

# Terms of Reference for consultancy “Improvement of Tourism Statistics and Electronic System of Tourism Statistics”, Ref. No. AL-ADF-365634-CS-QCBS

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Terms of Reference for the  
Improvement of Tourism Statistics and  
Electronic System of Tourism Statistics

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# 1. BACKGROUND

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The Institute of Statistics (INSTAT) is the organisation with the most involvement in the collection of tourism statistics in Albania. As the national statistics agency it has a mandate to collect, compile and disseminate a range of tourism statistics that are an essential part of a robust system of tourism statistics. INSTAT is largely guided by Eurostat directives and comply with their requirements. As in many other countries, this can lead to robust statistics that conform to international standards, but can also often fall short of the range and depth of data needed by the tourism sector for government bodies (such as the Ministry of Tourism and Environment) and the private sector to use for planning, marketing, policy making and regulating the sector effectively.

A review of the current system of tourism statistics (see report: *Tourism Information Management System and Statistics Improvement: Assessment and Technical Specification of Goods/System of Tourism Statistics*) identified INSTAT as being well organised and undertaking a wide range of important surveys. It also executes an inbound and outbound visitor survey for the Bank of Albania that generates useful tourism expenditure data. However, the inbound visitor arrivals statistics do not comply with UNWTO guidelines and are not detailed enough to be useful for tourism planning and marketing; cruise visitors are not measured at present; the domestic visitor survey does not generate data on expenditure; and accommodation statistics are drawn from a relatively limited sample. This means that the development of a Tourism Satellite Account (TSA), developing the European Tourism Indicator System (ETIS), and measuring tourism at the regional/ municipality level is not possible.

The first and only previous TSA compiled in Albania was for the base year of 2009, although this compilation used considerable amounts of estimated data to enable the account to be developed. Any new compilation will require more robust inbound air and land arrivals, cruise arrivals and domestic tourism expenditure data than is currently available.

The European Tourism Indicator System (ETIS) was developed by the European Commission in 2013 with the aim of helping destinations to monitor and measure their sustainable tourism performance. The system was tested through two pilot phases over a two-year period and in 2016 the Commission updated to the 2016 edition of the ETIS Toolkit, providing destinations with a fully tested system and a more realistic set of core indicators. ETIS consists of 43 core indicators, and the compilation of these requires a robust and extensive system of statistics that cover a range of sectors including energy, waste disposal, as well as tourism. A traditional system of tourism statistics will enable 12 of the core indicators to be generated, whilst additional data collection in Albania (largely from businesses) could deliver a further 18 indicators, generating a total 30 of the 43 indicators.

The overall Vision for tourism statistics in Albania is to:

- Generate meaningful data at both the regional/municipal and national levels.

- Provide useful and reliable tourism data for the entire tourism sector for planning, marketing, policy making and regulation in both the public and private sectors.
- Enable compilation of a national Tourism Satellite Account (TSA).
- Generate 30 of the 43 core indicators of the European Tourism Indicator System (ETIS).
- Implement a model for estimating tourism trips, nights and expenditure at regional/ municipality level.
- Develop a tourism statistics database and dashboard for the collection, storage and dissemination of tourism statistics so there is a central point where all users can access information from.

In order to achieve the Vision, it will be necessary to put in place the following six surveys what will be continuous (i.e. will run on an annual basis):

- *Inbound Visitor Survey*: a national-level sample survey of non-residents as they depart Albania after completing their trip, excluding cruise passengers.
- *Cruise Visitor Survey*: a national-level sample survey of cruise visitors as they depart Albania after their day-visit to the country.
- *Domestic and Outbound Visitor Survey*: a national-level sample survey of residents in Albania that measures domestic and outbound trips.
- *Tourism Business Survey*: survey of tourism characteristic businesses to measure business activity, and environmental awareness for regions of Berat, Vlore and Gjirokaster.
- *Residents Survey*: survey of residents in Albania for regions of Berat, Vlore and Gjirokaster.
- *Accommodation and Attractions Survey*: survey of accommodation and attractions, tracking the number of guests/visitors and their spend for regions of Berat, Vlore and Gjirokaster.

The implementation of the six surveys would generate sufficient and robust data to:

- Develop a TSA, with a recommended base year of 2024, and annually thereafter.
- Establish 30 of the 43 ETIS indicators, and track these on an annual basis.
- Implement a regional volume and value model to generate visitor numbers, overnights, expenditure and employment at a regional level.

The development of an online Tourism Statistics Database will increase the usefulness of the system of tourism statistics by allowing users to access it and use it for developing the tourism sector in Albania. It will also have an important role to play with the collection of accommodation and attractions data as businesses would provide operational statistics through it. The specifications of the Tourism Statistics Database are available in a separate report: *Technical Specifications for the Establishment of an Electronic System of Tourism Statistics*.

The establishment of the system of tourism statistics requires an *Inter-Institutional Platform (IIP)*, statistics relevant authority, to deliver successfully. As tourism crosses over several different sectors and institutions, the collection of data related to it requires interaction between several bodies. In Albania the IIP is expected to consist of individuals from six organisations: INSTAT, Ministry of Tourism and Environment, Bank of Albania, Immigration, Ministry of Culture and Albanian Development Fund) plus representatives from each of the four regions. The IIP will oversee the implementation of this and future development projects in the field of tourism statistics. The report *Tourism Information Management System and Statistics Improvement: Assessment and Technical Specification of Goods/System of Tourism Statistics* includes a detailed review of the current system of tourism statistics in Albania, and a three-year action plan for their improvement and development. This Terms of Reference corresponds to the tasks identified as being priority in Year 1, and sets out the scope of work to deliver these.

## **2. OBJECTIVES AND SCOPE OF WORK**

### **2.1 Objectives of the Assignment**

The overall objective of this assignment is to set in motion the improvement of tourism statistics in Albania, building on the recommendations made in the *Tourism Information Management System and Statistics Improvement: Assessment and Technical Specification of Goods/System of Tourism Statistics* and working closely with the newly established Inter-Institutional Platform (or Statistics relevant authority) that will act as the Steering Committee for the project.

The consultant will prepare the ToRs and will assist the relevant institutions to carry out the selection of a firm to develop the tourism statistics database.

The Consultant will be required to plan and commence implementation of six national surveys for the measurement of tourism, identify data sources that can be purchased from various bodies that will be of use in Albania's system of tourism statistics, carry out the selection of a firm to develop the tourism statistics database, and undertake compilation of an experimental tourism satellite account including the compilation and production of the first tourism statistics and economic impact of tourism report for Albania in close cooperation with the Ministry of Tourism, INSTAT and other relevant institutions.

### **2.2 Key Tasks**

In order to attain these objectives, the Consultant shall undertake the six key tasks as outlined below.

#### **Task 1: Inception Report**

The Consultant shall produce an Inception Report at the start of this consultancy. The purpose of the Inception Report is to outline the methodology, instruments proposed by the Consultant to conduct the various tasks, and well as reflect the level of effort and timeline that will be followed to develop each of the tasks.

## **Task 2: Survey Planning and Implementation**

Six national-level surveys are required as part of the improvement of the system of tourism statistics, covering: inbound visitors, cruise visitors, domestic and outbound visitors. The Consultant should establish these surveys in line with the following:

### ***Inbound Visitor Survey***

1. Propose a detailed implementation plan for the survey. Discussions with the Ministry of Tourism and INSTAT should be paramount during this process.
2. Establish a cost for undertaking this survey over a three year period (to capture data for three consecutive years).
3. Make recommendations to the relevant Statistics authority for the implementation of the survey.
4. Finalise survey methodology, including questionnaire, sample size, sampling frame, and other technical details providing expert assistance.
5. Oversee the initial launch of the survey and ensure plans and timeline are being followed.
6. Make the overall evaluation of the survey process and give recommendations for future improvements.

**Deliverables:** Inbound Visitor Survey Report documenting the procedure for implementing and evaluating the survey.

### ***Cruise Visitor Survey***

1. Propose a detailed implementation plan for the survey. Discussions with the Ministry of Tourism and INSTAT should be paramount during this process.
2. Establish a cost for undertaking this survey over a three year period (to capture data for three consecutive years).
3. Make recommendations to the relevant Statistics authority for the implementation of the survey.
4. Finalise survey methodology, including questionnaire, sample size, sampling frame, and other technical details providing expert assistance.
5. Oversee the initial launch of the survey and ensure plans and timeline are being followed.
6. Make the overall evaluation of the survey process and give recommendations for future improvements.

**Deliverables:** Cruise Visitor Survey Report documenting the procedure for implementing and evaluating the survey.

### ***Domestic and Outbound Visitor Survey***

1. Propose a detailed implementation plan for the survey. Discussions with the Ministry of Tourism and INSTAT should be paramount during this process.
2. Establish a cost for undertaking this survey over a three year period (to capture data for three consecutive years).
3. Make recommendations to the relevant Statistics authority for the implementation of the survey.
4. Finalise survey methodology, including questionnaire, sample size, sampling frame, and other technical details providing expert assistance.
5. Oversee the initial launch of the survey and ensure plans and timeline are being followed.
6. Make the overall evaluation of the survey process and give recommendations for future improvements.

**Deliverables:** Domestic and Outbound Visitor Survey Report documenting the procedure for survey implementation, evaluation and technical details.

### ***Tourism Business Survey***

1. Propose a detailed implementation plan for the survey. Discussions with the Ministry of Tourism and INSTAT should be paramount during this process.
2. Establish a cost for undertaking this survey over a three year period (to capture data for three consecutive years).
3. Make recommendations to the relevant Statistics authority for the implementation of the survey.
4. Finalise survey methodology, including questionnaire, sample size, sampling frame, and other technical details providing expert assistance.
5. Oversee the initial launch of the survey and ensure plans and timeline are being followed.
6. Make the overall evaluation of the survey process and give recommendations for future improvements.

**Deliverables:** Tourism Business Survey Report documenting the procedure for survey implementation, evaluation and technical details.

## ***Residents Survey***

1. Propose a detailed implementation plan for the survey. Discussions with the Ministry of Tourism and INSTAT should be paramount during this process.
2. Establish a cost for undertaking this survey over a three year period (to capture data for three consecutive years).
3. Make recommendations to the relevant Statistics authority for the implementation of the survey.
4. Finalise survey methodology, including questionnaire, sample size, sampling frame, and other technical details providing expert assistance.
5. Oversee the initial launch of the survey and ensure plans and timeline are being followed.
6. Make the overall evaluation of the survey process and give recommendations for future improvements.

**Deliverables:** Residents Survey Report documenting the procedure for survey implementation, evaluation and technical details.

## ***Accommodation and Attractions Survey***

1. This survey will utilise the online database system (see Task 5). Discussions with the Ministry of Tourism and INSTAT should be paramount during this process.
2. Finalise methodology, including recruitment of accommodation and attractions onto the system, and ensuring they engage with the data collection process.
3. Make the overall evaluation of the survey process and give recommendations for future improvements.

**Deliverables:** Accommodation and Attractions Survey Report documenting the procedure for implementation and evaluation

## ***Task 3: Identification of Third-Party Data Sources***

A wide range of data sources are currently available from various organizations that can be useful for the measurement and tracking of tourism in a destination. Airbnb data (from Airdna) has been identified as a source that should be subscribed to in order to generate useful data from the (mainly) self-catering market in Albania.

Other sources of data include Mastercard (tourism expenditure), Forward Keys (aircraft seat bookings) and various social media platforms that can provide data on visitor sentiment. The Consultant should:

1. Identify the range of third-party data sources available that are of interest and use to Albania.
2. Compile a comprehensive report on each identifying the data they produce, how they could be used in Albania, and their relevance and cost. This must include Airbnb.
3. Following approval from the relevant Statistics authority , put in place the procedures for the procurement, capture and organisation of this data on a regular and ongoing basis.

**Deliverables:** Report of third party data options clearly identifying the various availability of data, how these could be used in Albania, their relevance and cost.

#### ***Task 4: Experimental TSA for 2019 and TSA for 2023***

Whilst the availability of new data will not allow the development of a detailed TSA at this stage, it is important that the compilation of an experimental TSA with a base year of 2019 is undertaken, to provide a pre-COVID benchmark for the economic impact of tourism. The Consultant should:

1. Assess the data available for the compilation of a TSA for the reference year of 2019 and 2023.
2. Establish estimates and/or imputations for missing data based on sound and documented economic principles.
3. Compile a TSA for 2019 and 2023 that includes, at least, Table 1 (inbound tourism expenditure), Table 2 (domestic tourism expenditure), Table 4 (internal tourism expenditure), Table 5 (output of the tourism industries), Table 6 (reconciliation of demand and supply), Table 7 (employment) and Table 10 (non-monetary indicators) as set out in UNWTO Recommended Methodological Framework 2008 (TSA RMF:2008):

<https://www.e-unwto.org/doi/epdf/10.18111/9789284404377>

The Consultant must follow UNWTO Recommended Methodological Framework 2008 (TSA RMF:2008) and should ensure the account produces, at least, tourism direct gross value added and tourism GDP percentage for 2019.

4. Undertake training sessions with INSTAT and other relevant bodies on the compilation of the TSA, including compiling the seven tables and improving the data for future compilations.

Note that the TSA, at this stage, will be utilising the data made available from the surveys implemented in Year 1. At this early stage of data collection some of the findings may be weak, however in Years 2 and 3, as the surveys become more established, future TSAs will be able to utilise these data to generate more established results.



**Deliverables:** At least TSA Tables 1,2,4,5,6,7 and 10 and overall report detailing the compilation process and summary of findings for the years 2019 and 2023

***Task 5: Tourism Statistics Database***

The technical description of the proposed Tourism Statistics Database has been developed and is available in the report: *Technical Specifications for the Establishment of an Electronic System of Tourism Statistics*. Based on this the Consultant should:

Compile a terms of reference for the contracting a firm for the development of the Tourism Statistics Database.

Work with the relevant Statistics authority on the tender, selection and contracting process.

**Deliverables:** Terms of reference for the development of the Tourism Statistics Database.

***Task 6: Tourism Statistics and Economic Impact of Tourism Report***

Based on available data at the time, the Consultant should:

Develop the table of contents/scope of the report for comment/approval of the relevant Statistics authority.

Compile the Tourism Statistics and Economic Impact of Tourism Report utilising the most recent data available.

Clearly identify data for future reports that will be generated from the implemented surveys and other data collection initiatives that have been, or are being, implemented.

**Deliverables:** Tourism Statistics and Economic Impact of Tourism Report and a separate report clearly identifying the scope/table of contents of the next report (12 months later) that will incorporate newly collected data.

## **2.3 Method of procurement and Standard Contract**

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The selected procurement method of the service will be based on the World Bank's Procurement Regulations for IPF Borrowers, July, 2016 as amended.

A Consultant will be selected in accordance with the Quality and Cost Based Selection (QCBS), method set out in the Procurement Regulations.

The standard form of the Contract will be a Lump Sum Contract.

### **3. IMPLEMENTATION FRAMEWORK**

All six tasks under this assignment will be carried out by the Consultant over a 12 month duration (time allocated for the deliverables including 10 working days for review/approval of each). The following list of deliverables and timing of delivery serves as a guide for the Consultancy.

<b>Task</b>	<b>Deliverables/Services</b>	<b>Delivery of Task (Month)</b>
<b>1</b>	<b>Inception of Project</b>	
1.1	Inception Report	2
<b>2.</b>	<b>Surveys</b>	
<b>2.1</b>	<b><i>Inbound Visitor Survey</i></b>	
2.1.1	Establish costs and implementation body	3
2.1.2	Develop and finalise questionnaire and methodology	6
2.1.3	Commence survey	9
<b>2.2</b>	<b><i>Cruise Visitor Survey</i></b>	
2.2.1	Establish costs and implementation body	6
2.2.2	Develop and finalise questionnaire and methodology	8
2.2.3	Commence survey	11
<b>2.3</b>	<b><i>Domestic and Outbound Visitor Survey</i></b>	
2.3.1	Establish costs and implementation body	7
2.3.2	Develop and finalise questionnaire and methodology	10
2.3.3	Commence survey	12
<b>2.4</b>	<b><i>Tourism Business Survey</i></b>	
2.4.1	Establish costs and implementation body	7
2.4.2	Develop and finalise questionnaire and methodology	10
2.4.3	Commence survey	12
<b>2.5</b>	<b><i>Residents Survey</i></b>	
2.5.1	Establish costs and implementation body	7
2.5.2	Develop and finalise questionnaire and methodology	10
2.5.3	Commence survey	12

<b>2.6</b>	<b><i>Accommodation and Attractions Survey</i></b>	
2.6.1	Design input form for collection of data that will be incorporated into the Tourism Statistics Database	8
2.6.2	Recruit accommodation and attraction businesses to engage with the online database	11
<b>3.</b>	<b>Identification Third Party Data Sources (Big Data)</b>	
3.1	Identification of sources	6
3.2	Commence acquisition of Airbnb data and other data (national/regional)	8
<b>4.</b>	<b>Tourism Satellite Account</b>	
4.1	Compile experimental TSA for reference year of 2019	9
4.2	Undertake training sessions on TSA development	11
<b>5.</b>	<b>Tourism Statistics Database</b>	
5.1	Develop terms of reference (from technical spec) for developer	8
5.2	Tender for contract, select and commission to appropriate developer	10
<b>6.</b>	<b>Tourism Statistics and Economic Impact of Tourism Report</b>	
6.1	Compilation of first report	12

#### **4. TEAM PROFILE AND KEY PERSONNEL**

The Consultant must be a firm with at least 10 years' experience in the field of tourism statistics and measuring the economic impact of tourism. In addition to this they must have:

Experience working on data collection and evidence-based policy making.

Experience working in the area of tourism development, consulting on similar projects, and direct involvement in the development of tourism satellite accounts in other countries.

Experience working in European (and in particular Centra/Eastern European) countries.

Proven previous experience on IT tourism projects, ideally in the development of tourism statistics database, software tracking tourism and/or data analysis and reporting software.

Possess facilitation skills and a willingness to think creatively and produce innovative solutions.

The firm must provide a multi-disciplinary team of four key staff for the execution of this project. The Consultant team should be led by a Team Leader with international experience in the development of systems of tourism statistics and implementation of demand and supply surveys. The team should also include an international tourism satellite account/economist, local tourism expert, and IT specialist (local or international).

The following list of qualifications serve as a guide, although the Consultant team may propose additional or alternative staff if they feel they would be beneficial for delivery of the assignment.

The proposed team composition is as follows:

<b>No.</b>	<b>Position</b>	<b>Qualifications</b>	<b>Experience</b>
1	Team Leader <i>International Tourism Expert</i>	An advanced degree (Masters, PhD preferred) in tourism, statistics, economics or related field	At least 15 years of experience of working in tourism in the field of tourism statistics or tourism economics; strong analytical skills; ability to present complex ideas in a concise manner
2	Tourism Satellite Account Expert/ Economist <i>International Tourism Expert</i>	An advanced degree (Masters, PhD preferred) in statistics, economics or related field	At least 10 years of experience in the field of tourism economics and the compilation of TSA
3	IT Specialist <i>International Tourism Expert</i>	Graduated in computer science, information management or related field. Post graduate studies will be considered an asset	At least 10 years of professional experience in previous IT projects, preferred in the tourism field.
4	Tourism Expert <i>Local Tourism Expert</i>	Graduated in tourism or economics, or related field. Post graduate studies will be considered an asset	At least 5 years of professional experience, particularly working in the tourism sector in Albania. Experience with donor's projects required