
PROJECT BRIEF

Examining the impact of crises on tourism: Learnings from European destinations

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1. INTRODUCTION

The activities outlined in this brief aim to bolster Europe's tourism resilience by enhancing ETC members' understanding of the diverse impacts that crises have on the European tourism sector. The present document is intended as a guideline based on ETC's goals and requirements. A clear understanding of these goals and requirements should be reflected in the proposal. Applicants are asked to interpret all aspects of this document carefully yet creatively, using their business intelligence, market experience and expertise to propose the best possible solution for the project. Additional ideas and suggestions that contribute to achieving the project's objectives are welcome and should be clearly outlined in the proposal.

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1.1. ABOUT THE EUROPEAN TRAVEL COMMISSION (ETC)

The European Travel Commission (ETC) is an international non-profit association of official National Tourism Organisations (NTOs) in Europe. The organisation was established in 1948 and is headquartered in Brussels (Belgium).

ETC's mission is to support the promotion of Europe as a tourist destination in major long-haul markets. For its member NTOs, ETC also provides a broad portfolio of market intelligence services and encourages the sharing of best practices. ETC is established as a private body (AISBL) under the law of Belgium.

Moreover, within the scope of its mission, ETC works regularly with the European Commission on a series of initiatives aimed at maintaining Europe's position as the world's leading travel destination.

Further information about ETC can be found on the website www.etc-corporate.org.

2. INFORMATION ABOUT THE PROJECT

2.1. PROJECT OVERVIEW

In the wake of the COVID-19 pandemic, Europe's tourism recovery is maintaining its momentum despite economic, geopolitical and climate headwinds. Throughout 2023, and especially during the summer season, Europe regained a significant portion of its travel activity, largely due to a robust and rapid recovery in intra-regional travel and travel from the United States, as reported by European destinations. Year-to-date data show that 1 in 3 destinations have surpassed pre-pandemic levels of international tourist arrivals. The fastest growth is recorded mainly in southern Mediterranean destinations. However, recovery is not even across all destinations, a sign that there

is still a long way to go in terms of overall regional recovery. To date, about 66% of reporting destinations have still not reached 2019 levels of international tourist arrivals, according to data reported on the TourMIS platform.

Eastern European countries, particularly those bordering Russia or Ukraine, continue to face challenges in attracting the same volume of visitors as before the conflict began. The tourism recovery is also accompanied by growing apprehension regarding the industry's environmental impact and the increasingly challenging climate conditions in traditional holiday destinations, particularly during summer.

The starting point for this proposal is the need to support the recovery of European tourism destinations through solid market intelligence and fostering knowledge exchange. These are particularly crucial following the impacts of the COVID-19 pandemic, Russia's war in Ukraine, the Israel-Gaza conflict and ongoing environmental challenges.

In this regard, ETC intends to commission the production of a report that thoroughly assesses the impact of selected crises (e.g., humanitarian crises, geopolitical conflicts, extreme weather conditions, etc.) on European tourism destinations. The report should also capitalise on the lessons learned and propose a robust crisis management framework to enhance the preparedness of European destinations, ensuring they are better equipped to handle and navigate future crises effectively.

2.2. OBJECTIVES

The purpose of the project is to:

- Enhance the understanding of European destinations regarding the impacts of past and potential crises on the European tourism industry.
- Provide the necessary knowledge and expertise acquired from European destinations that have dealt with a given crisis and foster collaboration among destinations to address future crises.
- Provide ETC member NTOs with a crisis management framework designed to help them systematically navigate crises by addressing all essential areas (e.g. communication, resource management, etc.) with specific steps, ultimately leading to a more effective response and mitigating the impacts of the crises.

2.3. TARGET AUDIENCE

The report is targeted towards European National Tourism Organisations, Destination Management Organisations, governments and tourism stakeholders.

3. REQUIREMENTS AND DELIVERABLES

ETC expects this research initiative to map a number of selected crises that have significantly impacted European tourism and analyse their repercussions on the tourism sector. This project should also collect experiences from destinations that have endured specific crises, enabling other destinations facing similar circumstances to leverage acquired knowledge and mitigation strategies. Insights should also derive from a workshop session with CEOs of European NTOs hosted by ETC in May 2024. As a result of the extensive research and consultations, this project should deliver a comprehensive crisis management framework comprised of building blocks and actionable recommendations designed explicitly for NTOs. The framework is aimed at empowering destinations to proactively and effectively address diverse crises impacting the tourism industry.

For the purpose of this project, the term crisis refers to a sudden phenomenon such as war, terrorist attack, economic decline, extreme natural events/disasters, or pandemics, that have an economic, social, cultural, and political impact on individuals, society, and the economies that require immediate attention/action.

Proposed approaches which are not compliant with the requirements below will be excluded from further evaluation.

The contractor is expected to deliver the following minimum and technical requirements:

3.1. MINIMUM REQUIREMENTS

1. Introduction to the project

- a. The introduction should include a description of the study's background, purpose and relevance.

2. Crises mapping and impacts

- a. Based on desk research, this section should map selected crises that have significantly impacted European destinations and the tourism sector in the past ten years. Some examples include global pandemics, geopolitical conflicts, natural disasters, etc.
- b. The contractor should propose a set of crises¹ based on their relevance to the tourism sector and for which solutions should be within the realm of an NTO's work. The contractor must provide reasoning behind the criteria for selecting the crises.
- c. Elaborate on the impacts (direct and indirect, short-lived or long-lasting) a given crisis had on European destinations/regions and the tourism sector as a whole. These should include the impact on travellers' perceptions about the safety and accessibility of the impacted destinations, travel flows, labour markets, economy, transport connectivity, technology, environment, migration, political relations, etc.

3. Collection of case studies

¹ Between 5-10 to be agreed with ETC

- a. This section should be based on a consultation with European countries that have seen their tourism industry impacted by conflicts/crises. The consultation should gather insights on the impact of a given crisis on their destination, mitigation and recovery strategies, lessons learnt, and recommendations. In cases where a destination is more prone or has encountered a specific crisis multiple times (e.g. volcanic eruption, wildfires, etc.), explore whether the NTO is also adopting preventative strategies. A common template should be provided to collect seamless input from all consulted destinations.
- b. The contractor should propose the best research methodology to collect as many valuable insights as possible from the consultation with NTOs. The case studies should be based on the crises selected during the mapping process (point 2).

4. Framework & Workshop on crisis management

- a. As the report's primary aim, this section should map and elaborate on the essential building blocks for managing various aspects of a crisis, such as communication, governance, data and research, resource management, collaboration and partnerships with different authorities and sectors, etc. Those building blocks should be defined based on the insights collected during tasks 2 and 3 and accompanied by initial recommendations targeted to NTOs. The building blocks and preliminary recommendations will constitute the foundation of the crisis management framework.
- b. It is important to note that while some fundamental building blocks may apply universally to different crises, their specifics and nuances can somewhat vary based on each crisis's nature, scope, and context. Thus, when needed, these building blocks should be customised to meet the distinct demands and challenges of specific crises mapped in previous stages of the research.
- c. ETC expects to host a workshop with CEOs of European NTOs in May 2024 in Lithuania. The workshop will be centred around the identified building blocks and aim to explore, enhance, and refine the preliminary recommendations through exercises, collaborative brainstorming and sharing of insights and experiences among the participants. The awarded company will be expected to propose a format for the workshop and facilitate it, considering that the duration should not exceed 3 hours.
- d. The outcomes from the workshop will serve as a key component in finalising the report. They will enrich the recommendations within the framework with practical and concrete actions agreed upon by the CEOs. Any relevant findings that arise from the workshop that were not incorporated prior to the event should be incorporated in the report after the event.

3.2. TECHNICAL REQUIREMENTS

The deliverables mentioned above should adhere to the following technical requirements:

- **Style**

All deliverables need to align with the style guidelines provided by ETC.

- **Assignment of rights**

The contractor shall explicitly provide ETC with a worldwide, royalty-free, non-exclusive, perpetual (for the duration of the applicable copyright) license to exercise the Intellectual Property Rights in the Campaign Material (created for or in the course of the campaign) as stated below:

- a) to create and reproduce derivative works from the research project;
- b) to distribute copies and display publicly the study, whether independently or as part of other material;
- c) to distribute copies and display publicly derivative works from the research project

- **Reporting**

Regular written progress reports must be provided to ETC via email.

3.3. DELIVERABLES

The contractor will be expected to include information about the following deliverables and the related costs in their offer:

- A full report in electronic format (Word and PDF) with the research outcomes. The report should include:
 - An Executive Summary;
 - A clear presentation of the main results;
 - A clear and visually appealing presentation of the crisis management framework;
 - A detailed description of the applied methodologies (as an annex);
- A PowerPoint presentation of the main results.
- A press release (2000-3000 characters).
- Design and facilitation of a workshop with CEOs of European NTOs in May 2024, Lithuania (approximately 3 hours)

The organisation or individual(s) commissioned should be prepared to present the findings online or in person:

- The organisation or individual(s) should be prepared to organise a webinar to disseminate the main results of the report.
- The organisation or individual(s) should be prepared to give an oral presentation at an ETC Meeting.

Travel and accommodation costs for this presentation (1 person) are covered by ETC.

The final report should be in British English (as opposed to American English). The commissioned contractor is responsible for ensuring that the final document is of sufficiently high quality (both the English language and editing) to enable speedy publication without further editing.

3.4. IMPLEMENTATION PERIOD

The implementation period of the project is expected to start in **02/2024** and shall not extend beyond **30/08/2024**.

4. BUDGET AND TERMS OF PAYMENT

The maximum available budget for this project is 55.000 EUR (excluding VAT and including other taxes if applicable).

ETC will first approve that the deliverables are correct and ask the contractor to submit an invoice on the following basis:

- 20% - Following the kick-off meeting and on commissioning and approval of the project timeline.
- 30% - Following approval of the presentation of results and analysis of tasks 1, 2 and 3 (introduction, crisis mapping and impacts and collection of case studies).
- 30% - Following approval of the presentation of results and analysis of task 4 (mapping of building blocks and preliminary recommendations, facilitation of crisis management workshop and enriching the crisis management framework with inputs from the workshop).
- 20% - The final payment will be made only after completion and approval of all project deliverables by ETC (final report, PowerPoint with summary of results, press release, and webinar/physical presentation at ETC event).

N.B. All payments will only be made after all requested changes and adjustments have been implemented and the deliverables are approved by ETC.

The payment from ETC to the contractor may be subject to reduction in the event of any breach of the contractor's obligations. Breaches may include but are not limited to failure to deliver the required deliverables, not meeting established Key Performance Indicators (KPIs), etc.

5. SUBMISSION OF PROPOSALS

Proposals must be **clear, concise** (not exceeding **15 pages** in total) and **written in English**, so there can be no doubt as to word meaning and figures.

Proposals should include:

- 1) Very brief **company profile**
- 2) A detailed description of the execution plan, an explanation of the proposed research and methodology and information about any subcontracted consultant if the contractor has plans to subcontract a third party to carry out any part of the research.
- 3) Proposed draft planning for the workshop with CEOs (e.g. structure, example of exercises, etc.) information of any subcontracted consultant if the contractor has plans to subcontract a third party to carry out any part of the workshop facilitation.
- 4) **References** to relevant experience in delivering comparable work are outlined in 3.1. *Minimum Requirements* (i.e. case studies or reference list - including project goals, processes, dates and verifiable deliverables)
- 5) **Timeline** for the completion of the project
- 6) Description of **team credentials**, field of expertise and roles of the people involved in the project
- 7) Detailed breakdown of the **economic offer**. All prices should be quoted in Euro and exclude VAT (being a private VAT-registered entity based in Belgium) and include any other taxes if applicable. The economic offer should include all costs following the scope of work of the project (including third-party costs, if any). Any item that is essential for the smooth running of the project, as indicated within this document, even though not specified, shall be read as included in the list of requirements.

Project Manager:

Ms. Lyublena Dimova, ETC Executive Unit, Brussels: Lyublena.Dimova@visiteurope.com

5.1. DEADLINE FOR SUBMISSION

Proposals must be received by **09/02/2024** at 23:59 pm (CET).

The proposals must be valid for at least 6 months after the submission deadline.

5.2. QUESTIONS

Questions can be sent in written form to the Project Manager listed above until **22/01/2024** at 14:00 pm (CET).

ETC will provide the answers to all received questions by **02/02/2024** at 18:00 pm (CET) at the latest.

6. AWARD CRITERIA

The contract will be awarded on the basis of the supplier's proven ability to deliver the stated scope of work within the given timeframe. The award criteria used will also include, among others:

- The most economically advantageous proposal, namely the project that offers the best value for money;
- Compliance with the requirements set in this document;
- The proven relevant experience of delivering comparable work.
- The proposed methodological approach to comply with the project requirements
- The level of creativity of the proposed methodology

7. FINAL PROVISIONS

This Project Brief is in no way binding on the European Travel Commission nor any of the European Union institutions. Any contractual obligation commences only upon the signature of the particular agreement between ETC and the contractor.

ETC reserves the right to accept or reject any or all proposals received as a result of this Project Brief as well as to cancel this project, either partially or totally. In the event of cancellation of this Project Brief, this should not entail any financial obligation from ETC towards any applicant.

Submission of a proposal implies acceptance of the terms and conditions set out in this document.

8. ACCOMPANYING DOCUMENTATION

List Annexes

Brussels, 12/01/2024

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