

Expression of Interest – Research Service

Topic of Research: Economic impacts and policy opportunities arising from the Falepili Mobility Pathway

About the Australia-Pacific Partnerships Platform

The Australia-Pacific Partnerships Platform is an Australian Government initiative funded by the Department of Foreign Affairs and Trade (DFAT) and managed by DT Global. It provides Pacific countries with a suite of flexible, fit-for-purpose options that support broad governance and stability development outcomes. The Platform has two End of Investment Outcomes (EOIOs), and 8 Intermediate Outcomes (IOs) against which our work aligns; the EOIOs are:

- EOIO 1. Governance Program Delivery: Partner governments, ministries and organisations are more effective, accountable and inclusive in their governance and public financial management.
- EOIO 2. Enabling Development Services: The Australian Government's development cooperation programs and partner governments are supported with efficient, effective, inclusive and responsive enabling services.

For more information, please see www.partnershipsplatform.org

About Te Ao

As part of the Falepili Union, the Government of Australia (GoA) has committed to continue working closely with the Government of Tuvalu (GoT) to support Tuvalu's development priorities. Under the treaty, the governments of both countries have agreed to an enhanced development partnership that will support Tuvaluans to stay and thrive in their homeland. Through this enhanced partnership, the GoA is committed to supporting the GoT through the Tuvalu Australia Partnership on Economic Governance (Te Ao). This investment will support Tuvalu to build fiscal and economic resilience, to make resource allocation decisions that enhance resilience, and to strengthen sustainable and inclusive service delivery to meet the needs of Tuvalu's population.

Scope of Service

The Te Ao Program invites suitably qualified researchers, universities, research institutes and consortia to express interest in undertaking applied research on the Falepili Mobility Pathway. The research will generate practical evidence for the Government of Tuvalu to maximise economic and development benefits, understand participant challenges and assess options for targeted financial support.

1 Background

The Governments of Tuvalu and Australia have established the Falepili Mobility Pathway under the Falepili Union treaty. The pathway provides opportunities for Tuvaluan citizens to live, work and study in Australia, with potential implications for employment, education, household wellbeing, remittances, investment, long-term settlement and national resilience.

The pathway is a major policy initiative for Tuvalu. Broader human mobility research may be undertaken separately; this assignment is intentionally focused on the economic impacts, policy implications and

practical opportunities associated with implementation of the Falepili Mobility Pathway. It should complement, and not duplicate, other baseline or mobility studies.

The research will support evidence-based policy development and future planning by the Government of Tuvalu, the Te Ao Steering Committee and the Falepili Union Joint Committee. It is also expected to inform the work of Te Ao and the Falepili Stewardship Unit.

2 Purpose and objectives

The purpose of the assignment is to provide robust, culturally grounded and actionable evidence on the economic sustainability, opportunities and challenges arising from the Falepili Mobility Pathway.

The research will:

- assess current and potential economic impacts of the pathway for participants, households, communities and Tuvalu;
- identify the financial and settlement challenges experienced by Falepili visa holders;
- examine remittance, savings, investment, skills-transfer and circular migration opportunities;
- identify policy and program options that could maximise benefits and manage risks for Tuvalu;
- assess the feasibility of a financial mechanism or small loan facility to support visa holders during settlement; and
- provide practical recommendations that can guide Government policy, program design and future investment.

3 Scope of research

The provider will refine the scope during inception in consultation with the contracting authority and designated Government stakeholders. At a minimum, the study should address the following areas.

3.1 Economic impacts and opportunities

- Impacts on household income, employment, consumption, savings, debt, and financial resilience.
- Current and potential patterns of remittances, productive investment, and entrepreneurship.
- Labor market, skills development, knowledge transfer and circular migration opportunities.
 - Potential national-level benefits, costs and unintended consequences, including workforce and service-delivery implications for Tuvalu.
 - Differences in outcomes across relevant participant groups, including women, men, young people, people with disability and people from outer islands, where data permits.

3.2 Participant experience and financial challenges

- Upfront and ongoing costs associated with relocation and settlement.
- Access to banking, credit, housing, employment, and essential services.
 - Financial literacy, information and support needs before departure and after arrival.
 - Barriers that may affect equitable access to, and benefit from, the pathway.

3.3 Financial mechanism or small loan facility

The provider will undertake a proportionate feasibility assessment of a financial mechanism or small loan facility for eligible Falepili visa holders. This should consider:

- the problem the facility would address and the likely demand;
- potential eligibility, loan purpose, size, term, pricing, repayment and hardship settings;

- institutional and delivery options, including possible partners;
- legal, regulatory, fiduciary, safeguarding and consumer-protection considerations;
- capital requirements, operating costs, sustainability, risks and risk mitigations; and
- viable alternatives or complementary forms of support where a loan facility is not the preferred option.

3.4 Policy and implementation options

- Policy measures that could strengthen economic benefits and reduce adverse impacts.
- Institutional roles, coordination arrangements and realistic implementation pathways.
- Priority actions for the short, medium and longer term, with indicative resource and sequencing considerations.
- Practical indicators and data needs for ongoing monitoring.

4 Indicative research questions

- What economic benefits and costs are emerging, or are likely to emerge, for pathway participants, their households and Tuvalu?
- What financial, employment and settlement challenges do participants experience before departure and after arrival?
- How can remittances, savings, investment, entrepreneurship, skills transfer and circular migration contribute more effectively to Tuvalu's development priorities?
- What groups may experience different opportunities, barriers or impacts, and what measures could promote equitable participation and benefit?
- What policy, institutional or program measures would maximize benefits and manage risks?
 - Is a small loan facility or other financial mechanism feasible and appropriate? If so, what design and delivery model is most viable?
 - What data and monitoring arrangements are needed to support future decisions?
 - Applicants may propose refinements or additional questions where these would strengthen the study, provided the core purpose and priority areas are retained.

5 Methodology

A mixed-methods approach is anticipated. Applicants should propose a methodology that is rigorous, proportionate to the available timeframe and feasible across Tuvalu and Australia. The final methodology will be agreed during inception.

The approach is expected to include:

- a review of relevant literature, policy, program and administrative material;
- stakeholder mapping and an engagement plan;
- quantitative data collection, which may include a survey of pathway participants;
- semi-structured interviews or focus groups with participants, families, Australian and Tuvaluan Government officials, and other relevant stakeholders;
- case studies that illustrate diverse participant and family experiences;
- analysis of economic outcomes, policy implications and institutional opportunities;
- a feasibility and options analysis for targeted financial support;
- triangulation across data sources; and
- validation of emerging findings and recommendations with key stakeholders.

Applicants should explain their proposed sampling approach, anticipated sample size, participant recruitment, analytical methods, limitations and measures to support credible and representative findings. The provider should make effective use of existing data while clearly identifying data gaps.

6 Ethics data protection and cultural practice

The provider must apply appropriate research ethics and culturally safe practice throughout the assignment. The proposal should identify any institutional ethics approval required and explain how this will be secured without compromising the delivery timeframe.

Requirements include:

- free, prior and informed consent, including accessible participant information;
- confidentiality, privacy and secure management of personal and research data;
- clear protocols for anonymization, data access, retention and disposal;
- culturally appropriate engagement with Tuvaluan participants and communities;
- safe and inclusive participation, including for potentially vulnerable participants;
- compliance with applicable laws, institutional ethics requirements and contracting-authority policies; and
- prompt reporting and management of any ethical, safeguarding or data-security concern.

All data collection tools and consent materials must be approved by the contracting authority before use. Research data and outputs must not be published or shared beyond the agreed purpose without prior written approval.

7 Deliverables and indicative schedule

No	Deliverable	Minimum content	Indicative timing
1	Inception report	Final research questions; methodology; sampling; stakeholder map; work plan; ethics and risk approach; data-management plan; detailed deliverable schedule.	End of Week 3
2	Research tools	Survey, interview and focus-group instruments; participant information and consent materials; fieldwork protocols.	Before data collection
3	Progress update	Brief written update on participation, emerging issues, risks and any approved methodological changes.	End of Week 9
4	Draft research report	Integrated findings, analysis, limitations, financial-mechanism feasibility assessment and prioritized recommendations.	End of Week 13

No	Deliverable	Minimum content	Indicative timing
5	Validation workshop	Facilitation of a stakeholder validation session and concise record of feedback and agreed revisions.	Weeks 14–15
6	Final research package	Final report; executive summary; clean and documented datasets; codebook; approved transcripts or analytical files; and response-to-feedback matrix.	End of Week 16
7	Communication products	Two concise policy or research briefs and a presentation suitable for Government and committee audiences.	End of Week 16

The final schedule, review periods and acceptance arrangements will be agreed at contracting. Deliverables must be clear, concise and suitable for non-technical decision-makers. The provider will incorporate one consolidated round of comments on each draft deliverable unless otherwise agreed.

8 Assignment phases

Phase	Key activities	Timing
Preparation	Research design, literature and policy review, stakeholder mapping and ethics approvals	Weeks 1–3
Data collection	Surveys, interviews, case studies and fieldwork	Weeks 4–9
Analysis	Coding, economic and policy analysis, triangulation and options assessment	Weeks 10–12
Reporting	Draft report, validation, revision and final products	Weeks 13–16

9 Management reporting and stakeholder engagement

The provider will report to Development Effectiveness and Inclusion Specialist and work closely with designated representatives of the Government of Tuvalu and the Te Ao Program. The provider will participate in an inception meeting, regular progress meetings and a validation workshop. Key stakeholder engagement will be coordinated with the contracting authority to avoid duplication and consultation fatigue.

The contracting authority will facilitate reasonable introductions and access to available documents and data but does not guarantee participant availability or access to third-party datasets. The provider remains responsible for sound planning, stakeholder scheduling, ethics approvals and timely delivery.

10 Team composition and required capability

Expressions of interest are invited from individual researchers, universities, research institutes, consulting organizations or consortia. Multidisciplinary teams and partnerships that meaningfully include Tuvaluan or Pacific researchers are strongly encouraged.

The proposed team should collectively demonstrate:

- advanced qualifications and a strong publication or applied-research record in economics, migration, labour mobility, development policy, public policy, finance or a closely related field;
- demonstrated experience undertaking Pacific research, preferably relating to migration, mobility, remittances, labour markets or small island states;
- strong mixed-methods research design and quantitative and qualitative analysis capability;
- experience with feasibility studies, inclusive finance, loan facilities or financial-product design;
- knowledge of Tuvaluan context, institutions and culturally appropriate engagement practices;
- experience conducting research with geographically dispersed participants, including online data collection;
- strong research ethics, safeguarding and data-protection practice;
- the ability to communicate complex findings clearly to Government and non-technical audiences; and
- capacity to complete the assignment within the required timeframe.

The EOI should identify the proposed team leader and the specific responsibilities, availability and level of effort of each team member. Any subcontracting or consortium arrangement must be clearly explained.

11 Key risks and dependencies

Risk or dependency	Expected management response
Delays in Government or ethics approvals	Start approval processes immediately and build realistic contingency into the work plan.
Difficulty reaching participants in Australia or elsewhere	Use a combination of online and in-person methods and work with approved networks and Government contacts.
Low response rates or selection bias	Use a clear sampling strategy, targeted recruitment and transparent analysis of limitations.
Travel disruption or logistical constraints	Maintain flexible fieldwork and remote-delivery options.
Data gaps or quality concerns	Triangulate sources, assess data quality and clearly state limitations.

Risk or dependency	Expected management response
Consultation fatigue or overlapping research	Coordinate engagement and use existing evidence where appropriate.
Sensitive personal or financial information	Apply strong consent, privacy, anonymisation, safeguarding and data-security protocols.

Other dependencies include participant and stakeholder availability, access to relevant data, completion of procurement processes and continued availability of approved funding.

12 Budget and financial proposal

The assignment will be funded under the approved Te Ao FY2026–27 work plan allocation for research and policy support, subject to final approval and contracting. Applicants must submit a value-for-money financial proposal in **AUD**, exclusive and inclusive of applicable taxes where relevant.

The budget should itemize:

- professional fees by team member and level of effort;
- travel, accommodation and related fieldwork costs;
- survey, data collection, translation and transcription costs;
- consultation and validation costs;
- report production and dissemination costs; and
- any other direct expenses and assumptions.

The contracting authority reserves the right to negotiate the scope, methodology, team composition, schedule and price before contract award

13 EOI submission requirements

EOIs should be concise and provide sufficient evidence for assessment. Submissions should include:

Component	What to include
Cover letter	Applicant identity, lead contact and confirmation of availability.
Technical response	Understanding the assignment, proposed approach and any recommended refinements to scope or questions.
Methodology and work plan	Methods, sampling, analysis, ethics pathway, stakeholder engagement, schedule, risks and quality assurance.
Team	Roles, level of effort, relevant qualifications and brief CVs for key personnel.

Component	What to include
Relevant experience	Up to three comparable assignments, including client, dates, scope and outcome; referees may be requested.
Pacific and local participation	How Tuvaluan and Pacific expertise, capability development and culturally appropriate practice will be embedded.
Financial proposal	Fully itemised budget and assumptions.
Declarations	Actual or potential conflicts of interest, subcontractors and any conditions or departures from the TOR.

EOIs should not exceed 10 pages excluding CVs and financial schedules.. Submissions must be in English and received by the closing date and method on the EOI advert. Late or incomplete submissions may not be considered.

14 Evaluation criteria

EOIs will be assessed on the basis of technical quality and value for money. The proposed weighting is:

Criterion	Weight
Understanding of the assignment and quality, feasibility and cultural appropriateness of the proposed methodology	20%
Relevant organizational and team experience, including Pacific migration or mobility research	15%
Team capability, availability and appropriate inclusion of Tuvaluan or Pacific expertise	15%
Work plan, ethics, data management, risk management and ability to deliver within the timeframe	10%
Technical subtotal	60%
Financial proposal and overall value for money	40%

Criterion	Weight
Total	100%

The contracting authority may shortlist applicants, request clarification, invite a presentation or interview, contact referees, undertake due diligence, or seek a full proposal before making a final selection. The lowest-priced submission will not necessarily be selected.

15 Intellectual property confidentiality and publication

Ownership, licensing, and permitted use of research outputs, instruments, and datasets will be set out in the contract. Unless otherwise agreed in writing, all assignment information and participant data must be treated as confidential and used only for this assignment. No report, article, presentation, dataset, or other output arising from the assignment may be published, presented or shared externally without prior written approval from the contracting authority and any required Government approval.

16 Procurement conditions

- This EOI does not constitute an offer or commitment to contract.
- The contracting authority may amend, suspend or cancel the process, request additional information, or negotiate with one or more applicants.
- Applicants are responsible for their own costs in preparing and submitting an EOI.
- All actual or perceived conflicts of interest must be disclosed.
- The successful provider will be required to meet applicable due-diligence, contracting, safeguarding, insurance and compliance requirements.

Other Information

Amendments to the terms of reference may be made during the period of the engagement as required.

DT Global is deeply committed to safeguarding, which refers to how we keep people and the environment safe from harm. This includes children and vulnerable groups that we interact with as beneficiaries; partners who we collaborate with to deliver our programs; government stakeholders who we support; and importantly, our own personnel.

We take a zero-tolerance approach to sexual exploitation, abuse and harm of adults and children; fraud, corruption and bribery; modern slavery; and any form of exploitation across our operations, partnerships, and supply chains. We uphold the highest standards of integrity and expect the same of those we work with.

Engagement with DT Global is subject to formal background screening, criminal record checks, employment verification, and periodic compliance checks. All DT Global staff receive safety, compliance, safeguarding and integrity training, and we expect our personnel and partners to always act in alignment with our company values.