



Organisation of Eastern Caribbean States



ORGANISATION OF EASTERN CARIBBEAN STATES

REQUEST FOR EXPRESSIONS OF INTEREST

Organisation of Eastern Caribbean States

Unleashing the Blue Economy of the Caribbean (UBEC) Project

Grant No.: IDA – E0200

Assignment Title: Consulting Services for the preparation of OECS Guidelines and Best Practices for Beaches, Marinas, Moorings and Boat Operators.

The Organisation of Eastern Caribbean States (OECS) Commission has received funding from the World Bank toward the cost of the Unleashing the Blue Economy of the Caribbean (UBEC) Project and intends to apply part of the proceeds for Consulting Services for the preparation of OECS Guidelines and Best Practices for Beaches, Marinas, Moorings and Boat Operators.

The consulting services (“the Services”) shall prepare guidelines and best practices for beaches, marinas, moorings and boat operators; and identify priority areas requiring formal standards. A structured, multidisciplinary and participatory process shall guide implementation to ensure regional harmonisation, stakeholder buy-in, technical soundness and policy relevance.

The consultant will be required to review relevant literature, including legislation; engage relevant stakeholders; assess existing guidelines, best practices and standards; and develop tailored OECS guidelines and best practices. The assignment will require travel to UBEC implementing countries to ensure inclusivity, but also include broader regional (OECS) stakeholder consultation and validation.

The OECS now invites eligible consulting firms (“Consultants”) to indicate their interest in providing the Services. Interested Consultants should provide information demonstrating that they have the required qualifications and relevant experience to perform the Services. The minimum required qualifications and experience are listed in section 8 of the Terms of Reference (TOR) below. The details of the services required are available in the TOR which is available on the official website: www.oecs.org or can be obtained at the address given below.

The attention of interested Consultants is drawn to Section III, paragraphs, 3.13, 3.14, 3.16, and 3.17 of the World Bank's Procurement Regulations for IPF Borrowers, Sixth Edition, September 2025 ('Procurement Regulations'), setting forth the World Bank's policy on conflict of interest.

To obtain the maximum degree of comparison among Expressions of Interest (EOIs) and facilitate the evaluation process, the EOI should be a maximum of 30 pages and include the following information included below:

- **Title page with name of firm submitting the EOI:** should contain name of firm (or joint venture and/or a sub-consultancy, if applicable), address, email, telephone, name of contact person and date of submission.
- **Expression of Interest:** including the firm's general and specific experience, pool of experts etc.

Consultants may associate with other firms to enhance their qualifications but should indicate clearly whether the association is in the form of a joint venture and/or a sub-consultancy. In the case of a joint venture, all the partners in the joint venture shall be jointly and severally liable for the entire contract, if selected.

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

Further information can be obtained at the address below during office hours 08:30 a.m. – 4:00 p.m. (0830 to 1600 hours).

For more information or to submit Expressions of Interest, please contact:

Jossie Stephenson
Procurement Officer
OECS Commission Morne Fortuné
P.O. Box 1383
Castries
Saint Lucia
Telephone: 758-452-5895
Email: procurementbids@oecs.int

Copied to:

Mrs. Farzana Yusuf-Leon, email: farzana.yusufleon@oecs.int

An electronic copy of Expressions of Interest are to reach the OECS Commission by **November 21, 2025** addressed to:

Ms. Jossie Stephenson, Procurement Officer

At the following email address: procurementbids@oecs.int

copied to farzana.yusufleon@oecs.int

The email submissions should include the name and address of the Consultant and shall be clearly marked in the subject line as **“Expression of Interest – Consulting Services for the preparation of OECS Guidelines and Best Practices for Beaches, Marinas, Moorings and Boat Operators.”**.

The Terms of Reference for this consultancy is provided below.



Unleashing the Blue Economy of the Caribbean (UBEC)

Scope of Services
Terms of Reference

Consulting Services for the preparation of OECS Guidelines and Best Practices for Beaches, Marinas, Moorings and Boat Operators

July 2025
Revised September 2025

1.0 Introduction/Background

The Caribbean Sea, despite covering less than 1% of the world's ocean area (2.75 million sq. km), directly supports the economies of 34 coastal and small island countries and territories. This rich marine ecosystem, comprising coral reefs, mangroves, sea grasses, sandy beaches and rocky shores, boasts remarkable biodiversity and high regional endemism, making it the most concentrated zone for endemic marine species in the Western Hemisphere.

The Organisation of Eastern Caribbean States (OECS), comprising small island states, recognises the marine space as a key economic asset. Guided by the Eastern Caribbean Regional Ocean Policy (ECROP) and its associated strategic action plan (ECROP SAP), the OECS has embraced a transition to a Blue Economy to foster sustainable development, environmental resilience and inclusive prosperity.

Marine and coastal tourism – anchored by beaches, marinas, moorings and boat-based activities – represents a critical sector for economic development. However, the absence of harmonised regional standards poses risks to safety, service quality and environmental sustainability. Through World Bank support under the *Unleashing the Blue Economy of the Caribbean (UBEC)* Project (see Appendix), the OECS Commission seeks to engage a consulting firm to develop regional guidelines, best practices, and a roadmap for standards in marine-based tourism. These tools will promote safe, sustainable, environmentally responsible marine-based tourism and high-quality visitor experiences, while fostering economic resilience and community empowerment.

Given the multiplicity of users and uses in coastal and marine areas, these tools are critical to:

- Ensure safety, legal compliance and service quality
- Promote environmental stewardship
- Encourage consistency and excellence across the region
- Enable participation in global programmes (e.g., Blue Flag Certification) that recognize sustainability in tourism and enhance regional competitiveness in the global tourism market

2.0 Objectives

To engage a **Consulting Firm** to:

- Develop an OECS-wide guideline and best practices for sustainable management of beaches, marinas, moorings and commercial boat operators engaged in tourism services, including passenger transport, excursion and sightseeing tours, dive and fishing charters, yacht charters, and other recreational or leisure activities including non-motorised watercraft, offered to paying visitors
- Promote safe sustainable and responsible marine tourism while safeguarding the coastal environment
- Prepare a roadmap for standards development and implementation, including legal and institutional reform needs

- Adopt a phased approach whereby guidelines and best practices form the basis for identifying and prioritising areas requiring more formal standardization or legislative action, ensuring alignment with national and regional development priorities.
- Ensure a multi-disciplinary approach that integrates tourism, fisheries, environment, ports, coastal infrastructure, maritime safety, disaster risk management, planning and social development

3.0 Scope of Services and Design Considerations

The consulting firm shall prepare guidelines and best practices for beaches, marinas, moorings and boat operators; and identify priority areas requiring formal standards. A structured, multidisciplinary and participatory process shall guide implementation to ensure regional harmonisation, stakeholder buy-in, technical soundness and policy relevance.

The consultant will be required to review relevant literature, including legislation; engage relevant stakeholders; assess existing guidelines, best practices and standards; and develop tailored OECS guidelines and best practices. The assignment will require travel to UBEC implementing countries to ensure inclusivity, but also include broader regional (OECS) stakeholder consultation and validation.

Task 1 - Prepare a Work Plan

The Consulting Firm will prepare a detailed work plan outlining, amongst other things, the team carrying out the work and the management structure set to ensure successful delivery of the assignment; the schedule, inclusive of milestones and performance monitoring and evaluation protocol. Contingencies must be built into planning to allow the team to adapt to changing conditions.

In preparing the work plan, the Firm shall conduct an inception meeting with the Client upon commencement of the assignment to:

- a) review the process for the conduct of all activities within the scope of services,
- b) determine roles and responsibilities,
- c) discuss the basis on which this work will be implemented, and
- d) finalise the work plan and schedule, incorporating client feedback.

A final work plan and report detailing the outcome of the inception meeting will be prepared by the Firm and submitted to the client for review and approval.

Deliverable: Output 1 – Inception Report, including work plan and schedule

Task 2 – Desk Review and Stakeholder Consultation

The Consulting Firm shall undertake a comprehensive review of policies, regulations, standards, guidelines, and best practices at national, regional and international levels. This includes legal, technical and institutional gap analysis. Engagement with stakeholders will be hybrid (virtual and

in-person) and include site visits to relevant marine tourism facilities across the three UBEC Member States.

A **stakeholder mapping exercise** shall be prepared as a sub-deliverable. This mapping must identify all competent authorities, including but not limited to: Ports, Tourism, Fisheries, Environment, Maritime Safety, and Bureaus of Standards, Coastal Infrastructure/Waterfront Authorities, Land Use Departments, Disaster Risk Management Agencies, as well as private sector operators (e.g., marina and boatyard operators), regional bodies and traditionally underrepresented groups such as local fisherfolk, beach vendors, community associations, and women-led or informal marine-based enterprises, with a focus on ensuring gender equity and social inclusion.

The Consulting Firm shall engage key stakeholders through interviews and focus groups, both virtually and in-person, in the UBEC participating countries, including:

- National agencies responsible for Ports, tourism, fisheries, environment and standards
- OECS focal points and UBEC participating countries
- Relevant regional and international agencies, including CARICOM Regional Organisation for Standards and Quality (CROSQ)
- Local stakeholders across the tourism and marine sectors, particularly in the UBEC participating countries, with targeted outreach to ensure representation of marginalised groups.

The Firm will conduct benchmarking of international best practices such as the Blue Flag Certification Programme and other UNEP, IMO and US Clean Marina programs, as well as review relevant international standards, including but not limited to:

- Sustainable tourism (e.g., ISO 21401),
- Environmental management (ISO 14001),
- Safety management for recreational boating and marinas (ISO 13687 series, ISO 799, ISO 19083),
- Tourism and Related Services – Requirements and Recommendations for Beach Operations (ISO 13009)
- Tourism and Related Services – Sustainable Tourism – Good Practice for Implementing Fundamental Principles of Sustainable Tourism in Tourism Destinations (ISO 19882)
- Quality management systems (ISO 9001)

The findings of the review and consultations will inform a baseline assessment highlighting current practices, gaps, climate resilience, challenges and opportunities. This assessment will inform the development of guidelines and identify areas that require formal standards.

Deliverable: Output 2 – Report on Assessment, Gap Analysis and Recommendations to include:

- 1. Stakeholder Mapping Report***
- 2. Consultation Summary***
- 3. Assessment, Gap Analysis and Recommendations Report***

Task 3 – Develop Draft Guidelines, Best Practices and Roadmap for Standards Development

The OECS-wide guidelines and best practices will serve as a foundation for broader regulatory alignment by building consensus, testing feasibility and supporting strengthening capacity. Insights from their implementation will guide the phased and evidence-based identification of areas where formal standards or legislative action may be required.

Based on the findings from the mapping exercise, stakeholder consultations and baseline assessment under Task 2, the Consulting Firm shall develop draft OECS-wide guidelines and best practices for the management and operation of beaches, marinas, moorings, and boat operators. The guidelines must reflect the diverse needs, capabilities and operating realities of stakeholders across the OECS, including local fisherfolk, beach vendors, community groups and private operators.

The guidelines should address, at minimum, the following areas:

- **Environmental management:** Environmental conservation and protection measures, e.g. guidelines for waste management, pollution control, and habitat preservation; and best practices for sustainable development and eco-friendly operations (small craft boaters and marinas).
- **Infrastructure and operations:** facility standards, maintenance, visitor management
- **Safety and risk management:** [for small craft boaters, swimmers, beachgoers] lifeguard services, signage and emergency response protocols
- **Responsible tourism practices:** ethical conduct, cultural sensitivity, community engagement and incentives for sustainable practices
- **Climate Resilience:** adapting to changing conditions
- **Navigation and boating standards:** safe boating practices, mooring systems
- **Standard operating procedures (SOPs):** preventive maintenance, overcrowding control, customer service
- **Compliance mechanisms:** monitoring, enforcement, grievance redress

The Firm shall also prepare a draft Roadmap for Standards Development and Implementation, identifying priority areas for formal standardisation. The roadmap shall:

- Propose short, medium and long-term actions
- Define institutional roles and responsibilities (OECS Commission, national governments, regional standards bodies)
- Identify legal or policy adjustments required
- Highlight capacity-building and resource needs
- Suggest financing strategies and partnership opportunities, including public-private partnerships
- Include an indicative timeline and monitoring framework with measurable indicators

Draft outputs shall be circulated to the OECS Commission and the Regional Working Group for review and feedback prior to validation.

Deliverable: Output 3 – Draft OECS Guidelines and Best Practices for beaches, marinas, moorings and boat operators; and a Draft Roadmap for the development and implementation of standards

Task 4 – Validation and Finalisation of Guidelines, Best Practices and Roadmap

The Consulting Firm shall revise the Draft OECS Guidelines, Best Practices and Roadmap based on the feedback from the focal agencies including Tourism, Ports, Fisheries and Environment, and peer review from the technical team at the OECS Commission.

The Consulting Firm will facilitate a **regional validation workshop** comprising the Regional Working Group and other multi-disciplinary representatives from the Member States and the OECS Commission, to present the Draft OECS Guidelines, Best Practices and Roadmap. The Working Group will provide formal validation of the draft outputs and ensure alignment with national and regional priorities, policies and implementation frameworks.

Based on the feedback received during the validation session, the Consulting Firm shall finalise and submit:

- The OECS Guidelines and Best Practices for beaches, marinas, moorings and boat operators; and
- The Roadmap for Standards Development and Implementation

The Consultant shall also prepare a **Validation Report** summarising the key recommendations from the Regional Validation Workshop and how they were addressed in the final deliverables.

Deliverable: Output 4 – Validation Report; Final OECS guidelines and best practices for beaches, marinas, moorings and boat operators; and a roadmap for development and implementation of standards.

4.0 Outputs

The following four (4) outputs will result from this consultancy:

- **Output 1:** Inception Report, including work plan and schedule
- **Output 2:** Report on Assessment, Gap Analysis and Recommendations
- **Output 3:** Draft OECS guidelines and best practices for beaches, marinas, moorings and boat operators; and a draft roadmap for the development and implementation of standards
- **Output 4:** Validation Report; Final OECS guidelines and best practices for beaches, marinas, moorings and boat operators; and a roadmap for preparation and implementation of standards

5.0 Deliverables Timetable

Work under this assignment is anticipated to be done over 95 professional days and undertaken over a period of 12 months, and the Consulting Firm is expected to deliver the following within the stipulated timeframe:

Milestones and Outputs	Final Output due at end of month	Notes
Award of Contract	0	Contract signed by both parties
Output 1: Inception meeting report, including work plan and schedule	3 weeks after contract signature	
Interim Deliverable: Stakeholder Mapping Report (sub-deliverable of Output 2)	Month 2	
Output 2: Report on Assessment, Gap Analysis and Recommendations	Month 3	
Interim Deliverable: Draft Outline/Framework of Guidelines	Month 5	
Milestone: Mid-term technical review meeting to validate draft framework	Month 6	
Output 3: Draft OECS Guidelines, Standards and Best Practices for beaches, marinas, moorings and boat operators; and a draft roadmap for development and implementation of standards.	Month 7	
Milestone: Regional Validation Workshop	Month 10	
Output 4: Final OECS Guidelines, Standards and Best Practices for beaches, marinas, moorings and boat operators; a roadmap for development and implementation of standards. and validation report.	Month 12	

6.0 Indicative Payment Schedule

Deliverable acceptance	Payment
Output 1: Inception meeting report, including work plan and schedule	10%
Output 2: Report on Assessment, Gap Analysis and Recommendations	25%
Output 3: Draft OECS guidelines and best practices for beaches, marinas, moorings and boat operators; and a roadmap for the development and implementation of standards	35%
Output 4: Final OECS guidelines and best practices for beaches, marinas, moorings and boat operators; and a roadmap for the development and implementation of standards	30%

7.0 Qualifications and Experience

This assignment will be carried out by a consulting firm and is expected to have:

- A minimum of 7 years of experience in sustainable tourism development and planning.
- Demonstrated capacity and capability in development of environmental, natural resource management and safety guidelines and standards or best practices.
- Demonstrated knowledge and/or working experience pertaining to marina operations and boating.
- Demonstrated knowledge and/or working experience pertaining to management of public recreational areas, including beaches.
- Demonstrated experience in undertaking at least one similar assignment which has been successfully completed.

The firm must also provide a team of experts who will provide the skill mix as detailed in the scope of services presented above, including:

Tourism Planning and Development Specialist

- A post graduate qualification in sustainable tourism planning and development, economics, marketing, or other relevant area.
- At least 5 years of demonstrated experience in developing tourism policies, strategies, and guidelines to promote sustainable tourism development.
- Demonstrated knowledge and experience pertaining to tourism in the OECS region is required
- Knowledge and understanding of the Caribbean and/or OECS contextual environment is an advantage.
- Experience working with a wide range of stakeholders, including private sector, government agencies, and regional and/or international organizations.
- Excellent command of written and spoken English.

Quality Assurance and Standards Specialist

- A graduate or post graduate qualification in quality assurance, environmental sustainability or other relevant area.
- Work experience with a Standards Institution would be an asset.
- Demonstrated knowledge and/or working experience with National, Regional or International Standards
- Demonstrated knowledge and/or working experience pertaining to environmental and/or safety policy, regulations, guidelines and standards.
- Experience working with a wide range of stakeholders, including private sector, and government agencies.
- A minimum of 5 years of overall consulting experience.
- Excellent oral and written English communication skills.
- Experience in the English-speaking Caribbean region would be an asset.

Other experts, support staff & backstopping

The Consulting Firm may wish to have persons who provide administrative support as part of their team to ensure timely submission of deliverables in the required formats.

The costs for backstopping and support staff, as needed, are considered to be included in the tenderer's financial offer.

All experts must be independent and free from conflicts of interest in the responsibilities they take on.

Appendix

Unleashing the Blue Economy of the Caribbean (UBEC)

The Unleashing the Blue Economy of the Caribbean (UBEC) will be implemented as a Series of Projects (SOP) in three distinct five-year phases over a fifteen-year period (each project will have a life cycle of five years) involving multi-sectoral blue economy investments to support Caribbean countries to strengthen their climate resilience and accelerate economic recovery from the impacts of COVID-19. Phase 1 of UBEC, to be implemented between fiscal years 2022 and 2028, involves Grenada, Saint Lucia, Saint Vincent and the Grenadines, and the OECS Commission and focuses on three interrelated blue economy sectors: tourism, fisheries, and waste management.

The project development objective of the SOP and Phase I is to strengthen the enabling environment for the blue economy, economic recovery, and resilience of selected coastal assets in participating countries and provide immediate and effective response to an eligible emergency. Phase I of the SOP is designed to foster economic recovery and support marine and coastal resilience in Grenada, Saint Lucia, and Saint Vincent and the Grenadines by strengthening the sustainability and competitiveness of two critical, interconnected sectors – tourism and fisheries – and one underlying enabling infrastructure service, waste management. The SOP will achieve its objectives by: 1) strengthening regional and national policies and institutional frameworks to bring back business and attract new investments, (2) scaling up innovative financing mechanisms aimed at enhancing employment and productivity in the tourism, fisheries, and waste management value chains through establishment of a regional MSME matching grant program and a regional climate-risk fisheries insurance scheme, (3) supporting investment in coastal infrastructure to reduce risk and leverage private investment in blue economy activities and strengthen climate resilience, and (4) adopting a contingency emergency response mechanism to respond to future extreme weather events.

The SOP consists of four components: (i) Strengthening Governance, Policies, and Capacity Building; (ii) Scale Up Access to Finance and Infrastructure Investment; (iii) Contingent Emergency Response Component (CERC); and (iv) Project Management, Monitoring & Evaluation, and Communication.