Organic Agriculture (co-financed by the EU and its member states Sweden and Austria, and implemented by the Austrian Development Agency)

**How does the consultancy relate to the work plan:** through the engagement of a Marketing and PR training Agency, the GRETA project will 1. will facilitate the creation and marketing of SMT products and services and 2. Capacitate the project stakeholders in marketing and branding.

**Outcome reference:** Outcome 2 - Employment and income in both sectors is increased due to new and better products and services and through better market linkages, locally, nationally, and internationally

**Output reference:** 2.3 Innovations for new tourism products and services have been encouraged; 2.4 New market linkages through support of marketing activities have been created

Output 2.4 - The new market linkages have been created through marketing activities

**Budget Line:** 6.2.1.8

# Introduction and background:

The GRETA project | Green Economy: Sustainable Mountain Tourism and Organic Agriculture (co-financed by the EU and its member states Sweden and Austria and implemented by the Austrian Development Agency) contributes to improving the business environment and creating new income opportunities in sustainable mountain tourism and organic farming in order to reduce poverty and exclusion in the selected mountain areas of Georgia. The creation of new opportunities and increase of income two growth sectors go hand in hand with actions to support the Government of Georgia’s legal and policy framework and help Georgian SMEs (Small to Medium-Sized Enterprises) to professionalize and scale up.

Budget: The project budget totals € 6.8 Million Euros and consists of contributions from the EU (€ 3 mill.), Sweden (€ 2.8 mill.) and the Austrian Development Cooperation (€1.0 mill.).

Project Governance: The project is implemented by the Austrian Development Agency (ADA) and is funded by Sweden, the EU, and the ADC. The guiding principles and governance framework of the project are lined out in Annex I to the European Union Indirect Management Delegation Agreement 2018/401-348 and to the Arrangement on Delegated Cooperation with Sweden Description of Action: Green Economy: Sustainable Mountain tourism & Organic Agriculture (GRETA).

The three donors plus representatives of various government agencies are represented in an Advisory Committee (AC). ADA acts as the implementing Company, while the Austrian Foreign Ministry is providing bilateral funding (ADC). ADA has appointed a PIU (Project Implementation Unit) (Project Implementation Unit or Project Implementation Team).

The Advisory Committee is the project specific managing body: AC is composed of high-level representatives of Ministry of Economy and Sustainable Development of Georgia, Ministry of Environment Protection and Agriculture of Georgia, representatives of concerned local government units of the pilot regions, a private sector representative, the EU Delegation, the embassy of Sweden and the ADA Coordination Office in Tbilisi. The AC meets semi-annually. In addition, the AC will meet on urgent matters, if requested by an AC member.

Project start was in December 2018, the inception phase was completed in August 2019 and is now in its operational phase. The project is scheduled to end in April 2023.

# Objectives:

The GRETA project objectives are in line with the relevant strategies of the Government of Georgia such as the Social-Economic Development Strategy of Georgia (“Georgia 2020”) and the National Strategy of Rural Development of Georgia (2017–2020) among others. In the field of mountain tourism, the National Tourism Strategy 2025 for Georgia, the Tourism Development Marketing Strategy of the Georgian National Tourism Administration, and the Strategy for the Development of High Mountain Regions in Georgia (2017–2021) are of particular importance. In the field of organic agriculture, the Strategy for Agricultural Development in Georgia 2015–2020 constitutes a major guiding strategic document.

The legal and policy framework for sustainable mountain tourism and organic agriculture is enabling sustainable and inclusive development:

* Employment and income in both sectors are increased due to new and better products and services and through better market linkages, locally, nationally, and internationally.
* Access to capacity development measures for people and institutions active in the fields of sustainable mountain tourism and organic agriculture is improved and a system of knowledge management is in place enabling joint learning among public, private, and civil society actors.

The project targets eight municipalities in the regions of Upper Imereti (municipalities of Sachkhere, Tkibuli, Chiatura), in Racha-Lechkhumi-Lower Svaneti (municipalities of Ambrolauri, Oni, Tsageri, Lentekhi) and in Upper Svaneti (municipality of Mestia).

* Direct beneficiaries of GRETA are going to be at least 300 accommodation service providers (bed & breakfast private households), up to 300 other tourism service providers like tour operators (climbing, hiking, bicycle-, walking-, horseback-, historical- and culinary tours), tourism information centres associations and DMOs (Destination Management Organizations), up to 230 farmers should achieve “certified organic” status, three certification bodies, 70 local villagers, and six local inspectors specialized in selected local value chains. Additional direct beneficiaries may be added during project implementation.
* Indirect beneficiaries on the central level are six Ministries and public institutions (Ministry of Economy and Sustainable Development, Ministry of Environmental Protection and Agriculture, Ministry of Regional Development and Infrastructure, Enterprise Georgia, Georgian National Tourism Administration), some 70 extension service staff and other MEPA-representatives at the municipality and central level, 6 associations, retailers and online food stores, agricultural colleges and training institutions, several thousand tourists, and thousands of consumers of organic products.

Given so, the following years could be the right momentum to push Georgian sustainable mountain products and services domestically and worldwide.

# Objective(s) of the Assignment:

The purpose of the assignment is for highly professional branding and marketing trainers to create a curriculum, elaborate the programme and train the actors and various stakeholders:

* Culinary, hospitality, horse riding, guest houses, glamping, cultural and hiking guidebooks, etc.
* Local government representatives; municipalities, mayor’s offices, city councils
* Svaneti Destination Management Organization

Tasks to be conducted:

The selected firm shall be contracted/funded to perform the following tasks:

1. To elaborate a high-quality training programme in SMT Marketing, Branding, Strategic planning, Merchandising and Negotiation.
   1. Module #1 - Marketing
      1. Research and analysis
      2. Integrated marketing
      3. Retail marketing
      4. International Marketing
      5. Product cycle and labelling
      6. Marketing strategy
      7. Fundraising
   2. Module #2 - Branding
      1. Introduction to Brand and Branding
      2. Brand positioning and values
      3. Brand loyalty and brand equity
      4. Plan and build brand equity
      5. Brand performance
      6. New products and brand extensions
   3. Module # 3 - Strategic planning
      1. Product
      2. Strategy formulation
      3. strategy implementation
      4. strategy evaluation
   4. Module # 4 - Merchandising
      1. The role of merchandising in retail buying
      2. Pricing and margin management
      3. Sales forecasting and demand management
      4. Managing retail communications with selling teams
   5. Module # 5 - Negotiations
      1. Types and negotiation styles
      2. Negotiation strategy
      3. Closing deal
      4. Presentation
2. To conduct the skills assessment
3. To produce a training needs assessment (TNA) report
4. To conduct the pre – training evaluation
5. To re – elaborate training methodology
   1. Theoretical part
   2. Practical part
6. To elaborate an informational raising campaign about training in marketing for target municipalities
   1. Elaborate, design, and print the–training booklets
   2. Disseminate informational booklets in target regions
7. Organize, plan, and implement trainings
   1. Schedule trainings
8. Registration of training participants to implement the series of trainings
9. To develop training sessions’ progress reports
10. To conduct the post – training evaluation
11. To facilitate the development of the marketing strategies’ outlines
    1. Unique Selling Points
    2. Strategic focus
    3. Identify and define marketing channels
    4. Align marketing channels - develop integrated marketing campaigns to engage and convert potential visitors.
    5. Identify and define the campaign themes
12. To effectively communicate with the GRETA project service providers such as Multimedia production company, Digital Marketing company, video crew, experts and others
13. Travel requests, report, and other documentation (timesheet)
14. Monitoring and evaluation plan

In undertaking these activities, the consultants will adopt a fully consultative and participative approach, particularly when working with agreed beneficiaries. The firm will work closely with GRETA project staff as appropriate.

To achieve the outputs and results, the assignment should involve using a full range of methodologies. The consultant applicants should be able and prepared to use all the methodologies open to them to achieve the objectives of the assignment.

Consultants should be prepared to travel independently with support from GRETA field offices in arranging meetings and consultations.

# Deliverables:

|  |  |  |  |
| --- | --- | --- | --- |
| **Deliverables** | | | |
| 1 | Training programme | A comprehensive and high-quality training programme, up to 5 modules and a detailed plan with expected results and outcomes and the measurement instruments, possible duration, and deliverables of the training |
| 2 | Work plan | Detailed Management Plan including timeframe (per task) for the implementation |
| 3 | TNA report | The plan of the skills needs assessment: timeline, assessment instruments and questionnaires |
| 4 | Information/awareness-raising campaign | Elaborate on an informational raising campaign about training in marketing for target municipalities a.      Elaborate, design, and print the informational booklets b.      Disseminate informational booklets in target regions |
| 5 | Registration of participants | Registration programme and list of attendees At least 30 attendees per Municipality |
| 6 | Pre-training evaluation report | High–quality report on the assessment of the level of knowledge of the beneficiaries in various topics |
| 7 | On-site training sessions in 8 municipalities | Training sessions in 8 municipalities |
| 8 | Post-training evaluation report | High–quality report on the outcomes of the training, difference between the levels of knowledge before and after the training of the beneficiaries |
| 9 | Module # 1 | Some minimum requirements per module such as Duration, Content, Objective/aim, Lessons (average duration of each lesson), Exercise, Learning outputs, Structure, Methodology, Initial survey, Final survey, Outline And Report, session recording, evaluation, documentation, outputs |
| 10 | Module # 2 | Some minimum requirements per module such as Duration, Content, Objective/aim, Lessons (average duration of each lesson), Exercise, Learning outputs, Structure, Methodology, Initial survey, Final survey, Outline And  The report, session’s recording, evaluation, documentation, outputs |
| 11 | Module # 3 | Some minimum requirements per module such as Duration, Content, Objective/aim, Lessons (average duration of each lesson), Exercise, Learning outputs, Structure, Methodology, Initial survey, Final survey, Outline And  Report, session’s recording, evaluation, documentation, outputs |
| 12 | Module # 4 | Some minimum requirements per module such as Duration, Content, Objective/aim, Lessons (average duration of each lesson), Exercise, Learning outputs, Structure, Methodology, Initial survey, Final survey, Outline And  Report, session’s recording, evaluation, documentation, outputs |
| 13 | Module # 5 | Some minimum requirements per module such as Duration, Content, Objective/aim, Lessons (average duration of each lesson), Exercise, Learning outputs, Structure, Methodology, Initial survey, Final survey, Outline And  Report, session’s recording, evaluation, documentation, outputs |
| 14 | Outlines of marketing strategies for at least 6 beneficiaries (shall be selected in collaboration with the GRETA project) | Facilitate the development of the marketing strategies’ outlines a.      Unique Selling Points b.      Strategic focus  c.       Identify and define marketing channels d.      Align marketing channels - develop integrated marketing campaigns to engage and convert potential visitors. e.      Identify and define the campaign themes |
| 15 | Quarterly progress report | Report on the progress in the improvement of the knowledge and behaviours of the participants |
| 16 | Monthly progress report | A 5–10-page document describing the working progress |
| 17 | Administrative documentation related to Travels/Training/Brainstorming | A 2–3-page document describing and assessing the processes |
| 18 | M&E | A document of up to 5 pages tracking and assessing the results of the project. |
| 19 | Meetings, Meeting minutes, | Working meetings/presentations, workshops, and coaching sessions with various stakeholders |
| 20 | Final report combining all the deliverables | A compilation of all documents, reports, deliverables, assumptions, and concerns. Final report |

# Timeline and Milestones

The project must be completed by 30 June 2023. It is up to the bidder to specify the working days and FTE (full-time equivalents) needed.

# Size and Qualifications of the Assessment Team

Collectively, the team will be expected to include a balance of experts, context, content, and process to successfully complete this assignment.

**Minimum Required Personnel**

|  |  |
| --- | --- |
| REQUIRED PERSONNEL | Minimum Years of Experience in Handling either National or international wide Accounts |
| 1. Chief Marketing Executive | 10 years |
| 1. Analytics Manager – research and analysis | 5 years |
| 1. Branding expert | 5 years |
| 1. Branding Specialist | 5 years |
| 1. Marketing expert | 5 years |
| 1. Marketing Specialist | 5 years |
| 1. Hospitality and Sustainable Mountain tourism expert | 5 years |
| 1. Negotiation expert | 5 years |
| 1. Merchandising Specialist | 5 years |
| 1. Strategic planning expert | 5 years |
| 1. Administrative assistant | 3 years |
| 1. Administrative assistant | 3 years |

*Note: Bidders is free to recommend additional personnel that is deemed to be fit for the Team*

# Qualification and Eligibility

The firm to be selected must be an organization or institution that has at least 3 years’ experience in planning and organizing big-scale training programmes.

* At least **5 key experts** must be provided, according to the **Minimum Required Personnel** above mentioned.
* Core team of key experts have a crucial role in implementing the contract.
* Given the complexity of tasks and the ambitious results, it is expected that the Contractor should engage a Chief Marketing Executive, as team leader to ensure the high quality of the project.
* The firm must be capable of advising the client on how to achieve the set goals in an efficient manner.
* The firm may have a tie-up or joint venture arrangement with other local or international agencies to execute the project. It may also have a joint venture with a global training centries.

# Evaluation and Selection:

The overall proposal will consist of two separate parts - the technical proposal and the financial proposal. Proposals should be prepared as per the format below and they will be evaluated based on the scoring criteria mentioned here below. Bidders are also encouraged to avoid overly generic proposal language and instead provide a contextually appropriate, descriptive, and specific plan for managing the activities and reaching the expected deliverables.

Technical Bid/Proposal Criteria and Rating

|  |  |  |  |
| --- | --- | --- | --- |
| CRITERIA | DESCRIPTION | RATING | |
| 1. Quality of Personnel to be assigned to the project | Minimum Required Personnel | **40%** | |
| Team composition  Pool of Experts |
| 1. Expertise and Capability of the bidder | 1. Required Capabilities | **20%** | |
| Research and analysis, and insight Gathering |
| Hospitality and Sustainable Mountain tourism expert |
| Branding |
| Marketing |
| Strategic planning |
| Merchandising |
| Negotiations |
| 1. Experience and credentials |
| 1. Programme and curriculum |
| Modules, |
| Methodology, |
| Expected outcomes |
| 1. Project management Plan | Operational plan | **10%** | |
| Team structure/roles and responsibilities |
| Working packages (WKs) |
| Timeframe |
| Reporting |
| 1. Financial Offer | Financial proposal should indicate professional fees, including level of people and number of days and out of pocket costs like travel, per diems, etc. | **30 %** | |
| TOTAL | | **100%** |

Note technical proposal should not exceed 20 Pages.

# List of the required documents

The **TECHNICAL PROPOSAL** should include:

* + Outline of the proposed approach **Technical Approach** and personnel for the assignment;
  + Company profile with a list of services offered
  + Credential presentation reflecting the roster of clients, including one (1) touristic and one (agricultural) product done in the past 7 years, if any
  + Project Management Plan;
  + **Institutional Capacity and Past Performance**;
  + **CV(s)** and portfolios of the Personnel(s) where applicable;
  + At least **three signed references** that are independent of each other.
  + Detailed **Management Plan** including a timeframe (per task) for the implementation.

The **Financial Proposal** in EURO Gross excluding VAT:

* + Should include a detailed breakdown of fees per person and task and clearly defined (reimbursable) expenses.
  + Terms of payment;
  + Organization Identification Number.

\*You can check the VAT exemption status effective within Georgia at RS.GE (ID: 205305560)

Offer **must include all** above mentioned requested documentation, in order to be eligible for evaluation. In case of uncompleted offer, the Bidder will be disqualified from the evaluation process.

# Deadlines and Submission:

Questions for clarification can be addressed to [**greta@ada.gv.at**](mailto:greta@ada.gv.at) before **27.03.2023 09:00**.

The response to submitted questions will be supplied no later than **24.03.2022 16:00.**

Non-binding Technical and Financial proposals in the English language should be submitted via Email to [**greta@ada.gv.at**](mailto:greta@ada.gv.at) before **27.03.2023 09:00** in the form of two separate, signed, documents in pdf format. One document clearly marked TECHNICAL PROPOSAL and one document clearly marked FINANCIAL proposal.

Please indicate “**CFP – Marketing Training Service Provider for SMT”** in the subject line.

The GRETA project, its donors and implementing agency reserve the right to reject all proposals and cancel, reschedule and/or terminate the call for Expression of Interest and/or Tender at any time.

# Processing of Personal Data

During initiation and performance of contracts, ADA may process personal data of natural persons that are collected by ADA or transferred or disclosed to ADA by prospective contractors or third parties under their instruction, e.g., personal data of employees, legal representatives, agents or other partners of the prospective contractors or such third parties.

By submitting information to ADA, you, as a prospective contractor, acknowledge:

* to have taken note of ADA’s Privacy Notice <https://www.entwicklung.at/en/media-centre/privacy-notice> (’ADA Privacy Notice’);
* to ensure that each direct or indirect transfer or disclosure of personal data to ADA during the initiation or performance of a contract is lawful pursuant to applicable data protection law;
* to ensure that all persons, whose personal data are transferred or disclosed to ADA, were promptly and demonstrably provided the ADA Privacy Notice; and
* that if a contract is concluded and in accordance with its terms, ADA publishes, in particular on the ADA website, information about the contract and the contracting parties.