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CONSULTANCY TO UNDERTAKE AN IMPACT ASSESSMENT OF COVID-19 PANDEMIC THE TOURISM INDUSTRY

Summary of the assignment:

Nature of assignment	Short term
Location	Will vary depending on the respondents
Timeframe	21 working days
Reporting	To Executive Director/CEO

1.0 BACKGROUND TO THE EABC TRADEMARK EAST AFRICA PROJECT

The East African Business Council (EABC) is implementing the TMEA project titled *Public-Private Sector Dialogue (PPD) for Trade and Investment in Eastern Africa*. This regional project targets to mainstreaming advocacy throughout TMEA's project clusters which are transport & logistics; customs & tax; standards & Sanitary Phytosanitary (SPS) Measures; African Free Trade Area (AfCFTA) & Tripartite Free Trade Area (TFTA) and Non-Tariff Barriers (NTBs). The programme's core objective is to enhance private sector organisations' (PSO) capacity to proactively and positively influence decision-making, to accelerate dispute resolution, to sustain political buy-in, to increase commitment and to reduce overall programme risks in TMEA's project clusters. This will increase trade and investment in the EAC. The Regional Programme will contribute to core TMEA corporate results outlined below:

1. Reduce transport (road, rail, and air) cost and time along transport corridors by 10% and increase efficiency in private sector logistics services provision
 2. Enhance Customs and other trade-related agencies' efficiency (25% reduction in time to process trade documentation) through integrated trade management systems and greater inter-agency collaboration.
 3. Reduced tariffs, taxes, and levies by 5-8% overall (including sub-national) reduce exemption regimes, CET, and increase import/export tax incentives
 4. Enhanced efficiency of Bureaux of Standards, reduce related costs and time by 10%, reduce counterfeit and sub-standard goods by 20% through enhanced inter-agency collaboration and improve private sector compliance.
 5. Resolve 30% of all reported NTBs along with TMEA project clusters within a year.
 6. Catalyzing a 10% increase in exports annually, 93,000 direct jobs and \$425m
- An Impact Assessment of COVID-19 Pandemic on Tourism Sector in the EAC*

additional investment after seven years in targeted sectors in the EAC under the Compact and TLCs through increased investment incentives.

2.0 ABOUT EAST AFRICAN BUSINESS COUNCIL

The East African Business Council (EABC) is the umbrella body of the Private Sector in the East African Community (EAC). It brings together national private sector umbrella bodies, manufacturers, employers, bankers, insurance and transporters associations, chambers of commerce, corporates, and medium and small enterprises from the entire East African region.

EABC's mandate is to represent and promote the interests of the EAC business community, provide value-added services that enhance trade and competitiveness, and to participate actively and positively influence legal and regulatory formulation to improve the business environment. EABC works with the major stakeholders such as the EAC Secretariat, Organs, Institutions and National Governments and provides input in policy discussion while advocating for the implementation of resolutions at the national level aimed at increasing intra-regional trade. For effective implementation of the Regional PPD programme, EABC was selected by TMEA as the lead implementing partner for the Private Sector Organizations.

3.0 RATIONALE AND OBJECTIVE OF THE ASSIGNMENT

Tourism is considered as one of the largest foreign exchange earners and fastest-growing sectors in the EAC. According to the Report by EALA on tourism development in the EAC-2018, tourist arrivals in the EAC region increased from 3.5 million persons in 2006 to 5.7 million persons in 2017. Tourism contributed to the Gross Domestic Product (GDP) of the EAC Partner States by an average of 12% in 2017. The percentage contribution was higher than the average in Rwanda (14.9 %), Kenya (10%) and Tanzania (14%), Uganda (9.9%), Burundi (4.3%). Tourism contributes an average of 18.8% to EAC total exports, although the percentage contribution was higher, in Rwanda (30.5%) and Tanzania (26%). The total contributions of tourism to export earnings were at 1.5% for Burundi, 18% for Kenya, and 17.9% for Uganda.

The sector's contribution to the Gross Domestic Product (GDP) of the EAC Partner States is estimated to be an average of 8.8%. The contribution is highest in Rwanda (12.7%), followed by Kenya (9.7%) and Tanzania (9%).

However, with the first case of COVID-19 reported in the East African Community in February 2020, these figures have drastically declined since the outbreak of the COVID-19 pandemic. It is estimated that EAC Partner States will potentially lose International Tourism Receipts in the tune **USD 5.4 Billion** for the year 2020, given the projected long-term closure of seaports and airports. About **6.2 Million** foreign tourists may not travel to their preferred EAC destinations. The trickle-down effects will be felt across affiliated industries and the rest of the economy.

The COVID-19 impact on tourism in the EAC has also been significant with the decline in Safaris expeditions, Cut-Back operations in the Hospitality Industry

including Closure of Hotels & Recreational Centres, Loss of Revenue for East African Airlines and Loss of Jobs for the thousands employed by the sector. The breadth and scale on the impact of COVID-19 to the sector and directly affiliated industries has also resulted in the cancellation of (Meetings, Incentives, Conferencing & Exhibitions) MICE, nationally, regionally and worldwide

Considering the unparalleled and fast-evolving nature of the crisis, it is extremely challenging to estimate the impact of COVID-19 on international tourism. Based on the latest developments (quarantine measures, travel bans & border closures in most of Europe and in many countries of the Americas, Africa and the Middle East), the evolutions in Asia and the Pacific and the patterns of previous crises (2003 SARS and 2009 global economic crisis), UNWTO estimates international tourist arrivals could decline by 20% to 30% in 2020. This would, therefore, translate into a loss of 300 to 450 US\$ billion in international tourism receipts (exports), which is almost one-third of the US\$ 1.5 trillion generated globally in the worst-case scenario.

The East African Business Council (EABC) is thereby concerned with the disruptions in the tourism sector as a major contributor to the economic development of the EAC Partner States as well as one of the biggest employers of the East Africans. To enhance Public and Private Dialogue on the tourism industry and ensure a steady recovery of the sector, EABC with support from TradeMark East Africa, desires to undertake an assessment of COVID-19 pandemic on the tourism sector in the East African Community and consequently chart out post-recovery recommendations for the sector in the region.

4.0 SCOPE OF WORK AND DUTIES

To achieve the desired objectives of the consultancy, the technical proposal should detail how consultancy will be conducted. The technical proposal should also contain a work plan which explains how the assignment will be undertaken in line with the timeframe. Finally, the technical proposal will include a methodology that meets both the scope of work and deliverables described in the Terms of Reference (ToR). The main activities of the Consultant are not limited to:

- Assessment of the impact of COVID-19 pandemic on the Tourism Sector in EAC;
- Analysis of Partner States' response to COVID-19 through different stimulus packages and other measures taken in the 2020/2021 Budgets
- Develop EABC Policy brief on the impact of COVID-19 pandemic on the Tourism;
- Organize internal validation workshop and present report of the impact assessment of the COVID 19
- Provide recommendations on how the industry should restructure for resilience in light of global pandemics post COVID - 19

5.0 DELIVERABLES

The key deliverables include:

- **Inception report** which among other things will contain the detailed work plan for carrying out the scope of work, proposed methodology and research design survey instruments.
- **Draft report** of an Impact Assessment of COVID-19 pandemic on the tourism sector in the EAC and Post COVID-19 Recovery recommendations for the sector.
- **The final report** to include: final findings on the Impact Assessment of COVID-19 pandemic on the tourism sector in the EAC and Post COVID-19 Recovery recommendations for the sector. The report will cover the Consultant's final findings, after feedback from EABC Secretariat and other key stakeholders
- **Policy brief** which will contain a summary of both findings of an impact assessment of COVID-19 pandemic on Tourism and post-COVID-19 recovery recommendations for the tourism sector in the EAC.

6.0 QUALIFICATIONS AND EXPERIENCE

A suitable candidate should hold the following qualifications and key competencies:

- a) **Academic qualifications:** Master's Degree or above in tourism and, conservation, with tourism destination development specialization and proven experience in strategic development planning.
- b) **Work Experience:** A minimum of ten (10) years' demonstrable experience in conducting research/survey on the tourism sector, an understanding of the tourism of the EAC region.
- c) **Proven track-record** in related assignments
- d) **Knowledge and experience** in the area of the tourism value chain, public-private partnership, tourism destination and product development, investment promotion, etc
- e) **Languages:** Fluency in oral and written English is required as it is the main EAC working language. Good working knowledge of French and Kiswahili will be an advantage.
- f) **Additional Skills:** Excellent computer skills (Microsoft Office (Word, PowerPoint, and Excel), Email, analytical tools/software for data analysis, experience in working with internet searches, online databases, and data retrieval) are required.
- g) **Nationality:** The position is only open to Nationals of any of the EAC Partner States, Burundi, Kenya, Rwanda, Tanzania, Uganda and South Sudan.

7.0 THE APPLICATION PROCESS

All proposals should be addressed to;

The Executive Director / CEO
East African Business Council (EABC)
Ninth Floor, Mafao House, Old Moshi Road
P. O. Box 2617

An Impact Assessment of COVID-19 Pandemic on Tourism Sector in the EAC

Arusha, Tanzania.

Email: director@eabc-online.com with a copy to procurement@eabc-online.com clearly marked “**Consultancy to Undertake an Impact Assessment of COVID-19 Pandemic on the Tourism Sector in EAC**”. The proposal should include current curriculum vitae, proposed methodology, work plan and a financial proposal.

Applications close on (25th July 2020) at (5.00 p.m.).

EABC is an equal opportunity employer thus recruitment is on merit and with no regard to one’s age, colour, gender, marital status, disability or impairment, race or creed. Canvassing shall lead to automatic disqualification. Environmental aspects will be taken into consideration.

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