



**Petra Development and Tourism Region Authority**

**Revise and Update Petra Strategic Master Plan**

**Terms of Reference**

Assignment title: Revise and Update Petra Strategic Master Plan

Assignment duration: 6 months

Expected date of effectiveness: 3<sup>rd</sup> of November, 2020

Expected date of termination: 3<sup>rd</sup> of May, 2021

**Terms of Reference**

Assignment Title	<b>Revise and Update Petra Strategic Master Plan</b>
Contract modality	National specialize company
Duty station	Jordan, Petra Region
Contract effectiveness	November 3 <sup>th</sup> , 2020
Contract duration	Six calendar months

## Contents

<b>ACRONYMS AND ABBREVIATIONS</b> .....	2
<b>1. BACKGROUND:</b> .....	3
<b>1.1 About Petra Region</b> .....	3
<b>1.2 About PDTRA</b> .....	3
<b>2. ASSIGNMENT RATIONALE</b> .....	5
<b>3. OBJECTIVES OF THE ASSIGNMENT</b> .....	6
<b>4. SCOPE OF THE ASSIGNMENT</b> .....	6
<b>4.1. Tasks and Activities:</b> .....	7
Stage I Inception Phase: Site Analysis and Data Collection;.....	7
Stage II Concept Phase: Development Concept Alternatives: .....	8
Stage III: Detailed Master Plan.....	9
Stage IV: Detailed Tourism Plan .....	10
<b>5. ASSIGNMENT TIME-FRAME</b> .....	10
<b>6. DUTY STATION AND TRAVEL ARRANGEMENTS</b> .....	11
<b>7. QUALIFICATIONS AND EXPERIENCE:</b> .....	11
<b>8. EVALUATION CRITERIA:</b> .....	12
8.1 Evaluation of Technical Proposals (70 points): .....	12
8.2 Evaluation of Financial Proposals (30 points): .....	14
<b>9. ANNEXES:</b> .....	15
9.1 Evaluation of Technical Proposals Form –First Criteria: .....	15
9.1 Evaluation of Technical Proposals Form-Second Criteria:.....	16
9.1 Evaluation of Technical Proposals Form-Third Criteria:.....	17
9.2 Qualifications and Experience Form: .....	18

## ACRONYMS AND ABBREVIATIONS

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PR	Petra Region
PDTRA	Petra Development and Tourism Region Authority
PAP	Petra Archeological Park
MoTA	Ministry of Tourism and Antiquities
JTB	Jordan Tourism Board
PIMP	Petra Integrated Management Plan
PSMP	Petra Strategic Master Plan
WHS	World Heritage Sites
NTS	National Tourism Strategy
SWOT	Strength, Weaknesses, Opportunity and Threats Analysis
TO	Tour Operator
VIC	Visitor Information Center

## 1. BACKGROUND:

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### 1.1 About Petra Region

Petra region is located to the southern part of Jordan around 230 km from Amman and 120 km north of the red sea town of Aqaba. The region covers an area of (441 km<sup>2</sup>) of which (261km<sup>2</sup>) is dedicated to the Petra Archaeological Park (PAP). It also includes six urban communities with a population of around 38 thousand persons. The iconic rose-red city On December 6, 1985 was designated a UNESCO World Heritage Site, a world wonder since 2007, also Petra was chosen by the Smithsonian Magazine as one of the 28 places you should visit them before you die, is without doubt Jordan's most valuable treasure and greatest tourist attraction. Petra was once the capital city of an empire that extended into Syria established by the Nabataea's; a nomadic and industrious Arab people who settled in southern Jordan over 2500 years ago. Petra was an important junction for the silk, spice, and other trade routes that linked China, India, and southern Arabia with Egypt, Syria, Greece, and Rome. It prospered in the first centuries BC and AD.

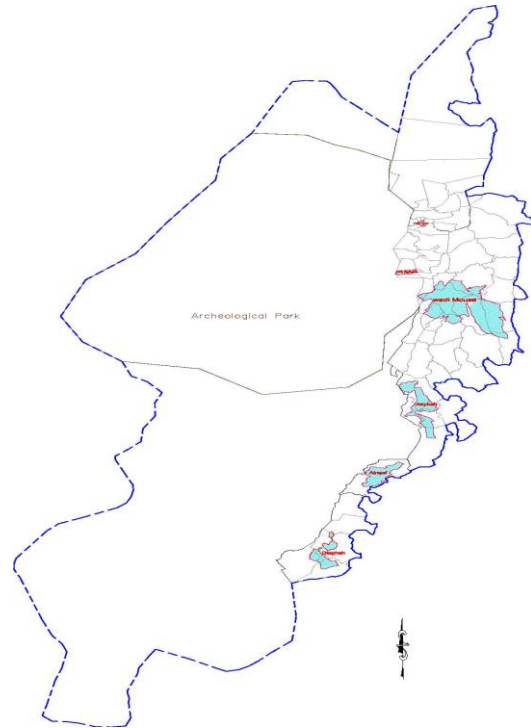


Figure (1): Map of PDTRA Area

In addition to the magnificent remains of the Nabataean city, human settlement and land use for over 10,000 years can be traced in Petra, where great natural, cultural, archaeological and geological features merge.

### 1.2 About PDTRA

In September 2009, Law Number 15 for the year 2009 was enacted to define the Petra Development and Tourism Region (PDTRA) and the inauguration of Petra Development and Tourism Region Authority that would take responsibility for the development of the Petra Region economically capitalizing on its potentials in tourism, among other areas such as local community development.

In part, this new law was also enacted to achieve positive economic and social gain for the entire

Petra region, and for Jordan as a whole. With the creation of the PDTRA, the national significance of this region to Jordan was explicitly declared.

**Summary Responsibilities of the Petra Development and Tourism Region Authority Commissioner's Council:**

- Administrate and supervise the Petra Region.
- Manage and develop the tourism industry in Petra and coordinate with national and international entities that are related to the economic sector.
- Provide a desirable investment environment to engage in various economic activities.
- Contribute to the development of comprehensive strategies for the protection, maintenance and restoration of archaeological sites, in coordination with the Department of Antiquities.
- Identify the areas and sites of heritage value in the region, which can be used for tourism purposes.
- Enhance the social status for the local committee and private institutions, and provide support to the traditional crafts projects and the tourism industry.
- Protect the environment in the region, including water resources, natural resources and biodiversity, by setting the standards, rules and regulations.
- Develop plans for human resource development.
- Controlling and regulating all land use.
- Presenting local Arab cultural heritage to national benefit.
- Improving tourism, and its economic potential, through national and international collaborative ventures.
- Stimulating the investment environment and optimizing the use of to enhance competitiveness.
- Improving the socio-economic conditions of the local community and initiating cultural, folklore, and tourism service projects that benefit them.

### **1.3 About Petra Strategic Master Plan:**

In June 2011 a detailed Strategic master plan has been done by ATC Consultants, which were based on the following tasks to be performed:

<b>Task No.</b>	<b>Tasks to be performed</b>
<b>Task 1</b>	Initial Diagnostic
<b>Task 2</b>	Stakeholder Workshop: Diagnostic
<b>Task 3</b>	Detailed Analyses, Scenarios and Strategy
<b>Task 4</b>	Stakeholder Workshop: Scenarios and Strategy
<b>Task 5</b>	Strategic Master Plan
<b>Task 6</b>	Selected Strategic Area Plans
<b>Task 7</b>	Hand Over

The previous master plan heavily consulted the local communities and their needs, PDTRA has established what so called Local Advisory committee (LAC), discussions with the committee members and other key groups would address the local inputs and it will provide the consultant with the most important needs and their requirements.

The previous master plan based on a study that covered the entire Petra Region, focused on the main urban areas, and the key natural landscape and environmental areas associated with the UNESCO World Heritage Site and archaeological park. The Strategic Master Plan addressed urban efficiency, economic and social development including all six local communities, mobilization of private sector investment and participation, balanced with the protection of the archaeological park itself.

Several major projects have been implemented within the region and work is underway to implement the other part, according to the plan prepared for that.

## **2. ASSIGNMENT RATIONALE**

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These Terms of References (TORs') are issued by the PDTRA. It concerns the Request for Proposal (RFP) to provide Consultancy Services related to revise and update Petra Master Plans and to provide clear guidance and technical support, mentoring, and on-job training to Petra Development and Tourism Region Authority (PDTRA).

The PDTRA aims to use the new version of the master plans as a tool to mainstream the new plans of PDTRA and the national plans within the tourism sector and tourism sites at the national and local levels, and accordingly undertaking the training program and also supporting PDTRA

in implementing the new version of the Master plans are considered priority vehicles for such mainstreaming at national and local planning levels.

PDTRA has developed comprehensive Master plans for Petra and its surrounding, the developed Master Plans ensures the sustainability of the natural and cultural assets of the site and maintain the associated ecosystem services. The plan was developed with strong stakeholder's involvement, it also includes all regulatory framework, policies, regulation, and guidelines, and monitoring plan that needed in for the implementation phase.

In the other hand, PDTRA has also started the implementation of the old Master plans, some of the project is already finished, other are not, it's time now to revise and update the old plans to catch up the new trends and changes have been recorded in the last few years. Corona Virus and the one million visitors marked the end of one age and the birth of another, the new age needs new plans and new ways of dealing with things. The recent tourism changes occur at the national and regional levels shed the light on the importance of the revising exercise and to formulate a consolidated strategic document that would help and guide PDTRA to better utilize its cultural, Natural, and social assets.

### **3. OBJECTIVES OF THE ASSIGNMENT**

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The respondent(s) will have overall responsibility for the creation of the Authority strategic master Plan update for the coming 10-year period (2021 to 2030), lead the Plan Update efforts, and be responsible for the timely completion of the Plan update. All work shall be completed following applicable Authority standards and within the agreed-upon timeline. This includes, but is not limited to, preparing and maintaining a detailed project timeline.

The key objective of this assignment is to provide the PDTRA with a new Strategic Master Plan that guides the planned development of the Petra region in an efficient, balanced, and sustainable way over the next 10 years (2021-2030) for the benefit of Jordanians. Special consideration is required for the protection of the globally significant Petra Archaeological Park, which lies wholly within the area. The Strategic Master Plan should also address urban efficiency, economic and social development including all six local communities, mobilization of private sector investment and participation, balanced with the protection of the archaeological park itself.

### **4. SCOPE OF THE ASSIGNMENT**

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The scope of this assignment is defined based on the above discussed main and specific objectives of this Terms of Reference. Also, the following aspects will have to be considered and taken on board during the assignment:

PDTRA seeks to revise and update its Strategic Master Plan to determine appropriate development zones and land uses; develop sustainable tourism that provides an authentic experience to visitors and long term benefit to local communities and Jordanians at large; protect the archaeological park; stimulate domestic and foreign investment in the region; improve socio-economic conditions of local communities; as well as identify potential untapped or under-utilized investment opportunities that can contribute to Jordan's economic growth.

The envisaged Strategic Master plan is to be developed under the supervision of the PDTRA. Components should include infrastructure, resource conservation, administration, regional interdependencies, sustainable development, new facilities, etc. Given that the mandate is also concerned with the social conditions of all six communities, a related socio-economic assessment of sources of employment and economic activity of the six communities should also be considered in term of urbanization.

#### **4.1. Tasks and Activities:**

Bidder is obliged to submit a monthly report to PDTRA that includes the stages of work that have been done on a monthly basis and what are the works of the next stage:

##### **Stage I Inception Phase: Site Analysis and Data Collection;**

Task 1: Compile and Review Readily Available Data, to revise all previous studies and documents, The Consultant will collect, compile, review, analyze, and evaluate the validity of any available data relevant to the Project area provided by PDTRA, this includes but not limited to:

- The Strategic master plan for Petra region, ATC Consultants, June 2011.
- Petra Tourism & Investment Strategy, Dar al Handasah, 2016.
- The following key regional studies and documents are available:
- Petra Priority Action Plan Study, Dar al Handasah, 1996
- Petra Region Land Use Code, Sigma, 1998
- Jordan Second Tourism Project, Staff Appraisal Document, World Bank, July 1997
- Jordan Second Tourism Project, Implementation Completion Report, World Bank, December 2005
- Petra Archaeological Park Management Plans
- Petra Archaeological Park Management Plan, UNESCO, 1994
- Management Analysis & Recommendations for the Petra World Heritage Site, US/ICOMOS, 1996
- Petra Archaeological Park Operating Plan (3 Vol.), The US National Parks Service, 2000.

##### **Task 2: Site Reconnaissance**

The Consultant will develop an understanding of the site surroundings; by conducting several field visits to current and finished projects. PDTRA in the last few years has started some



projects, the majority of them is now finished, and others are still under establishment. The vendor is responsible to validate them and to better link them with the new study.

### **Stage I Deliverables:**

#### **Inception Report that include but not limited to:**

- Site Analysis Drawings.
- The Opportunities and Constraints.
- Development Land Summary.
- Land Area Take-offs.
- Compiled Data Archives.

### **Stage II Concept Phase: Development Concept Alternatives:**

#### **Task 3: Projects Vision and Planning/Design Strategy:**

The Consultant is to provide an overview of the process and through workshops with PDTRA establish goals, vision and mission for the projects, as well as success factors, risk/reward scenarios, site guidelines.

#### **Task 4: Development Concept Alternatives**

The Consultant will prepare two (2) Concept Alternatives for PDTRA to select the preferred option to be developed in further detail in the next stages. The Consultant will present the two development options for PDTRA, and will review and evaluate the alternatives by using comparative evaluation table in relation to a number of qualitative evaluation criteria.

#### **Task 5: Preferred Concept Master Plan Development**

The Consultants will proceed with the preparation of the preferred concept master plan after PDTRA selection and written approval of the Preferred Development Alternative.

#### **Task 6: to revise and encourage private investment:**

By:

- Develop a detailed and systematic understanding of the current status
- Outline development possibilities and constraints.
- Summarize priorities for implementation.
- Develop a response to the diagnostics, vision and opportunities in a well balanced strategy and a set of policies and plans to guide the way forward with focus but not limited to Tourism.

**Stage II: Deliverables:**

**Concept Report that include but not limited to:**

- Project Objectives Report; Vision, mission, goals.
- Two Development Alternatives Drawings.
- Review Document for the Two Development Alternatives.
- Concept Master Plan

**Stage III: Detailed Master Plan**

**Task 7: Landscape Concept Design**

**Task 8: Traffic and Parking Considerations**

**Task 9: Infrastructure Schematic Concept Development**

**Task 10: Final Master Plan**

**Task 11: Concept Infrastructure Master Plan**

**Task 12: Road Designs**

**Task 13: Cost Estimates (Off-site Infrastructure, On-site Infrastructure and Total Project Cost).**

**Stage III Deliverables:**

**Final Design Report that include but not limited to:**

- Executive summary.
- Site analysis.
- Master planning approach.
- Development concepts.
- Land use zoning and area tabulations.
- Zoning of utilities and facilities and grids (water supply, waste water, storm water drainage, solid waste, etc.).
- Transportation infrastructure report which includes the layout of the main and secondary axes and linkage with the surrounding areas, as well as public transport, and traffic management provisions.

- Landscaping report including the definition of the landscaping strategy for the zone.
- Updated Development schedule that will provide construction phasing.
- Open space networks.

#### Stage IV: Detailed Tourism Plan

##### **Task 14: To revise the tourism trend;**

In the last few years and propose ideas, projects, initiatives that better capture the future tourism opportunities, and increase Petra market share. The proposed ideas should be innovative and built on the achieved added values

##### **Stage IV Deliverables:**

##### **Tourism Report that include but not limited to:**

- Tourism Situation Report including all necessary statistic studies, the effect of the projects on tourism trend.
- Recommendations for Managing the tourism process and keeping it under control.
- Innovative ideas for Tourism development.
- Plan to increase the marketing of the ancient city.
- Plan about management of new performed projects such as heritage village, Petra museum.

## **5. ASSIGNMENT TIME-FRAME**

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This assignment is expected to span between 3<sup>rd</sup> of November 2020 and 3<sup>rd</sup> of May 2021. The deadlines for the delivery of above mentioned deliverables are suggested as follow:

<b>Deliverables</b>	<b>Due Date</b>	<b>Language</b>
Stage I: Inception Report	End of Month one	English & Arabic
Stage II: Concept Report	End of Month three	English & Arabic
Stage III: Final Design Report	End of month Five.	English & Arabic
Stage IV: Tourism Report	End of assignment	English & Arabic

## **6. DUTY STATION AND TRAVEL ARRANGEMENTS**

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The vendor main duty station will be in Petra with regular visits to authority communities.

## **7. QUALIFICATIONS AND EXPERIENCE:**

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This bid is open to national and international firms with previous experience in Jordan, and with recognizable experience in the fields of strategic master planning.

Experience in strategic tools, institutional capacity building, world heritage sites, tourism, land use planning, GIS, stakeholder's consultation, community engagement, policy process, and are environmental legislation also required.

The consultant is required to deploy a team of experts needed for the assignment. The following are the key competencies/expertise required. The profile (including detailed CVs and examples of previous experiences) of each of the experts involved in the assignment needs to be included in the technical and financial proposal submitted by the consultant in the form of annexes.

- At least ten years of field-based experience in the strategic planning.
- At least ten years of experience in the field of cultural sites and world heritage sites planning and management.
- At least ten years of field-based experience in the development and implementation of local stakeholders' engagement and consultation processes to support the baseline assessments and the management planning process. This should include specific experiences in stakeholders mapping, consultation tools, socio-economic assessments, all related to natural resource use and management. Experts CVs must be included in the technical proposal of the consultant as an annex.
- In addition, the consultant needs to enjoy the following technical competencies:
  - o Excellent technical writing skills both in English and Arabic. All reports are required to be developed in Arabic with adequate English summaries.
  - o Excellent process planning and team coordination skills. This would include high-level communication, moderation, and facilitation skills.
  - o Very strong knowledge of Petra Region in terms of geography, demography, governance, and socio economic sittings and other special attributes.

Firms will be required to deploy:

- A team of experts with sufficient practical experience in the fields of:
  - Consultative land use planning and management and guidelines and procedures development and enforcement – team leader.
  - Tourism development specialist with particular experience in integrated planning and monitoring of tourism impacts on natural and cultural values.
  - Socio-economic experts with particular experience on rights-based approaches.
  - Policy development and legal frameworks experts related to land use planning, management and enforcement.
  - Environment experts with particular experience in biodiversity.
  - GIS and management information systems specialist.

## **8. EVALUATION CRITERIA:**

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The proposal evaluation shall be based on the highest level of receptiveness to the PDTRA's requirements and shall not be solely restricted to the lowest cost proposed.

A proposal to be considered unsuitable shall be rejected if it does not respond to important aspects of the Terms of Reference or if it fails to achieve the minimum technical score indicated hereunder.

The evaluation of the proposals received will be based on a combination of the technical proposal evaluation, the financial proposal evaluation. The criteria of the evaluation will comprise these key elements with a total of 100 points, which is divided into several evaluation segments. A proposal which obtains less than 75/100 in the technical proposal will disqualify and therefore will not be evaluated financially.

### **8.1 Evaluation of Technical Proposals (70 points):**

The technical proposal will be rated according to the following criteria:

- **Profile, Experience and Capabilities (15%); evaluation may include the following aspects:**
  - General company information about the Bidder including year of establishment, number of employees, revenue, structure, capacity range and reputation.
  - Number and location of offices inside and/or outside Jordan.
  - Projects that demonstrate the Bidder's track record and capability in the region, in similar environments and with a similar range of challenges such as: Master Planning for major tourism and archeological projects, Master Planning for

projects in highly sensitive environmental areas, and Master Planning for Special Development Regions.

- Where Bidders propose consortia including multiple firms, consideration will be given to the track record of each company including the track record of the firms working together on comparable projects.

▪ **Adequacy of approach and methodology (25%) ; evaluation will include some or all of the following:**

- Demonstrated clarity in the Bidder's understanding of the situation, challenges and requirements of the PDTRA.
- Demonstrated understanding of the project success factors.
- Methodology to be deployed in carrying out the work.
- Schedule of activities and overall time line to complete the services.
- Clear commitment to all deliverables, as well as consideration of any supplemental.
- Deliverables that may be included in Bidders' proposals.
- Plan for knowledge transfer during the project to the staff of PDTRA and others.

▪ **Qualifications and competence of personnel (30%):**

- The strength and experience of the team leader and leadership.
- The technical qualifications of key staff.
- The personal experience of key staff with similar projects in similar environments and with similar challenges.
- The percentage of time that key staff will spend on the project, and in particular the time they will spend on-site in Petra Region and Jordan so as to allow for better communication with the PDTRA team.
- Expertise to include, archeological specialist, environmental specialist, social and local community development expert, an economist and investment expert, tourism development expert, licensing and zoning experts, civil engineers and road and transport experts ,GIS and management information systems expert.

## 8.2 Evaluation of Financial Proposals (30 points):

If the technical proposal achieves the minimum of (75 % \* 70), the financial evaluation will be taken into account in accordance to these guidelines:

- The total amount of points for the cost component is 30. The maximum number of points shall be allotted to the lowest fees proposed by the qualified bidders the points for the other proposals are computed by dividing the lowest proposal by each subsequent proposal, and multiplying the result by the total points allocated.
- Payment Terms will be evaluated along the following dimensions:
  - Overall cost for Tasks 1 through 14.
  - Cost per unit of services.
  - Payment schedule.
  - Performance-orientation: payment will be made subject to approval of the deliverables.

## **9. ANNEXES:**

### **9.1 Evaluation of Technical Proposals Form –First Criteria:**

<b>CRITERIA</b>	<b>WEIGHT</b>	<b>EVALUATION</b>
<b>Profile, Experience and Capabilities (15%); evaluation may include the following aspects:</b>		
1-General company information about the Bidder including year of establishment, number of employees, revenue, structure, capacity range and reputation.	3%	
2-Number and location of offices inside and/or outside Jordan.	3%	
3-Projects that demonstrate the Bidder's track record and capability in the region, in similar environments and with a similar range of challenges such as: Master Planning for major tourism and archeological projects, Master Planning for projects in highly sensitive environmental areas, and Master Planning for Special Development Regions.	5%	
4-Where Bidders propose consortia including multiple firms, consideration will be given to the track record of each company including the track record of the firms working together on comparable projects.	4%	

(Table 1)



9.1 Evaluation of Technical Proposals Form-Second Criteria:

CRITERIA	WEIGHT	EVALUATION
<ul style="list-style-type: none"> <li>▪ <b>Adequacy of approach and methodology (25%) ; evaluation will include some or all of the following:</b></li> </ul>		
1-Demonstrated clarity in the Bidder understands of the situation, challenges and requirements of the PDTRA.	3%	
2-Demonstrated understanding of the project success factors.	3%	
3-Methodology to be deployed in carrying out the work.	5%	
4-Schedule of activities and overall time line to complete the services.	4%	
5-Clear commitment to all deliverables, as well as consideration of any supplemental.	3%	
6-Deliverables that may be included in Bidders' proposals.	4%	
7-Plan for knowledge transfer during the project to the staff of PDTRA and others.	3%	

(Table 2)

9.1 Evaluation of Technical Proposals Form-Third Criteria:

CRITERIA	WEIGHT	EVALUATION
<p>▪ <b>Qualifications and competence of personnel (30%):</b></p>		
<p>1-The strength and experience of the team leader and leadership.</p>	<p>10%</p>	
<p>2-The technical qualifications of key staff.</p>	<p>5%</p>	
<p>3-The personal experience of key staff with similar projects in similar environments and with similar challenges.</p>	<p>5%</p>	
<p>4-The percentage of time that key staff will spend on the project, and in particular the time they will spend on-site in Petra Region and Jordan so as to allow for better communication with the PDTRA team.</p>	<p>5%</p>	
<p>5-Expertise to include, archeological specialist, environmental specialist, social and local community development expert, an economist and investment expert, tourism development expert, licensing and zoning experts, civil engineers and road and transport experts ,GIS and management information systems expert.</p>	<p>5%</p>	

(Table 3)

9.2 Qualifications and Experience Form:

<b>Name</b>	<b>Role</b>	<b>No. of experience years</b>	<b>Experience</b>

(Table 4)