



MINISTRY OF FOREIGN AFFAIRS, FOREIGN EMPLOYMENT & TOURISM

## Terms of Reference (TOR)

Tourism for Heritage, Resilience, Inclusion and Value-driven Employment (THRVE) Project  
World Bank – Grant Facility for Project Preparation (GFPP)  
Grant No.: E572LK | Ref No.: LK-MOFAFET-535643-CS-QCBS

**Consultancy to develop an Actionable Strategic Action Plan 2026–2030, which includes a Demand and Supply Analysis, an Investment Needs Analysis and Regulatory Framework Review for the Tourism Industry**

### 1. Background

The Ministry of Tourism is implementing a comprehensive, multi-layered reform and development program designed to transform Sri Lanka into a competitive, resilient, and high-value global destination. This transformation begins with establishing strong evidence base through **Tourism Demand Analysis**, which identifies real market behaviour, visitor motivations, and future growth opportunities. Parallel to this, the **Investment Opportunity Analysis** maps viable tourism projects aligned with demand, ensuring that product development and investor facilitation are grounded in market realities. These insights feed directly into the **Tourism Policy Review** and **Regulatory System Review**, which modernize service standards, sustainability frameworks, licensing systems, and digital transformation pathways—creating a more efficient, investor-friendly, and globally aligned tourism environment.

Building on this foundation, the Ministry is developing a **National Tourism Strategic Action Plan** that synthesizes all analytical outputs into a unified policy and implementation framework. This national plan is operationalized through **Provincial Tourism Plans**, ensuring that each province translates national priorities into localized, actionable strategies. Complementing this, the **Destination and Product Analysis** define the experiences Sri Lanka must develop and promote, while the **Skills Gap Analysis** ensures the workforce is prepared to deliver these experiences at globally competitive standards. These strategic interventions are supported by **Tourism Infrastructure Development**, implemented in collaboration with national agencies and development partners, and strengthened through **Government and Stakeholder Capacity Building**, which enhances institutional readiness, coordination, and long-term sustainability.

### 2. Country Sectoral Context

**After facing one of its worst economic and political crises since independence in 2022, Sri Lanka's economy started to show signs of recovery by 2024.** Tourism has been a critical driver of economic growth in Sri Lanka in the last decades. Following recent shocks, the sector is rebounding. Sri Lanka's tourism sector generated approximately **US\$ 3.2 billion** in earnings in 2025, driven by a record 2.36 million tourist arrivals.

**Sri Lanka's tourism sector has demonstrated remarkable resilience but remains constrained by low-value growth and modest job creation.** Sri Lanka experienced a strong increase in international tourist arrivals after the end of the civil conflict, with numbers growing four-fold from 450,000 in 2009 to 2.3

million by 2018. The sector became a cornerstone of the country's economic recovery strategy. However, a series of shocks, including the 2019 Easter bombings, the COVID-19 pandemic, and the recent economic crisis, led to a dramatic downturn between 2019 and 2021. Despite these setbacks, the sector is rebounding as tourist arrivals reached approximately 2.05 million in 2024 and increased to 2.36 million in 2025, a 15.1-percentage growth. However, this recovery has yet to translate into high-value gains. Tourism receipts in 2024 were only US\$3.17 billion, compared to US\$4.4 billion in 2018, suggesting that visitors spending is lower.

**The nation's tourism offerings are evolving rapidly and have tremendous future scope for even further diversification.** They have recently expanded to include nature-based experiential and adventure tourism across the whole island including its diverse national parks, cuisine as a center of attraction and experience, and adventure sports. New potential products in marine based nature tourism, cultural and heritage-based tourism all have tremendous scope to widen the offering of the nation and attract new market segments as well such as a rising middle and upper middle class of travelers from the wider Indian subcontinent, the Middle East and China. Further potential exists to include travelers from southern hemisphere nations such as Australia and New Zealand to coincide with their own winters and the East coast season for Sri Lanka.

**The marketing of Sri Lanka's offerings has been sub-optimal and largely ineffective.** There have been multiple attempts at defining Sri Lanka's offerings over the years with multiple taglines and positionings, but these have not been strategic or based in solid market research and demand analysis. This has led to both inconsistencies for the industry at large in their positionings, as well as some confusion among the market as a whole. While challenges remain in defining a product that has multiple dimensions, a marketing strategy that is more targeted, based on the data and on knowledge of the competition, will assist the industry to better position themselves across their multiple client profiles.

### 3. Objectives of the Consulting Assignment

The overall objective of the assignment is to develop a data-driven tourism strategy and action plan for Sri Lanka's tourism sector to be implemented over the period of 2026 to 2030.

The tourism strategy will be under the oversight of the Ministry of Foreign Affairs, Foreign Employment, and Tourism (MOFAET) and in keeping with the Government's overall tourism development policy, but its development and implementation will need to be coordinated across multiple agencies involved in tourism.

The strategy will outline a set of targeted actions informed by factual, numerical, and financial evidence wherever such data is available. These actions will be further shaped by documented inputs from a robust multistakeholder consultation process, ensuring that perspectives from national, provincial, and local levels are meaningfully integrated. Particular emphasis will be placed on aligning proposed interventions with existing **provincial tourism development plans**, as well as ensuring coherence with **national policies, strategic frameworks, and sectoral plans**. This alignment will help guarantee that the recommended actions are both contextually relevant and supportive of broader national tourism development priorities.

The Consultancy will study current and potential global demand, the nation's current offerings (with provincial focus) and sector structure; their challenges and limitations, and growth based on both the current and potential offers and offer a series of recommendations to enable the execution of the strategy.

The Consultancy exercise will be structured into 4 parts or phases, the first 3 of which will be studies based on the specific areas and needs of: **1) demand analysis, 2) investment needs analysis and 3) regulatory framework analysis**. The final section will be the development of a comprehensive strategy

and action plan that outlines the findings from the first 3 phases and amalgamates them into an implementable strategy for the government with specific actions. This process must ensure thorough analysis and consultation at both provincial and national levels to promote inclusive and sustainable tourism development, with the active involvement of key stakeholders, including local communities.

## **4. Scope of Work**

### **4.1 Phase 1 - Demand & Supply Analysis**

Conduct a **global demand analysis** to identify key tourism trends in the world, emerging new markets and product opportunities but in the **context of the supply of Sri Lanka's offerings**, current as well as potential and **conduct gap analysis and economic analysis of each**.

The Consultant Firm will undertake the following tasks:

- Review international tourism trends, including post-pandemic recovery, niche markets, and demand for sustainable and experiential tourism in the context of Sri Lanka's offerings – both current and potential, and across multiple price segments. These include, but are not limited to analyzing and quantifying the traditional Beach, Culture, Nature-Based tourism, Wellness, MICE, but include Religious/Pilgrimage, Cuisine, Adventure, Marine, International Sports etc. Identify as many segments and sub-segments as relevant (e.g.: kitesurfing, scuba diving, deep sea fishing, architectural interests, bird watching, arts) and quantify each in terms of potential market size/value for Sri Lanka, volume of tourists, average per day tourist spending, potential employment creation and average length of stay.
- Analyze existing data available from multiple sources such as the Ministry of Tourism, SLTDA, Department of Wildlife, Forest Department, Central Cultural Fund, Department of Archeology, Private Sector DMCs, Hotels and industry bodies, Department of Immigration etc. as well as international booking engines.
- Identify Sri Lanka's main competitors for new and existing market segments and benchmark what Sri Lanka currently achieves against competitor nations including traveler categories and demographics, length of stay, employment and spend etc.
- Based on current and future demand segments, conduct an audit of Sri Lanka's supply of tourism products, again, across all price segments. Identify key product and investment gaps needed to ensure Sri Lanka is competitive in new and existing market segments in comparison to competitors. Identify critical gaps, infrastructure, emerging opportunities, evolving global sustainability regulations and accreditations, and policies, laws, regulations or institutional constraints to align supply-side offerings with identified future demand across the tourism market clusters.
- Assessment of existing and potential tourism products, and critical assets and competitive advantage in provinces (in all provinces or where tourism is dominant)
- Final report to contain Executive Summary, all findings and accompanying data and brief PPT for presentation.
- The Consultant Firm will be expected to keep a record of all stakeholder consultation findings with key findings and data obtained.

### **4.2 Phase 2 – Investment Needs Analysis**

Based on the results of phase 1, **identify the investment needs to fill the supply gaps and carry out an investor needs analysis** to understand investor appetite, investment barriers, investment quantum and potential funding mechanisms and strategies.

- Based on the results of phase one, map and categorize potential areas for investment in the prioritized product or offering categories including their type, geographies and potential locations. These would include but are not limited to nature-based tourism activities like high-end conservancies and lodges based on current and underutilized natural assets, market segments like wellness, heritage and culture where further enhancements like modern art, architecture etc. are possible against current traditional offerings, further adventure and activity-

based tourism such as white-water kayaking, ocean rowing, scuba diving, international sporting events, recreational fishing etc. Investment needs could also include public infrastructure like waste treatment and public access infrastructure.

- Identify strategies that will help expand the current seasons and geographies including Colombo, other provinces including North and East and existing utilized and underutilized National Parks. Develop this strategy with respect to on-going mega infrastructure projects like the completion of the central highway, port city marina, Galle marina etc. Identify further potential infrastructure projects that could help catalyze and unleash tourism sector investments in high value segments identified in the demand and supply analysis. These could include private investment and PPP models for enhancing domestic airfields and civil aviation, marinas for private boat use in fisheries harbors, public private partnerships for better waste management etc.
- Develop 5-6 tourism investment profiles (local and international) by investment type: hotels, infrastructure, restaurants and bars, attractions, services, different market segments. Include areas for potential new offerings along the lines of what has been identified above.
- Assess existing investor sentiment across these various segments and identify barriers to entry and implementation including but not limited to regulatory restrictions, land availability, funding etc. Conduct a survey to establish key constraints holding investors back and quantify the size of potential investments by segment. This would also include any regulatory restrictions or amendments needed to accommodate new classifications or categories of tourism products and offerings, meet globally evolving sustainability accreditations and regulations, and be more flexible and dynamic to allow new tourism business models.
- Recommend potential strategies and mechanisms for the government to unlock these assets and areas for investment. These would include, for example, parceling land banks at the right scale and granularity for bidding and investment, structuring and carving out civil aviation and marine assets for private participation etc. Determine any funding models that will be required to monetize these assets including PPPs, state funding that can be recovered in a reasonable time frame and ROI, etc. The recommendation will include the accompanying government agency or regulatory body associated with it with specific tasks required by them for the development.
- Final Investment strategy report to contain Executive Summary, all findings and accompanying data and brief PPT for presentation.
- The Consultant Firm will maintain record of all stakeholder consultation findings with key findings and data obtained.

#### **4.3 Phase 3 – Regulatory, Legislative, Enforcement and Institutional Framework Review**

This phase includes a comprehensive review of the local regulatory and institutional frameworks governing tourism, with a focus on identifying current impediments and proposing immediate reforms required to create a more enabling environment for investment, business operations, and sector growth. The analysis will also determine the regulatory bottlenecks and institutional constraints that affect the creation and enabling of potential new products, services, and markets identified in Phase 1, as well as the investor needs and investment facilitation requirements identified in Phase 2. Special emphasis will be placed on the processes and functioning of the **tourism business registration and renewal process, Tourism Development Levy (TDL) administration, SLTDA digitalization, and the institutional capacity of SLTDA to source, facilitate, and promote both local and international tourism investments and a New Tourism Act**

- **Review existing laws (legislation), policies, and institutional implementing structures governing the tourism sector in Sri Lanka.**

This includes but is not limited to the Tourism Act and regulations under the **SLTDA, SLITHM, SLCB, Ministry of Tourism, Urban Development Authority, Wildlife and Forest Departments, Local Governments and Municipalities**, and other cross-cutting agencies. The review will map all regulatory touchpoints encountered by tourism businesses and investors—from **initial business registration,**

**annual renewal, TDL compliance, environmental and construction approvals, operational licensing, safety certifications, and ongoing monitoring.** The analysis must identify all agencies involved in approvals, implementation, and enforcement, including those affecting **land allocation, zoning, construction, environmental clearance, coastal regulation, heritage site management, and community-level tourism operations.**

- **Identify shortcomings, overlaps, and bottlenecks that hinder sector development.**

This includes regulatory gaps that fail to capture emerging tourism activities, outdated provisions that restrict innovation, and prohibitions that limit new product development. The analysis must also identify:

- **Duplicated filings or approvals** across multiple agencies (e.g., business registration, environmental permits, local authority licenses).
- **Bottlenecks in SLTDA's business registration and renewal processes**, including delays, manual procedures, lack of digital integration, and inconsistent enforcement.
- **Challenges in TDL administration**, including compliance burdens, reporting inefficiencies, and gaps in monitoring and enforcement.
- **Regulatory shortcomings affecting investor facilitation**, such as unclear guidelines, lengthy approval cycles, and lack of coordinated support for investors.
- **Environmental and municipal regulations** that are either impractical or inconsistently enforced affect sustainable development and operational viability.
- **Regulations that hinder seamless visitor experiences** across offerings managed by different agencies (e.g., Wildlife, Forestry, Archaeology, Local Authorities).
- **Gaps in regulations are needed to meet global sustainability standards**, accreditation requirements, and evolving market expectations.

- **Recommend policy opportunities and regulatory changes and capacity-building measures to improve sector competitiveness, enhance visitor experience, and ease of doing business.**

Recommendations must remain within the scope of what is permissible under current Acts, laws, and legislation. The consultancy will propose:

- **Improvements to SLTDA's business registration and renewal systems**, including full digitalization, streamlined workflows, integrated databases, and transparent service standards. (This may be removed from the scope of this assignment and will be notified accordingly)
- **Reforms to TDL processes**, including simplified reporting, automated compliance systems, and strengthened monitoring mechanisms. (This may be removed from the scope of this assignment and will be notified accordingly)
- **Institutional strengthening of SLTDA**, including enhanced capacity for:
  - **Investor sourcing and promotion** (local and international)
  - **Investment facilitation and aftercare**
  - **Regulatory coordination across agencies**
  - **Digital transformation and data-driven decision-making**
- **Amendments to regulations and oversight frameworks** to better facilitate investment approvals, operational efficiency, and product diversification.
- **Measures to improve visitor experience**, including harmonized regulations across agencies, improved enforcement, and updated standards aligned with global best practices.

- **Final report to contain Executive Summary, all findings and accompanying data, and a brief PPT for presentation.**

- **Maintain a record of all stakeholder consultation findings with key insights and data obtained.**

This includes structured documentation of feedback from tourism businesses, investors, government agencies, local authorities, community groups, and industry associations, with clear identification of recurring issues, systemic gaps, and priority reform areas.

#### **4.4 Phase 4 – Marketing Plan**

Synthesizing all findings from Phases 1 through 3 into a single **strategic framework with actionable items** that positions Sri Lanka and its each province as a competitive, sustainable, inclusive and investor-friendly tourism destinations.

The marketing strategy development will include:

- Review the performance of Sri Lanka’s historical and current marketing strategies, including existing digital marketing channels including social media and assess their relative efficacy.
- Review current and international sales and supply channels and tactics and benchmark Sri Lanka’s sales and marketing channels in terms of cost effectiveness and efficacy in relation to international best practices and competitor tactics. These include all existing supply channels from local and international DMCs targeting varying price points, international booking engines, their intermediary costs and economics, strategies for market capture etc. Identify any shortcomings, bottlenecks, oligopolistic or inefficient structures that may hinder better market access and capturing demand.
- Develop a short brief on the positioning of Sri Lanka as an Island destination, Colombo as a city destination, each province as its own branded destinations including other major provincial cities destinations and Nature Based Tourism Sites.
- Develop a marketing strategy and brand vision actions which identifies key growth segments and positions Sri Lanka to take advantage of new demand opportunities. A particular focus will also be placed on Colombo, North central province, Uva, Sabaragamuwa, Northern and Eastern and Nature Based Assets. This will include strategies with respect to channel identification and strategies for development as well.
- It will also include the development of an action plan and campaign outlining identifying channels for effective implementation and a draft calendar of events based on the market and product assessment

#### **Phase 5 - Strategy Action Plan Development**

The Strategic Action Plan for Tourism will combine the actions from the Investment, Marketing, and Regulatory recommendations. The overall strategy must be data-driven and encompass all elements as identified in phases 1 through 3 with actionable projects for each, while also keeping with the broad policy objective as outlined by the government. The strategies articulated must ensure alignment with climate risk and vulnerabilities, national adaptation policy, national development priorities and sustainability goals as envisioned in the government’s tourism policy as well as international best practices.

- It will include the Investment strategy identifying priority business environment reforms and highlighting priority investment opportunities and needs in line with the new segments that have been identified.
- Regulatory strategy which will identify and prioritize regulatory upgrades needed to facilitate the expansion of new tourism market segments and the creation of associated infrastructure
- The strategies must provide a roadmap for implementation, including short, medium, and long-term priorities with actionable items and institutional ownership. This will include all specific tasks, projects, suggestions and recommendations as identified across phases 1 through 3. The roadmap will include all items, suggested timelines and government agencies or authorities that are required for implementation of their specific tasks and roles.

The process must include technical support for provinces to create or align their tourism development plans with the national strategy. Final report to contain the fully executable strategies and roadmap and brief PPT for presentation.

## 5. The Key Deliverables and Timelines

### Complete Set of Deliverables with Timeline (8 Months / 38 Weeks)

#### Phase 0 – Inception (Weeks 1–2)

##### Deliverables:

- Inception Report including:
  - Detailed methodology for Phases 1–4
  - Stakeholder engagement plan (national + provincial)
  - Data collection plan and templates
  - Workplan and Gantt chart
  - Risk matrix and mitigation plan
- Kick-off presentation to Steering Committee

#### Phase 1 – Demand & Supply Analysis (Weeks 3–8)

##### Deliverables:

- Global Tourism Demand Analysis
- Market segmentation and sub-segmentation (quantified)
- Competitor benchmarking report
- Supply-side audit (national + provincial)
- Gap analysis (products, infrastructure, sustainability, regulations)
- Provincial destination positioning briefs (all 9 provinces + Colombo city)
- Draft Calendar of Events
- Stakeholder consultation summary (Phase 1)
- **Phase 1 Report + Executive Summary + PPT**

#### Phase 2 – Investment Needs Analysis (Weeks 9–14)

##### Deliverables:

- Investment mapping by product category, geography, and scale
- Investor profiling database (local + international)
- Investor sentiment survey and analysis
- Barriers to entry and implementation (regulatory, land, finance, approvals)
- Investment quantum estimation by segment
- Infrastructure needs assessment (public + PPP + private)
- Strategies to expand seasons and geography
- Investment facilitation and asset unlocking strategy
- Funding models (PPP, blended finance, state recovery models)
- Stakeholder consultation summary (Phase 2)
- **Phase 2 Report + Executive Summary + PPT**

#### Phase 3 – Regulatory, Legislative, Enforcement & Institutional Framework Review (Weeks 15–20)

##### Deliverables:

- Mapping of all regulatory touchpoints (registration → renewal → TDL → operations)
- Review of all relevant Acts, regulations, policies, and institutional mandates
- Analysis of:
  - Business registration and renewal bottlenecks
  - TDL compliance and administration issues
  - SLTDA digitalization gaps
  - Investor facilitation constraints
  - Cross-agency overlaps and duplications
  - Environmental and municipal regulatory inconsistencies
  - Gaps in sustainability accreditation readiness
- Institutional capacity assessment of SLTDA (investment, regulation, digital, enforcement)

- Recommendations for:
  - Regulatory reforms
  - Institutional strengthening
  - Digital transformation
  - Visitor experience enhancement
- Stakeholder consultation summary (Phase 3)
- **Phase 3 Report + Executive Summary + PPT**

#### **Phase 4 – National Marketing Strategy (Weeks 21–26)**

- Review of marketing performance and digital channels
- Review of sales channels and distribution economics
- Improved Brand promise and vision
- Marketing strategy (draft and final)
- Marketing Action plan
- Calendar of Events

#### **Phase 5 - National Tourism Strategy Action Plan 2026–2030 (Weeks 27 - 38)**

##### **Deliverables:**

- Integrated National Tourism Strategy (Marketing + Investment + Regulatory)
- Provincial alignment framework and technical support
- Climate resilience and sustainability integration
- Roadmap with:
  - Short, medium, long-term actions
  - Institutional responsibilities
  - Timelines
  - KPIs and monitoring framework
- Financing and implementation plan
- Final consolidated stakeholder consultation report
- **Final Strategy & Roadmap + Executive Summary + PPT**

## **6. Qualification of the Consulting company**

The Consulting Firm must demonstrate the following minimum qualifications and capabilities:

### **• Proven International and Regional Expertise**

The firm must have extensive experience in designing and implementing **tourism demand and supply assessments, destination competitiveness studies, and national or regional tourism strategy development** across multiple countries. Experience in both developed and emerging tourism markets is essential to ensure global benchmarking and the application of best practices relevant to Sri Lanka.

### **• Highly Competent Multidisciplinary Technical Team**

The firm must field a team of senior technical experts with recognized international and national experience, including assignments completed in Sri Lanka. Team members must possess advanced education and professional training in:

- Tourism marketing and market research
- Tourism planning and policy development
- Tourism strategy and destination management
- Tourism product development and experience design
- Economic modelling, investment analysis, and financial feasibility

Experts must demonstrate a track record of delivering high-quality analytical outputs and actionable strategies for governments, development agencies, and tourism authorities. The Firm must nominate a lead for each of the 4 phases of the Assignment.

### • **Strong Understanding of the Sri Lankan Tourism Context**

The firm must demonstrate a clear understanding of Sri Lanka's tourism landscape, including:

- The sector's economic role and contribution
- Provincial tourism dynamics and regional disparities
- Regulatory and institutional structures
- Cultural, environmental, and heritage sensitivities
- Current challenges and opportunities for growth

Prior work in Sri Lanka or comparable South Asian destinations will be considered a significant advantage.

### • **Experience Working in Complex, Multi-Stakeholder Environments**

The firm must be able to operate effectively within a multi-agency, multi-jurisdictional environment involving national, provincial, and local authorities. This includes the ability to coordinate with government institutions, private sector associations, community groups, development partners, and regulatory bodies.

### • **Strong Facilitation and Consultation Capabilities**

The firm must demonstrate the ability to design and conduct structured stakeholder consultations at both national and provincial levels. This includes:

- Facilitating workshops, interviews, and focus groups
- Synthesizing diverse viewpoints into actionable insights
- Ensuring inclusive participation, including women, youth, SMEs, and community stakeholders

### • **Creative Problem-Solving and Innovation Orientation**

The firm must possess strong facilitation skills and demonstrate a willingness to think creatively, propose innovative solutions, and introduce global best practices adapted to Sri Lanka's context.

### **Staffing Requirements**

The Consultant Firm shall propose a multidisciplinary team of experts required to deliver the full scope of work outlined in these Terms of Reference. The firm must ensure that all experts are appropriately qualified, experienced, and available for the duration of the assignment.

The team composition must reflect the technical needs of each phase, including demand analysis, investment assessment, regulatory review, and strategy development. The firm is responsible for ensuring that the right expertise is deployed at the right stage of the project.

The project team will work in close collaboration with **MOFAET, SLTDA, SLITHM, provincial tourism authorities, and other relevant national, provincial, and local institutions**. The team must demonstrate the ability to build constructive working relationships, ensure smooth coordination, and facilitate effective knowledge transfer throughout the assignment.

The Consultant Firm is responsible for ensuring that:

- All experts meet the minimum qualifications and experience requirements
- Adequate time allocation is provided for each expert
- The team covers all technical areas required
- Knowledge and competencies are transferred to government counterparts through joint working sessions, capacity-building interactions, and collaborative review processes

**The experts will have the following minimum profile:**

#### **1. Team Leader – Senior Tourism Planning Expert (Local)**

##### **Scope of Work**

- Lead overall assignment, methodology, and quality assurance

- Guide all four phases and ensure integration
- Lead national and provincial consultations
- Oversee strategy development and final roadmap
- Serve as primary liaison with Steering Committee

#### **Qualifications**

- Minimum 15 years in tourism planning, strategy, or destination development
- Master's degree or higher in Tourism, Economics, Planning, or related field

#### **Competency**

- Advanced tourism value chain analysis
- Strong leadership and stakeholder management
- Proven ability to synthesize multi-disciplinary inputs
- Excellent analytical and report-writing skills

#### **Experience**

- Led at least 5 national or regional tourism strategies
- Experience in South or Southeast Asia preferred
- Experience with World Bank/ADB/UN agencies desirable

#### **Professional Memberships**

- Membership in professional bodies such as:
  - UNWTO Affiliate Network
  - Pacific Asia Travel Association (PATA)
  - Institute of Hospitality (UK)
  - International Association of Impact Assessment (IAIA)

## **2. Tourism Marketing Specialist (Local/International)**

#### **Scope of Work**

- Lead demand analysis, segmentation, and competitor benchmarking
- Develop national and provincial positioning
- Design marketing strategy and channel mix
- Review digital marketing performance

#### **Qualifications**

- Degree in Marketing, Tourism Marketing, or related field
- 10+ years in tourism marketing

#### **Competency**

- Visitor segmentation
- Digital marketing analytics
- Branding and destination positioning
- Market research interpretation

#### **Experience**

- Experience in South Asia essential
- Strong network with global tour operators

#### **Memberships**

- Chartered Institute of Marketing (CIM)
- PATA Marketing Committee
- Digital Marketing Institute (DMI)

## **3. Tourism Investment Specialist (Local/International)**

#### **Scope of Work**

- Lead investment needs analysis
- Conduct investor sentiment survey
- Develop investment pipelines and profiles
- Recommend financing models and PPP structures

#### **Qualifications**

- Degree in Finance, Economics, Business, or related field
- 10+ years in tourism investment advisory

#### **Competency**

- PPP structuring
- Investment modelling
- Investor facilitation frameworks
- Regulatory analysis

#### **Experience**

- Experience in South Asia preferred
- Track record of successful tourism investment projects

#### **Memberships**

- CFA Institute (preferred)
- Global Infrastructure Hub networks
- Investment Promotion Agencies (IPA) networks

### **4. Tourism Product Development Specialist (Local/International)**

#### **Scope of Work**

- Lead product audits and gap analysis
- Identify new product opportunities
- Develop product development frameworks
- Advice on experience design and standards

#### **Qualifications**

- Degree in Tourism, Hospitality, Recreation, or related field
- 10+ years in product development

#### **Competency**

- Adventure tourism design
- Nature-based tourism planning
- Experience curation
- Sustainability integration

#### **Experience**

- Strong private sector background
- Experience in South/Southeast Asia preferred

#### **Memberships**

- Adventure Travel Trade Association (ATTA)
- Ecotourism Society
- Global Sustainable Tourism Council (GSTC)

### **5. Other Local Experts – Scope and Expertise**

At least **one dedicated local consultant for each province** is essential to ensure accurate provincial-level insights, continuous engagement with local authorities, and effective coordination of field activities. The Consulting Firm may additionally deploy **any number of supplementary local consultants** as required to support specialized tasks, deepen provincial coverage, or strengthen thematic areas such as community tourism, environmental management, heritage conservation, or private-sector engagement. Local experts will support all phases by providing contextual insights, data access, and ground-level validation.

#### **Required Expertise Areas**

- Sri Lankan tourism regulatory environment
- Provincial tourism dynamics
- Local tourism product knowledge
- Private sector operations (hotels, DMCs, attractions)
- Environmental and heritage regulations

- Community tourism and local governance

#### **Qualifications**

- Minimum 7 years of experience
- Degree in Tourism, Economics, Planning, Environmental Management, or related field
- Strong understanding of Sri Lankan tourism laws and SLTDA processes

#### **Competency**

- Field research and stakeholder engagement
- Data collection and validation
- Provincial-level tourism insights
- Strong English writing and communication

#### **Preferred Experience**

- Work with donor-funded projects
- Experience with SLTDA, SLITHM, provincial tourism bodies
- Experience in tourism licensing, TDL, or regulatory processes

#### **Memberships**

- Sri Lanka Institute of Tourism & Hotel Management Alumni
- Sri Lanka Association of Inbound Tour Operators (if applicable)
- National Tourism Associations

### **7. Responsibilities of the Consultancy Company**

The Consultant Firm shall be responsible for implementing the entirety of the tasks defined in the scope of the assignment. To this end, the Consultant Firm shall bear all the costs related to the employment and mobilization of his/her team of international and local experts. This includes travel expenditures and accommodation costs.

Finally, the Consultant Firm shall be responsible for the costs of producing, translating, printing, and distributing the information materials and reports required to successfully conduct his/her assignment.

### **8. Institutional Framework**

The assignment will be overseen by a Steering Committee comprising representatives from SLTDA, SLITHM, relevant government agencies—including the Ministry of Tourism, the Sri Lanka Tourism Development Authority (SLTDA), and affiliated institutions—as well as other relevant institutions, universities and industry associations. The Consultancy Firm shall work in close coordination with the Steering Committee throughout the duration of the assignment and will engage with it on all technical aspects, including the methodology, interim findings, and final recommendations.

- The Consultant Firm shall work in strict coordination with the MOFAET, SLTDA, SLITHM and the Project Implementation Unit responsible for the accomplishment of the assignment.
- The Consultant Firm should interact with the MOFAET, SLTDA, SLITHM and concerning the technical aspects of projects.
- The MOFAET, SLTDA, SLITHM through its directories and the line institutions will facilitate the Consultant Firm with information regarding tourism strategies, studies, and national tourism data.
- The MOFAET through the line institutions will facilitate the Consultant Firm with information regarding cultural heritage aspects.
- The MOFAET, SLTDA, SLITHM will facilitate this interaction by introducing the Consultant Firm to the competent officials and participating to key meetings.
- At local level, the Consultant Firm will work in strict coordination with the concerned Provincial and District authorities. MOFAET and/or SLTDA will introduce the Consultant Firm to these authorities.
- MOFAET PMU specialists will work closely with the consultancy firm to ensure that all deliveries meet the required quality standards and are completed within the agreed timelines. This will

include rigorous monitoring and evaluation of the firm’s performance, adherence to technical specifications, and compliance with all procedural and reporting requirements.

## 8. Payment Conditions

### Payment Schedule

Payments will be made in four instalments, aligned with the approval of each major phase deliverable. The total duration of the assignment is **8 months (38 weeks)**.

Payment	Percentage of Contract Value	Timeline (Approx.)	Trigger for Payment
<b>1st Payment</b>	10%	End of Week 2	Approval of Inception Report
<b>2<sup>nd</sup> Payment</b>	20%	End of Month 2 (Week 8)	Approval of <b>Phase 1 Report</b>
<b>2nd Payment</b>	20%	End of Month 4 (Week 14)	Approval of <b>Phase 2 Report</b>
<b>3rd Payment</b>	20%	End of Month 5 (Week 20)	Approval of <b>Phase 3 Report</b>
<b>4th Payment</b>	10%	End of Month 6 (Week 26)	Approval of <b>Phase 4 National Marketing Strategy Report</b>
<b>5th Payment</b>	20%	End of Month 8 (Week 38)	Approval of <b>Phase 5 Final Strategy &amp; Roadmap</b>

### 2. Approval Checklist for Each Payment

Before any payment is released, the Steering Committee will verify that the following criteria have been met. All deliverables must be:

#### A. Complete and Submitted in Required Formats

- Full report (Word/PDF)
- Executive Summary
- Supporting datasets, annexes, and analytical outputs
- Presentation deck (PPT)

#### B. Technically Sound and Aligned with TOR Requirements

- All tasks under the respective phase completed
- Methodology applied as approved in the Inception Report
- Evidence-based analysis with clear data sources
- Recommendations aligned with national policy directions

#### C. Validated Through Stakeholder Consultations

- Documentation of consultations (minutes, attendance, summaries)
- Integration of stakeholder feedback into the report

#### D. Reviewed and Endorsed by the Steering Committee

- Technical review completed
- Comments addressed and incorporated
- Final version approved by MOFAET/SLTDA/SLITHM

#### E. Submitted Within the Agreed Timeline

- Deliverables submitted according to the approved workplan
- Any delays formally communicated and justified

### **3. Additional Clarifications**

#### **• Payment Processing**

- Payments will be released **within 30 days** of formal approval by the Steering Committee.
- All payments are subject to the Government of Sri Lanka's financial regulations.

#### **• Quality Assurance**

- Deliverables must meet the quality standards defined by **MOFAET, SLTDA, and the Project Steering Committee.**
- If deliverables do not meet required standards, the Consultant Firm must revise and resubmit at no additional cost.

#### **• Compliance With Legal and Tax Requirements**

- All statutory taxes, levies, and deductions applicable under Sri Lankan law will be applied.
- The Consultant Firm is responsible for all internal financial obligations related to its team.

#### **• Delays and Performance Adjustments**

- Delays in submission or failure to meet quality standards may result in:
  - Deferred payments
  - Proportional payment adjustments
  - Withholding payment until corrective actions are completed

#### **• Ownership of Deliverables**

- All reports, data, and materials produced under this assignment become the property of MOFAET/SLTDA.

### **9. Facilities for the Consultant Firm, and Access to Information**

The Consultant Firm will be responsible for all international transport, living accommodation and expenses for its staff, together with communications materials, printing, report production and translation. Oral interpretation at meetings will be provided by the Consultant Firm.

The Ministry of Tourism Development, Foreign Employment and Foreign Affairs, SLTDA and SLITHM will provide access to all relevant existing information, maps, studies, models, legal documents etc. that it already has at no cost to the Consultant Firm.

#### **Transfer of know how**

The Consultant Firm will work closely with the specialists of the MOFAET, SLTDA, SLITHM and Provincial Councils with the aim of building capacity on the different procedures, basic concepts and research methods contained in the study.

### **10. Consultancy Progress Monitoring and Deliverable Evaluation**

The Project Management Unit (PMU) will be responsible for the continuous monitoring and evaluation of the consultancy firm's performance throughout the assignment. This includes reviewing progress against the agreed work plan, verifying the quality and completeness of each deliverable, and ensuring alignment with project objectives and technical standards. All deliverables submitted by the consultancy shall be subject to PMU review, feedback, and formal approval prior to acceptance. The PMU will provide timely guidance, clarifications, and strategic direction to support the consultancy in maintaining methodological rigor and addressing emerging issues. Regular progress meetings, documentation reviews, and milestone-based assessments will be conducted to ensure transparency, accountability, and effective collaboration between the PMU and the consultancy team.