

TERMS OF REFERENCE

- I. **BIDDER** : Consulting, Research and Market Research Services
- II. **PROJECT TITLE** : National Cruise Tourism Development Strategy and Action Plan 2026-2032

III. BACKGROUND

The National Cruise Tourism Development Strategy (NCTDS), prepared by CHART Management Consultants, was first finalized and launched in March 2016 by the Department of Tourism (DOT), in partnership with the United States Agency for International Development (USAID), under the Advancing Philippine Competitiveness Project. The strategy recognized cruise tourism as an emerging and high-value tourism product segment with strong potential to enhance the Philippines' competitiveness in the Asia-Pacific region.

Guided by the National Tourism Development Plan (NTDP), the 2016–2022 NCTDS outlined short-term, medium-term, and long-term interventions aimed at improving ship access, enhancing port infrastructure, reforming regulatory frameworks, developing authentic and community-based tourism experiences, and strengthening partnerships with global cruise lines. The strategy emphasized sustainability and local community engagement, highlighting the need to safeguard cultural and natural resources while ensuring meaningful economic participation among host communities.

The NCTDS set forth a phased development approach with three strategic elements: (1) identifying the types of cruise lines and markets to target, (2) determining priority destinations for development, and (3) prioritizing infrastructure and service investments to enable growth. Strategic objectives focused on:

- Setting clear cruise tourism priorities
- Making priority ports and destinations more cruise-ready
- Enhancing the regulatory and business environment to make the Philippines more cruise-friendly
- Building international market awareness
- Optimizing the economic benefits of cruise ship visits to local communities.

While the Philippines made progress in cruise tourism promotion, port development, and international partnerships, shifts in cruise market dynamics, global travel trends, regional competition, and the impacts of the COVID-19 pandemic have significantly reshaped the landscape for cruise tourism development, especially in East and Southeast Asia.

In view of these changes, there is a need to update and expand the National Cruise Tourism Development Strategy to respond to current and emerging conditions, support sector recovery, and position the Philippines more strategically for sustained and inclusive growth.

IV. OBJECTIVES

The updating of the NCTDS for years (2026–2032) has the following objectives:

- Update national strategies to reflect international and domestic cruise tourism development pathways, recent developments and the current status of cruise tourism in the Philippines;
- Strengthen regional cooperation and route integration within Asia-Pacific cruise circuits;
- Expand the Philippine cruise tourism portfolio by re-evaluating current, emerging, and potential cruise destinations, including their ports, infrastructure capacity, and market readiness;

- Update and map top cruise itineraries with corresponding tourism experiences and excursion offerings; and
- Integrate up-to-date data and statistics on regional and global cruise tourism trends to guide positioning and market targeting.

This updated strategy will continue to align with the National Tourism Development Plan 2023–2028 and will provide coherent direction for government, local communities, port authorities, and private sector partners to enhance Philippine cruise tourism competitiveness and sustainability.

V. MINIMUM REQUIREMENTS

1. Must be a cruise expert consulting firm, and/or an academic and research institution, specializing in the conduct of custom research for local and international organizations;
2. Must have at least ten (10) years of experience or background conducting research and strategic advice on or for the cruise tourism industry;

VI. REQUIRED PERSONNEL

- A. Project Team Leader
- B. Cruise Product and Itinerary Expert
- C. Maritime Expert
- D. Cruise Line Expert

VII. SCOPE OF WORK AND DELIVERABLES

This project aims to update and enhance the National Cruise Tourism Development Strategy (NCTDS) for the period 2026–2032, building upon the foundations of the 2016–2022 strategy.

The updated strategy shall align with the National Tourism Development Plan (NTDP) and provide clear direction for the sustainable, inclusive, and competitive development of cruise tourism in the Philippines. The updated Strategy shall include market insights, policy considerations, infrastructure and destination assessments, product and itinerary development opportunities, and stakeholder collaboration. The Department of Tourism (DOT) shall maintain full ownership of all data gathered, reports submitted, and materials produced.

The following stages of study are planned. The tasks for each are detailed in the Consultant's workplan:

0. Inception Work Plan

Providing DOT with a comprehensive tentative work plan showing timeline of activities and responsibilities

1. Initial research and data discovery

Concluding with documenting preliminary findings and sharing with DOT

2. First trip to Philippines

- Meeting with authorities and other relevant parties
- Conducting priority site/port inspections
- Assessing current cruise tourism situation in the Philippines
- Concluding with a review and discussion in Manila with DOT

3. Philippine Itinerary patterns, destinations, cruise line customers

Concluding with documenting preliminary findings and sharing with DOT

4. Economic impact assessments

Proposing multipliers that could apply to the Philippines

5. Port readiness and enhancements

Documenting desirable port facility and terminal enhancements

6. Policy enhancements

Proposing solutions to overcome policies and regulations that stand in the way of cruise tourism growth

7. Report and present

Drawing together all key findings and recommendations in a PPT report & sharing with DOT

8. NCTDS Strategy

Proposing the way forward with steps, responsibilities, timings
Recommending market approaches to attract/build cruise calls

9. Final consultations (including a possible second trip to Philippines - to be decided towards the end of the project).

This could include:

- Presenting to DOT and key govt. officials
- Briefing interested parties
- Conducting workshops if required
- Assisting with content for DOT's Cruise Tourism Maps

VIII. PROJECT DURATION AND BUDGET

1. The research shall commence upon the receipt of the Notice to Proceed and should be completed until December 2026.
2. The Approved Budget for the Contract (ABC) for the project is **SIX MILLION PESOS (PHP6,000,000.00)** inclusive of all applicable government taxes and charges, professional fees, bank charges, and other fees that may be incurred in the process
3. Note that this consulting contract shall be a fixed price contract. Any extension of contract time shall not involve any additional cost to the Government.
4. Travel and accommodation within the Philippines for the consulting team are to be managed by DOT and included in the above budget. DOT will use its best efforts to obtain complimentary or favourable industry rates for all travel.
5. All manuals, reports, materials, databases, questionnaires, references, etc. acquired through the conduct of the survey research shall be turned over to DOT at the conclusion of the undertaking.

*Note: The contracting party should agree that the project shall be governed by and construed in all respects in accordance with the existing laws, rules and regulations of the Republic of the Philippines. Dispute resolutions shall likewise be governed and conducted within the Republic of the Philippines.

IX. PAYMENT SCHEME/SCHEDULE

Payment terms are to be agreed upon between PDOT and the winning bidder, subject to the delivery of milestones/deliverables during the course of project implementation and upon submission of required supporting documents as enumerated below for payment. To facilitate the processing of each payment, the Office of Product Development shall provide an official communication or request prior to each disbursement, confirming the satisfactory completion of the corresponding milestone or tranche through the issuance of a certification of satisfactory Services Rendered. Bills must be addressed to the Philippine Department of Tourism (PDOT).

Milestone	Deliverables	PHP
A. Inception	Comprehensive inception work plan	1,500,000.00
B. Initial research and first trip to Philippines	Preliminary findings from research and data. Discussion of emerging findings from port visits.	1,000,000.00
C. Itineraries, economic impact, port readiness and enhancements	Potential itineraries, port roles, cruise line targets, economic multipliers, port assessments	1,500,000.00
D. Policies, report and strategy	Proposed policy changes, summary report on all findings and recommendations, strategic steps.	1,000,000.00
E. Final consultations	Presentations to DOT and key stakeholders, Briefings of other interested parties	1,000,000.00
	TOTAL	6,000,000.00

While the project budget is denominated in PHP, the AUD equivalent shall be subject to the actual exchange rate at the time of conversion and receipt of funds by PDOT - Sydney.

While DOT will assist in coordinating travel logistics and sourcing preferential government rates for local accommodation and domestic transfers, the primary consultant shall directly settle these expenses with the service providers. The necessary allocation for these travel and accommodation costs must therefore be accounted for within the overall consultancy service contract. (Costs for travel to Manila from the consultants' base are also to be covered by their consulting fees).

X. CONTACT PERSONS

AUSTRALIA

Ms. Cassandra Sta. Maria-Camonggol

Officer-in-Charge

Philippine Department of Tourism – Sydney

Suite 02, Level 6, 56 Clarence S.

Sydney, NSW, 2000, Australia

Telephone: (61 2) 9279 3380, (61 2) 9221 1344

E-mail: cassie@tourismphilippines.com.au

PHILIPPINES

Ms. Micah Sales

Project Officer

Office of Product Development

5/F, The New DOT Building, 351 Sen. Gil Puyat Avenue

Brgy. Bel Air, Makati City 1200

Telephone: +632 8459 5200 local 510 / (+63)9176334346

Email: cruisephilippines@tourism.gov.ph