



PERFORMANCE EVALUATION OF USAID/BIH'S DEVELOPING SUSTAINABLE TOURISM IN BOSNIA AND HERZEGOVINA (TURIZAM)

FINAL REPORT

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MONITORING AND EVALUATION SUPPORT ACTIVITY II (MEASURE II)

PERFORMANCE EVALUATION OF USAID/BIH'S DEVELOPING SUSTAINABLE TOURISM IN BOSNIA AND HERZEGOVINA (TURIZAM)

Final Report

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ABSTRACT

The U.S. Agency for International Development in Bosnia and Herzegovina (USAID/BiH)–funded Developing Sustainable Tourism in Bosnia and Herzegovina (TURIZAM) is a \$19.9 million, five-year Activity running through August 2025, implemented by Chemonics International, Inc. This midterm performance evaluation, conducted by USAID/BiH’s Monitoring and Evaluation Support Activity (MEASURE II), examines the Activity’s design, implementation, and progress toward contractual objectives. This report was prepared to inform USAID/BiH’s decision-making for the remainder of the Activity, including any potential adaptations that need to be made to achieve the Activity’s expected results. The midterm performance evaluation was conducted between June and October 2023 and assessed the first 2.5 years of TURIZAM implementation.

The findings indicate that TURIZAM is perceived positively for its comprehensive design, effective implementation, and ability to adapt to challenges such as the Coronavirus disease of 2019 (COVID-19) pandemic and political turmoil. TURIZAM interventions laid the foundation for tourism development in the future by improving the strategic framework for sector development, standards and certifications, and quality of tourism products and services, as well as by investing in Bosnia and Herzegovina (BiH) promotion internationally. TURIZAM exceeded the majority of its contractual targets for the first two years but faced challenges in meeting targets related to facilitating micro, small, and medium enterprises’ (MSMEs’) access to finance and public–private partnerships (PPPs). Recommendations include supporting governments in the implementation of tourism development strategies, developing the BiH destination brand and promoting it internationally, strengthening the sector’s advocacy capacity, continuing good practices in grant implementation, and replicating the activities that yielded early results and closely monitoring those that have not produced any outcomes to date.

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ACRONYMS AND OTHER ABBREVIATIONS

AIR	American Institutes for Research
APS	Annual Program Statement
BAM	Bosnia and Herzegovina Convertible Mark
BD	Brčko District
BiH	Bosnia and Herzegovina
CO	Contracting Officer
COR	Contracting Officer's Representative
COVID-19	Coronavirus Disease of 2019
DI2	Diaspora Invest 2
EQ	Evaluation Question
ET	Evaluation Team
EU	European Union
FBiH	Federation of Bosnia and Herzegovina
FMoET	Federal Ministry of Environment and Tourism
FGD	Focus Group Discussion
FTC	Foreign Trade Chamber
GES	Gender Equality Seal
HWR	Herzegovina Wine Route
IP	Implementing Partner
IR	Intermediate Result
JIP	Joint Implementation Plan
KI	Key Informant
KII	Key Informant Interview
LGAA	Local Governance Assistance Activity
LoA	Life of Activity
MBV	Most Beautiful Villages
MEASURE II	Monitoring and Evaluation Support Activity II
MEL	Monitoring, Evaluation, and Learning
MSME	Micro, Small, and Medium Enterprises
MTT	Ministry of Trade and Tourism
NGO	Nongovernmental Organization
NP	National Park
PPP	Public Private Partnership
PtP	Pathways to Professionalism
PwD	People with Disabilities
RfA	Request for Application
RS	Republika Srpska
SPPG	Supporting Political Pluralism and Good Governance Processes
TRP	Tactical Recovery Plan
TSA	Tourism Satellite Account
TURIZAM	Developing Sustainable Tourism in Bosnia and Herzegovina
U.S.	United States

UN	United Nations
UNDP	United Nations Development Programme
UNWTO	The United Nations World Tourism Organization
USAID	United States Agency for International Development
USAID/BiH	United States Agency for International Development Mission in Bosnia and Herzegovina
WTTC	World Travel and Tourism Council

EXECUTIVE SUMMARY

INTRODUCTION AND BACKGROUND

By request of the United States Agency for International Development Mission in Bosnia and Herzegovina (USAID/BiH), the USAID/BiH's Monitoring and Evaluation Support Activity (MEASURE II) conducted a midterm performance evaluation of Developing Sustainable Tourism in Bosnia and Herzegovina (TURIZAM) Activity. TURIZAM is a \$19.9 million USAID/BiH-funded Activity implemented by Chemonics International Inc. The Activity launched in August 2020 and is scheduled to close in August 2025. The midterm performance evaluation examined TURIZAM's progress during the first 2.5 years of implementation aimed at strengthening and improving economic growth in the tourism and tourism-related sectors. The Mission and the implementing partner (IP) will use the evaluation results to make informed programmatic decisions and apply midterm corrective actions in Activity design and implementation. The evaluation team (ET) ensures the credibility and relevance of evaluation findings, conclusions, and recommendations by conducting a rigorous evaluation design and implementation plan.

METHODS

The TURIZAM evaluation was conducted between July and October 2023. The evaluation employed a comprehensive, mixed-method data collection approach that utilized multiple data sources and types to triangulate findings. The evaluation design included a desk review of Activity documents and secondary data sources, 41 individual and group key informant interviews (KIs), two focus group discussions (FGDs), and online surveys of USAID/BiH TURIZAM partners and beneficiaries. The evaluation team sampled individuals from United States Agency for International Development (USAID), the TURIZAM IP, TURIZAM partners from the public and private sectors, TURIZAM beneficiaries, and international organizations working in the tourism sector in Bosnia and Herzegovina (BiH). The evaluation team triangulated data to identify findings, conclusions, and recommendations.

FINDINGS AND CONCLUSION

EVALUATION QUESTION I: HOW HAS TURIZAM BEEN DESIGNED AND IMPLEMENTED, AS PERCEIVED BY ITS PARTNERS AND BENEFICIARIES?

For a vast majority of key informants (KIs), the TURIZAM design was comprehensive, encompassing all key issues and addressing the major gaps in the BiH tourism sector. For many KIs, the funding amount of the Activity's grant was not sufficient in the light of the needs of the sector. Grant recipients were mostly satisfied with the amounts they received, although they noted receiving less funding than they had requested in their applications. Nevertheless, KIs noted that government support and access to finance for micro, small, and medium enterprises (MSMEs) in the tourism sector are insufficient.

Most KIs praised TURIZAM's contribution across its interventions and described TURIZAM employees as approachable and professional. KIs appreciated the Activity's efforts to promote BiH as tourist destination, offer high quality trainings and education, draft tourism development strategies, and support workforce development. In a few cases, however, efficient implementation was hindered by design shortcomings of certain interventions. For instance, KIs suggested that the timing and sequencing of some interventions could have been better coordinated with stakeholders and partners and that some in-person and online training courses were not available in the local language.

TURIZAM conducted in-depth assessments of its areas of assistance and consulted with a wide range of stakeholders to develop relevant documents (e.g., strategies, plans, analyses) and plan its activities.

The Activity continuously searched for areas of cooperation with other donors and international partners from the sector and established good cooperation.

According to most KIs, TURIZAM integrated gender considerations into all its interventions. The Activity produced the first-ever tourism sector gender assessment in BiH and a disability inclusion analysis and plan.

TURIZAM started implementing most of the activities in line with the initial design, but some of the planned activities were canceled or modified because of new insights from the field.

EVALUATION QUESTION 1A: HOW HAS TURIZAM MANAGED, IMPLEMENTED, MONITORED, AND COORDINATED THE GRANT COMPONENT OF THE ACTIVITY?

TURIZAM managed its grant component in accordance with the USAID-approved grants manual. The grant component of TURIZAM included three different Requests for Applications (RfAs): the first two targeted nongovernmental organizations (NGOs) and local cooperatives, associations, or firms; the third round aimed to support destination management companies or inbound travel agencies. Overall, TURIZAM received 180 concept notes and approved funding for 23 grant applications.

All grantees were satisfied with TURIZAM's grant management and noted the commitment and dedication with which the Activity's staff supported the grant application and implementation process. Grant applicants with substantial experience in developing project applications regarded the application process as straightforward, but it was more demanding for applicants with limited experience. All grantees greatly appreciated the Activity's provision of technical assistance, including mentorship to applicants whose concept notes were approved and reviews of draft applications by a TURIZAM technical expert. Still, some grantees felt that the grant approval process was too long and led to delays in implementing planned activities. TURIZAM explained that some delays were caused by needing to provide multiple rounds of feedback to grantees with low capacity to develop quality grant applications, along with a large number of applications TURIZAM received for one of its RfAs, which the Activity struggled to process in a timely manner.

Grant recipients reported few problems during grant implementation and were appreciative of the support provided by the Activity's staff, who conducted active grant monitoring through regular site visits and phone calls. Grant disbursement was conditional on achievement of predefined milestones and submission of progress reports. Although this was not felt to be a major problem, virtually all grant recipients reported that receiving grant disbursements in advance would have been preferable.

EVALUATION QUESTION 1B: HOW HAVE THE CONTEXTUAL FACTORS (COVID-19 PANDEMIC, WAR IN UKRAINE, AND LOCAL POLITICAL ISSUES) AFFECTED TURIZAM IMPLEMENTATION?

Most KIs agreed that Coronavirus disease of 2019 (COVID-19) had devastating effects on the tourism sector. TURIZAM successfully adapted to the conditions created by the COVID-19 pandemic by switching to operating remotely through virtual implementation of most interventions. TURIZAM developed the tourism Tactical Recovery Plan (TRP) and organized a process resulting in receipt of the Safe Travels Stamp by BiH, the first country in the region to receive the stamp. The pandemic fostered new trends in tourism, including digitalization, a shift to domestic tourist destinations, and the rise in other tourism subsectors, such as adventure and rural tourism.

Although the war in Ukraine did not directly affect the tourism sector, the related inflation negatively affected the implementation of some TURIZAM grants. However, some stakeholders believed that the attractiveness of BiH as a low-cost tourist destination was not hurt by inflation.

Most KIs agree that the current political situation negatively affected tourism sector development. The complexity of BiH government structure and the lack of a state-level tourism ministry complicated the implementation of TURIZAM interventions, an issue that was further exacerbated by political blockages at the entity level. Still, TURIZAM and its partners were able to avoid political pitfalls and work successfully with institutions and organizations on state, entity, and local levels.

EVALUATION QUESTION 2: WHAT PROGRESS HAS TURIZAM ACHIEVED IN REACHING ITS CONTRACT TARGETS AND RESULTS IN TERMS OF IMPROVING ECONOMIC GROWTH IN THE TOURISM SECTOR?

TURIZAM supported the creation of the entity and Brčko District (BD) tourism development strategies, resulting in adoption of the Republika Srpska (RS) and Federation of Bosnia and Herzegovina (FBiH) strategies, although the adoption of the BD tourism strategy is still pending. For the FBiH, this was the first tourism development strategy ever adopted. TURIZAM heavily promoted BiH in international markets by supporting tourism boards, international fair attendance, and presenting BiH as a unique brand. TURIZAM supported trips to BiH for media representatives, which resulted in their publishing articles about BiH in prominent international magazines such as *The Daily Telegraph* and *The Guardian*. TURIZAM also designed and implemented a Trip Advisor campaign to promote the FBiH, resulting in 18 million views and 22,000 clicks. The Activity's work with the Sarajevo and Tuzla international airports helped in the development of several new air travel routes. The promotion of the Herzegovina Wine Route (HWR) and the BiH wine tourism destination brand with the BiH Foreign Trade Chamber (FTC) increased the international recognition of this region as a wine destination. The city of Trebinje has been recognized as one of the top 100 green destinations in the world, and one of the villages selected and promoted through the Most Beautiful Villages (MBV) initiative was recognized as one of 52 Best Tourist Villages of the World in 2022. TURIZAM's grants for training boosted employment opportunities for trainees, whereas grants for marketing enhanced grantees' presence in both domestic and international markets.

In other areas of implementation, TURIZAM laid a strong foundation for further sector development. These areas include, for instance, tourism-related regulatory improvements in environmental protection and nature conservation; TURIZAM's interventions aiming to improve the quality of tourism products and services, including TURIZAM Academy, Pathways to Professionalism (PtP), and TedQual certifications; and attaining quality marks, geographic indications, and certification for agricultural and rural products and processes. TURIZAM continues working to improve access to finance for tourism service providers, agriculture, and other tourism-related MSMEs, and supports initiatives to attract potential public-private partnership (PPP) investments into the sector. Stakeholders praised TURIZAM's engagement in all these areas. However, higher-level results – improved environmental protection and nature conservation, improved quality of tourism products and services, and increased placement and sales of indigenous tourism products, require more time and have yet to be seen.

RECOMMENDATIONS

To enhance economic growth in the tourism sector, this report recommends considering:

1. supporting entity ministries in the implementation of tourism development strategies and regulatory reform agendas;
2. strengthening the sector's advocacy capacity;
3. developing and promoting the harmonized BiH destination brand;
4. investing more effort into advocating for visa waivers and simplifying procedures for target markets¹;
5. continuing to work with international airlines and local airports on establishing new air travel routes;
6. strengthening the capacity of tourism MSMEs to access new sources of funding;
7. working on PPP legislation, capacity, and promotion;
8. continue to support the inclusion of women and people with disability (PwD) in the sector;
9. supporting tourism boards to mobilize funds and invest in digital marketing;
10. continue to find and promote new tourism products;
11. expanding the Activity grant fund;
12. removing delays which affect the grant application timeliness and modifying rules around cost contributions;
13. continuing with good practices around cooperation with other donors, and strengthening collaboration with other USAID's IPs;
14. replicating the approaches that yielded the results and closely monitoring (ideally, employing the complexity-aware monitoring approaches) those that have not produced any visible results;
15. continuing and being consistent in including relevant stakeholders in activity design and planning;
16. facilitating development of domestic tourism;
17. modifying the Activity Monitoring, Evaluation, and Learning (MEL) plan to revise targets for indicators on which the Activity under- or over-performed.

¹ According to USAID, TURIZAM initiated stronger advocacy activities for visa waivers and simplifying procedures shortly after the completion of the evaluation data collection.

INTRODUCTION

In May 2023, the United States Agency for International Development Mission in Bosnia and Herzegovina (USAID/BiH) issued a statement of work to its Monitoring and Evaluation Support Activity (MEASURE II), implemented by the American Institutes for Research (AIR), to conduct a midterm performance evaluation of the United States Agency for International Development (USAID) funded Developing Sustainable Tourism in BiH (TURIZAM). The midterm performance evaluation assessed Activity design, performance, and outcomes achieved during the first 2.5 years of implementation and provides actionable recommendations to inform decision-making for the remainder of Activity implementation.

BACKGROUND

This section of the evaluation report gives the basic information about the TURIZAM Activity, expected results, and performance indicators. The Activity contributes to the 2020–2025 USAID/BiH’s country development and cooperation strategy’s Development Objective 2: “Socio-Economic Conditions Improved.” The Activity was launched in August 2020 and is scheduled to end in August 2025.

SUMMARY INFORMATION

TURIZAM is a five-year, \$19.9 million Activity implemented by Chemonics International, Inc. The Activity primarily contributes to Intermediate Result (IR) 2.2: “Private Sector Growth Increased” and Sub-IR 2.2.1: “Competitiveness of targeted industries and Micro, Small and Medium Enterprises enhanced.” For more information about the Activity, refer to Exhibit I.

Exhibit I. Basic Information on the TURIZAM Activity

Activity Name	Developing Sustainable Tourism Activity in BiH (TURIZAM)
USAID Office	USAID/BiH Economic Development Office
Implementer	Chemonics International, Inc.
Cooperative Agreement #	72016820C00004
Total Estimated Cost	\$19.9 million
Life of Activity	August 12, 2020, to August 11, 2025 (5 years)
Active Geographic Region	Across Bosnia and Herzegovina
Target Groups	Government institutions (state, entity, cantonal, and municipal levels), the private sector, trade organizations, business/professional associations, regional development agencies, nongovernmental organizations (NGOs), businesses
Country Development and Cooperation Strategy’s Intermediate Result	The Activity primarily contributes to IR 2.2 Private Sector Growth Increased The Activity also contributes to IR 1.2 Governance effectiveness in targeted areas strengthened
Required Evaluation	Yes
External or Internal Evaluation	External

ACTIVITY DESIGN

The purpose of the TURIZAM Activity is to accelerate economic growth in Bosnia and Herzegovina (BiH) by strengthening the tourism sector. The Activity design envisions fostering economic growth in the tourism sector by improving the regulatory environment; strengthening tourism quality,

services, and branding; facilitating access to finance for tourism service providers; and securing increased access to regional and global markets for tourism and indigenous agriculture products. According to the award, the Activity envisions that the development of the tourism sector will “lead to more jobs, provide sustainable income for producer organizations and tourism-related companies, help to change the “BiH brand,” and have a positive spill-over effect to other sectors, such as agriculture, transportation, and environmental protection.”

As is outlined in the Activity award, the TURIZAM Activity design has four objectives. Under **Objective 1**, the Activity aims to establish a stimulative environment for tourism sector growth by supporting the creation of harmonized tourism competitiveness regulatory frameworks at entity and state levels, and by implementing interventions focusing on environment protection and nature conservation. Under **Objective 2**, the Activity aims to improve the BiH tourism industry by strengthening tourism quality, services, and branding. Under **Objective 3**, the Activity focuses on improving access to finance for tourism service providers, agriculture, and other tourism-related micro, small and medium enterprises (MSMEs). This objective is expected to lead to a significant increase in investments. Under **Objective 4**, the Activity aims to increase tourism and local agriculture product access to local and regional markets.

EVALUATION PURPOSE AND QUESTIONS

The midterm performance evaluation of the TURIZAM Activity investigated the quality of the Activity design and implementation and explored the results achieved during the first 2.5 years of implementation with regard to enhancing economic growth in the tourism sector. The midterm performance evaluation aimed to provide USAID/BiH with actionable data and information to inform decision-making for the remainder of the Activity’s implementation, to maximize the likelihood of achieving the intended Activity results. The Mission and the implementing partner (IP) will use the evaluation results to take midterm corrective actions to the Activity design and/or implementation approach. The evaluation team (ET) assessed the Activity’s progress to date on the basis of the following evaluation questions (EQs) and subquestions:

1. How has TURIZAM been designed and implemented, as perceived by its partners and beneficiaries?
 - IA. How has TURIZAM managed, implemented, monitored, and coordinated the grant component of the Activity?
 - IB. How have the contextual factors (Coronavirus disease of 2019 (COVID-19) pandemic, war in Ukraine, and local political issues) affected TURIZAM implementation?
2. What progress has TURIZAM achieved in reaching their contract targets and results in terms of improving economic growth in the tourism sector?

EVALUATION METHODS AND LIMITATIONS

DATA COLLECTION APPROACH

The ET used a mixed-methods approach and relied on qualitative and quantitative data to address the EQs. Four key methods were used to collect data: documentation review, key informant interviews (KIIs), focus group discussions (FGDs), and an online survey of TURIZAM partners and beneficiaries, including grantees. From the launch of the evaluation throughout data collection and writing, the team conducted a documentation review. KIIs and FGDs were organized early in the evaluation process, and online surveys were implemented in the final stages of data collection. Details of those techniques are explained further below.

The ET triangulated the data collected through various data sources and techniques to ensure that the findings were reliable, valid, and credible.

ACTIVITY DOCUMENTATION: TURIZAM award (including modifications), progress reports, a Monitoring, Evaluation, and Learning (MEL) plan, and tracking tables represented the core documentation to address all evaluation questions. These documents helped the ET understand the Activity design, the way the activities were implemented and the extent to which the implementation followed the design, contextual factors that affected implementation, and results that the Activity achieved halfway through implementation. To assess the grant component of the TURIZAM Activity, the ET reviewed the grant-related documentation, such as requests for applications (RfAs), a grant manual, grant agreements, and available grant completion reports. The ET also reviewed TURIZAM's contract deliverables to better understand the Activity interventions. The full list of documents reviewed by the ET are presented in the Annex 2.

SECONDARY DOCUMENTATION: To understand the context and identify factors that potentially hindered or enabled the Activity implementation, the ET explored secondary data and reports with the particular focus on

- Travel and Tourism Competitiveness Index reports;
- Travel and Tourism Development Index reports;
- Agency for Statistics of Bosnia and Herzegovina reports;
- 2021 and 2022 European Commission's Bosnia and Herzegovina Progress Report;
- 2021–2027 Development Strategy of Canton Sarajevo; and
- European Bank for Reconstruction and Development Bosnia and Herzegovina country diagnostics reports.

KEY INFORMANT INTERVIEWS AND FOCUS GROUP DISCUSSIONS: KIIs were conducted from July 3 to September 11, 2023. In total, the ET conducted 41 KIIs with 65 participants. The interviews were conducted with USAID staff, TURIZAM staff, other donors and international organizations, and TURIZAM partners and beneficiaries. TURIZAM partners included government institutions, Nongovernmental Organizations (NGOs), chambers of commerce, national parks (NPs), tourist organizations, airports, and banks. The beneficiaries included grantees, trainees, and road show participants. In addition, it is important to note that some of TURIZAM's partners were also beneficiaries of the Activity. On the completion of the first draft report, the ET conducted an exit interview with TURIZAM staff to clarify the remaining inconsistencies and ambiguities.

The KII guides are provided in Annex 3. The ET carried out the majority of the KIIs remotely, via Zoom. Seven interviews were conducted in person.

Further, two FGDs were conducted during the data collection phase. One FGD was conducted with grant applicants who had not received grant assistance (referred to as nonbeneficiaries in Exhibit 2, below) and another FGD with the beneficiaries of the Most Beautiful Villages (MBV).² Both FGDs were conducted remotely, using the Zoom platform.

² Please see findings 4 and 19 for more information about the Most Beautiful Villages.

Exhibit 2. Number of Individuals Reached Through Interviews and Focus Groups.

USAID/ BiH	Implementing partners	Beneficiaries	Partners	Non-beneficiaries	International organizations	All
5	10	20	30	5	3	73

ONLINE SURVEYS: An online survey was developed to support the findings identified through documentation review, KIIs, and FGDs. The survey was sent to 1,584 Activity beneficiaries and 122 partners via email in the first week of October, followed by three reminder e-mails sent four days later and on the day of the deadline. The ET received 50 responses, for a response rate of 41 percent from partners, and 465 responses from beneficiaries, a 29 percent response rate.

For all data collection methods, participants were required to provide clear consent. Participants' personally identifiable information was anonymized in the analysis and reporting. The consent forms, survey questions, and KII and FGD protocols are included in Annex 3.

LIMITATIONS

INTERVIEWER BIAS. Interviewers' behavior and reactions may lead key informants (KIs) to respond in a certain way. Therefore, the interviewers were trained to ask questions in a nonleading manner. In addition to avoiding any potentially leading questions, the ET ensured that participants understood that the evaluation was for the purpose of learning, that their true opinions were valuable, and that their responses were confidential.

RESPONSE BIAS. Some stakeholders could have overstated or understated the results of the TURIZAM interventions. To account for this bias, the ET cross-checked inputs from various stakeholders and documentation to validate the findings. The ET ensured that KIs understood that their opinions were valued and that their responses were confidential.

Because the survey was conducted online, the response rate was entirely dependent on respondents' willingness to participate. The ET reminded the survey respondents about completing the survey via email, paying particular attention to explaining the purpose of the survey and the importance of the feedback. Potential survey respondents were reminded that completing the survey would not take more than 10 minutes.

RECALL BIAS. Some partners and beneficiaries who had collaborated with TURIZAM over the past 2.5 years had difficulty remembering the specifics of their engagement with the Activity. To mitigate this bias, the ET reviewed all Activity documents to understand specific activities they were involved in and, as needed, reminded the KIs to help them recall their experiences with the Activity.

UNAVAILABILITY OR UNWILLINGNESS OF BENEFICIARIES TO RESPOND. The team had difficulties contacting and scheduling meetings with KIs for the evaluation because many KIs were away on summer vacation at the time of data collection. The ET envisioned this in the evaluation work plan and planned expanding data collection through September 2023.

FINDINGS AND CONCLUSIONS

FINDINGS EQ I. HOW HAS TURIZAM BEEN DESIGNED AND IMPLEMENTED, AS PERCEIVED BY ITS PARTNERS AND BENEFICIARIES?

Finding I. The vast majority of stakeholders perceived the TURIZAM design as comprehensive and inclusive of all critical issues identified in the BiH tourism sector.

Prior to the request-for-proposal stage, USAID conducted an analysis of literature about the tourism sector, reviewed the design of tourism activities that were successfully implemented by other Missions, and consulted with BiH tourism sector stakeholders—all to inform the design of the TURIZAM Activity. As a result, USAID designed an overall Activity framework to foster tourism development from multiple angles.

Most KIs—local and international partners, and beneficiaries,—perceived the TURIZAM design as comprehensive, noting that it addressed the key gaps in the sector. According to the survey of TURIZAM partners, more than six of ten partners (65 percent) agreed that the TURIZAM design addressed the most pressing issues in the sector. Several representatives of international partners active in the sector also praised the TURIZAM design, describing it as far-reaching and emphasizing that TURIZAM is the largest project focusing exclusively on tourism development ever implemented in BiH.

As far as USAID's support is concerned, this is a really large project and I am glad to see that such a large amount of funds was channeled into tourism, for the first time in Bosnia and Herzegovina. – International partner

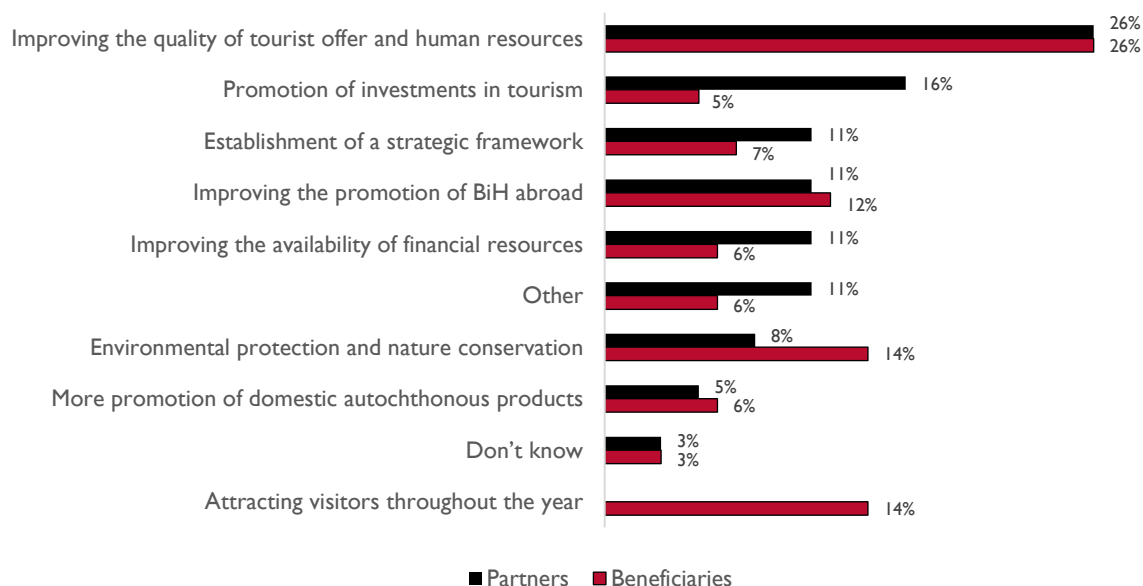
I would say that [the project] is really good and coordinated, and that one looks at what the country needs and consults those who are affected by it. – Local partner

A few KIs proposed that additional or different interventions should have been prioritized in the Activity design. Specifically, some KIs thought that TURIZAM should have focused more on developing systemic solutions in the sector, for instance, by advocating for the establishment of a state level ministry of tourism. Others prioritized removing visa restrictions for tourists from Middle Eastern countries who were interested in visiting BiH and staying for longer periods of time. A few KIs mentioned a need for a stronger focus on spa and health tourism. A government representative stated that government institutions should have been more involved in the Activity design phase.

It is necessary that, first of all, as far as this project is concerned, and in the future, institutions should be more involved in the preparation itself [design], so that we know exactly in advance. It's not that someone would prove their competence regarding anything but simply that the activities are coordinated, that we don't have duplication of activities and that we don't have some activity that will get stuck in the middle of implementation due to some error in the preparation itself. – Government representative

According to the survey, TURIZAM's partners and beneficiaries saw both the improvement in the quality of tourist offer and human resources as the two top priorities (each garnering 26 percent of the votes in the survey) of tourism development in BiH. Promoting investments in tourism was ranked as second priority by TURIZAM's partners (16 percent), followed by the development of a strategic framework, enhancement of the promotion of BiH abroad, and improving access to finance (11 percent each). TURIZAM's beneficiaries ranked both environmental protection/nature conservation and activities to attract visitors throughout the year (both with 14 percent of respondents' votes) as the second-highest priorities, whereas the third-highest priority—improving the promotion of BiH abroad (12 percent)—was again closely aligned with the view of partner institutions and organizations (refer to Exhibit 3).

Exhibit 3. TURIZAM Stakeholders Clearly Prioritize Improving the Quality of Tourist Offer and Human Resources for the Development of Tourism in BiH.



Finding 2. According to KIs, TURIZAM’s grant fund is too small, given the needs of the tourism sector. The Activity design included a grant fund to enhance the capacity of local businesses operating in the tourism sector and integrate MSMEs, business associations, and NGOs into interventions. The total value of the grant fund was \$500,000, representing 2.5 percent of the total value of the Activity. Most grantees expressed satisfaction with their individual grant amounts, although some mentioned receiving less funding than initially requested.³ Several KIs, including USAID and the TURIZAM IP, recognized that the grant fund was too small relative to the needs of the sector, especially because the government funds for the tourism sector were modest compared with government funding for other industries. Several partners argued that companies in the tourism sector had low access to bank loans, primarily because of the lack of collateral, and their access to finance was made worse during and after the pandemic. Moreover, the Impact and Performance Evaluation of USAID’s Grant Assistance to Micro, Medium, and Small Grants in BiH (2023, internal document) indicated that grants distributed to MSMEs in the tourism sector effectively improved business revenues and profits. Altogether, these findings suggest that this sector may benefit from additional financial assistance. Due to this potential, and attempting to reduce the sector’s dependence on international donor grant assistance, TURIZAM has initiated advocating with the Federation of Bosnia and Herzegovina (FBiH) Ministry of Tourism to increase its grant support to the sector.

In my opinion, USAID should have done what we expected from them, dedicate themselves to larger investments [grant fund] in tourism sector. – Grant applicant

Finding 3. Most partners and beneficiaries shared positive impressions of TURIZAM implementation. These actors, including relevant international organizations, were satisfied with their cooperation with TURIZAM and TURIZAM’s approach to the implementation. Partners and beneficiaries described TURIZAM employees as supportive and approachable. According to the survey of partners, more than eight of ten respondents considered TURIZAM employees as highly skilled (85 percent), professional (85 percent), communicative (83 percent), and collaborative (83 percent).

³ For more information on grantees’ grant satisfaction, refer to Finding 12.

I think that their team is composed of good and quality people I had a good cooperation. – Local partner

Most KIs praised TURIZAM's approach to implementing certain activities. The majority of survey respondents (72 percent of beneficiaries and 88 percent of partners) agreed that TURIZAM activities were relevant for developing the tourism sector in BiH. Most KIs appreciated TURIZAM's work on promoting BiH as a tourist destination, along with 69 percent of survey respondents. Many mentioned the quality of technical assistance and training—according to the survey of partners and beneficiaries, around seven of ten respondents rated the implementation of TURIZAM's capacity building very good or excellent. Most relevant KIs and nearly three of four survey respondents also endorsed interventions such as road shows, which facilitated stakeholder networking, new business connections, and business development. TURIZAM's activities to develop entity/district strategies were described as much needed and high quality by KIs and survey respondents (81 percent) who were familiar with the documents. Several KIs endorsed other TURIZAM's documents, such as nature park visitor management and community engagement plans. TURIZAM's activities on workforce development was also praised and considered high priority.

I think that USAID TURIZAM really worked a lot on these promotional activities, on promoting the tourism offer of BiH at very important fairs, on very important tourist sites and bringing foreign journalists who deal with tourism. – International partner

What is very good and what is of high quality are those presentations and the organization of roadshows. . . . We show up there, we have the possibility to present in a circle where it would take us a little more time to gather all the interested parties. They organize it for us and we partially finance it, we go and do a great presentation. Our members hold B2B meetings with all these agencies, we give interviews to the media that they gather, and I have to admit, it's a genius thing. – Local partner

I mean, in general, with the advent of the USAID TURIZAM project, some things started from a standstill. In addition to these tourism strategies, they are active in any document adoption, from green schemes to everything that has been done in more advanced tourist destinations. – Local partner

I know that there was a lot of training in terms of human resources, so I also include this professional retraining program [Pathways to Professionalism], or whatever they officially call it in the hotels. The program was also introduced to the faculties [TedQual]. Three agreements were signed with the faculties. It definitely influenced [TURIZAM] the quality of human resources. – Local partner

Absolutely useful [documents]. This is not just my personal opinion. This is also the opinion of the entire private sector. – Local partner

A few KIs reported dissatisfaction with TURIZAM interventions because of issues with communication and planning:

- Two partners from Republika Srpska (RS) government institutions expressed dissatisfaction with collaboration with the Activity. Although their initial cooperation was satisfactory, TURIZAM reduced its involvement with the RS government counterparts, primarily due to the general changes in the United States' (U.S.) approach to working with RS government, and because the work on the strategy development was finalized. However, TURIZAM has continued its other activities in RS as planned, primarily in collaboration with local governments and businesses.
- Several TURIZAM partners and beneficiaries complained that some TURIZAM activities were implemented in English without translation, and some beneficiaries could not understand the content (for instance, a speech at a conference; a workshop; some online courses).

- TURIZAM implemented an intervention, MBV⁴, to improve the promotion of rural tourism in BiH. TURIZAM adapted the MBV concept for BiH, selected 14 villages for the MBV label, and promoted them on Tripadvisor, attracting foreign tourists. Representatives of several villages have already reported seeing more tourists as a result of this promotion. But some of these villages lack infrastructure to greet the tourists properly, according to FGD participants, of whom some thought that MBV promotion came prematurely. TURIZAM noted that it plans to continue working with the MBV implementer, Alterural, and villages to build their capacity to advocate for their local communities to help them improve their tourist offerings.
- TURIZAM envisioned and developed a plan for the management of visitors in the Una and Kozara NPs. Although a KI thought these documents were useful, due to unresolved property ownership, lack of spatial plans, and poor infrastructure, the KI shared that the Una NP had insufficient capacity to receive tourists. In addition, the visitor management plan prepared by TURIZAM for the Kozara NP was, according to a KI, prepared prematurely because the park was facing challenges with attracting visitors.
- A KI mentioned that the Flow Hospitality and Typsy online courses could have been offered to high school students at a more suitable time. TURIZAM offered students free access to courses at the end of the academic year, when students had exams and lacked time to participate in nonmandatory courses.

Finding 4. TURIZAM was inclusive and collaborative in implementation of its interventions. In most cases, TURIZAM’s interventions began with an in-depth assessment of the specific intervention area. For example, before producing the 2021–2027 BiH Human Capital Development Strategy and Plan, TURIZAM conducted a Human Capital Needs Assessment and Forecast. Prior to initiating activities to improve the capacity of tourism boards and operators, TURIZAM conducted a Tour Operators Needs Assessment to determine the level of support required. To identify the main challenges and needs to support women in tourism, TURIZAM commissioned an expert team to conduct a gender assessment of the sector.

TURIZAM consulted with a broad range of stakeholders when developing their documents and planning its activities. According to the survey of partners, two-thirds (67 percent) of respondents confirmed that TURIZAM consulted them during the implementation of its activities. For instance, to inform the entity/district tourism development strategies, TURIZAM established the Tourism Competitiveness Coalition comprising representatives from the private sector, academia, and other local stakeholders and organized focus groups and meetings with the public and private sector and cantonal and local community representatives. In addition, the Activity developed regulatory reform agendas in close collaboration with entity chambers of commerce to ensure that private sector voices were captured. TURIZAM employed a similar, inclusive approach to develop other documents.

TURIZAM consistently looked for potential areas of collaboration with other donors and international partners. On learning that the United Nations Development Programme (UNDP) implemented a project on the sustainability of protected areas in BiH, TURIZAM established a collaboration to develop plans to manage the protected areas. Further, UNDP and TURIZAM organized two joint workshops for the employees of NPs in FBiH and RS. TURIZAM cooperated with the German Agency for International Cooperation in developing a curriculum for cooks for the Vocational Education and Training project. The Activity helped the USAID Economic Development, Governance and Enterprise Growth Activity find and mobilize adventure tourism operators and

⁴ MBV is a tourism concept initially launched in France and adopted by other European countries to sustain and promote its member villages’ heritage and thus bring economic opportunities to those communities. TURIZAM’s grantee Alterural implemented this concept in BiH.

service providers from BiH to help create the Western Balkan Adventure Tourism Association and the adventure tourism operator's network in BiH and the surrounding region. Through cooperation with the UNDP/European Union (EU)- European Union Support to Agriculture Competitiveness and Rural Development in Bosnia and Herzegovina project, TURIZAM was able to integrate support mechanisms for the certification of protected designation of origin, protected geographical indication, and traditional specialty guaranteed in the EU grant support program for certification in agriculture. In addition, TURIZAM initiated the process of launching the Certified Incentive Specialist certification program in cooperation with the Society Incentive of Travel Excellence.⁵

In terms of collaboration with other USAID's Activities, TURIZAM recently collaborated with the Supporting Political Pluralism and Good Governance Processes (SPPG) on advocacy for the adoption of the FBiH tourism development strategy. TURIZAM staff mentioned that they had exchanged information with Diaspora Invest 2 (DI2) and the Local Governance Assistance Activity (LGAA), but no joint activities have been implemented thus far.

Finding 5. TURIZAM has considered gender in all its activities and has taken action to include people with disabilities (PwD) in the sector. Most KIs thought TURIZAM successfully promotes women's empowerment in tourism. According to the Activity tracking table (Year 1 and 2), women made up about 44 percent of TURIZAM's program participants designed to increase access to productive economic resources. The survey of partners and beneficiaries indicates that more than seven of ten respondents (72 percent) believed that TURIZAM addressed gender equality in most of its activities. TURIZAM produced the first-ever Gender Assessment in the tourism sector and integrated a gender perspective into the tourism development strategies of FBiH, RS, and Brčko District (BD). The Activity initiated collaboration with the United Nations Women to promote the Women's Empowerment Principles. Further, TURIZAM signed a Joint Implementation Plan (JIP) with Women in Travel Community Interest Company and will focus on developing initiatives to engage women in the tourism sector. For the BiH Star of Tourism award, TURIZAM proposed to the FBiH Chamber of Commerce the introduction of additional categories for the award to acknowledge successful women's businesses, businesses engaging youth and PwD, and innovations in business, which the chamber accepted and implemented. Further, TURIZAM developed the first ever Disability Inclusion Analysis and Plan for the tourism sector in BiH and partnered with the Life With Down Syndrome Association to promote accessible employment opportunities in the tourism sector for individuals with intellectual and other disabilities.

Most KIs thought women were already well integrated into the tourism sector in BiH, even more than men, including in industry and government institutions. A KI noted that women are the drivers of BiH's rural tourism as primary producers of traditional products. This is somewhat in line with the Gender Assessment developed by TURIZAM, which states that women are well represented in the sector, but "overrepresented in lower-wage service jobs with little opportunity for promotion and are excluded from many opportunities to influence policy in the sector" (p. 7).

In other words, support for the gender aspect was strongly felt during the entire project. Constantly. And that is a very nice feeling for me as a woman. One absolute support always in every sense; individually, by project, individually through criteria, everywhere. Wonderful support. – Local partner

As for the project, in a way, it is more useful for women than for men. Women are mostly producers of some of these traditional products. They are mostly pillars of rural households. Throughout the project, this is represented 100% as it should be. – Local partner

Finding 6. Although most TURIZAM interventions have been implemented as envisioned in the Activity award, a few required adaptations. The TURIZAM award foresaw developing "a unified national tourism strategy." Because entity institutions oversee tourism

⁵ A specialized program focused on developing incentives for professionals from the tourism sector who can eventually receive the certification.

development, however, the Activity opted to develop three strategies, one for each entity and BD. The BiH state arrangement does not allow governance of tourism at the national level, and therefore, TURIZAM invested effort to ensure that the three strategies were harmonized by employing the same approach to their development and including the same pillars in each document. TURIZAM intends to make an additional effort to explore opportunities for developing a state-level strategy in Year 4.

To improve the data-driven decision-making among the tourism stakeholders, the Activity focused on promoting available data sources among the decision-makers. TURIZAM initiated working with the BiH Agency for Statistics and the Central Bank on producing the United Nations World Tourism Organization (UNWTO)–compliant Tourism Satellite Account (TSA)⁶ but found low stakeholder engagement and interest in the account. TURIZAM, however, plans to continue exploring opportunities to implement this activity in Year 4.

The Activity planned to implement the UNDP Gender Equality Seal (GES),⁷ as stipulated by the Award document, and initiated several meetings with UNDP on that matter. However, UNDP informed TURIZAM that UNDP could not achieve the GES because of the lack of human resources and instead proposed that TURIZAM embed staff members in entity gender centers to facilitate the implementation of the GES certification. Understanding that obtaining the UNDP GES would take significant time and resources, TURIZAM withdrew from implementing GES and partnered with United Nations Entity for Gender Equality and the Empowerment of Women to introduce the Women’s Empowerment Principles, as noted in the previous findings section.

On learning that other donors were already implementing interventions with the same objectives, TURIZAM canceled planned activities focused on supporting the Sarajevo and Banja Luka Green Cities agenda to avoid duplication. Further, TURIZAM’s activities on improving the tourism board’s international destination promotion and digital transformation capacity included some capacity building of destination management and marketing organizations, but these activities were canceled because of the lack of commitment from the tourism boards, which did not want to invest their own funds in these activities.

EQI CONCLUSION

The TURIZAM design was developed to be comprehensive and establish a foundation for longer term tourism development and thus was highly praised by stakeholders from the industry. Most partners and beneficiaries commended TURIZAM’s approach to Activity implementation, describing TURIZAM’s staff as highly professional and supportive. Most KIs also commended TURIZAM’s activities on the development of BiH tourism, primarily the Activity’s work on the promotion of BiH as a tourist destination, the quality of technical assistance and training, interventions such as road shows, tourism documents such as tourism development strategies, and interventions to improve the workforce quality. Conversely, a few TURIZAM partners complained about the Activity’s approach to implementation of certain interventions. In addition, TURIZAM was unable to implement some activities, such as establishing the national tourism strategy, as initially planned, but TURIZAM successfully adapted its implementation approach to the local specificities and new information in the field. The size of the small grant fund relative to the sector’s needs was identified as the Activity’s area for improvement. In most cases, TURIZAM’s approach to implementation was

⁶ TSA is a main tool for the economic measurement of tourism developed by UNWTO, the Organization for Economic Co-operation and Development, the Statistical Office of the European Communities, and the United Nations Statistics Division. TSA includes a set of ten summary tables that present information such as inbound, domestic tourism and outbound tourism expenditure, international tourism expenditure, employment, and investment, and serves as a tool for developing policies and strategies in tourism.

⁷ GES is a certification process that UNDP country offices can qualify for and be benchmarked against in accordance with best practices.

planned in consultation with a broad range of international and local stakeholders. TURIZAM continuously looked for opportunities for collaboration with other donors and international organizations, representing an example of good practice in this area. Moreover, the Activity was the pioneer in terms of analyzing the gender and disability perspectives in tourism in BiH and taking steps to make the sector more inclusive of these populations.

FINDINGS EQ IA. HOW HAS TURIZAM MANAGED, IMPLEMENTED, MONITORED, AND COORDINATED THE GRANT COMPONENT OF THE ACTIVITY?

Finding 7. TURIZAM grants were distributed according to the procedures described in the grant manual approved by USAID. The grant administration process employed by TURIZAM was outlined and regulated through a detailed grant manual. Grant opportunities were solicited through three different RfAs.⁸ Overall, TURIZAM received 180 concept notes and approved funding for 23 grant applications. The grant eligibility criteria were mostly consistent across the RfAs, with the only difference being the general eligibility based on the specific enterprises required for each grant type.⁹

Scoring concept notes was the first step in evaluating potential grant recipients. An internal review panel comprising TURIZAM technical staff was responsible for scoring, and all recommendations were vetted by the Activity Contracting Officer's Representative (COR) or Contracting Officer (CO), depending on the grant size.¹⁰ Full applications were developed after receiving the approval for concept papers.¹¹ Because of a recent change in USAID policies, the Activity was not allowed to require cost share as part of the grant. One of the RfAs, however, states that grantees were expected to make contributions to the overall grant budget. The remaining RfAs did not require contributions, but their merit criteria indicated that applications with contributions would be scored higher. On announcing the grant recipients, TURIZAM organized a Zoom orientation to present details about the grant requirements with all grantees and answer their questions.

Finding 8. TURIZAM provided considerable assistance to applicants during the grant preparation stage, resulting in a high level of satisfaction among grant recipients. Applications for TURIZAM grants under the Annual Program Statement (APS) grant mechanism followed a two-stage process.

⁸ Three RfAs included (a) the Annual Program Statement (APS), (b) championing the Most Beautiful Villages of BiH, and (c) expanding Source Market Travel Agent Networks. The RfAs contained detailed information about the Activity and its objectives, eligibility, the grant application process, merit, review criteria, and grant administration information. The RfAs also included a grant application template, grant budget template, applicant self-assessment form, and required certifications list.

⁹ The APS and the MBV-related RfA called for NGOs, local cooperatives, associations, or firms legally registered in BiH to apply. The third RfA called for destination management companies or inbound travel agencies to apply. Other eligibility criteria required applicants to be registered legal entities in BiH without records of misconduct, compliant with regulations, and operational for a minimum of three years. Applying entities must employ a minimum of three full-time technical staff members, including an executive director, and submit only one application per prime organization. Successful implementation of prior development activities related to TURIZAM priority areas, financial sustainability, robust management policies, and internal controls are underlined as essential in the RfAs.

¹⁰ Concept notes were evaluated for eligibility, past performance relevance, alignment with TURIZAM objectives, and appropriateness of the funding request relative to potential impact, sustainability, and prior experience with USAID and other donors.

¹¹ In terms of scoring full applications, most points were allocated to the feasibility of design and technical approach (30). The Activity also scored expected outcomes, management capacity, sustainability, cost effectiveness, past performance, gender awareness, and disability inclusion.

During the initial stage, applicants submitted an email concept note to TURIZAM on a rolling basis.¹² On TURIZAM review of the concept notes, successful applicants proceeded to the project application phase. KIs with grantees revealed that applicants whose concept notes did not pass the initial screening in most cases received feedback outlining the reasons for rejection. Applications under the other two RfAs were submitted directly to TURIZAM without the concept note step.

Most KIs praised the approach of submitting a shorter concept note first and a longer, more detailed application only if the concept note passed initial screening. The applicants who did not pass the concept note stage particularly commended this approach. These KIs revealed that, because developing a grant application is time-consuming and requires proficiency and skill, they had saved considerable time and other resources by not having to invest in a project that would not meet basic criteria for funding.

I find this approach excellent because you never know if you will be successful, and you can waste a lot of time on the application process. When you have this concept note procedure where you first work on the concept note and then see if it's a good match for the program, that seems much more acceptable for me. . . . I would be happiest if all grants were of this type. – Grant recipient

Some applicants selected for submission of full applications reported having received advice from TURIZAM on the way to make minor refinements to their proposed projects, primarily related to budget and spending. Although, in some cases, these refinements led to an extension of the grant review and selection period, they increased the likelihood of the application's being selected for funding. Once the concept note underwent review, successful applicants advanced to submitting their full applications.¹³

Perceptions of the complexity of the application process varied among grantees. KIs revealed that applicants with substantial experience in developing grant applications regarded the process as straightforward but that applicants with limited experience found it complicated. TURIZAM remained at the applicants' disposal throughout the application phase to provide consultation and assistance in application development, addressing any questions as they arose. All applicants with approved concept notes had designated mentors to assist them while preparing the full application.

The application process was quite straightforward. One of the simpler applications I have done. First, a concept note was requested. This was around the end of the year. We submitted it and received a quick response that our concept note was accepted, allowing us to write the full application. I wrote it myself. – Grant recipient

The application process was really complicated for me. I have been involved in many projects but always in the implementation part. The administrative part has always been done by my friends and colleagues. I am inexperienced with these procedures. The procedure was a bit complicated. – Grant recipient

In general, all grantees were satisfied with TURIZAM's grant management. The consultations, led by a technical expert who reviewed grant applications as they were being developed, received high praise from all grantees. Even those grantees who faced hurdles in implementation highlighted that open communication helped them overcome any challenges. In the survey of TURIZAM beneficiaries, the vast majority highly ranked TURIZAM employees' professionalism (90 percent), skills (90 percent), communication (87 percent), and availability (93 percent).

¹² The concept note form, provided by TURIZAM, contained essential information including company registration details, a brief description of the grant, a preliminary budget, estimated grant duration, and a preliminary implementation timeline.

¹³ This phase began with an applicant self-assessment. On the basis of Activity documentation, the application form encompassed both technical and budgetary aspects of the grant. The technical information segments covered basic details, program description, implementation strategy, and evidence of prior experience and capacity. Budget sections contained cost summaries and a comprehensive grant budget. TURIZAM supplied a designated template for the detailed grant budget.

One positive thing I can say about TURIZAM is that the people who work there are extremely dedicated and accommodating, from the smallest details to more serious issues. They allowed us to communicate and get in touch during the weekends and off working hours. They have all given us their personal, private contacts and said, “Call us on Saturday, Sunday, at eight in the evening, we’ll talk.” ... We do not encounter that kind of friendliness with others. ... If they were not this way, we would have disengaged from this project at some point because we would not be able to cope with all the obstacles we encountered. – Grant recipient

We are extremely satisfied, we knew the people working on this project from previous projects, and we had good communication right away, no time was wasted, and we also had a certain level of trust. – Grant recipient

Finding 9. Most grantees shared positive experiences with grant duration, but a few expressed dissatisfaction, stating that they missed the whole season by the time the grants were approved. According to the survey of grantees, seven of ten respondents (70 percent) viewed the duration from submitting to the approval of concept note as positive, and about three of four (76 percent) viewed the duration from submitting the full application to signing a grant agreement as positive. However, KIs with grantees and an inspection of project documentation revealed that, in some cases, the grant application process took longer than anticipated. Although the concept notes were evaluated and decided on quickly (in approximately two months), evaluations of full applications took considerably longer. KIs reported this process took anywhere from three to six months, with a couple of the KIs reporting even longer periods, up to ten months. It is worth noting that this was the case for APS grant scheme only. The beneficiaries explained this by the fact that, because of the limited pot of resources, TURIZAM had to be very selective when choosing partners to work with. In addition, the IP, as well as grantees, confirmed that, in some cases, the procedures were delayed because of a high number of grant applications received right before the deadline, as well as some grantees’ low capacity to prepare quality applications and thus requiring extensive assistance.

Grantees mentioned that these delays had an adverse effect on their projects because of the tourism industry’s seasonal nature. The tourism sector follows a distinct timeline, with bustling peak seasons and slower offseasons in which investments in the companies are made. In some cases, prolonged fund waiting times led to considerable delays in implementing planned activities because companies were anticipating TURIZAM grants for financing.

We finalized the concept note and it was accepted. Then it was necessary ... to make sure everything fits [in the application form]. After we completed the application. We waited a long time for some signatures. – Grant recipient

Finding 10. Most grantees did not face any major issues during the grant implementation. Ten of 23 total grants were completed by the end of the data collection period. Most grantees said they had encountered minimal challenges in grant implementation. However, a few grantees mentioned obstacles due to external factors. The COVID-19 pandemic was tapering off as the grants started, but KIs reported that high inflation rates triggered a rise in transport expenses and essential raw materials for training programs, particularly within the hospitality sector. To mitigate this issue, some grantees opted to adjust their training prices, whereas others benefited from TURIZAM’s practical support, including carpooling arrangements to help with transport and similar measures.

We kicked off implementation after COVID. For this reason, COVID did not bother us too much. We were scared that we would have less tourists, that also did not happen. – Grant recipient

COVID was finished, so we could have all our meetings ... The costs were higher than we expected. But we managed with the allocated budget. – Grant recipient

TURIZAM conducted regular site visits to monitor grant implementation, starting before contract signing and through implementation and close out. TURIZAM also maintained regular phone communication with the grantees. All grantees spoke positively about the dedication of TURIZAM’s

personnel, who remained on call for them around the clock. A grantee referred to the nature of their relationship with TURIZAM as “collaboration.”

Oh, we were working day by day, so it was not even monitoring. It was a collaboration. A daily collaboration. We were doing everything together. – Grant recipient

Two or three people from USAID visited us and explained the reporting procedures and document management. We have had maximum support in implementation so far. They even instructed us to reach out in case we [did] not understand something. They were open to the idea of collaborating, and we never had any issues. – Grant recipient

Finding 11. All TURIZAM grants were allocated as fixed-amount awards with specific milestones, progress reports, and periodic payments. Each grant agreement outlined specific milestones, accompanying progress reports, and subsequent payments. TURIZAM verified the grantees’ documentation, ensuring that the grant recipients completed the milestones before receiving any payments. KIs said they submitted their progress reports via email. Grantees reported that they did not have issues with paying for their activities upfront and being reimbursed later. However, grantees also reported that advance payment would have been useful to them.

[An advance payment] was not offered to me, we did not even insist on it as it was immediately clear that this approach was not possible. For us, it would have been much easier if payments had been made in advance, as now we are already in a situation to question whether we should continue to do projects of this kind. – Grant recipient

The grant agreement between TURIZAM and the grantee called for the grantee to submit a comprehensive completion report to the IP by the grant’s conclusion, usually within 30 days after the end of activities. This report is subject to review by TURIZAM staff. Components of the completion report include a technical narrative detailing objectives, achievements, and lessons learned, explanations for unmet milestones, and a financial report. A few grantees reported having difficulty understanding the requirements under the completion reports, stating that they managed to finalize them with TURIZAM’s assistance.

We had one interim report, and the final report was quite straightforward. The first one was simple, and for the final report, a bit more was required. It was not complicated, but we did not immediately grasp what was being asked. We were not sure how detailed the report needed to be, so it was returned to us once. However, when they explained it to us, it became clear and simple. – Grant recipient

Finding 12. Grantees noted that the grant amounts they received were lower than initially planned. Most grantees expressed satisfaction with the individual grant amounts they received. According to the survey, almost three quarters of respondents (73 percent) felt that the grant amount was satisfactory. However, some grantees mentioned they had to operate with less funding than that in their initial plans. Namely, during the period between the acceptance of the concept note and the submission of the application, a few grantees reported that they were advised to adjust their budgets, which resulted in a decrease in the allocated funds. The same opinion was reflected by 40 percent of survey respondents, who noted receiving smaller amounts than requested. This adjustment was attributed to a high number of applications, which led to the need for more, smaller value grants. The IP, however, noted that the adjustments were made to optimize the spending under each grant, ensuring that only relevant activities were funded.

Feedback we got to the concept note stated we should try to decrease the budget amount as much as possible before submitting the full application We decreased the budget, following the recommendation that we should decrease it more than 15 percent of the initial planned budget. However, TURIZAM asked us to decrease it even more because they lacked funds. – Grant recipient

EQIA CONCLUSION

Overall, TURIZAM successfully managed the Activity grant fund. Grantees praised TURIZAM staff’s professionalism and dedication. Perceptions of the complexity of the grant application form and

overall procedures varied across applicants, with experienced grant recipients describing the applications as rather simple and those with less experience describing the applications as complex. Grant reporting procedures were described as simple and not overly demanding.

Most grantees implemented the grant without significant obstacles, with TURIZAM's regular surveillance and assistance. Grantees pointed out the organization's effective communication, emphasizing that TURIZAM staff were always on call to support them with any issues. Some KIs also revealed that the grant evaluation and negotiation process took a long time, which in some cases affected grant implementation timelines. The KIs also reported that advance payments would have been helpful. In addition, although grantees expressed satisfaction with the size of the grants they received, many of these grantees received lower amounts than they had initially requested.

FINDINGS EQ IB. HOW HAVE THE CONTEXTUAL FACTORS (COVID-19 PANDEMIC, WAR IN UKRAINE, AND LOCAL POLITICAL ISSUES) AFFECTED TURIZAM IMPLEMENTATION?

Finding 13. The TURIZAM design was completed early in the COVID-19 pandemic, when there was little certainty about future global developments, but the Activity managed to adapt to and implement its interventions in an uncertain operating environment. Implementation of TURIZAM started in August 2020, during the first six months of the pandemic. At the time, strict epidemiological measures were in place. Specifically, hotels and restaurants operated under strict measures,¹⁴ and tourists had to meet COVID-19 health and safety requirements before arriving at tourist destinations¹⁵ and on returning to their home countries.¹⁶ The regulations were highly dynamic, and they continually changed. Although COVID-19 had a devastating effect on the sector, TURIZAM responded well to the changing context and operating environment. Because the Activity design allowed for virtual implementation for most interventions, TURIZAM focused on organizing online meetings, workshops, and conferences. For example, TURIZAM organized online meetings, workshops for the development of entity tourism strategies (in some cases), conducted an online conference about the certification of agricultural products, and established an online learning platform titled TURIZAM Academy.¹⁷

To respond to the pandemic, TURIZAM developed the Tactical Recovery Plan (TRP)¹⁸ and initiated steps toward receiving a Safe Travels Stamp. The Safe Travels Stamp was issued by the World Travel and Tourism Council (WTTC) for companies and destination authorities that had implemented hygiene and health protocols in accordance with WTTC's Safe Travels Protocols. The WTTC Safe Travels Stamp was intended to restore trust and ensure the safety of travelers. The Activity developed 23 online courses related to COVID-19 response management in the tourism sector, enabling industry stakeholders to complete and meet the entity ministries' requirements for issuing the Safe Travels Stamps at the business level. BiH was one of the first countries in the region to receive the Safe Travels Stamp. Several KIs noted that TURIZAM came at the right time, when

¹⁴ In BiH, compulsory protective masks were worn in closed spaces, with 2 meters of physical distance between two persons and not more than 50 persons in closed spaces and 100 in an open space.

¹⁵ For example, foreigners coming to BiH had to fulfill one of the following regulations: (a) negative PCR test 48 hours before coming to cross the border if coming from EU countries and 72 hours if coming from other countries; (b) certificate of vaccination; and (c) certificate issued by a doctor that the person had overcome COVID-19.

¹⁶ For example, on August 8, 2020, Germany introduced compulsory testing for the COVID-19 virus for persons entering the country from "areas of heightened risk."
(<https://wiki.unece.org/display/CTRBSBC/Germany>)

¹⁷ TURIZAM Academy is explained in more detail in Finding 19.

¹⁸ TURIZAM developed TRP as a market engagement recovery plan for the tourism sector in BiH. TRP was designed to support governmental and tourism industry stakeholders in addressing the negative impacts of the COVID-19 pandemic on the tourism sector.

tourism in BiH needed support to move forward and face the pandemic. According to the survey of partners and beneficiaries, more than two-thirds of respondents (68 percent) agree that TURIZAM started when the tourism sector needed the most assistance.

COVID-19 certainly affected the development of tourism in BiH and the whole world. My opinion is that this project came at the right moment when tourism in BiH needed some “wind in its sails” and support. Inevitably, financial support of foreign donors is always important as far as the development of tourism is concerned, so I think that this project came at the right time and that we caught the moment and with all these activities we certainly helped accelerate the development of tourism both at the state level and at the local levels. – Local partner

Most government institutions that partnered with TURIZAM noted that COVID-19 slowed their activities, especially at the beginning of the pandemic. Since, however, most of the grants were implemented two years into the COVID-19 pandemic (the first grant agreement was signed on January 31, 2022), most grantees agreed that COVID-19 did not influence grant implementation.

The project plan, all that needed to be implemented, was probably extended appropriately, so we had that education in 2021, which was complicated because of COVID, but we managed. We have absolutely implemented all the activities that we agreed upon. From our side, I don't see that there were any obstacles, although, admittedly, COVID slowed everything down. – Local partner

Finding 14. The pandemic fostered new trends in tourism, specifically a rise in domestic tourism and in specific tourism subsectors, such as adventure and rural tourism. During the pandemic, the tourism sector in BiH received assistance from the entity governments. Among their support for tourism MSMEs, governments of FBiH and RS issued tourism vouchers (government subsidies) that citizens could use for domestic travel, generating considerable interest among BiH citizens. According to KIs, the pandemic led to an unplanned increase in domestic tourism. Most survey respondents confirmed the same opinion: 76 percent of beneficiaries and 86 percent of partners agreed that the COVID-19 pandemic started the trend of domestic tourists' turning more to getting to know BiH.

Well, I think we all know how large an impact COVID had, how much it changed tourism itself, especially in BiH, it engendered some new ideas and gave some people and businessmen some new opportunities. Earlier, we didn't even think about visiting some of our domestic destinations. During COVID, it was the only possibility. I would say that this habit has remained to this day, that our people continue to visit domestic destinations because they discovered how many possibilities and potential we have. – International partner

Several KIs mentioned that COVID-19 spawned new trends, such as digitalization and moving from mass to individual tourism, such as adventure, rural, and sustainable tourism. With the outbreak of COVID-19, these trends were fostered, not just in BiH but globally. The rise in adventure and rural tourism was seen as a compelling opportunity for growth because BiH has a lot of potential in this area.

The fact is that the coronavirus itself brought to the surface some new trends. These new trends mainly involve digitization in all sectors, including tourism, on the one hand, and perhaps some realignment of the broader trends in tourism on the other, a shift from mass tourism to more individual, adventure tourism, rural tourism, sustainable tourism. – Local partner

[COVID] has a negative general impact, but in our sub-sector [rural tourism] I see it as also an opportunity because during the COVID period when people were travelling less, we really noticed that people actually sought to discover their own country, its own natural beauty and to try activities in Bosnia. – Grant recipient

Finding 15. Most KIs agreed that the war in Ukraine did not directly affect their activities. However, grantees and partners recognized the indirect effect of inflation.

Most KIs noted that they did not see the direct effects of the war in Ukraine on tourism in BiH. According to the survey of partners, a quarter of respondents (25 percent) believed that the war in Ukraine had a negative effect on their activities. A KI mentioned that the war in Ukraine started polarizing people into pro-Russian and pro-Ukraine, which complicated some of the implementations

in the field. For example, workers of the Sutjeska NP voiced explicit support for Russia. Coupled with allegations for corruption against the park director, USAID withdrew from its plan to cooperate with the NP on the development of its visitor management plan.

Grantees and partners noticed increasing inflation as a result of the war in Ukraine. Several grantees mentioned that inflation increased the cost of grant implementation. Specifically, the price of food and transportation noticeably increased. A grantee mentioned that TURIZAM assisted its organization to cope with increased costs by offering to use its vehicles for transportation. Other partners thought that inflation did not affect tourism in BiH since inflation was a worldwide phenomenon and BiH was still more affordable than many other countries. Inflation lowered people's standard of living and BiH could benefit from this as a budget destination.

The increase in prices was noticeable in the project implementation expenditures and in the cost of transport. But we had support from USAID and from TURIZAM. – Grant recipient

About inflation, unfortunately, for the last ten years we have positioned ourselves as a budget destination and we are still very, very reasonably priced. As long as the general standard of living is not in steep decline, I think that we will again be very affordable in terms of prices. Through USAID's Tourism project, we know that we rate very highly in terms of the price-quality ratio we offer. – Local partner

Finding 16. Even though the current political situation is not conducive to tourism development, TURIZAM has successfully avoided multiple political pitfalls. Most KIs agreed that the current state arrangement hampers development in the tourism sector. This situation is reflected in the lack of a national ministry of tourism to regulate the sector. Because of political divisions, TURIZAM was unable to create the national tourism development strategy. Also, tourism boards were divided across ethnic lines, each promoting its regions rather than promoting the country as a whole. KIs noted that this was ineffective because BiH is a small country. Further, several KIs noted that the politicians in BiH very often deceive the public by making false promises that they would support the tourism sector but without any concrete actions.

In the last 15 years, whichever party was in power, they would first say that tourism is a chance [for development]. But what could we do? Imagine if we say that the wood industry is a chance for us, but we don't have a competent ministry that regulates this sector. – Local partner

Before elections, everyone brags about the natural beauty and the development of tourism, but no one is ready to allocate funds so that we have a well-rounded tourist product, so that we have a quality destination. – Local partner

With all the political issues in the sector, TURIZAM established effective collaboration with government institutions and organizations at all levels. TURIZAM promoted the BiH Foreign Trade Chamber (FTC) as an institution that connected all the stakeholders from the sector and engaged in many activities in cooperation with partners from both entities. The Activity cooperated with entity ministries of tourism and the BD government in developing tourism development strategies. TURIZAM also cooperated with entity chambers of commerce in including the private sector in the TURIZAM activities. In addition, when necessary, TURIZAM also provided support to lower-level institutions, such as the Canton of Sarajevo and the city of Trebinje.

The political situation in BiH always gets in the way. I like that we always find a way to bypass politics and do what is good for the benefit of tourism in BiH. – Local partner

EQIB CONCLUSION

At first, the COVID-19 pandemic led to uncertainty about future global developments, but it also created a new way of doing business. TURIZAM successfully adapted to the unique situation by implementing most of its activities, including meetings, workshops, and conferences, in a virtual setting. In direct response to the pandemic, TURIZAM developed the TRP for the sector and initiated actions that resulted in BiH being the first country in the region to receive the Safe Travels

Stamp. The pandemic did not influence the implementation of TURIZAM grants, as most of them were implemented later in the pandemic. The pandemic fostered a shift toward domestic tourism, which was underdeveloped before the pandemic—specifically toward adventure, rural, and sustainable tourism. Most KIs agreed that the war in Ukraine did not directly affect their activities, but some grantees and partners reported being affected by inflation and increased costs of transportation. The BiH government structure and political situation are not conducive to tourism development. Nevertheless, TURIZAM has found committed local government partners with whom they have managed to establish successful collaboration.

FINDINGS EQ2. WHAT PROGRESS HAS TURIZAM ACHIEVED IN REACHING ITS CONTRACT TARGETS AND RESULTS IN TERMS OF IMPROVING ECONOMIC GROWTH IN THE TOURISM SECTOR?

Finding 17. TURIZAM’s activities, aimed at improving the regulatory environment for tourism development, resulted in several positive outcomes, but improvements in environmental protection and nature conservation are still pending. TURIZAM made progress in establishing an enabling environment by harmonizing policies and regulations necessary for noticeable growth in the tourism sector. According to TURIZAM’s progress reports, the Activity exceeded its targets regarding the number of strategies, policies, and regulations developed to foster tourism sector growth, for which the principal task was assisting the entity and BD ministries in drafting tourism development strategies. According to the Activity documentation and KIs, RS adopted its tourism development strategy 2021–2027 in December 2021, and the Federal Government adopted the FBiH tourism development strategy in October 2023. The BD tourism development strategy was developed but has not yet been adopted. Several KIs from both entities agreed that tourism strategies were extremely important for the sector development, some arguing that having the strategic framework in place would help stakeholders draw investments into tourism.

The sector strategy is very important to us, as we have never had a tourism development strategy from which we would draw ideas for incentives and analysis of the sector, for the improvement, growth, and development of the sector. It is very important to us for the sake of international cooperation, because the first question for all EU or regional projects, i.e., partner or project implementers, is always whether you have a strategy. – Local partner

TURIZAM progress reports show that COVID-19 Health and Safety Guidelines and Protocols developed by TURIZAM early in the pandemic were adopted by both entity and district governments in the first quarter of 2021. The IP stated that, because of TURIZAM’s advocacy, BiH was among the first countries in the region to receive the Safe Travels Stamp during the pandemic.

According to Activity documentation and KIs, TURIZAM conducted an in-depth analysis of policy, regulatory, and institutional frameworks relevant to tourism development, resulting in the formulation of regulatory reform agendas for each entity. According to the IP, amendments to the RS law on tourism introduced in February 2023 were a result of policy discussions organized by TURIZAM to inform the development of the tourism strategy and regulatory reform agenda. In the upcoming period, TURIZAM plans to assist the entity ministries in setting their reform priorities on the basis of these documents. TURIZAM invested some effort in strengthening data-driven policy formulation and marketing, attempting to raise stakeholder awareness about the necessity of data collection consistent with international standards and BiH’s position on international indexes relevant to tourism. These activities have not brought about any tangible outcomes to date, primarily due to the lack of institutional buy-in. TURIZAM intends to continue advocating for strengthening data-driven policy development and marketing in the upcoming period.

The TURIZAM award stipulates that the Activity will improve environmental protection and nature conservation by increasing areas classified as protected, improving NP management, and promoting environmental and responsible tourism best practices and certifications. According to Activity documentation and KIs, TURIZAM invested considerable effort in improving the conservation

agenda by organizing awareness workshops, drafting policy papers, and designing social media campaigns. TURIZAM also drafted a plan to increase the protected area and trained selected NPs' staff to promote tourist activities in these areas. Further, TURIZAM developed visitor management and community engagement plans for the Una and Kozara NPs, promoted best practices for environmental responsibility, and assisted tourism sector stakeholders in receiving relevant certifications. The results of these interventions have not yet materialized, but the IP stated that TURIZAM's strategic plan envisions investing in visibility of these interventions in Year 4 and 5.¹⁹

There was always emphasis on the important aspect of the protection and preservation of nature, which I see as the basis for sustainable development, especially in protected areas. – Local partner

The city of Trebinje was listed among the top 100 green destinations and won the Green Destinations Story Award, showing that substantial results can sometimes be achieved with little effort. Specifically, as was outlined in the Activity documents and confirmed by KIs, TURIZAM encouraged the city of Trebinje to apply for this award and helped them prepare the application but did not provide any funds to the city. The city of Trebinje applied for and won the award, leading to increased promotion and visibility globally as a green destination. Further, the initial success led to a chain of positive outcomes. In 2023, the city of Trebinje's story about Orjen Nature Park was selected among the world's 100 best stories about sustainable development, and the city's promotional video won first prize at the 23rd International Touristic Film and Multimedia Festival and Competition, "The Golden City Gate." Building on this success, the city of Trebinje plans to continue applying for international awards in the future.

Finding 18. TURIZAM set the stage for strengthening tourism quality, services, and branding, with some activities already producing positive outcomes. TURIZAM implemented various interventions aiming to improve the quality of tourism products and services. Activities on harmonization of local quality standards for hospitality establishments with international practices resulted in the adoption of a new categorization of accommodation facilities in RS, which is now more in line with international standards. In addition, TURIZAM supported the reclassification of 46 hotels in the RS according to new standards. In FbiH, the Federal Ministry of Environment (FmoET) and Tourism approved the improvements to the classification standards for hotels, but the implementation remains optional until the adoption of the new Law on Hospitality in FbiH.

To promote the rural tourism, TURIZAM implemented the MBV initiative. The promotion of the selected villages led to new visitors, according to FGD participants. Further, in cooperation with the Ministry of Foreign Trade and Economic Relations, TURIZAM worked with local authorities to support the candidacy of one of the villages, Krupa na Vrbasu, for the Best Tourist Villages award, which resulted in its recognition among the 52 Best Tourist Villages 2022 by the UNWTO.

As a result of the selection in the most beautiful villages of BiH, and especially in the selection of the most beautiful villages in the world, we have received a significant increase in the number of interested people who come to these areas, and almost every day we have announcements of excursions of people who come and get to know us at this moment, convey more and more information about us to others [whom] we expect to visit us. – MBV FGD participant

TURIZAM developed the hub-and-spokes model for Sarajevo, Mostar, and Banja Luka. The hub-and-spokes model increases the number of destinations, attractions, and experiences offered to tourists (spokes), in addition to their starting point (the hub, for example, Sarajevo), with the purpose of

¹⁹ Indicator "Percent change in income in protected areas from tourism activities" did not have a reported achievement for Year 2, whereas the indicator "Number of hectares under improved management practices or technologies that promote improved climate risk reduction and/or natural resources management with Turizam assistance" did not have achievements for the first two years of implementation.

expanding their stay in the country. TURIZAM received positive feedback on this model from destination management organizations; however, it is too early to discuss the higher level results.

TURIZAM initiated implementation of a number of other activities envisioned to improve the quality of tourism products and services, but it is too soon for the results to emerge. For instance, TURIZAM envisioned Signature Experiences to promote tourist attractions unique to BiH that could attract high-yield travelers, but a co-implementer opted out of the application. According to the Activity progress reports, TURIZAM decided to implement the intervention on its own and developed a comprehensive three-year marketing access plan (2023–2025) and established the brand's visual identity for Signature Experiences. Activities to support the adoption of a BiH green brand included measures to upgrade the adventure tourism sector standards, which were included in entity strategies. TURIZAM also developed and promoted an outdoor cluster plan, which gave directions on increasing the value and improving the sustainability of the adventure tourism cluster through product development and promotional activities. The Activity supported the International Rafting Federation's World Rafting Championship 2022 and assisted the Una NP and Ciro Cycling Trail in promoting their activities.

TURIZAM's interventions to enhance the quality and professionalism of tourism and hospitality human capital set the stage for future advancements. In 2021, TURIZAM developed the 2021–2027 BiH Human Capital Development Strategy and Plan, which served to plan various capacity-building activities, of which the largest were the following:

- **TURIZAM Academy:** TURIZAM Academy is an online learning platform containing online courses, webinars, and other materials produced through TURIZAM's ongoing activities. According to the TURIZAM database of beneficiaries, at the start of the midterm performance evaluation, 924 participants completed a total of 2,380 courses (three courses per participant, on average).
- **Flow Hospitality and Typsy:** Flow Hospitality and Typsy are two international online learning platforms. TURIZAM signed an agreement to use five courses from Flow Hospitality and around 100 Typsy courses, which were offered free of charge via the TURIZAM Academy platform. Flow Hospitality courses mostly targeted students and employed and unemployed workers, whereas Typsy courses targeted managers and key employees of companies from the hospitality sector. According to the database, at the start of the midterm performance evaluation, 88 participants had completed a total of 151 courses (two courses per participant, on average).
- **Pathways to Professionalism (PtP):** PtP is an on-the-job-training program based on a training plan developed to assist hospitality businesses in mitigating labor attrition problems. Eleven hotels and restaurants in the Sarajevo region and five in Banja Luka region completed training sessions.
- **Safe food-handling courses:** In cooperation with the Food Safety Agency, TURIZAM developed safe food-handling courses and offered them on its online platform TURIZAM Academy. Fifty-two participating food business operators and organizations completed a total of 148 courses.
- **TedQual:** TedQual is a voluntary, rigorous certification that is accessible to any tourist education, training, or research program that has regular programming and has graduates. TURIZAM worked with three interested higher educational institutions (University of Tuzla, University of Eastern Sarajevo, and University of Herzegovina) to submit a TedQual compliance self-assessment. Thus far, the Faculty of Economics of East Sarajevo University and the Faculty of Economics Tuzla University have received TedQual certifications.

- **Improvements of vocational education programs:** TURIZAM cooperated with the German Society for International Cooperation’s Vocational Education and Training project and the Ministry of Education of Canton Sarajevo on the modernization of vocational education for cooks in two secondary schools in Sarajevo—the School for Tourism and Hospitality and Secondary School Center Hadžići. The first cohort of students enrolled in September 2022.

TURIZAM held numerous capacity-building workshops and trainings for accommodation providers in rural areas and destination management and marketing organizations, such as UNWTO Quest training and digital and social media marketing and promotion workshops. Most KIs shared positive perceptions of the TURIZAM trainings. Partners saw a noticeable effect of TURIZAM in the improvement of the quality of tourism products, services, and promotion. Most KIs acquainted with the TURIZAM Academy considered it very useful. Beneficiaries of the PtP program agreed that it was a quality program needed by the industry. According to the survey of beneficiaries, 55 percent of respondents rated the TURIZAM Academy (including Flow Hospitality and Typsy) implementation as very good or excellent, whereas as many as 71 percent gave the same rating to trainings and workshops organized for the tourism sector. KIs also praised TURIZAM activities in secondary (curriculum development) and higher education (TedQual certificate).

[Education] was the best thing they did. . . . That’s why this part where USAID is pushing to train staff at receptions, in hotels, in restaurants and anywhere that has to do with tourism is a great thing. – Local partner

Unlike the trainings, the Job Fair that TURIZAM organized in Banja Luka in April 2022 produced immediate results. TURIZAM cooperated with the RS Employment Bureau, RS Ministry of Trade and Tourism (MTT), RS Chamber of Commerce, and RS Association of Tourism Employers Horeca to organize the fair, which hosted around 200 job seekers, with 33 individuals gaining full-time employment as a result of their participation in the event.

To improve the destination branding, TURIZAM conducted webinars and workshops for local tourist boards and developed a Brand Communications Toolkit. The primary issue that the Activity identified prior to any interventions was that BiH was not represented as a unified destination in international fairs. Because BiH does not have a state-level tourism board, the three tourism boards representing BiH regions across ethnic lines have usually presented their destinations in their own booths. TURIZAM made attempts to bring these organizations together and promote a unified BiH brand during the Building Sustainable Destinations Through Partnerships panel at the Internationale Tourismus-Börse Berlin in March 2023. On this occasion, the Activity achieved success in terms of joint promotion; each organization used the same booth design and marked their booths with the same BiH logo, promoting BiH as “the most exciting destination in the world.” This is a substantial achievement because the BiH context is characterized by strong political and ethnic divisions. While TURIZAM initiated considerable efforts to develop a harmonized BiH brand, any results of these efforts as they relate to tourism numbers and changes in the behavior of local actors, including improved coordination and collaboration, will take time.

TURIZAM provided technical assistance to a number of organizations in developing their digital brand communication plans for key assets. In addition to assistance to various festivals and minor organizations, some of the beneficiaries included boards such as the Tourism Organization of Republika Srpska, Visit Sarajevo, and the Herzegovina and Tuzla tourism boards. The tourism boards have not implemented the digital plans to date, some boards because of the lack of funds, others because of poor internal resources.

TURIZAM supported beneficiaries in acquiring quality marks, geographic indications, and certification of BiH agricultural and rural products and processes. Specific supports include the following:

- TURIZAM assisted several crafts and fruit and vegetable producers in implementing organic standards.

- Two individual producers and a cooperative received a certification from the BiH Institute for Intellectual Property for their production of cereals and honey.
- A smoked meat producer obtained geographical indications from the BiH Food Safety Agency.
- Two hospitality organizations received halal certification.
- Two authentic local food products, *Krajiški omač* and *Trahana*, received Traditional Guaranteed Specialty certification.

One KI mentioned that activities for improving standards and certifications contribute to women's empowerment because women make up the majority of indigenous producers in BiH. It is expected that, in the future, these standards and certifications will help the beneficiaries export their products internationally. Two KIs, government representatives, however, doubted that certification could help producers export their products because they produce limited quantities and because BiH has a limited possibility of exporting food products to the EU market until BiH meets a number of requirements.

This project for sure contributed a lot to one thing. It contributed to the fact that women producers of indigenous products, such as those we support, feel empowered, have much more self-confidence as a very important group, as in tourism and agriculture we have gained by providing quality service in every aspect, not only as producers.
– Local partner

Finding 19. Although TURIZAM initiated several activities to improve access to finance among the MSMEs in the tourism sector, the results have been limited to date.

TURIZAM initiated activities to improve access to finance for tourism service providers, agriculture, and other tourism-related MSMEs. TURIZAM developed the Online Finance Directory to improve access to information on financing opportunities for tourism MSMEs. Further, the Activity signed a JIP with nine banks, two leasing companies, and two microcredit organizations to improve access to finance for MSMEs in the sector. TURIZAM organized several road shows with banks in different cities across BiH to inform the companies of financing possibilities. However, the IP explained that financial institutions in BiH are not interested in financing MSMEs from the tourism sector, especially after the COVID-19 pandemic. The banks lack trust in the stability of the tourism industry because it is susceptible to seasonal, climate, and political influences, and tourism MSMEs are not used to using bank loans. The Activity made some progress by convincing the FMOET and the Federal Government to allocate Bosnia and Herzegovina Convertible Mark (BAM) 1 million through the Federal Development Bank to subsidize interest rates and the total fees for processing the credit applications of projects from the tourism sector MSMEs. The implementation of this activity is still pending as a result of staff changes in the Ministry, but it may stimulate some MSMEs to request loans.

I know that USAID organized some conferences with certain banks from BiH and that they tried to connect our private sector and banks in the best possible way, to explain to the banks how important investment in tourism is and what the benefits of tourism are. However, I'm honestly not sure what the outcome of those efforts was. – Local partner

They [the beneficiaries] told us they liked everything we told them about energy efficiency and the hotel industry, that they were going to make those investments with their own funds. So, we train people in these topics, and they decide on the investment, but they don't want to go to the banks. So, we cannot tick that box, because they have money to invest.
– IP

TURIZAM initiated several activities to attract foreign investments and establish public–private partnerships (PPPs) in the sector. On the basis of the signed JIP with the Sarajevo Business Forum, TURIZAM was able to focus on the organization of several tourism-related events, such as a tourism panel and promotion of investments in tourism. In cooperation with RS MTT, TURIZAM supported the development of a questionnaire of potential PPP investments, disseminated to municipalities in

the RS. On the basis of the questionnaire, RS MTT collected 14 new projects for review and consideration, although the results have yet to be seen. Because of complexities of legal regulation of PPPs, poor capacity of governments to implement such projects, and perception of BiH as a high-risk country for investments, both local authorities and investors are reluctant to engage in such transactions.

Finding 20. TURIZAM promoted BiH in international markets with an emphasis on local events and experiences. Because TURIZAM implementation started during the pandemic, TURIZAM's interventions attempting to attract high-yield visitors year round were initiated by developing the COVID-19 health and safety guidelines and protocols and the TRP. Afterward, TURIZAM invested considerable efforts to improve the appeal of BiH internationally. In collaboration with the FBiH Chamber of Commerce, TURIZAM designed and implemented a Trip Advisor campaign to promote FBiH in five priority markets: Germany, Türkiye, Austria, Croatia, and Serbia. Investing BAM 100,000 in the campaign, TURIZAM secured BAM 0.5 million from the FMoET. The campaign was considered successful because it resulted in 18 million views and 22,000 clicks.

TURIZAM achieved several successes hosting the so-called familiarization trips. Familiarization trips present promotional tours or trips designed to familiarize potential promoters of a destination with its attractions to encourage them to sell the destination or products to their clients. In cooperation with Intrepid Travel and the Resilience Council, TURIZAM organized an eight-day "Bosnia and Herzegovina Expedition" familiarization trip for representatives of eight world-renowned media organizations, resulting in articles published in their respective magazines. The familiarization trip for Intrepid Travel resulted in its offer of an eight-day BiH trip on Intrepid's platform, compared with the previous two-day offer. In addition, TURIZAM organized a familiarization trip for the United Kingdom's The Travel Corporation that resulted in the corporation's adding 14 BiH products and experiences to its Balkan tour programs. Familiarization trips for journalists resulted in articles about BiH in *The Daily Telegraph* and *The Guardian*.

Further, TURIZAM organized the Online Travel Agent Academy to reach, inform, and educate international tour operators and travel agents about BiH tourism offerings. According to the reports, 448 international travel agents had completed 1,642 courses offered by the academy by the end of Year 2. TURIZAM supported three destination presentations in partnership with Visit Sarajevo, the Tourism Organization of Republika Srpska, Herzegovina Tourism Cluster at Internationale Tourismus-Börse Berlin, Uzakrota Departures Summit Berlin, and Roadshow in Amman. TURIZAM signed a JIP with the Malaysian Association of Tours and Travel Agents, Turkish Airlines, Expedia, Finn Partners, and Lieb Management to expand the network of international travel agents and promote BiH worldwide. TURIZAM also signed a JIP with Monri to enable digital payment options for tourism service providers. The outcomes of these activities have yet to be seen.

The Activity organized a delegation of eight Bosnian travel agencies and four hotels on two country-to-country road shows in the United Arab Emirates, Saudi Arabia, and Jordan. The main goal of the road shows was networking with domestic tour operators and discussing direct business-to-business opportunities to promote and sell BiH tours. The KIs that participated in the road shows said that road shows did not result in any business deals, but the IP learned that some of the road shows resulted in business cooperation. For instance, BH Passport, a local tour provider, signed a contract with a Jordanian company to start selling tours to BiH as a result of the road show. Also, the IP noted that the establishment of the direct airline route from Amman to Sarajevo was a result of a roadshow. A KI emphasized the extreme importance of continuing the exploration of opportunities for partnership through such events, because a single successful partnership could generate profit to cover the costs of all the unsuccessful road shows. Participants were also willing to continue investing in the road shows themselves.

A great idea, the results of both the Dubai and Jeddah road shows are zero. At the same time, I do not consider it a failure. We needed to go, we needed to do promotion, I always say we will go to ten road shows, if we get just one quality partner at one of those, all ten will pay off. – FGD participant

The Activity achieved noticeable results with the Sarajevo and Tuzla international airports. First, TURIZAM developed incentive schemes for the Sarajevo, Tuzla, Banja Luka, and Mostar airports to attract international airlines. The Activity also supported Tuzla International Airport in attracting Ryanair to introduce two new routes to Tuzla. Although the connections to these destinations were already established by Wizz Air, the KIs perceived the collaboration with Ryanair as important. However, these flights were suspended in fiscal year 2023 because of the airport tax the airline companies needed to pay for every passenger to the BiH Directorate of Civil Aviation. An incentives scheme for Sarajevo International Airport resulted in attracting LOT Polish Airlines to establish a route from Sarajevo to Warsaw. In addition, during the road show in Jordan, TURIZAM facilitated a discussion between Sarajevo International Airport and Royal Jordanian Airlines, thus contributing to the establishment of a direct flight between Amman and Sarajevo, which had been planned and advocated by various stakeholders for a long time.

The partnership resulted in Ryanair introducing flights from Tuzla to Memmingen, Stockholm, and Vienna, which increased the number of flights we already had with Wizz Air. Unfortunately, on June 1 this year [2023], that is, after less than 7 months, Ryanair temporarily suspended flights. – Local partner

According to the Activity documentation and KIs, TURIZAM provided extensive technical assistance to the BiH FTC and Slow Food Trebinje in developing their business and marketing plans. Specifically, the purpose of the assistance to FTC was to develop and promote the Herzegovina Wine Route (HWR) and the BiH wine tourism destination brand. For Slow Food Trebinje, the objective was to promote the region as a slow food destination. These interventions resulted in the HWR's achieving Iter Vitis membership in September 2022, thereby raising international recognition of this tourist niche and improving the tourist offer of BiH. With TURIZAM support, the city of Mostar received an award as the best wine city; the city of Trebinje received an award as the best sustainable destination; and the Tvrđos Monastery wine cellars, in Trebinje, received an award as the best practice that improves historical heritage and wine. TURIZAM assisted Slow Food Trebinje and Lux Travel to develop and promote the Cheese and Honey Trail. Several KIs noted that the results of TURIZAM support to the HWR and Slow Food are noticeable.

I think that this is one of the aspects of the USAID's tourism project where they made significant progress, if we consider that the Herzegovina Wine Route entered the European network of protected wine routes. . . . What I see is that, every year, more and more international promotion is done by USAID tourism and it has effects. – Local partner

Finding 21. Although most grants were not completed by the time of data collection, most grantees were satisfied with the early results of grant assistance. Most grant recipients expressed overall satisfaction with the early outcomes of the grants. Almost all grant recipients acknowledged that the grants secured them media exposure and recognition as USAID's grantees. Some said TURIZAM helped them significantly expand their business networks. Among those who received grants intended for enhancing their brand and expanding access to regional and international markets, some grant recipients reported that the grants increased their presence within domestic and international markets and catalyzed new business prospects. Regarding grants for the training of tourism workers, grantees expressed their satisfaction with employment opportunities generated for trainees. In several instances, trainees secured jobs while still in the training or immediately on completion. TURIZAM supported some grantees in obtaining valuable international certification and helped them obtain Safe Travels Stamps during COVID-19. Recipients emphasized the necessity of patience because the results of various grants, such as those related to marketing and branding, might not be visible immediately.

There's a shift in adventure tourism. There are workshops being held. Guidelines have been established, so progress is noticeable. We have also received that management plan. The collaboration will continue. – Local partner

As far as I can see, there is no regeneration or revolution happening now, but some things are moving; [TURIZAM is] really putting in a lot of effort It is impossible not to have results. If we do not see any results, that does not mean that [TURIZAM is] not achieved something. – Local partner

Finding 22. Several partners noted that TURIZAM laid the foundation for the sector’s economic growth in the upcoming period and that achieving tangible results takes time.

Partners believed that the tourism sector needed a longer term, comprehensive approach to sector development. Although TURIZAM already has made progress in achieving its results, a few partners and beneficiaries mentioned that they anticipated more concrete results in the long term, as it takes time for the effects to emerge. According to the survey of partners and beneficiaries, almost eight of ten respondents (77 percent) agreed that it would take time for the TURIZAM interventions to produce results. Analysis of the TURIZAM award indicates that many Activity interventions were designed to establish the foundation for the longer term tourism development in the country rather than to produce immediate results. Most interventions—such as the development of strategic documents, in-depth analyses of specific sectoral niches, work on standards and certifications, curriculum development, identification of opportunities for tourism MSME financing and investments, and capacity-building activities—require time to bring about high-level results such as an increased share of tourism in the nominal gross domestic product and an increased number of jobs in the tourism sector. Immediate results would also require high engagement, collaboration, and synergies among all relevant actors, which are hard to achieve in the BiH context.

The results of the promotion are very difficult to measure at the moment, so it takes a lot of time to have concrete results. – Beneficiary

We have started implementing some activities, but it is still a short period of time to be able to say whether there is an impact in terms of increasing the number of visitors. I think we will be able to say that in a few months after we manage to implement some of the activities. – Local partner

It [TURIZAM] has created an extremely good platform for further implementation, communication, and I consider it very important that this project gets its next phase. – Local partner

According to TURIZAM’s annual reporting, of 34 performance indicators defined in the Activity MEL plan, TURIZAM reached Year 1 and Year 2 targets on eight indicators and exceeded targets on 19 indicators. Of the 19 indicators in which TURIZAM exceeded targets, in five it also exceeded the life of Activity targets²⁰ (LoA). TURIZAM, however, did not reach its targets on four performance indicators: tracking the number of private sector enterprises with increased access to finance, amount of finance secured by enterprises, online reach and engagement statistics, and percentage of female participants in TURIZAM-assisted programs designed to increase access to productive economic resources.²¹ Concerning the indicators that track MSMEs’ access to finance and the amount of finance secured by enterprises, TURIZAM’s IP explained the Activity made some progress in their work with banks and companies, and they believe they can make up the current shortfall in the following years. However, the Activity also noted that tourism companies, which traditionally had very limited access to finance, learned to rely on private sources of financing, so it is hard to motivate them to reach out to banks. The *Online reach and engagement statistics index* did not reach the target value because some tourism organizations initially refused to invest in their digital marketing, but this attitude has changed in the meantime and the Activity expects that it will be attaining their targets in the following years. For the indicator *Percent change in women’s participation*

²⁰ The Activity exceeded the Life of Activity targets on the following indicators: Share of tourism in nominal GDP (%); Number of part-time, seasonal and other types of jobs not considered full time officially registered jobs in USG-assisted enterprises and other private sector partners/beneficiaries; Number of strategies, policies, regulations necessary for the tourism sector growth adopted with USG assistance; Change in number of tourism nights recorded (in 000); Number of local agriculture/culinary/gastro/rural tourism events and experiences promoted.

²¹ The Activity could not report achievements for the remaining three indicators sourced from secondary sources because they were unavailable.

in tourism workforce, the Activity explained that the actuals being lower than expected are a consequence of the COVID-19 pandemic, which caused the loss of many tourism jobs, including jobs held by women. The LoA target for this indicator was reduced from 13 to 10 percent in TURIZAM's most recent contract modification issued during this evaluation. But this indicator may not reflect the primary issue when it comes to women participation in tourism workforce – the need to have more women in managerial positions in the sector.

The Activity Tracking Table showing TURIZAM's progress on its performance indicators updated by the Activity at the start of the evaluation is enclosed in Annex 4.

EQ2 CONCLUSION

TURIZAM made visible progress in improving the tourism development strategic framework and international promotion of BiH in the first three years of the Activity. In terms of the regulatory framework, the RS and FBiH tourism development strategies have been adopted. With TURIZAM assistance, Sarajevo and Tuzla international airports established new airline routes. Considerable progress has been made in international promotion of BiH destinations. One of the villages selected under the MBV Activity, Krupa na Vrbasu, was selected as one of 52 Best Tourism Villages in the world in 2022, and the villages have in general started reporting an increased number of visitors. The world-renowned media, such as *The Daily Telegraph* and *The Guardian*, published articles about BiH. The Trip Advisor campaign promoting FBiH resulted in 18 million views and 22,000 clicks. The city of Mostar was pronounced the best wine city; the city of Trebinje one of the best sustainable destinations; and the Tvrđos Monastery wine cellars, in Trebinje, the best practice that improves historical heritage and wine.

The higher level effects of TURIZAM activities have yet to be seen. The FBiH and RS strategies are awaiting implementation, and the BD strategy is awaiting adoption. Enhanced international promotion is expected to lead to an increased number of foreign visitors and affect economic growth. Similarly, improvements in the quality of tourism services and products—such as TedQual certification of tourism higher education programs, acquisition of quality marks, geographic indications, certification of agricultural and rural products, and capacity building of tourism workforce—are expected to lead to improvement in the country's image, more visitors and longer stays, and economic growth advancement in the longer run. TURIZAM's results regarding environmental protection and nature conservation, and facilitating the tourism MSMEs' access to finance and investments in tourism, have yet to be seen. In conclusion, the Activity laid a strong foundation for the sector's economic growth in the future.

RECOMMENDATIONS

On the basis of the findings and conclusions of the TURIZAM midterm performance evaluation, the ET identified the following recommendations for USAID's consideration:

Design

- Consider building on the momentum and facilitating further development of domestic tourism.
- Because all stakeholders agreed that TURIZAM grant fund was insufficient, considering the needs of the sector, look for opportunities to increase the Activity grant fund or government funding for the sector.

Implementation

Work with governments and advocacy

- Continue supporting the entity ministries in the implementation of action plans accompanying tourism development strategies and regulatory reform agendas.
- Strengthen the sector's capacity to jointly advocate for regulatory improvements (e.g., adoption of a BD tourism development strategy, FBiH Law on Hospitality, establishment of a tourism satellite account, and nature protection and conservation) and stronger government engagement in tourism development (e.g., by investing in infrastructure of NPs and MBVs).
- Support women's inclusion in policy development in the sector and advocate for increasing women's employment in higher ranking jobs within the sector. Continue advocating for more opportunities for employment of PwD in the tourism sector.

Promotion and increase in the number of foreign visitors

- On developing the harmonized BiH destination brand, continue investing in campaigns such as Tripadvisor and familiarization trips to promote the new brand.
- Continue working with MBVs and NPs to build their capacity to attract and receive tourists.
- Support tourism boards to mobilize funds and/or invest in digital marketing.
- Continue advocating for visa waivers/procedure simplification for the residents of countries that are potentially solid target markets.
- Continue working with airlines to establish new routes to BiH and with airports to establish an enabling environment for international airlines to come to the country.

Access to finance and PPPs

- Continue strengthening the capacity of businesses in the tourism sector to develop business plans for facilitating access to finance, including EU subsidies.
- Consider working on legislative improvements, capacity building of local actors to engage in PPPs, and promotion of successful examples of PPPs implemented in BiH in the past to encourage the actors to use this mechanism in tourism.

Grant implementation

- Continue providing open communication and collaboration with grant applicants and grantees and providing assistance in the preparation of grant applications and reporting, especially for applicants without prior experience with (USAID) grants.
- Consider removing the cost contribution requirement from the merit criteria to be more inclusive of applicants who are at lower stages of business development.
- Consider timing grant applications and scoring so that they better fit industry requirements, particularly in season-sensitive activities.

Collaborating, learning, and adapting

- Continue looking for synergies and opportunities for collaboration with other donors.
- Strengthen collaboration with other USAID activities, including: the SPPG on advocacy activities; LGAA and DI2 on PPPs, and (where appropriate) advocating for local initiatives (e.g., assistance to the MBV, NP development, environmental protection, and nature conservation); Media Engagement Activity and its beneficiaries on promotion of TURIZAM activities; and the Development Finance Corporation to secure bank guarantees to tourism MSMEs.
- Replicate approaches that generated success thus far to achieve more desired results. For instance, replicate the approaches to promotion employed by the city of Trebinje and Krupa na Vrbasu. Use job fairs and grants to facilitate employment. Advocate directly with parliamentarians for adoption of regulatory documents.
- Closely monitor implementation and results of activities that have not produced visible results yet, particularly road shows and the hub-and-spokes model. Adapt on the basis of learning and reconsider whether investments of this kind represent adequate value for money. Also, monitor for results all activities designed to improve the quality of products and services (including those related to standards and certifications, and classification of hotels, trainings, and activities in the education sector) and adapt on the basis of learning. Assess the costs and benefits of investing considerable effort in development of the state-level tourism strategy, given the lack of political will for state-level initiatives.
- Be consistent in including and consulting relevant stakeholders in activity planning to ensure their support and avoid issues with sequencing and timeliness of interventions.
- Ensure that the target audience understands the content of capacity-building/awareness-raising interventions by offering them in local language. Consider providing the foreign-language courses for tourism workers.
- Revise the Activity MEL plan to modify the targets for indicators where the Activity over- or under-performed, and to make it in accordance with the contract modification. Employ complexity-aware approaches to track the implementation and outcomes of activities for which the results are hard to capture through traditional performance tracking.

ANNEXES

ANNEX I: STATEMENT OF WORK

PURPOSE OF THE ASSIGNMENT

As defined in the 2020-2025 Country Development Cooperation Strategy (CDCS), the United States Agency for International Development in Bosnia and Herzegovina (USAID/BiH) strives to strengthen economic growth by supporting the competitiveness of industries in Bosnia and Herzegovina (BiH). One of the Mission’s primary targets is the tourism sector, with the potential to be one of the fastest-growing industries in BiH.²²

USAID/BiH has requested its Monitoring and Evaluation Support Activity (MEASURE II), implemented by American Institutes for Research (AIR), to conduct a mid-term performance evaluation of the USAID’s Developing Sustainable Tourism Activity in BiH (TURIZAM). This performance evaluation will examine TURIZAM’s progress during the first two and half years of implementation in accelerating economic growth in the tourism sector. This evaluation aims to provide the Mission with credible and valuable insights to make informed programmatic decisions and potential adjustments for the remainder of the Activity, maximizing the likelihood of achieving the desired results. The implementing partner (IP) will use the evaluation results to take mid-term corrective actions (if needed) to the Activity implementation practices.

SUMMARY INFORMATION

TURIZAM is a 5-year USAID/BiH-funded Activity implemented by Chemonics International Inc. The Activity contributes to the CDCS Development Objective 2: Socio-Economic Conditions Improved. The mid-term performance evaluation will analyze the Activity design and progress toward the expected results. The evaluation team will apply a rigorous performance evaluation design to obtain high-quality data and produce credible and actionable findings, conclusions, and action-oriented recommendations. Exhibit I-I presents the TURIZAM Activity details.

Exhibit I-I. Basic Information on the Developing Sustainable Tourism Activity in BiH

Activity Name	Developing Sustainable Tourism Activity in BiH (TURIZAM)
USAID Office	USAID/BiH Economic Development Office
Implementer	Chemonics International Inc.
Contract Number	72016820C00004
Total Estimated Cost	\$19,994,947.00
Life of Activity	August 12, 2020 to August 11, 2025
Active Geographic Region	Across Bosnia and Herzegovina
CDCS Intermediate Result and Sub-Intermediate Result	The Activity primarily contributes to: IR 2.2 Private Sector Growth Increased Sub-IR 2.2.1. Competitiveness of targeted industries and SMEs enhanced, as well as Sub-IR 2.2.2. Access to transparent financing increased

²² European Bank for Reconstruction and Development. (2022). Bosnia and Herzegovina country diagnostic: Private investment challenges and opportunities 2022, available at: <https://www.ebrd.com/bh-country-diagnostic.pdf>

CDCS Intermediate Result and Sub-Intermediate Result	The Activity also contributes to: IR 1.2 Governance effectiveness in targeted areas strengthened Sub-IR 1.2.2 Sub-IR 1.2.2: Adoption of key reforms and implementation supported, and Sub-IR 2.1.3. Broad-based participation in community development strengthened
Required evaluation?	Yes
External or internal evaluation	External

BACKGROUND

Tourism in BiH represents a fast-growing sector that contributes significantly to the country's economy. As a small open economy, BiH is a mostly service-dominated country. According to the Agency for Statistics of BiH, services' share of GDP creation amounted to more than 60 percent in 2021, with tourism-related services²³ adding the most value (one-fifth of GDP).²⁴ Exports of services, dominated by those in the tourism sector,²⁵ accounted for 11 percent of GDP from 2017-2019.²⁶ In the period from 2010 to 2019, BiH recorded an increase of more than 2.3 times in foreign tourist arrivals,²⁷ with tourism adding (directly and indirectly) 10 percent to GDP in 2018.²⁸ In recent years, most of the foreign tourist visits were recorded from neighboring countries, Croatia and Serbia, and by tourists from Slovenia, United Arab Emirates, and Saudi Arabia.²⁹ With the onset of the COVID-19 pandemic, the number of tourism nights dropped to almost a third in 2020 compared to 2019. Although the number of nights rose in 2021 and 2022, it still has not reached the 2019 level.³⁰

Even though the tourism sector recorded continuous growth in the previous decade, BiH has yet to reach its full potential and has many obstacles on that path. According to the Travel & Tourism Competitiveness Index (TTCI), BiH has been the least competitive economy in the region for the last ten years³¹ in terms of travel and tourism.³² The country was viewed to have the worst business environment in the Balkans and Eastern Europe in 2019 (ranked 134th out of 140 countries). Under the TTCI subindex 'Enabling environment', business environment represents one of the key pillars of the TTCI and measures the extent to which a country has a policy environment conducive for companies to do business. Ranking 97th out of 140 countries, BiH was also viewed as having the

²³ Such as transportation, food, trade, and accommodation

²⁴ Agency for Statistics of Bosnia and Herzegovina. (2022). Gross Domestic Product by Production, Income and Expenditure Approach 2021, available at: https://bhas.gov.ba/data/Publikacije/Bilteni/2023/NAC_00_2021_TB_I_BS.pdf

²⁵ Travel services account for around 50 percent and transport services for another 20 percent total services exports

²⁶ European Bank for Reconstruction and Development. (2022). Bosnia and Herzegovina country diagnostic: Private investment challenges and opportunities 2022, available at: <https://www.ebrd.com/bh-country-diagnostic.pdf>

²⁷ Total number of tourism nights in 2010: 1,416,691 compared to 2019: 3,374,452, Agency for Statistics of Bosnia and Herzegovina. (2022). Tourism, available at: https://bhas.gov.ba/data/Publikacije/VremenskeSerije/TUR_01.xls

²⁸ World Bank, "TCdata360: Travel and Tourism Total Contribution to GDP", Washington, DC (available at: https://tcdata360.worldbank.org/indicators/tnt.tot.contrib.gdp?country=BIH&indicator=24693&viz=line_chart&years=1995,2028).

²⁹ Agency for Statistics. (2022). Turizam. Available at: <https://bhas.gov.ba/Calendar/Category/19>

³⁰ Agency for Statistics. Turizam. Available at: <https://bhas.gov.ba/Calendar/Category?id=19&page=8&statGroup=19&tabId=0>

³¹ Kosovo not included

³² World Economic Forum. Travel & Tourism Competitiveness Report 2011-2019 and Travel & Tourism Development Index 2021. Available at: <https://www.weforum.org/reports>

worst infrastructure system in the Balkans and Eastern Europe in 2019.³³ Infrastructure represents a subindex of TTCI and captures the availability and quality of physical infrastructure of each economy. The most recent data from the Travel & Tourism Development Index 2021³⁴ shows that the country's status remained unchanged, with BiH ranking 95th out of 117 countries.

According to the Organization for Economic Cooperation and Development (OECD)³⁵, BiH faces several obstacles that hinder tourism sector development. Firstly, BiH has a complex tourism policy framework characterized by responsibilities sharply divided between multiple administrative levels, as well as weak tourism policy coordination between the state and entities. The country has low visibility as a tourist destination internationally, and poor quality of tourist products, services, and infrastructure. Recruiting a qualified workforce is challenging due to seasonality³⁶ (in 2019, BiH ranked 105th on the WEF Index for the indicator “ease of finding skilled workforce”³⁷), further contributing to BiH's low rank in the TTCI. Difficulties in finding skilled workers, in turn, affects the quality of tourist products and services. Many municipalities fail to fully exploit their tourism potential due to a lack of financial resources and a lack of engagement with private sector stakeholders. Finally, the presence of informal employment in the tourism sector has imposed limitations and prevents certain benefits like access to government subsidies, favorable loan terms and loan guarantees, and other support measures³⁸.

TURIZAM DESCRIPTION AND THEORY OF CHANGE

The purpose of the Turizam Activity is to accelerate economic growth in BiH by strengthening the tourism sector. The Activity design envisions fostering economic growth in the tourism sector by improving the regulatory environment; strengthening tourism quality, services, and branding; facilitating access to finance for tourism service providers; and securing increased access to regional and global markets to tourism and indigenous agriculture products. According to the Award, the Activity envisions that the development of the tourism sector will “lead to more jobs, provide sustainable income for producer organizations and tourism-related companies, help to change the ‘BiH brand’, and have a positive spill-over effect to other sectors; such as agriculture, transportation, and environmental protection”.

Turizam aims to reach its purpose through components organized under 4 objectives:

Objective 1: Enabling environment with the harmonized policies and regulations established

- 1.1: Support harmonized tourism competitiveness strategies, policies, and regulations
- 1.2: Protect the environment, conserve nature, and promote sustainability

³³ World Economic Forum. Travel & Tourism Competitiveness Report 2019. Available at: https://www3.weforum.org/docs/WEF_TTCR_2019.pdf?_gl=1*e19ytz*_up*MQ..&gclid=CjwKCAjw5pShBhB_EiwAvmnNVIopYfT0KVo5o3r_xutTkun79IIT9slhM1hfln4sLG3hTfsdO_JEXBoCmjEQAvD_BwE

³⁴ World Economic Forum. (2021). Travel & Tourism Development Index 2021 – Rebuilding for a Sustainable and Resilient Future. Available at: https://www3.weforum.org/docs/WEF_Travel_Tourism_Development_2021.pdf

³⁵ OECD. (2021). Competitiveness in South East Europe 2021: A Policy Outlook, Competitiveness and Private Sector Development. OECD Publishing. Paris, France. Available at: <https://doi.org/10.1787/dcbc2ea9-en>.

³⁶ OECD. (2021). Competitiveness in South East Europe 2021: A Policy Outlook, Competitiveness and Private Sector Development. OECD Publishing. Paris, France. Available at: <https://doi.org/10.1787/dcbc2ea9-en>.

³⁷ World Economic Forum. (2019). Travel & Tourism Competitiveness Report 2019 – Travel and Tourism at a Tipping Point. Geneva, Switzerland. Available at: https://www3.weforum.org/docs/WEF_TTCR_2019.pdf

³⁸ OECD. (2021). Competitiveness in South East Europe 2021: A Policy Outlook, Competitiveness and Private Sector Development. OECD Publishing. Paris, France. Available at: <https://doi.org/10.1787/dcbc2ea9-en>.

Objective 2: Tourism quality, services, and branding strengthened resulting in an improved BiH tourism industry

- 2.1: Improve quality of tourism products and services across value chain
- 2.2: Enhance quality and professionalism of tourism and hospitality human capital
- 2.3: Revolutionize destination branding and secure geographic indications/certification

Objective 3: Tourism service providers, agriculture, and other tourism-related SMEs gain improved access to finance resulting in a substantial increase in investment

- 3.1: Bridge finance gap for tourism SMEs and indigenous agriculture producers
- 3.2: Fuel tourism-driven investment and public-private partnerships

Objective 4: Tourism and indigenous agriculture products gain increased access to regional and global markets

- 4.1: Attract high-yield visitors year-round
- 4.2: Market indigenous agriculture products locally and internationally

TURIZAM MONITORING, EVALUATION, AND LEARNING PLAN

Turizam is tracking 34 indicators to measure progress in meeting Life of Activity targets. Exhibit 2 presents detailed information on all Activity indicators across expected results, together with their baselines, targets, and actuals for the first two years of implementation. Baselines and targets presented in Exhibit I-2 have been taken from the Activity MEL plan, while actuals have been drawn from the tracking table uploaded onto the BiHPERFORM system.

Exhibit I-2. Activity Indicators, with Targets and Actuals for FY 2021 and 2022, and Life of Activity Targets

	Narrative Summary	Indicators	Baseline/ Year	Targets (actuals) ³⁹		LOA Targets
				FY 2021	FY 2022	
Activity Goal	Private sector growth increased	Share of tourism in nominal GDP (%)	9.3%/2020	n/a (5.0%)	n/a (6.6%)	5%
		Number of new full time equivalent (FTE) jobs created in the tourism market economy	0/2020	0 (-719)	375 ⁴⁰	2,985
		Number of part-time, seasonal and other types of jobs not considered full time officially registered jobs in USG-assisted enterprises and other private sector partners/beneficiaries	0/2020	0 (0)	25 (585)	250

³⁹ Actuals sourced from the TT differ from the values reported in annual report for several Activity indicators.

⁴⁰ Actual not reported.

	Narrative Summary	Indicators	Baseline/Year	Targets (actuals)		LOA Targets
				FY 2021	FY 2022	
Activity Purpose	Economic growth in tourism sector enhanced	Travel and Tourism Competitiveness Index (TTCI) Rank	105/2019	100 ⁴¹	n/a ⁴² (95)	85
		Change in amount of tourism receipts (in mil US\$)	0.3 billion/2020	40 mil (500)	100 mil ⁴³	820 mil
		CBLD-9: Percent of <u>USG</u> -assisted organizations with improved performance	0%/2020	0% (n/a ⁴⁴)	10% (78%)	90%
		EG.5.2-1 Number of firms receiving <u>USG</u> -funded technical assistance for improving business performance	0/2020	60 (300)	300 (535)	1,390
		Percent change in women's participation in tourism workforce	20,735/2020	n/a (1%)	1% ⁴⁵	13%
		GNDR-2: Percentage of female participants in <u>USG</u> -assisted programs designed to increase access to productive economic resources (assets, credit, income, or employment)	0%/2020	50% (50%)	50% (44%)	50%
		Youth -3: Percentage of participants in <u>USG</u> -assisted programs designed to increase access to productive economic resources who are youth (15-29)	0%/2020	15% (26%)	20% (27%)	25%
		STIR-10 Number of innovations supported through <u>USG</u> assistance	0/2020	5 (8)	14 (31)	80
		STIR-14 Number of investments in the digital ecosystem	0/2020	1 (5)	4 (15)	27
		Number of new tourism products and experiences launched	0/2020	2 (4)	20 (35)	350
Activity Sub-Purpose I	An enabling environment with the harmonized policies and regulations necessary for noticeable growth in the tourism sector established	Number of strategies, policies, and regulations necessary for the tourism sector growth adopted with <u>USG</u> assistance	0/2020	2 (8)	2 (5)	10
		Percent change in size of land area classified as protected	2.61%/2020	0% (0%)	0% (19691.8) ⁴⁶	2.25%

⁴¹ Actual not reported.

⁴² TTCI is reported bi-annually.

⁴³ FY 22 actual not entered in BiHPERFORM TT.

⁴⁴ Actual is not reported in the Activity progress report.

⁴⁵ Actual is not reported in the Activity progress report.

⁴⁶ Reported actual for FY 22 is not expressed in percentages.

Activity Outcome/ Output	Narrative Summary	Indicators	Baseline/ Year	Targets (actuals)		LOA Targets
				FY 2021	FY 2022	
Activity Outcome/ Output 1.1.	Harmonized tourism competitiveness strategies, policies, and regulations supported	Number of strategies, policies, and regulations necessary for the tourism sector growth drafted with Turizam assistance	0/2020	1 (8)	5 (14)	25
Activity Outcome/ Output 1.2.	Environmental protection and nature conservation and sustainability supported	Percent change in income in protected areas from tourism activities	0%/2020	0% (0%)	5% ⁴⁷	80%
		EG.3.2-28: Number of hectares under improved management practices or technologies that promote improved climate risk reduction and/or natural resources management with USG assistance	0/2020	0 (0)	0 (0)	23.71
Activity Sub-Purpose 2	Tourism quality, services, and branding strengthened	Percent change in sales of firms receiving USG-funded assistance	0/2020	0% (15%)	5% ⁴⁸	20%
		Change in number of tourism nights recorded (in 000)	1,235.97/2020	50 (988.75)	150 (936.1)	1,528.7
Activity Outcome/ Output 2.1	Quality of tourism products and services across the value chain improved	Percent of hotels/spas/guesthouses classified per new standards	0%/2020	0% (0%)	0% (8%)	70%
Activity Outcome/ Output 2.2	Quality and professionalism of tourism and hospitality human capital enhanced	Number of tourism, hospitality, and related value-chains entrepreneurs, operators, and employees trained in technical, quality, safety, supervisory and managerial disciplines as a result of Turizam assistance	0/2020	600 (2,363)	1,600 (2,878)	13,900
		Number of service employees, entrepreneurs, and operators training activities held	0/2020	10 (53)	50 (145)	305
Activity Outcome/ Output 2.3	BiH destination branding revolutionized and geographic indications or certification secured	BiH Country Brand ranking	116/2019	116 (109)	116 (109)	96
		Number of new local traditional products, processes, and businesses that have achieved protected status or brand certifications	0/2020	1 (2)	15 (15)	110

⁴⁷ Actual is not reported in the Activity progress report.

⁴⁸ Actual is not reported in the Activity progress report.

	Narrative Summary	Indicators	Baseline/ Year	Targets (actuals)		LOA Targets
				FY 2021	FY 2022	
Activity Sub-Purpose 3	Access to finance for tourism service-providers, agriculture, and other tourism-related SMEs improved	EG 2-12. Number of private sector enterprises with increased access to finance due USG assistance	0/2020	0 (0)	2 (1)	30
		Amount of investments in the tourism sector facilitated (in 000\$)	0/2020	0 (0)	100 (136.94)	25,000
Activity Outcome/ Output 3.1	Finance gap for tourism SMEs and local agriculture producers bridged	Amount of finance secured by enterprises (in 000 \$)	0/2020	0 (0)	50 (7.5)	3,000
		Number of SMEs financial applications approved for financing	0/2020	0 (0)	1 (1)	12
Activity Outcome/ Output 3.2	Tourism-driven investment and public-private partnerships strengthened	Number of public-private partnerships facilitated	0/2020	0 (0)	1 (1)	7
Activity Sub-Purpose 4	Access to regional and global markets for tourism and local agriculture products increased	Number of international travel agents selling BiH itineraries	0/2020	0 (0)	20 (136)	230
		Online reach and engagement statistics index	100/2021	n/a (n/a)	120 (97.78)	200
Activity Outcome/ Output 4.1	High-yield visitors attracted year-round	Number of local entrepreneurs, travel agents, and tour operators trained on new/better destination and product marketing, digital media tools and strategies	0/2020	50 (342)	220 (461)	1,700
Activity Outcome/ Output 4.2	Local agriculture and handicrafts products placed for sale at local and international markets	Number of local agriculture/culinary/gastro/rural tourism events and experiences promoted	0/2020	2 (3)	3 (24)	23

EVALUATION QUESTIONS

The evaluation team will answer the following evaluation questions and sub-questions:

EQ1. How has Turizam been designed and implemented, as perceived by its partners and beneficiaries?

EQ1 A. How has Turizam managed, implemented, monitored, and coordinated the grant component of the Activity?

EQ1 B. How have the contextual factors (COVID-19 pandemic, war in Ukraine, and local political issues) affected Turizam implementation?

EQ2. What progress has Turizam achieved in reaching their contract targets and results in terms of improving economic growth in the tourism sector?

EVALUATION DESIGN AND METHODOLOGY

The evaluation design will employ a mixed-methods approach and triangulate data across several sources to assess the efficiency of Turizam interventions and the early outcomes. Specifically, the evaluation team will collect qualitative and quantitative data to provide multiple perspectives and contexts to the evaluation questions. The proposed methodology will ensure systematic and efficient collection of data from the following sources:

- **Activity documents:** Activity Award and modifications; MEL documentation; work plans; annual and quarterly progress reports; and data and documents collected and produced by the Activity and its beneficiaries.
- **Secondary documentation:** documentation related to the tourism sector, such as Travel and Tourism Competitiveness Reports / Travel & Tourism Development Index, and documentation from international organizations such as OECD, European Union, and World Bank Group, as well as documentation from relevant BiH government/public institutions.
- **Key informant interviews (KIIs)** with USAID/BiH and Turizam implementing partner (IP), Turizam beneficiaries, relevant government agencies and institutions, international and donor organizations, tourism and economic experts, and other stakeholders. The full list of key informants and the semi-structured interview guide will be presented in the evaluation work plan and subject to USAID/BiH comments and approval.
- **An online survey** with Turizam beneficiaries.

Exhibit I-3 presents the evaluation matrix, which details the methodological approach to answer each evaluation question. The evaluation team will use secondary documentation and primary data collected through KIIs to gather and triangulate information and best inform the evaluation findings, conclusions, and recommendations. Once the data collection is completed, the evaluation team will compare findings from different data sources to cross-validate the data, enrich the understanding of each research question, and provide a comprehensive overview of the progress and outcomes of the Turizam assistance.

Exhibit I-3. Evaluation Matrix

Evaluation Question (AQ)	Data Sources/Data Collection Methods	Research Design
<p>I. How has Turizam been designed and implemented, as perceived by its partners and beneficiaries?</p> <p>IA. How has Turizam managed, implemented, monitored, and coordinated the grant component of the Activity?</p> <p>IB. How have the contextual factors (COVID-19 pandemic, war in Ukraine, and local political issues) affected Turizam implementation?</p>	<p>Activity documents: Activity Award and modifications; MEL documentation; work plans; progress reports; other Activity documentation.</p> <p>Secondary documentation relevant to the tourism sector.</p> <p>Key informant interviews with USAID/BiH, IP, Turizam partners and beneficiaries, international and donor organizations, experts, and other stakeholders.</p> <p>Online survey of Turizam partners and beneficiaries.</p>	<p>Mixed methods: literature review, transcript coding, descriptive analysis of survey data</p>

Evaluation Question (AQ)	Data Sources/Data Collection Methods	Research Design
2. What progress has Turizam achieved in reaching their contract targets and results in terms of improving economic growth in the tourism sector?	<p>Activity documents: Activity Award and modifications; MEL documentation; work plans; progress reports; other Activity documentation.</p> <p>Secondary documentation relevant to the tourism sector.</p> <p>Key informant interviews with USAID/BiH, IP, Turizam partners and beneficiaries, international and donor organizations, experts, and other stakeholders.</p> <p>Online survey of Turizam partners and beneficiaries.</p>	Mixed methods: literature review, transcript coding, descriptive analysis of survey data

EVALUATION LIMITATIONS

Potential limitations of this evaluation include the following:

- **Response bias.** Some organizations may overstate the outcomes of Turizam’s interventions which they worked on. To account for this bias, the evaluation team (ET) will cross-check inputs from various stakeholders and documentation to validate the credibility of the findings. The ET will ensure that KIs understand that their sincere opinions are valued and that the ET will treat their information as confidential.
- **Interviewer bias.** Interviewers’ behavior and reactions may lead KIs to respond in a certain way. Therefore, the interviewers will be trained to ask questions in a non-leading way. In addition to avoiding any potentially leading questions, the ET will make sure that participants understand that their true opinions are the most appreciated and that their responses are confidential.

DELIVERABLES AND REPORTING REQUIREMENTS

All deliverables will be submitted electronically and in English. The deliverables will include:

- 1. Detailed evaluation work plan and data collection instrument(s)**
The evaluation work plan will include (1) a detailed evaluation design matrix (including the key questions, methods, and data sources used to address each question and the data analysis plan for each question); (2) draft data collection instruments (interview guides and surveys) (3) the list of potential interviewees (without personal information); (4) sampling plan for the survey; (5) known limitations to the evaluation design; (6) the anticipated schedule and logistical arrangements; and (7) a list of the members of the evaluation/ team, delineated by roles and responsibilities.
- 2. Presentation of preliminary findings**
A presentation of preliminary findings to USAID/BiH will include a summary of preliminary findings and recommendations to USAID/BiH.
- 3. Draft evaluation report**
The draft evaluation report will be consistent with the USAID Evaluation Report Requirements (ADS REFERENCE 201MAH, at <https://www.usaid.gov/ads/policy/200/201mah>), USAID’s evaluation policy (https://www.usaid.gov/sites/default/files/2022-05/Evaluation_Policy_Update_OCT2020_Final.pdf) and take into account criteria to ensure the quality of the report

specified in ADS REFERENCE 201 MAA (<https://www.usaid.gov/ads/policy/200/201maa>). Once the initial draft report is submitted, USAID/BiH will have 15 working days to review and comment on the initial draft and submit the consolidated comments to the research team. The research team will address the consolidated comments and submit a revised final draft report within 10 days of receiving USAID/BiH comments.

4. Final evaluation report

Once USAID’s comments on the initial draft are provided to the evaluation team, the team will address comments and submit a revised final report within ten days. Upon USAID’s approval, MEASURE II will prepare the 508 compliant report version and upload it on USAID DEC and MEASURE II website.

5. Evaluation follow-up workshop

Upon the Mission’s approval of the final report, MEASURE II will organize a follow-up workshop to discuss utilization of evaluation findings and conclusions, as well as application of recommendations to ongoing and/or future USAID/BiH development programming. The workshop will strengthen the use of evidence and facilitate improved collaborating, learning, and adapting (CLA) practices for USAID/BiH.

The overview of the tentative evaluation timeline is provided in Exhibit I-4. The evaluation team will conform with the presented schedule to the extent possible. However, slight changes in the timeline are possible and will be communicated to USAID/BiH at the earliest convenience.

Exhibit I-4: Tentative Evaluation Timeline

Tentative Dates	Tasks and Deliverables
June 23, 2023	Submit the draft evaluation work plan to USAID/BiH
June 26 – 30, 2023	Logistical preparation, scheduling KIIs interviews and FGDs, piloting data collection instruments, interviews with USAID and IP
July 2023	Literature review Primary data collection KIIs transcription Initial data analysis
August 2023	Presentation to USAID/BiH to discuss the preliminary findings and recommendations
September 2023	Finalize transcription of KIIs and FGDs Finalize data analysis Draft report
October 13 2023	Submit the draft evaluation report to USAID/BiH
October/November 2023	USAID to send comments on draft report
November/December 2023 (up to 10 working days upon receiving comments)	Submit the final evaluation report to USAID/BiH
December 2023	Evaluation follow-up workshop

TENTATIVE TEAM COMPOSITION AND KEY QUALIFICATIONS

The evaluation team is expected to include six members. The tentative team composition and team members' key qualifications are illustrated in Exhibit I-5. The team composition and level of effort for each team member will be elaborated in detail in the evaluation work plan.

Exhibit I-5. Team Composition and Team Members' Key Qualifications

Position	Key Qualifications
Evaluation Co-leads (MEASURE II staff members)	Project management skills; technical experts in evaluation methodologies according to USAID's requirements; and report writing skills.
Subject Matter Expert, evaluation team member	Expertise in tourism development, tourism policy and strategy, destination management planning, marketing strategies, and sustainability.
Research Assistants (MEASURE II junior staff members)	Data collection and data analysis skills; organizational skills and ability to ensure smooth data collection and processing.

Support for the evaluation team will include:

- Home Office (HO) and Field Office (FO) support in reviewing the evaluation deliverables and exercising general oversight of the evaluation process;
- transcription of audio recordings from KIIs;
- an Office Manager who will provide logistical support with contracting, payments, and field work coordination.

ANNEX II: REVIEWED DOCUMENTS

1. USAID TURIZAM Monitoring, Evaluation, and Learning Plan
2. USAID TURIZAM Award and its modifications
3. USAID TURIZAM Work Plan Year 1
4. USAID TURIZAM Work Plan Year 2
5. USAID TURIZAM Annual Report Year 1
6. USAID TURIZAM Annual Report Year 2
7. USAID TURIZAM Year 1 1st Quarterly Report
8. USAID TURIZAM Year 1 2nd Quarterly Report
9. USAID TURIZAM Year 1 3rd Quarterly Report
10. USAID TURIZAM Year 1 4th Quarterly Report
11. USAID TURIZAM Year 2 1st Quarterly Report
12. USAID TURIZAM Year 2 2nd Quarterly Report
13. USAID TURIZAM Year 2 3rd Quarterly Report
14. USAID TURIZAM Year 2 4th Quarterly Report
15. USAID TURIZAM Year 3 1st Quarterly Report
16. USAID TURIZAM Year 3 2nd Quarterly Report
17. USAID TURIZAM RFA 1
18. USAID TURIZAM RFA 2
19. USAID TURIZAM RFA 3
20. USAID TURIZAM Grants Manual
21. USAID TURIZAM Grant Agreements
22. USAID TURIZAM Contact List for Different Activities
23. USAID TURIZAM Online Finance Directory for Entrepreneurs in Tourism Industry
24. USAID TURIZAM Gender Assessment
25. 2022-2027 Tourism Development Strategy of FBiH
26. 2021-2027 Tourism Development Strategy of RS
27. 2021-2027 Development Strategy of Canton Sarajevo
28. 2021-2025 Tourism Development Strategy of Jordan
29. Business Associations Business Plans
30. World Economic Forum. (2019). Travel & Tourism Competitiveness Report 2019. Travel and Tourism at a Tipping Point
31. World Economic Forum. (2021). Travel & Tourism Development Index 2021 – Rebuilding for a Sustainable and Resilient Future
32. OECD. (2021). Competitiveness in South East Europe 2021: A Policy Outlook, Competitiveness and Private Sector Development. OECD Publishing. Paris, France
33. Agency for Statistics of Bosnia and Herzegovina. (2022). Gross Domestic Product by Production, Income and Expenditure Approach 2021
34. European Bank for Reconstruction and Development. (2022). Bosnia and Herzegovina country diagnostic: Private investment challenges and opportunities 2022
35. Agency for Statistics of Bosnia and Herzegovina. (2023). Business statistics, Tourism cumulative data January – December 2022
36. Agency for Statistics of Bosnia and Herzegovina. (2022). Business statistics, Tourism cumulative data January – December 2021
37. Agency for Statistics of Bosnia and Herzegovina. (2021). Business statistics, Tourism cumulative data January – December 2020
38. Agency for Statistics of Bosnia and Herzegovina. (2020). Business statistics, Tourism cumulative data January – December 2019

ANNEX III: DATA COLLECTION INSTRUMENTS

KEY INFORMANT INTERVIEWS (KII)

1. USAID/BiH (Activity Contracting Officer Representative (COR), Head of EDO Office, MEASURE II COR)
2. Turizam IP
3. Turizam partners and beneficiaries (government institutions and agencies, NGOs, development agencies, business associations, banks, businesses)
4. International organizations and representatives of international community in BiH
5. Turizam grantees and grant applicants

INFORMED CONSENT FORM FOR KIIS

Purpose: Thank you for taking the time to meet with us today. My name is (NAME). I am a researcher from MEASURE II, USAID/BiH's Monitoring and Evaluation Support Activity. MEASURE II is USAID/BiH's monitoring and evaluation platform. Our role is to assist the Mission in monitoring the implementation and effects of all their Activities in BiH by conducting different types of research, including project evaluations, sector assessments, surveys, and indices. We also help USAID's implementing partners develop their routine monitoring, evaluation, and learning plans. USAID/BiH has asked our team to conduct a mid-term performance evaluation of the Turizam Activity. The Activity began in 2020 and is being implemented by Chemonics International Inc. You have been asked to participate today, so we can learn more about the support your organization has received from Turizam or your involvement in implementing the Turizam programs. We would like your honest impressions, opinions, and thoughts on the implementation and outcomes to date of the interventions conducted under the Turizam Activity. We are independent consultants with no affiliation with the organizations implementing the Turizam Activity.

Procedures: If you agree to participate, we ask that you discuss your experience and opinion of the activities and services implemented under the Turizam program. The interview will take about one hour of your time. Although USAID may decide to publish the evaluation findings, all of your answers will be kept confidential. Nothing you tell us will be attributed to any individual. Instead, the report will include only a composite of all of the answers received by individuals we interview. Although we may use quotes, none of the individuals interviewed will be named in the report. We will use the data collected through interviews to produce a report for the USAID/BiH with recommendations on how to improve the effects of the Turizam Activity.

Risks/Benefits: There are no significant risks to your participation in this study. You will not receive any direct benefit or compensation for participating in this study. Although this study will not benefit you personally, we hope our results will help improve future tourism development activities in Bosnia and Herzegovina.

Recordings and Transcripts: The recording is created to produce direct transcripts of this interview to ensure that your statements are not misheard or misinterpreted. The recordings and transcripts will not be shared outside the evaluation team. They will be stored in a secure file without your personal identifiers. All details regarding data protection can be accessed by contacting the controller of this information, USAID MEASURE II, at sfazlic@measurebih.com. Do you have any questions at this time? (Interviewer should answer any questions)

Permission to Proceed: I understand the purpose of the interview as outlined above and understand that I can withdraw from the interview at any time and for any reason. I agree to participate in the interview (Evaluator records).

Yes No

Permission to Record:

Yes No

Initials of evaluator to indicate receipt of verbal consent: _____

Date: _____

USAID

1. What have been the main reasons for USAID to design the Turizam Activity? What informed the design of the Activity?
2. What is the Activity theory of change?
3. What are the biggest challenges Turizam experienced during the first 2.5 years of implementation?
4. Which contextual factors affected the implementation? How did the Activity address these challenges?
5. How has Turizam implemented the grant component of the Activity? Did the Activity face any challenges, and how were they addressed?
6. Who were the best Turizam partners during this period, and which partnerships were hard to establish or less productive than originally envisaged?
7. Turizam produced 28 documents as contract deliverables. How were these documents disseminated, and to what extent have they been used by stakeholders and beneficiaries?
8. What outcomes has the Activity achieved in...? How did they contribute to these results?
 - Improving and harmonizing the regulatory framework necessary for tourism growth?
 - Improving environmental protection and nature conservation?
 - Increasing quality of tourism products, services, and human capital?
 - Strengthening destination branding and secure geographic indications/certification?
 - Improving access to finance for tourism service providers, agricultural producers, and MSMEs?
 - Facilitating tourism driven investments and public-private partnerships?
 - Improving tourism and domestic agriculture products' access to regional and global markets?
9. To what extent would you say these results are a good progress towards accelerating economic growth in the tourism sector?
10. How has Turizam addressed gender equality issues in the sector?
11. How successful has the Activity been in achieving contract targets to date? What are the areas of their good performance, and areas for improvement?
12. If you had an opportunity to design the Turizam Activity again, what would you have done differently?
13. To what extent have you coordinated and collaborated with other donors in the sector?

IMPLEMENTING PARTNER

1. What is the Activity theory of change?
2. What are the biggest challenges Turizam experienced during the first 2.5 years of implementation?
3. Which contextual factors affected the Activity implementation? (PROBE: COVID-19, war in Ukraine, local political issues.)
 - How did the Activity address these challenges?
4. How has Turizam implemented the grant component of the Activity?
 - What types of grants have you distributed so far?
 - What are the grant administration and monitoring procedures in place?
 - Did the Activity face any challenges in grant management, implementation, or coordination, and how were they addressed?
 - What early outcomes have grant recipients achieved to date?
5. Who were the best Turizam partners during this period, and which partnerships were hard to establish or less productive than originally envisaged?
6. Turizam produced 28 documents as contract deliverables. How were these documents disseminated, and to what extent have they been used by stakeholders and beneficiaries?
7. What outcomes has the Activity achieved in...? How has Turizam contributed to these results?
 - Improving and harmonizing the regulatory framework necessary for tourism growth?
 - Improving environmental protection and nature conservation?

- Increasing quality of tourism products, services, and human capital?
 - Strengthening destination branding and secure geographic indications/certification?
 - Improving access to finance for tourism service providers, agricultural producers, and SMEs?
 - Facilitating tourism driven investments and public-private partnerships?
 - Improving tourism and domestic agriculture products' access to regional and global markets?
8. To what extent would you say these results are a good progress towards accelerating economic growth in the tourism sector?
 9. How has Turizam addressed gender equality issues in the sector?
 10. How successful has the Activity been in achieving contract targets to date? What are the areas of good performance, and areas for improvement?
 11. To what extent have you coordinated and collaborated with other donors in the sector?
 12. If you had an opportunity to change the design of the Turizam Activity, what would you have done differently?

GRANTEES

1. Can you briefly describe the project for which you received Turizam financial support?
2. Please describe the grant application procedures:
 - a. How did you learn about the grant opportunity?
 - b. What kind of documentation was required?
 - c. Were the application procedures simple or complex? Did you need Turizam's or a third party's assistance in preparing the application?
 - d. How did you submit the application (hardcopies or electronic documents, in person, via email or post)?
 - e. What was the duration between the application submission and signing grant agreement?
3. Grant implementation/management: Have you faced any issues in grant implementation? (PROBE: due to COVID-19, war in Ukraine, political issues, other)
4. How often, and at what point, did the Turizam monitor your grant application?
5. Please describe the grant reporting requirements.
6. Please describe the grant payment procedures.
7. To what extent were you satisfied with Turizam's grant administration procedures? What worked well, and what should be improved?
8. How has this grant help your organization/company? What have you been able to do with the grant?
9. In your opinion, what should the Turizam Activity do to facilitate the economic growth in the sector? What should be its priority?

DONORS/INTERNATIONAL ORGANIZATIONS

1. Please describe the work that your organization does in the tourism sector.
2. What are the major obstacles to accelerating economic growth in the tourism sector in BiH?
3. Which contextual factors hindered tourism development over the last three years?
4. What changes, positive or negative, have you noticed in the last two and half years when it comes to:
 - Improving and harmonizing the regulatory framework necessary for tourism growth?
 - Improving environmental protection and nature conservation?
 - Increasing quality of tourism products, services, and human capital?
 - Strengthening destination branding and secure geographic indications/certification?
 - Improving access to finance for tourism service providers, agricultural producers, and SMEs?
 - Facilitating tourism driven investments and public-private partnerships?
 - Improving tourism and domestic agriculture products' access to regional and global markets?

5. Are you familiar with the work of the USAID funded Turizam Activity? In what ways, if any, has your organization coordinated or cooperated with Turizam?
6. In what ways, if any, do you coordinate or cooperate with (other) stakeholders in the tourism sector including civil society organizations, donors, government institutions, industry associations etc.?
7. Based on your experience working in the tourism sector, what activities and approaches have been most successful and unsuccessful in accelerating economic growth in the tourism sector in BiH?
8. Do you have any research or policy reports on this topic you would be comfortable sharing?

PARTNERS

1. Could you describe your involvement in the Turizam Activity?
2. How would you rate your cooperation with the Implementing Partner?
3. What are the biggest challenges you experienced during the implementation of Turizam activities?
4. Which contextual factors affected the implementation of Turizam activities? (PROBE: COVID-19, war in Ukraine, local political issues.) How did you address these challenges?
5. Have you been involved in the production of Turizam documents? If yes, how were these documents disseminated, and to what extent have they been used by stakeholders and beneficiaries?
6. Have you read any Turizam-produced documents? If yes, how would you rate their usefulness?
7. What outcomes has the Activity achieved in...? How has Turizam contributed to these results?
 - Improving and harmonizing the regulatory framework necessary for tourism growth?
 - Improving environmental protection and nature conservation?
 - Increasing quality of tourism products, services, and human capital?
 - Strengthening destination branding and secure geographic indications/certification?
 - Improving access to finance for tourism service providers, agricultural producers, and SMEs?
 - Facilitating tourism driven investments and public-private partnerships?
 - Improving tourism and domestic agriculture products' access to regional and global markets?
8. To what extent would you say these results are a good progress towards accelerating economic growth in the tourism sector?
9. How has Turizam addressed gender equality issues in the sector?
10. How successful has the Activity been in achieving contract targets to date? What are the areas of good performance, and areas for improvement?
11. To what extent have you coordinated and collaborated with other donors in the sector?
12. What could have been done differently in the area that you were involved in?

TRAINEES

1. How did you learn about Turizam activity? How did you start your collaboration with Turizam?
2. Could you describe the training that you were involved in? What was the goal of the training, and how was the training implemented?
3. What were the results of the training? Is there something you can do now that you could not do before?
4. To what extent were you satisfied with the training:
 - What worked well, and what should be improved?
 - How would you rate the quality of trainers?
 - Was the training program well organized and easy to follow?
 - Was the training at a comfortable pace? Was it too fast/slow?

- Did the experience of the training experience match the intent of its course title and description?
 - Did the training meet your expectations?
5. Was the training relevant to your job or potential job? If yes, how did the training you attended help you in your current job or potential job? Would you recommend this training to your colleagues?
 6. In your opinion, what should the Turizam Activity do to facilitate economic growth in the sector? What should be its priority?

FOCUS GROUP DISCUSSION

MOST BEAUTIFUL VILLAGES

1. How did you learn about the USAID TURIZAM activity? How did you start your collaboration with TURIZAM?
2. Are you familiar with USAID TURIZAM activities related to the development of rural tourism?
3. Were there any visible improvements in the field? Was there an increase in the number of tourists? Did you have problems with accommodation capacities?
4. Could you tell us about the added value of this activity?
5. How did you specifically collaborate with TURIZAM? Did you receive any technical support? Did you receive any financial incentives? What has been done and is there anything else planned to be done after your village was selected among these 14 villages?
6. What have you done so far with Alter Rural? What was agreed upon by signing the contract? Do you have any future activities planned with them? How has it worked so far? What do you expect?
7. What are your recommendations for both Alter Rural and USAID TURIZAM regarding the improvement of your area? What do you expect in the future? What should be done in the continuation of this project to encourage further development in your places?

GRANT APPLICANTS

1. Could you describe the activity for which you applied for the grant assistance?
2. How did you hear about the grant?
3. Which documents were needed to be submitted for the application? How was the process of submitting the application itself, was it, in your opinion, complex, or easy?
4. Did you receive any assistance for the application?
5. Are you familiar with the activities that are carried out within the USAID TURIZAM? What else does TURIZAM do besides awarding grants? Have you come across USAID TURIZAM documents?
6. In your opinion, what are the biggest problems in the tourism sector and what should USAID TURIZAM work on the most in order to change the state of tourism in this country?
7. Apart from grants, would any other type of assistance be helpful?
8. TURIZAM has four components. The first is to strengthen the regulatory framework, laws, by-laws, and other regulations that deal with this sector. The second is about strengthening human resources and strengthening tourism products in this country. The third one is about increasing access to financial resources. Finally, the last one is about increasing access to different markets, both domestic and foreign. In your opinion, is there anything that should be focused on, apart from the mentioned?

ONLINE SURVEYS

The online survey of partners:

Q1. How would you rate your cooperation with the Turizam Activity? (On a scale from 1 – not cooperative at all to 5 – very cooperative)

Q2. To what extent do you agree or disagree with the following statements? (Likert Scale 1=strongly disagree; 2=disagree; 3=Neither agree nor disagree; 4=Agree; 5=Strongly agree):

- The COVID-19 pandemic had a negative effect on the implementation of our activities.
- War in Ukraine had a negative effect on the implementation of our activities.
- Political situation in BiH had a negative effect on the implementation of our activities.

Q3. Turizam staff successfully addressed the challenges faced during the implementation. (Likert Scale 1=strongly disagree; 2=disagree; 3=Neither agree nor disagree; 4=Agree; 5=Strongly agree)

Q4. Were you involved in the production of Turizam documents? *Single response*

- Yes
- No – skip to Q6.

If yes, Q5. To what extent do you agree or disagree with the following statements? (Likert Scale 1=strongly disagree; 2=disagree; 3=Neither agree nor disagree; 4=Agree; 5=Strongly agree):

- Quality of produced documents is high
- Documents that were produced were effectively disseminated
- Stakeholders and beneficiaries use these documents

Q6. Have you read any Turizam-produced documents other than the one you worked on? *Single response*

- Yes
- No – skip to Q8

Q7. To what extent do you agree or disagree with the following statements? (Likert Scale 1=strongly disagree; 2=disagree; 3=Neither agree nor disagree; 4=Agree; 5=Strongly agree):

- Quality of produced documents is high
- Documents that were produced were effectively disseminated
- Stakeholders and beneficiaries used these documents

Q8. To what extent do you agree or disagree with the following statements? Choose “not applicable” for any statement the content of which is not related to your involvement in Turizam (Likert Scale 1=strongly disagree; 2=disagree; 3=Neither agree nor disagree; 4=Agree; 5=Strongly agree; not applicable):

- Turizam contributed to the improvement and harmonization of the regulatory framework necessary for tourism growth.
- Turizam contributed to the improvement of environmental protection and nature conservation.
- Turizam contributed to the increase of quality of tourism products, services, and human capital.
- Turizam contributed to strengthening destination branding and securing geographic indications/certification.
- Turizam contributed to improving access to finance for tourism service providers, agricultural producers, and MSMEs.
- Turizam contributed to facilitating tourism driven investments and public-private partnerships.
- Turizam contributed to improving tourism and domestic agriculture products’ access to regional and global markets.
- Turizam results contributed to accelerating economic growth in the tourism sector.

Q9. How would you rate your cooperation with the other stakeholders involved in the activity that you were involved in? (On a scale from 1 – not cooperative at all to 5 – very cooperative).

Q10. What could have been done differently in the area that you were involved in? *Open-ended.*

The online survey of beneficiaries:

Q1. What was your involvement in the Turizam Activity? *Multiple response question.*

- Online courses
- Roadshow participation
- Conference
- Webinar
- Other: please specify

Q2. We were asked about our priority interests that would help us in our development. (Likert Scale 1=strongly disagree; 2=disagree; 3=Neither agree nor disagree; 4=Agree; 5=Strongly agree)

Q3. To what extent do you agree or disagree with the following statements? (Likert Scale 1=strongly disagree; 2=disagree; 3=Neither agree nor disagree; 4=Agree; 5=Strongly agree):

- Organization of the received assistance was on a high level.
- Received assistance was very helpful.
- Content of received assistance was of high quality.
- Received assistance met my expectations.
- Received assistance was most relevant to my job.

Q4. To what extent do you agree or disagree with the following statements? (Likert Scale 1=strongly disagree; 2=disagree; 3=Neither agree nor disagree; 4=Agree; 5=Strongly agree):

- As a result of the training, I can do something I was not able to do before.
- Received assistance helped me at my current job.
- I would recommend this type of assistance to my colleagues.

Q5. What could have been done differently in the area that you were involved in? *Open-ended.*

ANNEX IV: TURIZAM TRACKING TABLE

Level of Result	Narrative Summary	Indicators	Baseline	Targets (actuals) ⁴⁹		LOA Targets
				FY 2021	FY 2022	
Activity Goal	Private sector growth increased	Share of tourism in nominal GDP (%)	9.7%/2020	n/a (5.0%)	n/a (6.6%)	5%
		Number of new full time equivalent (FTE) jobs created in the tourism market economy	0/2020	0 (-719)	375 ⁵⁰	2,985
		Number of part-time, seasonal and other types of jobs not considered full time officially registered jobs in USG-assisted enterprises and other private sector partners/beneficiaries	0/2020	0 (0)	25; F 12, M 13 (585)	250; F 125, M 125
Activity Purpose	Economic growth in tourism sector enhanced	Travel and Tourism Competitiveness Index (TTCI) Rank	105/2019	100 ⁵¹	n/a ⁵² (95)	85
		Change in amount of tourism receipts (in mil US\$)	0.4 billion/2020	40 (500)	100 ⁵³	820
		CBLD-9: Percent of USG-assisted organizations with improved performance	0%/2020	0% (n/a ⁵⁴)	10% (78%)	90%
		EG.5.2-1 Number of firms receiving USG-funded technical assistance for improving business performance	0/2020	60 (300)	300 (535)	1,390
		Percent change in women's participation in tourism workforce	20,735/2020	n/a (1%)	1% ⁵⁵	10% ⁵⁶
		GNDR-2: Percentage of female participants in USG-assisted programs designed to increase access to productive economic resources (assets, credit, income, or employment)	0%/2020	50% (50%)	50% (44%)	50%
		Youth -3: Percentage of participants in USG-assisted programs designed to increase access to productive economic resources who are youth (15-29)	0%/2020	15%; F 50%, M 50% (26%; F 49%, M 51%)	20%; F 50%, M 50% (27%; F 50%, M 50%)	25%; F 50%, M 50%
		STIR-10 Number of innovations supported through USG assistance	0/2020	5 (8)	14 (31)	80
		STIR-14 Number of investments in the digital ecosystem	0/2020	1 (5)	4 (15)	27
		Number of new tourism products and experiences launched	0/2020	2 (4)	20 (35)	350

⁴⁹ Actuals sourced from the TT differ from the values reported in annual report; for several Activity indicators.

⁵⁰ Actual not reported.

⁵¹ Actual not reported.

⁵² TTCI is reported bi-annually.

⁵³ FY 22 actual not entered in BiHPERFORM TT.

⁵⁴ Actual is not reported in the Activity progress report.

⁵⁵ Actual is not reported in the Activity progress report.

⁵⁶ Revised from 13% to 10% according to TURIZAM Contract modification #5.

Level of Result	Narrative Summary	Indicators	Baseline	Targets (actuals)		LOA Targets
				FY 2021	FY 2022	
Activity Sub-Purpose 1	An enabling environment with the harmonized policies and regulations necessary for noticeable growth in the tourism sector established	Number of strategies, policies, and regulations necessary for the tourism sector growth adopted with <u>USG</u> assistance	0/2020	2 (8)	2 (5)	10
		Percent change in size of land area classified as protected	2.61%/2020	0% (0.04%)	0% (0.51%)	2.25%
Activity Outcome/ Output 1.1.	Harmonized tourism competitiveness strategies, policies, and regulations supported	Number of strategies, policies, and regulations necessary for the tourism sector growth drafted with Turizam assistance	0/2020	1 (8)	5 (14)	25
Activity Outcome/ Output 1.2.	Environmental protection and nature conservation and sustainability supported	Percent change in income in protected areas from tourism activities	0%/2020	0% (0%)	5% ⁵⁷	80%
		EG.3.2-28: Number of hectares under improved management practices or technologies that promote improved climate risk reduction and/or natural resources management with <u>USG</u> assistance	0/2020	0 (0)	0 (n/a)	23.71
Activity Sub-Purpose 2	Tourism quality, services, and branding strengthened	Percent change in sales of firms receiving <u>USG</u> -funded assistance	0/2020	0% (15%)	5% ⁵⁸	20%
		Change in number of tourism nights recorded (in 000)	1,235.97/2020	50 (988.75)	150 (-63.17)	1,528.7
Activity Outcome/ Output 2.1	Quality of tourism products and services across the value chain improved	Percent of hotels/spas/guesthouses classified per new standards	0%/2020	0% (0%)	0% (8%)	70%
Activity Outcome/ Output 2.2	Quality and professionalism of tourism and hospitality human capital enhanced	Number of tourism, hospitality, and related value-chains entrepreneurs, operators, and employees trained in technical, quality, safety, supervisory and managerial disciplines as a result of Turizam assistance	0/2020	600; F 300, M 300 (2,363; F 1,189, M 1,117)	1,600; F 800, M 800 (2,878; F 1,277, M 1,560)	13,900; F 6,950, M 6,950
		Number of service employees, entrepreneurs, and operators training activities held	0/2020	10 (53)	50 (145)	305
Activity Outcome/ Output 2.3	BiH destination branding revolutionized and geographic indications or certification secured	BiH Country Brand ranking	116/2019	116 (109)	116 (109)	96
		Number of new local traditional products, processes, and businesses that have achieved protected status or brand certifications	0/2020	1 (2)	15 (15)	110
Activity Sub-	Access to finance for	EG 2-12. Number of private sector enterprises with increased access to finance due <u>USG</u> assistance	0/2020	0 (0)	2 (1)	30

⁵⁷ Actual is not reported in the Activity progress report.

⁵⁸ Actual is not reported in the Activity progress report.


Level of Result	Narrative Summary	Indicators	Baseline	Targets (actuals)		LOA Targets
				FY 2021	FY 2022	
Purpose 3	tourism service-providers, agriculture, and other tourism-related SMEs improved	Amount of investments in the tourism sector facilitated (in 000\$)	0/2020	0 (0)	100 (136.94)	25,000
Activity Outcome/ Output 3.1	Finance gap for tourism SMEs and local agriculture producers bridged	Amount of finance secured by enterprises (in 000 \$)	0/2020	0 (0)	50 (7.5)	3,000
		Number of SMEs financial applications approved for financing	0/2020	0 (0)	1 (1)	12
Activity Outcome/ Output 3.2	Tourism-driven investment and public-private partnerships strengthened	Number of public-private partnerships facilitated	0/2020	0 (0)	1 (1)	7
Activity Sub-Purpose 4	Access to regional and global markets for tourism and local agriculture products increased	Number of international travel agents selling BiH itineraries	0/2020	0 (0)	20 (136)	230
		Online reach and engagement statistics index	0/2020	n/a (n/a)	120 (97.78)	TBD ⁵⁹
Activity Outcome/ Output 4.1	High-yield visitors attracted year-round	Number of local entrepreneurs, travel agents, and tour operators trained on new/better destination and product marketing, digital media tools and strategies	0/2020	50; F 15, M 35 (342; F 187, M 155)	220; F 66, M 154 (461; F 249, M 212)	1,700; F 510, M 1,190
Activity Outcome/ Output 4.2	Local agriculture and handicrafts products placed for sale at local and international markets	Number of local agriculture/culinary/gastro/rural tourism events and experiences promoted	0/2020	2 (3)	3 (24)	23

⁵⁹ Revised from 200 to TBD according to TURIZAM Contract modification #5.

ANNEX V: CONFLICT OF INTEREST FORMS


Name	Salminka Vizin
Title	Deputy Chief of Party
Organization	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II)
Evaluation Position?	<input checked="" type="checkbox"/> Team Leader <input type="checkbox"/> Team member
Evaluation Award Number	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II), implemented by American Institutes for Research, Contract Number: AID-167-1-17-00004
USAID Projects Evaluated	Developing Sustainable Tourism Activity in Bosnia and Herzegovina (Turizam) Contract Number: 72016820C00004
I have real or potential conflicts of interest to disclose.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<p>If yes answered above, I disclose the following facts: <i>Real or potential conflicts of interest may include, but are not limited to:</i></p> <ol style="list-style-type: none"> 1. <i>Close family member who is an employee of the USAID operating unit managing the project(s) being evaluated or the implementing organization(s) whose project(s) are being evaluated.</i> 2. <i>Financial interest that is direct, or is significant though indirect, in the implementing organization(s) whose projects are being evaluated or in the outcome of the evaluation.</i> 3. <i>Current or previous direct or significant though indirect experience with the project(s) being evaluated, including involvement in the project design or previous iterations of the project.</i> 4. <i>Current or previous work experience or seeking employment with the USAID operating unit managing the evaluation or the implementing organization(s) whose project(s) are being evaluated.</i> 5. <i>Current or previous work experience with an organization that may be seen as an industry competitor with the implementing organization(s) whose project(s) are being evaluated.</i> 6. <i>Preconceived ideas toward individuals, groups, organizations, or objectives of the particular projects and organizations being evaluated that could bias the evaluation.</i> 	

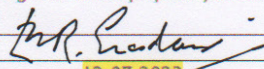
I certify (1) that I have completed this disclosure form fully and to the best of my ability and (2) that I will update this disclosure form promptly if relevant circumstances change. If I gain access to proprietary information of other companies, then I agree to protect their information from unauthorized use or disclosure for as long as it remains proprietary and refrain from using the information for any purpose other than that for which it was furnished.

Signature	
Date	6/22/2023

Name	Mirza Kulenovic
Title	Senior Research Analyst
Organization	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II)
Evaluation Position?	<input checked="" type="checkbox"/> Team Leader <input type="checkbox"/> Team member
Evaluation Award Number	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II), implemented by American Institutes for Research, Contract Number: AID-167-I-17-00004
USAID Projects Evaluated	Developing Sustainable Tourism Activity in Bosnia and Herzegovina (Turizam) Contract Number: 72016820C00004
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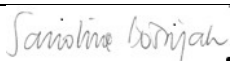
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Signature	
Date	6/22/2023

Name	Roger Goodacre
Title	Tourism development expert
Organization	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II)
Evaluation Position?	<input type="checkbox"/> Team Leader <input checked="" type="checkbox"/> Team member
Evaluation Award Number	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II), implemented by American Institutes for Research, Contract Number: AID-167-1-17-00004
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Signature	
Date	12-07-2023

Name	Sandina Bosnjak
Title	MEL Manager
Organization	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II)
Evaluation Position?	<input type="checkbox"/> Team Leader <input checked="" type="checkbox"/> Team member
Evaluation Award Number	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II), implemented by American Institutes for Research, Contract Number: AID-167-I-17-00004
USAID Projects Evaluated	Developing Sustainable Tourism Activity in Bosnia and Herzegovina (Turizam) Contract Number: 72016820C00004
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Signature	
Date	June 2, 2023


Name	Emina Abu Annab
Title	Research analyst
Organization	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II)
Evaluation Position?	<input type="checkbox"/> Team Leader <input checked="" type="checkbox"/> Team member
Evaluation Award Number	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II), implemented by American Institutes for Research, Contract Number: AID-167-I-17-00004
USAID Projects Evaluated	Developing Sustainable Tourism Activity in Bosnia and Herzegovina (Turizam) Contract Number: 72016820C00004
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Signature	<i>Emina Abuannab</i>
Date	6/22/2023

Name	Erma Kurtovic
Title	Analyst
Organization	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II)
Evaluation Position?	<input type="checkbox"/> Team Leader <input checked="" type="checkbox"/> Team member
Evaluation Award Number	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II), implemented by American Institutes for Research, Contract Number: AID-167-I-17-00004
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Signature	
Date	22/06/2023

Name	Selma Omerbegovic
Title	Analyst
Organization	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II)
Evaluation Position?	<input type="checkbox"/> Team Leader <input checked="" type="checkbox"/> Team member
Evaluation Award Number	USAID/BiH Monitoring and Evaluation Support Activity (MEASURE II), implemented by American Institutes for Research, Contract Number: AID-167-I-17-00004
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Signature	<i>Selma Omerbegovic</i>
Date	22/06/2023

ANNEX VI. STATEMENT OF DIFFERENCE

This section was prepared by the evaluation team members, MEASURE II staff, who participated in the Developing Sustainable Tourism in Bosnia and Herzegovina (TURIZAM) Performance Evaluation. MEASURE II adhered to rigorous research methods when conducting this evaluation. Findings, conclusions, and recommendations reflect the results of a thorough analysis, not the evaluation team members' opinions. However, they often reflect the views of the Activity partners and beneficiaries, who represent valid key informants in evaluations. MEASURE II appreciates the comments from USAID and the IP, acknowledging their unique perspectives. In this evaluation, as in any other, USAID and IP provided us with invaluable input, helping make the final research product more straightforward and informative.

The evaluation team carefully reviewed each USAID and IP comment on this evaluation report. Whenever the comments aligned with the existing data, the evaluation team revised or specified the findings to reflect TURIZAM's work and achievements more precisely. Our responses to the Mission's and IP's individual comments have been submitted to USAID in a separate document. This section outlines a few findings where the evaluation team members disagreed with USAID's comments to a certain degree, explaining the rationale for the disagreement.

Evaluation report, Executive Summary, conclusion:

"In some areas of implementation, however, concrete results have yet to be seen from TURIZAM activities. These include, for instance, tourism-related regulatory improvements in environmental protection and nature conservation; TURIZAM's interventions aiming to improve the quality of tourism products and services, including TURIZAM Academy, Pathways to Professionalism (PtP), and TedQual certifications; and attaining quality marks, geographic indications, and certification for agricultural and rural products and processes. TURIZAM continues working to improve access to finance for tourism service providers, agriculture, and other tourism-related MSMEs, and supports initiatives to attract potential public-private partnership (PPP) investments into the sector, but tangible results may require more time."

USAID's comment:

"This is inaccurate and contradictory to what is written later in the document. For the areas that I highlighted with this comment there are many already very concrete examples. The text should be modified to reflect that. Just to give a few examples showing that concrete results are already there and they are already seen contrary to what the sentence says for these areas:

- Y3 was closed with a total of 69 certificates since the beginning of project (LOP is 110);
- Pathways to Professionalism was introduced in 16 hotels and restaurants across the country, with 82 coordinators and line supervisors trained, and so far 84 employees completed the training;
- HWR and MBV BiH were established successfully, engaging over 100 stakeholders;
- Turizam Academy recorded thousands of completed courses; two universities obtained the TedQual certificates, etc.

The reports says on page 36:

"Most KIs acquainted with the TURIZAM Academy considered it very useful. Beneficiaries of the PtP program agreed that it was a quality program needed by the industry. According to the survey of beneficiaries, 55 percent of respondents rated the TURIZAM Academy (including Flow Hospitality and Typsy) implementation as very good or excellent, whereas as many as 71 percent gave the same rating to trainings and workshops organized for the tourism sector.

KIs also praised TURIZAM activities in secondary (curriculum development) and higher education (TedQual certificate)."

So please adapt the paragraph to say the contrary of what is currently written. There are very concrete and useful achievements where results are already seen and recognized by beneficiaries and other stakeholders, in almost all areas of USAID Turizam’s implementation.”

MEASURE II response:

This paragraph was rephrased to make the intended point more straightforward. The key message is that TURIZAM did its job to improve the situation in these areas, but these are the outputs, while the outcomes are yet to be seen. For instance, the certification of universities and training for tourism service providers are outputs; the expected outcome is increased quality of tourism services. Establishing MBV is an output; bringing more people to these villages and providing them with quality services is the higher-level result.

Evaluation report, paragraph under Finding I 8:

“To improve the destination branding, TURIZAM conducted webinars and workshops for local tourist boards and developed a Brand Communications Toolkit. The primary issue that the Activity identified prior to any interventions was that BiH was not represented as a unified destination in international fairs. Because BiH does not have a state-level tourism board, the three tourism boards representing BiH regions across ethnic lines have usually presented their destinations in their own booths. TURIZAM made attempts to bring these organizations together and promote a unified BiH brand during the Building Sustainable Destinations Through Partnerships panel at the Internationale Tourismus-Börse Berlin in March 2023. The Activity achieved limited success in terms of joint promotion, as each organization kept its own booth, but all three tourism boards accepted marking their booths with the same BiH logo, promoting BiH as “the most exciting destination in the world.” This, however, is a substantial achievement because the BiH context is characterized by strong political and ethnic divisions. TURIZAM intends to invest more effort in developing a harmonized BiH destination brand in Year 4.”

USAID’s comments:

“Please modify to reflect the following: on the biggest international event that was the ITB Berlin 2023, Tourism Cluster Herzegovina had a joint booth with Fortuna Tours and TORS, which was placed opposite the Visit Sarajevo booth, making it look as a single national booth.

The design of the booth was unified and included BiH elements, including the Bosnia and Herzegovina tourism logo.

EDO Office director was in Berlin on that occasion, the design itself has been endorsed by the Ambassador and Mission Director, as it was really a big and historical deal and achievement to have all counterparts “under one flag” and to have a common approach in Berlin.”

“100% agreed. This was a big success. Why was this statement made, “The Activity achieved limited success in terms of joint promotion, as each organization kept its own booth”? I suggest deleting it unless there is strong evidence to do so otherwise. I was at ITB and saw the impact firsthand.”

MEASURE II response:

Noting the IP’s and USAID’s impressions of the event, the evaluation team slightly revised the finding. However, the evaluation team invested considerable effort to determine the level of TURIZAM’s contributions to destination branding. In addition to TURIZAM staff, the evaluation team talked to all other stakeholders who participated in the fair. The team studied the photos of the booths, and saw that each organization kept its booth and logo and added the BiH logo above. Also, please note that the evaluation team learned that these organizations collaborated on fairs long before TURIZAM started and that the positions of their booths in this fair have been the same at least on one occasion before 2023. TURIZAM provided additional support to participating organizations, and they stepped ahead in joint promotion by unifying the booth design and adding the joint markings. While this is significant in the BiH context, which the report acknowledged, BiH is still promoted by three organizations. The evaluation team found no evidence that each of them promoted BiH in addition to their regions; if this were the case, the findings could incorporate examples and how TURIZAM coordinated their presentations. Based on documentation, TURIZAM’s work on developing a harmonized brand approach has yet to be initiated.

**MONITORING AND EVALUATION
SUPPORT ACTIVITY (MEASURE II)**

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