

BELIZE SUSTAINABLE TOURISM PROGRAM
(IDB-2060/OC-BL)

National Sustainable Tourism Master Plan

Terms of Reference

The Belize Sustainable Tourism Program (STP) (IDB-2060/OC-BL) is a response to challenges that must be faced if Belize's tourism sector is to grow in a manner that is economically, environmentally, and socially sustainable. Successful sustainable tourism is defined by environmentally sensitive business operations, support for the protection of cultural and natural heritage, and tangible economic and social benefits to local people in a viable business model. The intention is to strengthen the sector's contribution to the national economy by consolidating the overnight tourism market with investments and activities along three inter-related fronts: (i) enhancing the tourism experience and resource sustainability at consolidated destinations subject to pressure; (ii) diversifying tourism products in emerging destinations for the overnight market segments; and (iii) strengthening tourism institutions for policy, destination planning, and management. The program consists of two components: Component I: Investments in overnight tourism destinations; and Component II: Institutional strengthening and capacity building for policy, destination planning, and management. The program is being funded by the Government of Belize and the Inter-American Development Bank (IDB).

A priority of Component II is the preparation of a National Sustainable Tourism Master Plan for the entire tourism sector (overnight and cruise ship tourism) that will incorporate reforms proposed by the government and translate sustainability objectives into actions as well as public and private investments. In addition, the development and finalization of five key destination-specific development plans of the National Sustainable Tourism Master Plan will be completed as an additional activity of this Terms of Reference that incorporate the principles of the National Sustainable Tourism Master Plan and further refine its approaches at the destination level.

The preparation of the National Sustainable Tourism Master Plan and the five destination-specific development plans that will follow from the National Sustainable Tourism Master Plan are expected to be a highly participatory process involving all stakeholders in destinations across the country. The process must build on best practice for sustainable tourism planning internationally. The results must constitute a clear road map for the sector over the next 20 years, with considerable Belizean ownership.

To achieve this, the Government of Belize, through the Ministry of Tourism, Civil Aviation, and Culture (MTCAC) and the Belize Tourism Board (BTB) under the auspices of the Sustainable Tourism Program (STP), is interested in contracting the services of an international consultancy firm with demonstrated experience in the planning, analysis, and design of sustainable tourism policies and programs, and specifically in the design of national tourism master plans, preferably in Latin America and the Caribbean. Preference will be given to international consultancy firms who work in collaboration with local firms and experts, and can demonstrate previous experience in working in such partnerships.

1. BACKGROUND

- 1.1.** Tourism is one of the main engines of growth in the Belizean economy and the principal source of foreign exchange. The sector generated US\$290 million in visitor expenditures in 2007, accounting for 71% of total services exports and corresponding to approximately 22.4% of total GDP¹. In addition, over 25% of the employed labor force is estimated to be related to or driven by tourism, placing tourism at the forefront of the country's economy.
- 1.2.** Belize has experienced steady growth in the tourism sector, with the exception of 2008. The average growth per year of the sector from 1975 to 2007 has been 5.4%. The total annual number of tourists increased from 47,200 overnight visitors in 1975 to 245,026 in 2008, a decline from the 251,422 visitors recorded in 2007, reflecting the global economic situation faced in 2008.² However, with the appropriate enabling environment, the World Travel and Tourism Council estimates that travel and tourism in Belize will grow by 4.7% per annum in real terms between 2009 and 2018.³
- 1.3.** Belize's tourism product is highly dependent on the country's natural and cultural heritage. In addition to many archaeological sites, Belize encompasses a network of both terrestrial and marine protected areas offering opportunities for diving, wildlife observation and bird-watching, hiking, and other recreational activities. With convenient access to some of Central America's richest tropical forest reserves and the world's second largest barrier reef, Belize displays several competitive advantages in the sector relative to other Central American and Caribbean countries. These also include a largely English-speaking population, diverse cultures, close proximity to the United States, and a stable political situation.
- 1.4.** Belize's tourism sector caters to two distinct market segments: (i) overnight or 'stay-over' visitors; and (ii) cruise ship passengers. A total of 245,026 overnight visitors were recorded in 2008, approximately 29% of all arrivals. The United States and Canada accounted for 60.3% and 7.2% of overnights in 2008 while Europeans represented 14.0% of the market share. The overnight segment is served by approximately 620 hotel and resort facilities offering a total of 6,536 rooms. Of this total number of hotels, only 75 have more than 20 rooms. Occupancy rates in 2008 overall were 41.1%. The highest occupancy rates occur from January to April while the lowest rates coincide with the peak of the hurricane season in September and October. In addition to seasonality, low occupancy rates are attributed to problems in meeting quality standards which, in turn, are associated in part with high operating costs, supply constraints, and other business climate limitations.
- 1.5.** Cruise tourism has been a rapidly growing segment of the Belize tourism industry. Cruise passenger arrivals grew from 14,183 in 1998 to 597,370 in 2008 or approximately 70.9% of all tourist arrivals. After a marked peak in growth in 2004, the cruise ship segment is showing signs of leveling off with a total of 274 ship calls in 2008, a 32.5% decline in calls relative to the 406 ship calls in 2004, but nearly the same as 2007's 278 ship calls. At the moment, passengers are transported from cruise ships by smaller vessels to the

1 Central Bank of Belize

2 Belize Tourism Board. Travel and Tourism Statistics 2008.

3 The 2008 Travel and Tourism Economic Research, Belize. World Travel and Tourism Council. 2008.

Fort Street Tourism Village in Belize City where they are taken by buses to various nearby destinations. The Government is considering the development of a new cruise ship terminal.

- 1.6.** There are important differences between cruise and overnight visitors that have to be taken into account in planning for the sector. Despite their relatively small numbers, overnight visitors contributed 88% of total direct tourist expenditures in 2007 compared to 12% by cruise ship visitors. In addition, the overnight segment has proven less volatile, rising since the late 90s and expected to continue to rise in spite of the slight downturn in 2008, while the cruise segment has grown faster but has been more susceptible to external events such as natural disasters. The overnight segment also accounts for 90% of all employment in the industry, with spending by cruise visitors heavily concentrated in Belize City and overnight tourism spread more widely across the country.
- 1.7.** While the tourism sector's performance in the last decade has improved significantly, growth remains modest in international terms. Belize's market share of international tourist arrivals in the Caribbean region grew from 2.8% in 2001 to 4.2% in 2005, but has declined since then. Belize's market share for tourism in Central America has declined from 4.5% in 2001 to 3.0% in 2008. Overnight visitors as a percentage of overall arrivals in Belize are among the lowest in the region and, as a consequence, tourism expenditures per capita in Belize are considered low, with significant room for growth in the overnight segment.
- 1.8.** The institutional framework for the sector consists of the Ministry of Tourism, Civil Aviation, and Culture (MTCAC), responsible for tourism policy, the Belize Tourism Board (BTB), responsible mainly for implementing marketing and tourism policy, and the Belize National Tourism Advisory Council, a coordinating body. This framework is guided by a sector policy which promotes sustainable tourism (see Annex I, Tourism Policy, March 2005).
- 1.9.** The BTB is a statutory body representing a strategic partnership between government and the private sector. Its responsibilities include, among others, planning, developing, and promoting the tourism industry, promoting private investment in tourism, and vetting the standards of facilities offered by the industry. BTB works closely with public sector entities in the implementation of tourism policies as well as with the Belize Tourism Industry Association (BTIA) and other organizations from the private sector family. BTB revenues are derived mainly from accommodation taxes (78%) and the cruise passenger head tax (14%).
- 1.10.** The Belize National Tourism Advisory Council is a body created by law in 2000 under the MTCAC that brings together all the relevant actors from the public and private sectors. Reactivated in 2008, the Council includes, among its objectives, developing, establishing, and monitoring plans and policies, procedures and guidelines, legislative measures and educational and training programs necessary for the efficient management and development of tourism in Belize.

- 1.11.** City, town and village councils and local boards have the responsibility for administering basic services such as water supply and solid waste management in tourist localities but lack the capacity to provide the coverage and quality required by the sector. These and other local entities can play an important role in ensuring that tourism development is compatible with the conditions of a destination.
- 1.12.** In 2008, the Government of Belize confirmed the central position of the tourism sector in its economic development strategy and reiterated the core message of its Belize Tourism Policy, March 2005, promoting a product focusing on the natural and cultural heritage of the country, an equitable distribution of benefits through the promotion of the overnight segment, and the delivery of a world class visitor experience. The MTCAC has recently proposed a new Tourism Development Strategy that promotes the creation of tourism zones and fully incorporates sustainable principles and practices through the Sustainable Tourism Program (BL-L1003). The Government is also considering financing of the Solid Waste Management Program (BL-L1006) to reduce environmental pollution and enhance key tourism destinations such as Belize City, San Ignacio, and islands such as San Pedro and Caye Caulker.
- 1.13.** The sector faces several fundamental challenges that, if not addressed, could affect its continued contribution to the national economy. These challenges are related to: (a) natural resource degradation affecting the visitor experience at popular overnight destinations; (b) insufficient product diversification; and (c) weaknesses in institutional capacity and coordination d) lack of market understanding e) poor physical planning resulting in resource use conflicts.
- 1.14.** The tendency of visitors to converge at a few popular sites during the short high season has led to concerns about the capacity of existing destinations for accommodating demand without damaging the quality of the visitor experience and the associated natural and cultural heritage. Coastal areas and the offshore cayes are particularly vulnerable to problems such as coral reef degradation and beach erosion. In addition, congestion at sites visited by cruise ship passengers threatens the branding of the country as an environmentally sustainable destination. This situation suggests that payments for the use of resources, such as user fees or taxes, could be raised in a way that deals with excess demand and helps generate revenues for the government.
- 1.15.** The rapid expansion of private residential units for second home ownership (condominiums, time shares, villas) in locations such as Ambergris Caye and Placencia also create competing demand for shorefront property and further add to the pressure on scarce water and other resources. This raises the need to establish, implement, and monitor acceptable levels of visitation and/or visitation fees at those sites/attractions and to apply measures for restoring and protecting natural and cultural resources, thereby ensuring that visitors receive quality services and attention.
- 1.16.** Recent experience with the popularity of adventure travel and other specialty tours (e.g., cave tubing, new Mayan archeological sites, culinary tourism, agrotourism, etc.) suggests that there are untapped opportunities that could help diversify the tourism product, raise

occupancy rates, and consolidate the overnight segment without jeopardizing the country's branding. To do so, however, the sector must overcome basic constraints including, for example, limited access, the absence of facilities, and limited capacity to provide a greater diversity of visitor services in both inland and coastal settings.

- 1.17.** Investments in tourism to date have been largely ad hoc, underscoring weaknesses in the institutions responsible for the sector and related services and assets. Conflicts frequently arise over the compatibility of large-scale tourism development proposals with Belize's branding, national policy, and sector-specific plans. These problems reinforce the need for more integrated approaches to destination planning, where needs for physical infrastructure can be assessed within the context of coherent, locally endorsed plans for zones or regions selected as priorities for tourism development. Public institutions across several sectors (tourism, natural resources and environment, coastal zone management, public works, fisheries, and agriculture) need to work more closely, effectively, and efficiently with private investors, local governments and businesses, communities and other stakeholders to achieve a common tourism strategy at each destination in accordance with their role and within a common national planning framework.
- 1.18.** To address these challenges, the Sustainable Tourism Program will invest in the restoration and improvement of infrastructure facilities in four well-established overnight destinations selected on the basis of the current volume of overnight visitation, environmental conditions, as well as economic and social impact. These enabling infrastructure developments will be carried out as part of Component I of the Sustainable Tourism Program. The four consolidated destinations are: (a) San Ignacio and surroundings (Cayo District); (b) Ambergris Caye (Belize District); (c) Placencia peninsula (Stann Creek District); and (d) Belize City (Belize District). Taken together, these four destinations account for approximately 75% of total overnight tourists annually and 64% of tourism earnings.
- 1.19.** Recognizing the need to further diversify the tourism product and promote a wider distribution of benefits, complementary investments will also be made, under Component II, in developing new products, expanding visitor services, and in capacity building to two emerging destinations selected based on their market potential and social needs: (a) Punta Gorda (Toledo District); and (b) Hopkins (Stann Creek District). Emphasis is placed on ecotourism, adventure travel, and cultural tourism in recognition that these segments are often associated with higher expenditures, longer length of stay, and offer greater opportunities to get more remote and rural communities involved in the sector.
- 1.20.** To strengthen institutional capacity in the sector, the Sustainable Tourism Program will support the development of the National Sustainable Tourism Master Plan and foster improvements in the way key institutions coordinate initiatives among themselves and with private investors, conduct market research, and monitor performance of the sector.

2. OBJECTIVES OF THE CONSULTANCY

2.1. Overall Objective

- 2.1.1. The overall objective of this consultancy is to strengthen national and local capacity for tourism sector policy, destination planning, and management through the preparation of a **National Sustainable Tourism Master Plan** for the entire tourism sector.
- 2.1.2. The National Sustainable Tourism Master Plan will define strategies and activities and provide distinct mapping that will catalyze the further development of Belize's tourism sector to promote local participation and development based on sustainable tourism principles and practices, including the Global Sustainable Tourism Criteria (GSTC) being spearheaded by the United Nations Foundation. The key principles of successful sustainable tourism are defined as environmentally sensitive business operations, support for the protection of cultural and natural heritage, and tangible economic and social benefits to local people.

2.2. Specific Objectives

- 2.2.1. The National Sustainable Tourism Master Plan will guide the Government of Belize and tourism industry stakeholders by providing them with *an actionable plan*, based on a clear road map that will focus on the zoning approach to tourism development that has been proposed by the government.
- 2.2.2. The National Sustainable Tourism Master Plan will provide a framework to:
 - streamline governmental engagement and coordination through the strengthening of the Belize National Tourism Advisory Council;
 - create and strengthen policies and laws that help support the sustainable development of the sector, including enforcement;
 - create a positive and streamlined environment for private sector investment in tourism development, both local and foreign, including clear guidelines for compliance and mechanisms for monitoring investments through the process of implementation for compliance;
 - develop specific strategies for guiding the overnight sector and the cruise sector of the tourism industry;
 - develop specific strategies for defining and developing destinations for future tourism development and tourism use;
 - provide for equitable revenue sharing and taxation of the sector;
 - guide market research, marketing, and branding efforts at the country and destination levels;
 - outline infrastructure development needs and strategies both nationally and at the destination level, and build on the enabling investments of Component I of the Sustainable Tourism Program;

- provide a national master plan incorporating all efforts at the destination level identified in Component I with comprehensive mapping connecting the destinations cited along with emerging destinations and the identifying of ideal areas as future growth destinations;
 - promote national and local human resource capacity building to respond to the needs for development of the tourism sector, including training and education at both the local and national levels;
 - promote strategies to strengthen safety and security;
 - create mechanisms for monitoring and evaluation of the tourism sector's growth and development, with a focus on sustainable tourism principles and practices, including the integration of a Tourism Satellite Account (or other integrated data management system) as a monitoring mechanism when it is developed;
 - create mechanisms for monitoring the implementation of the National Sustainable Tourism Master Plan, providing opportunities to change, adjust, and update the plan over time to reflect new and emerging tourism sector opportunities and challenges.
- 2.2.3. The National Sustainable Tourism Master Plan will create an integrated approach to the development, management, and monitoring of the tourism sector, including its impact on the environment and economic well-being of local communities and towns, and its adherence to sustainable tourism guidelines.
- 2.2.3.1. Specific attention will be paid to protecting and enhancing the natural and cultural resources upon which the tourism sector relies and is based by providing strategies to promote best practices to prevent direct, indirect, or cumulative impacts and contribute positively and pro-actively to natural and cultural heritage protection and enhancement, including the incorporation of natural disaster risk management and climate change adaptation in the development of the sector.
- 2.2.3.2. The National Sustainable Tourism Master Plan will propose methods to strengthen and enhance environmental and cultural policies to support tourism development following sustainable guidelines, including methods of implementation and monitoring for compliance.
- 2.2.4. The National Sustainable Tourism Master Plan will include the review and update of Belize's Tourism Policy, March 2005 as part of its work on strengthening sustainable tourism principles and practices within its policies and development.
- 2.2.5. The National Sustainable Tourism Master Plan will provide for action steps that will be implemented in short, medium, and long-term segments, establish specific monitoring and evaluation objectives to be met within those timeframes, and key indicators of progress towards meeting those objectives. It will also include mechanisms to review, adjust, and update goals and objectives to reflect changing circumstances in the tourism sector. The overall timeframe for the National Sustainable Tourism Master Plan is twenty years, in line with the government's national sustainable development plan, Horizon 2030.

- 2.2.6. The National Sustainable Tourism Master Plan will provide mapping of Tourism development and areas of growth over time relaying the current Destinations as the 5 yr plan, emerging destinations as the 10 yr overlay plan and project areas for future development growth as the 20 yr overlay plan. It will focus on destination management planning at the national level and at the district level, including mechanisms for identifying areas for future tourism growth and the generation of associated socioeconomic benefits, as well as integrating the enabling investments of Component I of the Sustainable Tourism Program in the four overnight destinations of Belize City, Ambergris Caye, Placencia, and San Ignacio as well as the two emerging destinations of Punta Gorda (Toledo District) and Hopkins (Stann Creek District).
- 2.2.7. Concurrently with the development of the National Sustainable Tourism Master Plan, the Consultants will develop five destination-specific development plans as the first action steps of the National Sustainable Tourism Master Plan: Belize City Waterfront Strategy; Ambergris Caye Physical Tourism Development Plan; San Ignacio Urban Design Strategy; Placencia Peninsula Physical Tourism Development Plan; Placencia Peninsula Disaster Risk Management Plan. These destination-specific development plans will provide specific guidance to each of the destinations in the further development and management of the tourism sector, following the framework of the National Sustainable Tourism Master Plan.

3. ACTIVITIES

The consultancy firm will be responsible for undertaking the following activities:

- 3.1. **Phase I: Diagnosis of Belize's Tourism Sector:** A detailed analysis and review of existing information pertaining to the tourism sector and creation of a draft outline of the National Sustainable Tourism Master Plan
(2 months)
 - 3.1.1. Review information on the state of the tourism sector in Belize, including its issues, problems, strengths, constraints, resources, and potential. A list of documents to be reviewed is contained in Annex I, including documents prepared for the creation of the Sustainable Tourism Program. This review will include an analysis of the national tourism situation, as well as analysis of the four established destinations (Belize City, Ambergris Caye, Placencia, San Ignacio) and the two emerging destinations of Punta Gorda and Dangriga/Hopkins identified by the Sustainable Tourism Program.
 - 3.1.2. The analysis will include a review of the legal, institutional, and policy frameworks that guide tourism development in Belize currently; the components influencing tourism investment, including incentives for development, both foreign and local; taxation structure, revenue collection and sharing; the current product offerings and market strategy; infrastructure development needs; training and capacity development needs; safety and security; cruise tourism and overnight tourism. Strengths and weaknesses of the tourism sector will be identified as part of this analysis.

- 3.1.3. The analysis will include a review of available market data (to assess demand for various products), including the most up to date rapid assessments available from BTB from both originating markets and visitor surveys.
- 3.1.4. The analysis will include a review of comparable national sustainable tourism master plans that have been or are in development in Mexico, the Caribbean, and Central America. International best practices in sustainable tourism practices, including the Global Sustainable Tourism Criteria and relevant World Travel and Tourism Council's Tourism for Tomorrow Award winners in the "Destination Stewardship" category, will be reviewed, among other resources. These will also inform the development of Belize's National Sustainable Tourism Master Plan.
- 3.1.5. Conduct interviews and a working session with the Project Director of the STP, the MTCAC, the BTB, and other stakeholders and government agencies identified by the STP to discuss further clarifications and expectations, updates, and on-going developments that pertain to the development of the National Sustainable Tourism Master Plan and the subsequent completion of the five destination-specific deliverables.
- 3.1.6. On the basis of the analysis of the tourism sector, refine the working outline of the National Sustainable Tourism Master Plan, including specific categories to be further developed following the input of major stakeholders. The analysis will guide the priority categories to be included in the National Sustainable Tourism Master Plan and will also be used to create the subsequent short-medium-, and long-term action steps that will form the road map for the implementation of the plan. This draft will be reviewed and accepted as a draft working document by the STP.

3.2. Phase II: Development of the National Sustainable Tourism Master Plan
(10 months)

- 3.2.1. The consultancy firm will conduct, at a minimum, seven multi-stakeholder working sessions around the country¹ to solicit input into the National Sustainable Tourism Master Plan, using the outline of the plan developed and approved in Phase I. These working sessions will be a minimum of one full work-day (8 hours, including one hour lunch break) and include a minimum of 15 stakeholders in each area, including government representatives, private sector representatives from different areas of the tourism industry, non-governmental organizations, and other relevant parties. Working sessions will be held in Corozal (for Corozal District); Orange Walk (for Orange Walk District); San Ignacio (for Cayo District); Dangriga (for Stann Creek District); Punta Gorda (for Toledo District); Belize City (for Belize District); and San Pedro (for the northern islands).
- 3.2.2. In addition, a working session will be held in either Belize City or Belmopan with relevant national stakeholders and government ministries (national BTB, BTIA, BHA, MTCAC, members of the National Tourism Advisory Council, and national non-governmental representatives) to provide the national perspective. This working session

¹ Proposed number of working sessions to be evaluated within the technical proposal

will be a minimum of one full work-day (8 hours, including one hour lunch break) and will include a minimum of 15 stakeholders.

- 3.2.3. The attendees for these working sessions will be selected in coordination with STP, MTCAC, and BTB.
- 3.2.4. The agenda for the working sessions shall be the responsibility of the consultancy firm, created in consultation with STP, MTCAC and BTB, and shall provide an opportunity for all stakeholders to contribute their opinions, comments, and suggestions to the design and formulation of the National Sustainable Tourism Master Plan, its strategic approach, objectives, goals, and action steps.
- 3.2.5. As a result of the initial working sessions and the review of international best practices in tourism master planning, the consulting group will create a draft National Sustainable Tourism Master Plan that includes, at a minimum, addressing the following areas:²
 - A national vision for tourism that incorporates the principles and practices of sustainable tourism development;
 - Institutional strengthening – creating mechanisms for better streamlining of tourism development decision making by creating linkages between government ministries, developing mechanisms for collaboration and coordination, inter-agency efficiency in permitting and licensing for tourism development projects, and policy implementation;
 - Policy development and guidance – using Belize’s existing tourism policies concerned with tourism, develop action steps for strengthening policies, including recommendations for legislation, laws and regulations, and rule-making to support the effective development of the industry in coordination with the key sectors upon which this development depends. Develop a policy framework to support the tourism sector, with strengthened coordination and adherence to best practice sustainable tourism policies and practices. Include recommendations for enforcement mechanisms to accompany laws, rules, and regulations that are recommended as a result of policy development, including strengthened monitoring of tourism sector compliance from initiation of development to on-going management after completion. It is expected that the policy framework will include key strategic considerations for the long-term sustainable development of the sector such as climate change adaptation, energy efficiency, and utilization of renewable resources.
 - Linkages – Develop and strengthen linkages with other Belize development and master plans including, but not limited to, the Government of Belize Horizon 2030 national sustainable development plan, the Coastal Zone Master Plan, etc; Define physical linkages from the various destinations (short and long term) –

² To be assessed within evaluation of technical proposal

inland to islands to the City - focusing on strengthening the connectivity at a National scale.

- Zoning – Creation of a zoning framework to guide tourism destination development. Focus on distinct zoning relative to the type of end users at the various destinations prescribing zoning and typology of development in accordance to the scale and resources of the Country. Create clear decision-making frameworks to indicate lines of authority and levels of authority in decision-making, operations management, and enforcement (i.e. national, district, town and village council);
- Investment framework – Create a framework that succinctly delineates the factors that will attract investors in the tourism sector, both Belizean and foreign. This includes delineating policies that impact on tourism investment, streamlining and presenting rules and regulations that impact on the tourism sector, from labor regulations to environmental impact assessment, from compliance monitoring to post-project management, to encourage tourism investment by the private sector; consistent enforcement of laws, rules, and regulations to ensure a climate of compliance; creating and instituting incentives to strengthen sustainable tourism development, by favoring policies, laws, regulations and rules that enhance protection of the environment and culture of Belize and minimize the negative impacts of development; streamlining applications, permitting, licensing processes for tourism investment to encourage investment, as well as compliance, to move tourism sector development forward in a sustainable framework. (Consideration may be given to exploring the establishment of a Tourism Investment Unit for Belize, to guide, facilitate, and monitor investors navigating through the investment process, as has been done successfully in other countries in the Caribbean region, such as St. Vincent and Grenadines.)
- Taxation and fees – Create a streamlined taxation and fee structure that equitably impacts the different sectors of the tourism industry, including fairness in assessment, inclusion of all industry sectors, and equitable methods of allocating revenues collected to strengthen tourism sectors and the industry as a whole.
- Product development – Create specific product development strategies for cruise tourism and overnight tourism that maximize economic benefits to local communities increase opportunities for enhanced local participation in the industry and minimize impacts on cultural and natural heritage, visitor experiences, and the environment; create national and destination-level strategies to enhance diversification of the tourism product across the country, and identification of areas for future tourism growth and development. Include domestic tourism, leisure and recreation opportunities.
- Marketing – Strengthen national/destination/emerging sectors (i.e. agrotourism, cultural tourism, culinary tourism, etc.) with tourism marketing efforts at the international, regional, and domestic levels. Strengthen mechanisms to carry out

effective and on-going research, including both long-term and rapid assessments, and to make the information available consistently and easily to the tourism sector. Strategic marketing to distinct end users for the Country by identifying the varying destinations and each corresponding target group for those destinations (high vs. low density). Focus on developing and marketing a product defined by the destinations in accordance with the typology identified for that destination.

- Human resource development – create a framework of training and education that uses both the national education system and locally-based training initiatives directed at human capacity building to strengthen the tourism sector and the ability of local Belizeans to pursue work and careers in tourism.
- Infrastructure development – Including enhancing country access (i.e. air, road and marine access improvements), support for the further development of basic services (water, electricity, sanitation), including strategies for private sector participation or cost-sharing; mechanisms to identify areas for infrastructure development to support future tourism destination growth that diversifies the tourism product in response to market analysis and trends; planning for future tourism infrastructure development in new areas and also building on the enabling investments already put in place by Component I of the STP in the four established destinations of Belize City, Ambergris Caye, San Ignacio, and Placencia, and the two emerging destinations of Punta Gorda and Hopkins.
- Safety and security – Safety and security is essential for a thriving and developing national tourism industry in Belize. A key part of the Master Plan will be to establish a process for enhancing public safety standards in destinations across the country, implementing emergency and risk management planning at both the national and destination level, and enhancing national and border security as it impacts on tourism.
- Tourism Satellite Account – Incorporate Belize integrated data management systems that track tourism information and impacts, including mechanisms to integrate with new data management systems (including a TSA) as they are developed and become available, into the National Sustainable Tourism Master Plan as a tool to monitor and assess the impact of the tourism sector on the overall economy of Belize.
- Natural and Cultural Asset protection- strengthening integrated strategies and planning for tourism related capacity management in terms of ecologically sensitive areas, culturally sensitive areas, heritage protection and tourism resource use conflict management. Identification of areas for urban renewal through tourism.
- Additional objectives and strategies as identified by stakeholders during the initial Working Sessions.

- 3.2.6. The draft of the National Sustainable Tourism Master Plan will include specific strategies, goals, and action steps to meet those goals, with short-, medium-, and long-term goals and actions identified, and monitoring and evaluation indicators to measure progress at key intervals. A mechanism will also be included to review the plan at defined intervals, and change and/or update goals, strategies and action steps based on changing circumstances.
- 3.2.7. The draft of the National Sustainable Tourism Master Plan must be reviewed and approved by STP, with comments and suggested revisions provided to the consultancy firm. Revisions must be incorporated into the draft and the subsequent draft version reviewed and approved.
- 3.2.8. This draft will then be presented to the National Tourism Advisory Council Project Steering Committee of the STP for its review. Suggested changes and revisions will be incorporated into the draft by the consultancy firm.
- 3.2.9. Once the suggested revisions have been incorporated into the draft and the draft has been approved by the STP, it will then be presented at a national workshop. The national workshop will be coordinated by the consultancy firm in close consultation with STP, MTCAC, and BTB. Further feedback will be solicited from stakeholders at the national workshop and incorporated into the draft.
- 3.2.10. The final National Sustainable Tourism Master Plan will be created by the consultancy firm, conform to international standards, provide a clear and measurable road map for Belize sustainable tourism development, and will employ descriptive text and graphics to be easily understandable to the public, potential investors, government, private sector, and NGOs. The format of the components of the National Sustainable Tourism Master Plan will be agreed in consultation between the consultancy firm and STP, MTCAC, and BTB, and will include visual components such as maps and graphics, stand-alone document components, accompanying power point presentations, accompanying policy and design guidelines that adhere to best practice sustainable tourism principles and practices, and other formats that are user-friendly for different audiences.
- 3.2.11. The final National Sustainable Tourism Master Plan must be reviewed, accepted, and approved by STP, the National Tourism Advisory Council Project Steering Committee of the STP, MTCAC, and BTB.
- 3.2.12. Presentation and launch of the National Sustainable Tourism Master Plan will be carried out by STP, MTCAC, and BTB, in coordination with the consultancy firm.

3.3. Phase III: Preparation of Destination-Specific Development Plans (8 months)

- 3.3.1. Concurrently with the development of the National Sustainable Tourism Master Plan, the consultancy group will complete five specific Destination-Specific Development Plans as the first deliverables of the National Sustainable Tourism Master Plan: Belize City

Waterfront Strategy; Ambergris Caye Physical Tourism Development Plan; San Ignacio Urban Design Strategy; Placencia Peninsula Physical Tourism Development Plan; Placencia Peninsula Disaster Risk Management Plan. These destination-specific development plans will form part of an overall destination management planning approach for each destination, and provide guidance for both current and future tourism development in each of the identified destinations. Each plan will build on the enabling investments in infrastructure development being carried out as a part of Component I of the Sustainable Tourism Program, but will look at short-, medium-, and long-term tourism development and management goals for the tourism sector in that destination, following the framework of the National Sustainable Tourism Master Plan.

- 3.3.2. The consultancy firm will use the framework of the National Sustainable Tourism Master Plan to hold consultations with key stakeholders in each of the four destinations in order to develop the specific deliverables. Key stakeholders to participate in each destination will be selected in coordination with the STP, MTCAC, and BTB.
- 3.3.3. The stakeholders will suggest strategies, objectives, goals, and action steps that integrate with the overall national plan and contribute destination-specific accomplishments towards the national goals.
- 3.3.4. Each destination-specific development plan must include short, medium, and long-term goals, with action steps tailored to meet those goals, and mechanisms for evaluation of progress towards fulfillment of those goals. It must also include a mechanism to review, change and update goals and objectives over time, based on changing circumstances. It must include mapping of current and future growth for the destinations with a strategy for connectivity and recommendations for scale, density and the destination typology best suited for each destination.
- 3.3.5. Based on these consultations, a review of the existing documents, any existing destination plans, and progress on the enabling infrastructure investments of Component I of the Sustainable Tourism Program, the consultancy firm will create a draft of the following:
 - 3.3.5.1. *Waterfront Strategy for Belize City*. Objectives for this plan include, but are not limited to:
 - 3.3.5.1.1. Create criteria and standards for tourism development in line with the National Sustainable Tourism Master Plan;
 - 3.3.5.1.2. Create mechanisms to strengthen and create a vibrant downtown area that enhances the quality of life for both visitors and local residents, promotes heritage and builds civic pride;
 - 3.3.5.1.3. Address environmental issues, including land and water way use, water usage, sewage treatment, streetscape environment;
 - 3.3.5.1.4. Provide for improved pedestrian access, improved physical and visual links between neighborhoods, and create mechanisms to encourage urban regeneration, including improved safety and security.
 - 3.3.5.2. *Ambergris Caye Physical Tourism Development Plan*. Objectives for this plan include, but are not limited to:

- 3.3.5.2.1. Create criteria and standards for tourism development in line with the National Sustainable Tourism Master Plan;
 - 3.3.5.2.2. Strengthen and improve physical planning, particularly in high-use terrestrial and marine areas, resulting in land use zoning for the entire Caye and future investment programs specifically for the environmental restoration and protection of San Pedro Town and Ambergris North.
 - 3.3.5.2.3. Address environmental issues, including shoreline erosion, loss of environmental and scenic quality, and land use conflicts;
 - 3.3.5.2.4. Propose strategies for product diversification, and promotion of enhanced visitor experience that also enhances quality of life for local residents, including improved safety and security.
- 3.3.5.3. *Urban Design Strategy for San Ignacio*. Objectives for this plan include, but are not limited to:
- 3.3.5.3.1. Create criteria and standards for tourism development in line with the National Sustainable Tourism Master Plan;
 - 3.3.5.3.2. Strengthen and improve physical planning and implement zoning and development standards to enhance San Ignacio's role as a gateway to destinations and activities in Cayo District and beyond;
 - 3.3.5.3.3. Address social and environmental issues, including river shoreline stabilization, water quality, urban design management, traffic congestion, loss of environmental and scenic quality, and land use conflicts;
 - 3.3.5.3.4. Propose strategies for product diversification with San Ignacio as the hub, and promote enhanced visitor experience that also enhances quality of life for local residents, including improved safety and security.
- 3.3.5.4. *Placencia Peninsula Physical Tourism Development Plan*. Objectives for this plan include, but are not limited to:
- 3.3.5.4.1. Create criteria and standards for tourism development in line with the National Sustainable Tourism Master Plan;
 - 3.3.5.4.2. Strengthen and improve physical planning and implement zoning and development standards to maintain the small-scale, authentic character of the Peninsula and its villages;
 - 3.3.5.4.3. Address environmental issues, including shoreline erosion, water quality, loss of environmental and scenic quality, and land use conflicts;
 - 3.3.5.4.4. Propose strategies for product diversification, and promotion of enhanced visitor experience that also enhances quality of life for local residents, including improved safety and security.
- 3.3.5.5. *Placencia Peninsula Risk Management Plan*. Objectives for this plan include, but are not limited to:
- 3.3.5.5.1. Create criteria and standards for tourism development in line with the National Sustainable Tourism Master Plan and national disaster response plans;
 - 3.3.5.5.2. Create a plan designed to avoid and limit damages associated with flooding and breaching of access routes and other infrastructure due to hurricanes and other natural disasters;

- 3.3.5.5.3. Strengthen local emergency response mechanisms; refine and clarify local, regional, and national communication and decision-making authority to address natural disaster response needs.
- 3.3.6. These draft plans must include, but not be limited to: physical plans for land-use, zoning, open space, circulation/way-finding/signage, infrastructure, connectivity on a National level from the four destinations to emerging destinations to future growth areas sited, ecologically sensitive zones, and priority areas for future development and/or improvement.
- 3.3.7. Each of the draft plans will be presented to STP, MTCAC, and BTB for review, feedback, and further refinement. The drafts will be revised and then approved by STP.
- 3.3.8. Once approved, each draft plan will be presented at a working session in the appropriate destination (4 destinations – Belize City, San Pedro, San Ignacio, Placencia), organized by the consultancy firm. A minimum of 15 stakeholders must participate in each working session, which shall be a minimum of three hours. The draft destination-specific development plans will be presented and shall provide an opportunity for local stakeholders to contribute their opinions, comments, and suggestions to the design and formulation of the plans, their strategic approach, objectives, goals, and action steps.
- 3.3.9. Following the working sessions, final destination-specific development plans will be prepared, reviewed and approved by STP, and presented in each destination in coordination with STP, MTCAC, and BTB.
- 3.3.10. The format for presentation of the destination-specific development plans will be agreed in consultation between the consultancy firm and STP, MTCAC, and BTB and may include visual elements such as maps and graphic representations, stand-alone document components, accompanying power point presentations, accompanying policy and design guidelines that adhere to best practice sustainable tourism principles and practices, and other formats that are user-friendly for different audiences.

4. REPORTS AND TIME SCHEDULE

The entire consultancy period, including all components as outlined the Terms of Reference, shall not exceed 16 months. The following reports shall constitute deliverables of the Terms of Reference:

4.1. Work plan

The consultancy group will submit an outline of their work plan within one month of the signing of the consultancy agreement, outlining their methodology, timeframe, and detailed description of activities they will undertake and human resources to be utilized to complete the work.

4.2. Phase I: Diagnosis of Belize's Tourism Sector

- 4.2.1. A report on the results of the analysis of the tourism sector, to include major strengths and weaknesses.
- 4.2.2. A brief analytical report of comparable international best practices in tourism master planning and implications for the National Sustainable Tourism Master Plan.
- 4.2.3. A draft outline for the National Sustainable Tourism Master Plan (refining the initial draft outline provided). This draft to be reviewed and approved by STP.

4.3. Phase II: Creation of the National Sustainable Tourism Master Plan

- 4.3.1. Brief report (3-4 pages) on the results of each working session (8 sessions).
- 4.3.2. Draft National Sustainable Tourism Master Plan (to be reviewed and approved by STP, the National Tourism Advisory Council Project Steering Committee of the STP, MTCAC, and BTB).
- 4.3.3. Final National Sustainable Tourism Master Plan (to be reviewed and approved by STP, MTCAC, and BTB)
 - 4.3.3.1. Consultancy firm and STP will agree on design, format, and presentation of National Sustainable Tourism Master Plan (which will include multiple formats of color renderings of site maps, zoning and land use maps and overall area maps of destinations as well as graphically rendered maps of the overall national master plan of the country focused on each district in digital (pdf, jpg, tiff) formats and true color 10 hardcopy prints at 8/12 x 11, 11 x 17 and 24 x 36 or larger formats as well as a power point presentation summary document which can be used as stand-alone components of the plans with various end-users)
 - 4.3.3.2. Visual components of the National Sustainable Tourism Master Plan will include:
 - 4.3.3.2.1. Baseline destination map of existing tourism attractions, destinations, entrance and exit points into the country, etc.
 - 4.3.3.2.2. Future destination map which identifies and defines priority areas for tourism development and investment nationwide
 - 4.3.3.2.3. Production of zoning maps for future tourism development areas, indicating areas for (but not limited to): increased development growth; ecologically sensitive areas; priority zones for future infrastructure development; priority zones for day visitation; priority zones for overnight visitation; under-utilized sites (all mapping data to be delivered in autocad and pdf format for digital reproduction and further use by the country)³

4.4. Phase III: Five Destination-Specific Development Plans – Belize Waterfront Strategy, Ambergris Caye Physical Development Plan, San Ignacio Urban Design Strategy, Placencia Peninsula Physical Development Plan, Placencia Peninsula Risk Management Plan

- 4.4.1. Brief report (3-4 pages) on results of consultations at each destination (4 destinations).

³ Number of proposed elements to be evaluated within the technical proposal

4.4.2. Draft of the five destination-specific development plans, as indicated above. The drafts will be reviewed and approved by STP, MTCAC, and BTB. These draft plans must include, but not be limited to: physical plans for land-use, zoning, open space, circulation/way-finding/signage, infrastructure, ecologically sensitive zones, and priority areas for future development and/or improvement.⁴

4.4.3. Final destination-specific development plans for each of the above

4.4.3.1. The format for presentation of the destination-specific development plans will be agreed in consultation between the consultancy firm and STP, MTCAC, and BTB and may include visual elements such as maps and graphic representations, stand-alone document components, accompanying policy and design guidelines that adhere to best practice sustainable tourism principles and practices, and other formats that are user-friendly for different audiences.

4.5. The final versions of all deliverables will reflect the comments received from the STP, MTCAC, BTB, and IDB and will be reviewed, approved, and accepted by STP.

4.6. All draft and final versions of all deliverables will be submitted in both paper and digital format (PDF, Autocad and Word) for timely distribution and review.

4.7. Timeframe

Activities	Month															
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Work plan																
Phase I: Diagnosis																
Report on the state of tourism																
Report on comparative analysis of international tourism master plans																
Initial draft of national master plan																
Phase II: National Sustainable Tourism Master Plan																
Working sessions (8)																
Draft National Sustainable Tourism Master Plan																
Final Tourism Master Plan																
Phase III: Destination-Specific Development Plans																
<i>Waterfront Strategy – Belize City</i>																
Development of draft																
Final plan																
<i>Physical Tourism Development Plan – Ambergris Caye</i>																
Development of draft																

⁴ Number of proposed elements to be evaluated within the technical proposal

regional, and local levels with a focus on natural and cultural heritage; and the formation of actionable plans at both the national and destination levels with short-, medium- and long-term goals and methods to clearly evaluate progress towards those goals. The consulting team must be multi-disciplinary, and work in close coordination with the Sustainable Tourism Program. Preference will be given to consultancy firms that work in collaboration with local Belizean consultancy firms and/or experts.

The team of consultants should include, but not be limited to, seven dedicated staff who meet the following minimum qualifications and experience:

Team Leader: Minimum **Bachelor's** Degree + 15 years experience (or MA degree and 10 years of international experience) in tourism policy and planning, marketing and development, including project formulation and coordination, tourism sector analysis at the national and local level, workshop planning and coordination, report writing, field activity coordination. The team leader should have experience of a minimum of 5 projects as a team leader- 3 in tourism planning/policy development. Ability to manage budget, reporting, and on-time completion of deliverables. Experience in managing and directing multi-national, multi-disciplinary teams to accomplish complex projects for international organizations, with preference given to those with experience with IDB or World Bank. Liaison with Executive Director of STP.

Sustainable Tourism Development Expert: Minimum Bachelor's Degree + 10 years experience in sustainable tourism development at national and international levels having participated in at least 3 sustainable tourism development projects at national/international level). Experience in product analysis and development; marketing and creation of tourism zones; development of national sustainable tourism strategy; understanding of natural and cultural tourism and its particular sustainable development challenges and needs; and quality standards.

Tourism Physical Planning Expert – Minimum Bachelor's Degree + 10 years experience (or MA degree and 5 years of experience) in physical planning for tourism; infrastructure planning and development; zoning, urban planning and economic development; land use analysis and experience working with national and local governments to formulate tourism development action plans in both urban and rural environments. Familiarity with Environmental Impact Assessment processes and natural disaster risk management.

Tourism Policy Expert: Bachelor's Degree + 10 years experience (or MA degree and 5 years of experience) in analyzing and assisting with the strengthening of institutional frameworks; policy development; legal and regulatory support for tourism development; experience with safety and security enhancements and structures that support overall tourism development; and knowledge of human capacity building needs and training frameworks to support tourism development. The tourism policy expert should have experience in a minimum of 3 projects in policy analysis and formulation)

Tourism Economist – Minimum MA degree and 5 years of experience in the analysis of the contribution to and impact of tourism on national economies as a basis for developing policy frameworks. The economist should have a minimum experience of 3 projects within this discipline. Prior experience in the assessment of revenue generation

mechanisms; taxation and the creation of investment structures to enhance participation of local investors; streamlining both national and international interest in supporting additional investment to support enabling infrastructure developments already underway.

Environmental Development Specialist – Bachelor’s Degree in environment and/or natural resources management + 10 years experience (or MA degree and 5 years experience) with experience in at least 3 relevant projects such as best practices in environmental management applied to the tourism sector, protected area management and enhancement; environmental impact assessment; sustainable energy; and climate change adaptation.

Social sciences/communications Specialist – Minimum MA degree (social sciences and/or communication) and 5 years experience in the analysis of the social impacts of tourism development and participation in at least 3 relevant projects. Must have demonstrated experience in conducting or facilitating local consultation processes in national policy dialogues. Knowledge of the Belizean social and cultural context is a requirement.

6. Local Services, Facilities and Support

- 6.1.** STP will provide assistance in identifying local technical specialists and in recommending stakeholder participants for consultations and meetings, as appropriate.
- 6.2.** STP will provide advice and consultation to the consultancy firm on their activities, review, make recommendations, and sign-off on all draft and final deliverables.

Abbreviations

STP	Sustainable Tourism Program
IDB	Inter-American Development Bank
MTCAC	Ministry of Tourism, Civil Aviation, and Culture
BTB	Belize Tourism Board
BTIA	Belize Tourism Industry Association

Annex I

Documents to be included for review for the TOR

Belize Tourism Board: Tourism Statistics for 2006, 2007, 2008

Belize Tourism Board: Visitor Experience and Motivation Survey, 2006, 2007, 2008

Belize Tourism Policy, March 2005

Belize Cruise Tourism Policy

Blackstone Report, 1998

Coastal Zone Management Authority and Institute: The National Integrated Coastal Zone Management Strategy for Belize, 2001

Coastal Zone Management Authority and Institute: Tourism and Recreation Best Practices for Coastal Areas in Belize, 2001

Dyett and Bhatia: Sustainable Tourism Development Plan (for Placencia), 2005

IDB: Belize Country Environmental Analysis: Towards Competitiveness and Sustainable Development, 2005

IDB: Belize Country Strategy (2008-2012), May 2009

IDB: Belize Disaster Risk Management Sector Note, 2007.

IDB: Belize Sustainable Tourism Program (BL-L1003) Loan Proposal

IDB: Studies for the preparation of the Belize Sustainable Tourism Program (BL-T1011), Oct. 2008

Realizing the Possibilities. Budget Presentation for Fiscal Year 2008/2009. 2008. Hon. Dean Barrow, Prime Minister and Minister of Finance. Belmopan, Belize.

Toledo Responsible Tourism Policy, 2008-2018, May 2008

World Travel and Tourism Council, Travel and Tourism Economic Research, Belize, 2008