

## TERMS OF REFERENCE

### PREPARATION OF DESTINATION INVESTMENT AND MANAGEMENT PLANS (DIMPs) FOR THE PROVINCE OF PUNJAB

|                       |   |
|-----------------------|---|
| Country:              | Pakistan  |
| Name of the Project:  | Punjab Tourism for Economic Growth Project (PTEGP)  |
| Consultancy Services: | Preparation of DIMPs for the following destinations of Punjab:<br><br>i. Bahawalpur District (Indicative sites identified in TORs)<br>ii. Rohtas Fort, Jhelum District<br>iii. Chakwal District (Indicative sites identified in TORs)<br>iv. Kotli Sattian & Narr (Rawalpindi District) |
| IDA Loan:             | IDA 59820   |
| Project ID:           | P158099   |
| Procurement ID        |   |

#### 1. BACKGROUND

Government of Punjab, Planning & Development Board in collaboration with World Bank Group (WBG) and multiple implementing agencies is implementing Punjab Tourism for Economic Growth (PTEG) Project with the total project cost of USD 55 million over five years (30<sup>th</sup> April 2023). The project aims to promote the tourism sector by strengthening the institutional capacity through better skills development, increase private sector participation and improve infrastructure services in support of the tourism sector in the province of Punjab.

PTEGP's Project Development Objectives (PDO) are commensurate with the vision of the Government of Punjab will be measured by the following result indicators:

- a) Increase in the number of visitors to the targeted destinations;
- b) Number of reforms implemented under the Punjab Tourism Policy
- c) Amount of private, tourism-related investment facilitated
- d) Number of direct project beneficiaries (gender-disaggregated)

#### 2. RATIONALE

The federal and provincial governments in Pakistan have identified tourism as a sector with significant potential to revitalize economic growth, and it is gathering inputs from the provinces on the roadmap for tourism sector promotion and development. In this context, the World Bank Group (WBG) through the International Development Association (IDA) is supporting the Government of Punjab's commitment to accelerate growth and diversify tourism offering in priority destinations. The WBG's support through an IDA loan of US\$50 million was confirmed

in April 2017, with the signing of Punjab Tourism for Economic Growth Project (PTEGP) project.

The Destination Investment and Management Plans (DIMPs) to be prepared under this consultancy will identify required public sector investments and potential private sector investments that are required for an optimum tourism system that enables growth and diversity of the tourism offering in priority destinations. The management plans will provide detailed recommendations for improved visitor management, heritage protection, and environmental preservation at existing priority sites and attractions. These management plans will include course of action to help the authorities manage high-usage of sites by suggesting ways to safeguard heritage sites/attractions (linked to the investment plans where required and/or feasible).

The objectives for the development of DIMPs are to:

- a. Increased and managed the number of tourists (including high spenders) in Punjab in a sustainable, competitive and inclusive way;
- b. Enhanced the quality and diversity of the tourism offering through better horizontal and vertical coordination in tourism;
- c. Established effective and efficient visitor management systems and public infrastructure facilities at existing attractions,
- d. Improved management and governance systems over tourism assets at the destination level;
- e. Facilitated an active participation of private sector with increased investment in tourism sector of Punjab;
- f. Increased income and employment opportunities in tourism sector with higher participation of women and marginalised groups.

The DIMPs will help in identifying, leading, influencing and coordinating the management of all the aspects of the destinations that contribute to a visitor's experience, taking account of the needs of visitors, local residents, businesses and the environment.

This Consultancy will be informed by the "Tourism Policy of Punjab 2019" and tourism sector's COVID-19 mitigation strategy prepared and launched by the Tourism Development Corporation of Punjab (TDCP) in consultation with the provinces. The focus of the consultancy will be on tourism destinations in Punjab reflecting the geographical resource potential and at different stages of the product lifecycle currently identified as Chakwal, Jhelum, Kotli Sattian / Nurh (Rawalpindi), Multan and Bahawalpur. The consultancy will aim at:

- a. Identification and implementation of tourism investments needs in the public domain (infrastructure such as roads and tourist facilities);

- b. Identification of private sector investment opportunities to diversify the product and service offering in scope and quality (including PPPs);
- c. Introduction of health and safety standards to conform with SOPs for COVID-19 and also for improved sustainability and capacity building of communities and local tourism sector;
- d. Identify tourism services and facilities that meet the needs of women, differently-abled persons, families and elderly;
- e. Incorporate elements of COVID-19 impact mitigation strategies and SOPs to ensure that the destinations are ready to operate in a post-COVID environment while ensuring the safety of visitors, workers, communities and local authorities.

Deliverables of this consultancy will identify the implementation of specific activities, timelines and estimated budget, to be implemented through PTEGP and other resources. Depending on the satisfactory performance, the same firm/consultant could be requested to develop similar plans for additional destinations. However, client reserves the right to initiate the procurement for other sites on competitive basis at any time on need basis. **The final deliverables of this consultancy will be drafted within the World Bank Environmental and Social Safeguards Framework (ESMF, RPF and other documents) prepared for PTEGP together with the Covid-19 checklists on occupational health and safety standards prepared for PTEGP. All these will be provided to the shortlisted consultant by the PMU PTEGP.**

Annex 1 has the details of the geographic scope of this assignment in destinations.

## **2.1. SCOPE OF WORK**

The Consultancy will include the following phased activities:

### **2.1.1 Baseline Survey for the Priority Tourism Destinations**

The survey will cover relevant information related to tourism in the priority destinations. A complete list of required information will be finalized through the inception report submitted by the selected firm. Before embarking on the survey, the selected firm will conduct a desk research to see the data that is already available through the surveys that might have been conducted by the Tourism Department, PTEGP, Gallup and World Bank and other institutes in Punjab and also on impact of COVID-19 on tourism industry of Pakistan.

#### **2.1.1. Tourism Assets/Attractions**

The study will include an inventory of the tourism assets/attractions in the priority destinations together with their historic built area context. The consultants should use relevant, up- to-date secondary sources where possible (UNESCO conducted inventory and asset mapping few years ago). In addition, the analysis that will include:

- a. If required, complete the UNESCO's inventory and potential tourism assets/attractions (related to scenic beauty leisure and scenery, historical, archaeological, architectural, religious/cultural, adventure, intangible including food, music, traditional festivals, arts and craft or any other type of tourism activity).
- b. Evaluation of the tourism assets (significance/values, physical infrastructure, tourism potential, tourist access, current tourist facilities, etc.).
- c. Identify and describe the destination and its immediate surroundings in terms of visitors' interest including products, services, accessibility options, boarding and lodging options, restaurants, toilets and other amenities.
- d. Inventory of potential enterprises, products and offerings; including tourism attractions and specialties of the areas (foods, clothes, handicrafts, list of festivals, fairs, sporting events music and folklore, etc.) and key stakeholders.

### **2.1.2. Tourism Enterprises Survey (mostly informed by the data collection of firms and businesses)**

The survey will map the local tourism enterprises formal and informal that comprise of the business establishments that directly cater to tourists and visitors; including hotels, motels, lodges, restaurants, eateries, home stays, campsite renting, food kiosks, tour operators, transporters, souvenir/gift shops, music groups/associations etc. Information covered under the survey should include at least the following:

- a. Number & Enterprises with classification based on type, size, location, number of Employees (gender segregation), revenues, etc.
- b. Products/services being offered by the identified enterprises.

Complete details about the information to be collected about the tourism enterprises will be finalized in the inception meeting.

### **2.1.3. Tourism Infrastructure**

- a. Road infrastructure to reach the identified tourist sites (length of road, different routes, connectivity with main highways/roads, quality of road, average travel time, signage etc.).
- b. Tourist facilities such as transport, restrooms, call centers, internet accessibility, emergency help centers, shopping areas, health facilities, entertainment opportunities etc.
- c. Exclusive tourist facilities available for women, children, differently-abled people and identify gaps.
- a. ICT infrastructure in the locations (mobile phones, internet services, etc.) and potential use of ICT in industry's promotion.

### **2.1.4. Tourist Demand (mostly informed by the data collection of firms' surveys)**

- a. Size and scope of the travel market - what is the market and how big is it?
- b. Tourists profiles with respect to age, gender, education, occupation, income, purpose of visit (leisure, business, research/education, visit friends and relatives (VFR), religious pilgrimage, medical, etc.), country of origin, mode of journey, use of package tour, etc.
- c. Growth trends of tourists and frequency of visits over the last 3-5 years.
- d. Tourist (local and foreign) flow patterns on annual and seasonal basis– to analyze that where, when, how and why do the tourists visit a specific destination.
- e. Number, nature and duration of stay (no. of overnight visitors versus same-day visitors; use of accommodation options; hotels, friends or relatives, camping, etc.).
- f. Expenditure pattern of the tourists (local and foreign, how much and on what); expenditure segregation by package tour, accommodation, food/drinks, entry fee, transport, recreation, shopping, donations/grants etc.).
- g. Travel taste of tourism consumers – what are the characteristic of travel consumers, their likes and dislikes when traveling in terms of accommodation, activities, food, purchases, local culture etc.
- h. Visitor assessment of their vacation – how do visitors rate their travel experience?

### **2.1.5. Employment & Economic Contribution of Tourism**

- a. Share of local population engaged in tourism-related activities (number of households, type of activities, seasonality effect, etc.).
- b. Characteristics of tourism employment versus that in other sectors (seasonal, daily wage, etc.) with data segregated by subsectors, public/private, gender, skills level.
- c. Projections for human resources requirements for next 5-10 years based on Punjab Tourism Policy 2019 targets and Punjab’s ADP targets for new jobs.
- d. Wage analysis (sample-based research details will be finalized during inception meeting) and average income of households engaged in tourism supply chain and other sectors (poverty comparison).
- e. Training requirements for public and private sector.
- f. Skill development institutions and training capacity within and around destinations.
- g. Tourism contribution to the economy of the target locations.
- h. Government’s revenue collection from tourism-related businesses (tax from hotels and restaurants, roads toll, tourist sites entry fee, other charges/levies if any etc).
- i. Government expenditure (budgeted and actual) on tourism in the selected locations.

### **2.2. Desk Study of the Supply and Market Analysis per Destination**

The study of supply and market analysis for each destination will focus on the following:

- Present historical trends based on the data and project scenarios for low, medium and high growth and outlook for the target areas;
- Reflect on the restrictions and opportunities created by seasonality patterns and COVID-

- 19 of the destinations;
- Suggest management approaches with one or two benchmarks global competitors (relevant selection to be agreed);
  - Mapping of stakeholders including local authorities – key departments/functions: transport, environment, municipal services, department of forest, civil society organizations (community, civic, environmental, wider economic partners, women and children), that are influenced by or have influence on tourism.

### **2.3. Tourism Investment Plan**

The Tourism Investment Plan will provide analyses on the following:

- Constraints to investments, including but not limited to access to capital, land, other inputs and security of tenure;
- Regulatory processes for tourism investments and to what extent they impede/encourage diversification, innovation and quality;
- The investor market for each destination, types of tourism projects in each category and asset class (existing and pipeline), access and availability of finance, size of projects, target market segment and typical structure of deals;
- Identify and quantify the major infrastructure and destination facility barriers (and risks) related to tourism development in and around these destination areas, and recommend appropriate investments assessing operating and maintenance costs;
- Inventory of priority connectivity/transport/utilities infrastructures (including air and road connection, water and waste management) at destination level and timing required to fill the gaps identified (reflecting seasonality conditions);
- Needs assessment for tourism-related infrastructure (including visitor information centres, signage, lighting, parking, access to tourist attractions, construction and renovation/upgradation of tourism infrastructure in protected areas);
- Details of potential/new enterprises/projects serving the destinations especially in terms of capacity, brand, and quality, or new capital projects that will have positive impact on tourism development at the destination level;
- Provide an indication of how many properties/businesses could be supported in each destination based on carrying capacity and supply/demand analysis. This should identify the requirements for meeting the demands of different segments of tourists;
- Provide an indication of which destinations (and areas in/around them) are most market-ready for tourism development to attract selected market segments;
- How the various products should be developed in terms of phasing. Which types of products can be brought to the market first, and in/around which destination areas;
- Formulate an investment plan for the PTEGP based on the quantification of demand indicators such as peak visitor loads (at both the destination and key site level), numbers of additional hotel rooms, additional capacity of transport networks (roads, airports etc.), together with specific investment opportunities and indicative cost of each investment/project.

## **2.4. Destination Management Plan**

The consultant shall undertake the following activities, in each case providing sound justification:

- Describe the current management system of existing attractions and sites and assess their effectiveness and efficiency; including environment and social infrastructure (such as existence of citizen engagement systems, grievance redress mechanisms);
- Document the roles and other institutional details (charter, year of establishment, governance, staffing, capacity etc.) of the applicable management authority that govern tourism site and overall destination at both provincial and federal levels;
- Propose a sustainable and effective management and governance system for existing assets and anticipated (proposed) activities following the low, medium and high growth scenario;
- Propose institutional and regulatory changes if necessary, to support the envisaged management system and indicate realistic revenue options;
- Assess the feasibility based on the current legal framework for establishing a destination level tourism management entity (Destination Management Organization) and formulate a road-map for its establishment;
- Reflect on international best practices in support of proposed management systems;
- Reflect on the current and proposed policy and regulatory tourism environment at provincial and federal level in support of the proposed destination management system.

### **2.4.1. Destination Concession Models**

Designed and implemented carefully, tourism concessions can greatly benefit a wide range of stakeholders, while ensuring the conservation of natural resources and biodiversity. The consultant shall:

- Develop sustainable tourism concession models in and around the priority destinations, in order to engage the private sector and to enable communities to benefit from tourism development and job creation. The concession models should emphasize on the role of the private sector as a partner in helping area authorities in achieving their common objectives of conservation of natural and cultural heritage and attracting visitors.
- Suggest transparent and clear procurement procedures so as to ensure development is adhering with the protected area's core purpose of conservation.

### **2.4.2. Destination Marketing Plan**

Destination Management Plans should also cover all the fundamental aspects of destination marketing including; destination image, branding, promotion and communication efforts and the use of electronic medium and social media.

## 2.5. Visitors Management Plan

Based on the site-specific issues identified in various World Bank reports, Punjab Tourism Policy 2019, Site Management Plans (available with PTEGP), desk research and consultations with stakeholders, especially Police, Deputy Commissioner Office, Tourism Department, DTS (Punjab), and other line departments. Suggest an actionable course to ensure smooth visitors' circulation without disruption in daily routines' of the host communities and address concerns including but not limited to:

- Access, traffic management and parking spaces for each destination;
- Solid waste management, training needs and equipment for local authorities and communities;
- Reducing, recycling plastics and glass materials and disposal of non-recyclable;
- Signage and visitors' management (barriers including entry tickets) during and off-peak seasons.

## 3. DELIVERABLES AND TIMETABLE

The key deliverables for this consultancy are detailed DIMPs and VMPs reports, detailed maps and summary presentations for each selected destination covering the major activities. Deliverables should be at such detail that they directly inform the implementation of future investments in the destinations and describe how to manage them over a defined period of time, articulating the roles of the different stakeholders involved and identifying clear actions that will be taken and the allocation of resources. An indicative program for specific deliverables and expected timing is as follows:

| <b>Deliverables</b>  | <b>Timeline</b>                           |
|--|---|
| <p>Inception report providing:</p> <ul style="list-style-type: none"> <li>• Brief conceptual/analytical framework to identify all relevant research and analysis.</li> <li>• List of all stakeholders to be consulted.</li> <li>• Approach and work plan.</li> <li>• Timelines for the entire assignment in a Gantt chart.</li> <li>• Table of content of final report to identify the sections of the final report.</li> <li>• Secondary data sources to be used and rationale for field surveys.</li> <li>• Methodology for data collection for analyses.</li> <li>• Identify the best global market practices.</li> </ul> | <p>Within 2 weeks of contract signing</p> |
| <p>Summary report or presentation of key findings from desk research</p>   | <p>Within 3 weeks of contract signing</p> |

|  |                                       |
|--|---------------------------------------|
| Field survey and stakeholder consultations under which a stakeholder workshop is required to be carried out at a location specified by the PMU PTEGP | Within 6 weeks of contract Signing    |
| Draft Investment Needs Reports   | Within 8 weeks of contract signing    |
| Draft Destination Management Plan  | Within 10 weeks of contract signing   |
| Draft Destination Investment Plan for Concession Models  | Within 12 weeks of contract signing   |
| Draft Report on VMPs   | Within 14 weeks of contract Signing   |
| Final DIMPs and VMPs report together with a well written executive summary   | Within 1 20 weeks of contract Signing |
| Dissemination of the DIMPs and Visitors Plans through 2 workshops or webinars (depending on the pandemic situation) in Lahore and Islamabad          | Within 24 weeks of contract signing   |

The total level of effort for the assignment is estimated at 6 technical staff months. This does not include research analyst and other support staff.

The final report and its executive summary should be well-written, proof-read, edited and formatted. The consultant will prepare presentations, info graphs of the interim and final deliverables as and when requested by the client. Management of the final workshops (deliverable no. 8 mentioned above) will be done jointly by Government of Punjab and the consultancy firm and there will be strict adherence to the communications policy of Government of Punjab and WBG.

#### **4. WORKING ARRANGEMENTS**

The Consultant will be required to present the findings of the various components of the studies to Government of Punjab and WBG representatives at key milestones during the Consultancy. The Consultancy will be extended full support from the relevant agencies of the Government of the Punjab through their designated representatives, regarding access to sites (by obtaining necessary clearances and NOCs), available data and information relevant to the preparation of the documents as well as to other key agencies and stakeholders.

However, it is the sole responsibility of the qualified firm to contact the identified stakeholders,

gather the necessary information, synthesize and analyze it as well as prepare all assignment deliverables satisfactory to the Government of the Punjab. The same consultant firm may be tasked to prepare similar plans for additional destinations depending upon satisfactory performance in this assignment.

The Consultant will report to the Project Manager PTEGP.

## Annex 1

### Priority Tourism Destinations and Boundaries

| Destination          | To include areas and locations amongst others:                             | Total Destination Population   |
|----------------------|--|--|
| Bahawalpur           | Tomb of Bibi Jawindi/Uch Sharif, Nur Mahal, Derawar Fort, Cholistan Desert | Estimated population: 3,668,106<br>Number of bi-annual tourist arrivals: More than 1000 of people come to attend the Urs every year. |
| Kotli Sattian / Nurh | Kotli Sattian / Nurh   | Estimated population of 2017: 119,312<br>Number of bi-annual tourist arrivals:   |
| Chakwal / Jhelum     | Katas Raj, Various Lakes in the area, Rohtas Fort, Khewra Salt Mines       | Chakwal<br>Area: 6,525sq. km Population: 1,083,725<br>Jhelum<br>Area: 3,587 sq. km. Population: 936,957                              |