

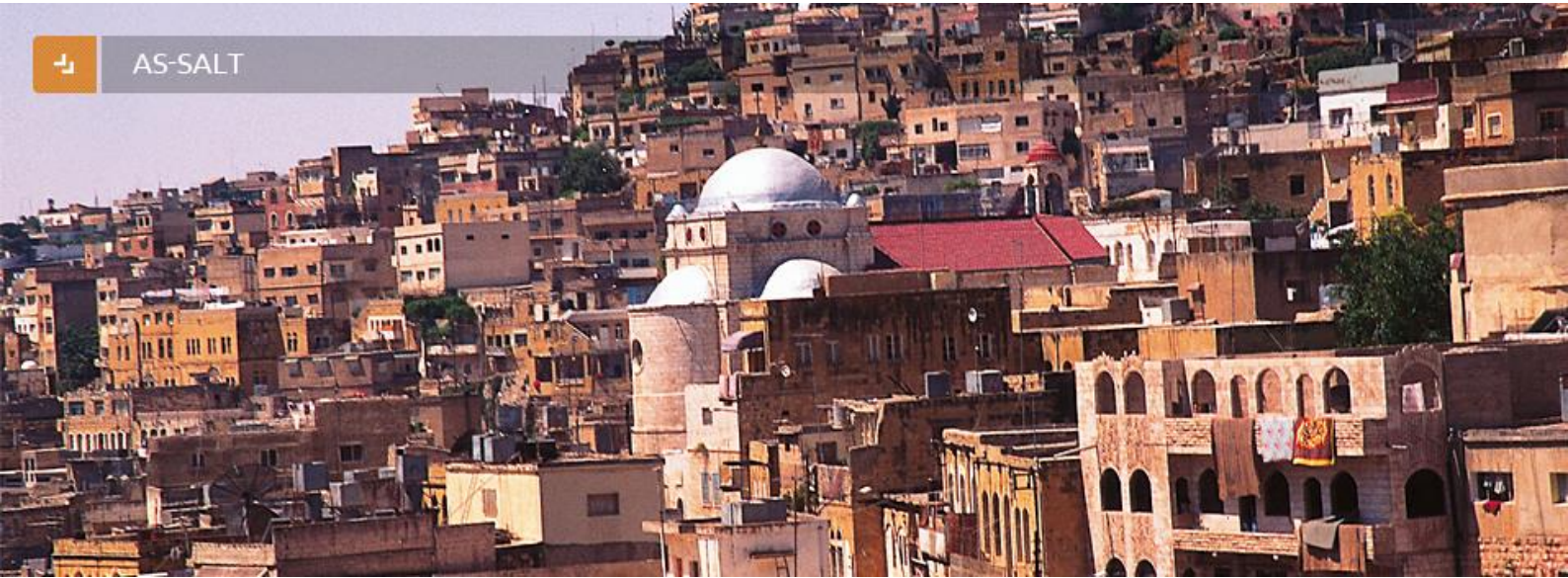


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## EVALUATION

### MIDTERM PERFORMANCE EVALUATION OF BUILDING ECONOMIC SUSTAINABILITY THROUGH TOURISM (BEST) IN JORDAN

FEBRUARY 2018

This publication was produced for review by the United States Agency for International Development (USAID). It was prepared by Robert Travers, Team Leader, Rajan Kapoor, Helen Van Wengen, Afnan Al-Hadidi, Ragheb Fityan, Management Systems International, a Tetra Tech Company.

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Cover Photo: Salt, Jordan – The pilot Distinctive Destination being developed with assistance from BEST. Photo Credit: Jordan Tourism Board

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## ACRONYMS

ACOR	American Center for Oriental
AMEP	Activity Monitoring and Evaluation Plan
ASEZA	Aqaba Special Economic Zone Authority
BEST	Building Economic Sustainability through Tourism
CAQA	Council for Accreditation and Quality Assurance
CoP	Chief of Party
CIS	Civic Initiatives Support
DC	District of Columbia
DDP	Distinctive Destination Program
DoA	Department of Antiquities
DMO	Designation Marketing Organizations
EGST	Economic Growth through Sustainable Tourism (2014)
EQ	Evaluation Question
FDI	Foreign Direct Investment
FY	Fiscal Year
GDP	Gross Domestic Product
GM	General Manager
HRD	Human Resource Development
IHG	InterContinental Hotels Group
IP	Implementing Partner
IR	Intermediate Result
JADE	Jordan Action for the Development of Enterprises
JCP	Jordan Competitiveness Program
JHRC	Jordan Heritage Revival Company
JICA	Japan International Cooperation Agency
JLGF	Jordan Loan Guarantee Facility
JOD	Jordanian Dinar
JOHUD	Jordan Hashemite Fund for Human Development
JTA	Jordan Trail Association
JTB	Jordan Tourism Board
JTDP II	Jordan Tourism Development Project II (2008 – 2013)
KII	Key Informant Interview
LENS	Local Enterprise Support Project
M&E	Monitoring and Evaluation
MESP	USAID/Jordan Monitoring and Evaluation Support Project
MICE	Meetings, Incentives, Conferences and Exhibitions
MOTA	Ministry of Tourism and Antiquities
MOU	Memorandum of Understanding
MSI	Management Systems International
NGO	Non-Governmental Organization
PIRS	Performance Indicator Reference Sheets
PDTRA	Petra Development & Tourism Regional Authority
RFC	Royal Film Commission
RSCN	Royal Society for the Conservation of Nature
SCHEP	Sustainable Cultural Heritage through Engagement of Local Communities Project
SDC	Salt Development Corporation
SME	Small and Medium-sized Enterprise

SOW	Statement of Work
TCI	Tourism Competitiveness Index
TPF	Tourism Partnership Fund
TRC	Tourism Research Centre
UAE	United Arab Emirates
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNHCR	United Nations High Commissioner for Refugees
UNWTO	World Tourism Organization
US	United States
USAID	United States Agency for International Development
USG	United States Government
US\$	United States dollar
VTC	Vocational Training Corporation
WTTC	World Travel & Tourism Council

# EXECUTIVE SUMMARY

## INTRODUCTION

### ACTIVITY SUMMARY

This report presents findings, conclusions, and recommendations from the midterm performance evaluation of the Building Economic Sustainability through Tourism (BEST) Activity in Jordan. BEST is a five-year program of the United States Agency for International Development (USAID). USAID awarded an incentive-based contract to Chemonics International Inc. on June 1, 2015 and the contract ends on May 31, 2020. The five-year, US\$ 36 million Activity is to help enable Jordan's transformation into a globally competitive tourism destination. The Activity works in partnership with the Ministry of Tourism and Antiquities (MOTA) and builds on the work of the previous USAID Jordan tourism development projects. Working closely with governmental, non-governmental, and private sector stakeholders, the Activity aims to strengthen the country's tourism facilities and services, improve the management and promotion of tourism sites, boost marketing efforts and encourage tourism to secondary sites. It also seeks to increase the employment of women and youth working in the tourism sector.

### EVALUATION PURPOSE

This report responds to the USAID Statement of Work (SOW), provided as Annex A, requesting the USAID/Jordan Monitoring and Evaluation Support Project (MESP)<sup>1</sup> to conduct a midterm evaluation of BEST performance in its first two years, until September 2017.<sup>2</sup> The objective of the midterm evaluation is to provide USAID with findings and strategic recommendations related to the effectiveness of the Activity's interventions. The evaluation results will help inform USAID's implementation decisions for Years 3, 4 and 5 of BEST's programming.

The emphasis is therefore on lessons learned and areas where improvements can be made: The evaluation should not be read as a summary of BEST interventions and achievements to date, as these are outlined in BEST's own progress reports.

### EVALUATION QUESTIONS

The midterm evaluation questions set by USAID are as follows:

#### Effectiveness

- I. Assess the overall effectiveness of BEST, specifically, whether and how did the Activity achieve its intended outcomes?
  - a. Have deviations from submitted design changed the intended outcomes? Why and How?
  - b. Are there certain areas/activities and approaches that have been more effective? Why?

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<sup>1</sup> Management Systems International, a Tetra Tech Company, implements MESP.

<sup>2</sup> U.S. government fiscal years begin October 1 and ends September 30.

## Synergies

2. Assess the performance of BEST in developing synergies (coordination and collaboration) with other USAID activities that focus on similar objectives, for example, job creation and access to finance?
  - a. What added value, in case any, does BEST provide in areas that are also covered by other USAID activities?

## Learning

3. Based on the performance of BEST to date, both in terms of effectiveness and sustainability, what are some key lessons learned, by component and sub-activities that can inform the remainder of the activity?
4. Moving forward, should BEST continue with its comprehensive approach or should it consider a shift to a narrower approach focused on fewer components? If so, which ones and why?

## Sustainability

5. Which interventions under BEST, in case any, can be expected to sustain over time? Why and how? (Few areas of focus could be the Pathways to Professionalism, various site development grants, and partnerships with banks, etc.).

## BACKGROUND

### THE JORDAN TOURISM SECTOR

According to activity documents, secondary data sources, and in-depth interviews with finance sector stakeholders, the enabling environment for tourism in Jordan continued to be gravely impacted by regional instability through 2015 and 2016. There were declining tourism arrivals since 2010 with some evidence of recovery in 2016/17. Figure 4 looks at the performance of Petra, which is a benchmark of leisure tourism in Jordan. Beginning on page 10, this report provides greater coverage of how the conflicts in Iraq and Syria have impacted the Jordanian economy. The performance of other regional destinations is also referred to.

The direct contribution of travel and tourism to Gross Domestic Product (GDP) in Jordan in 2016 was US\$ 1,929 million (JOD 1,370 million) contributing 4.9% of the Kingdom's GDP and a vital source of foreign exchange.<sup>3</sup>

Approximately 98% of private businesses in Jordan fall into the category of Small and Medium-sized Enterprises (SMEs) and the tourism sector illustrates this. Most hotel rooms are concentrated in Amman where business tourism helps boost occupancy. The World Heritage Site of Petra and other heritage and natural sites (such as Wadi Rum, also enlisted by the United Nations Educational, Scientific and Cultural Organization [UNESCO]) are the key attractions of the destination for leisure tourism. The Dead Sea has a developing resort and convention product and the seaside city of Aqaba is an emerging destination with a significantly expanding accommodation stock. The Kingdom includes many spectacular landscapes and a sizeable proportion of these are protected and have been made accessible to tourism by the Royal Society for the Conservation of Nature (RSCN) which

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<sup>3</sup> WTTC (2017) Travel and Tourism Economic Impact Jordan This refers to economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation, excluding commuter traffic.

has also developed activity tourism options. Religious tourism is also an important reason for visiting Jordan. The Jordan Tourism Board (JTB) leads tourism promotion and there is an active network of inbound tour operators who service inbound and inter-country tourism.

In 2016 Jordan's hotel occupancy rates were *circa* 42% and airline occupancy rates are reported to be around 60%. Both are stated to be below levels necessary to drive an acceptable return on investment.<sup>4</sup>

## BEST APPROACH

BEST was designed to build on previous USAID interventions in tourism, and to involve a shift in focus to secondary destinations. BEST's Theory of Change is not specifically related to secondary destinations however:

*If the business climate for and the competitiveness of the Jordanian tourism sector improves, THEN Jordan's economic growth and job creation will increase.*

The Theory of Change (focused on business climate reform and competitiveness) suggests that the tourism sector is a promising avenue of job creation in Jordan, so job creation will occur when there is increased demand for, and satisfaction with, tourism-related products and services. By improving their capacity, financing, marketing and site management, the Theory suggests that firms will be able to attract more tourists and encourage them to spend more money on tourism products. With increased tourist spending, actors in the value chain will add additional staff to meet demand.

Among activity indicators, the core key performance indicators include:

- Number of jobs created
- Change in female participation in the workforce, and
- Amount of private sector funding leveraged.

Jordan BEST's activities are arranged in four components

- Component 1: Business enabling environment & industry partnerships
- Component 2: Jordan's tourism assets are developed, maintained, and improved in ways that increase demand
- Component 3: Destination marketing
- Component 4: Increased access to finance for Jordanian businesses and entrepreneurs in the tourism sector

## EVALUATION METHODOLOGY

This evaluation used a mixed method approach to answer the evaluation questions. Secondary data was sourced from BEST reports and internal databases, as well as literature and statistics relevant to Jordan tourism. Qualitative and quantitative primary data were collected from BEST and its stakeholders, including government institutions, SMEs, banks, and relevant SME associations. Targeted focus groups and a general survey of tourism businesses were also undertaken. Further

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<sup>4</sup> BEST (2017) Draft Jordan National Tourism Strategy. Version 3.



description of this evaluation's timeline, data sources, collection procedures, and analysis plan begins on page 16.

Five case studies were also developed, three from Jordan and two from other countries. These are outlined in Annex E. The Jordan case studies examine BEST's initiatives on Pathways to Professionalism, the Jordan National Trail and the Salt Distinctive Destination Pilot. The international case studies are on USAID standardized activity reporting in Vietnam, which provides a model of systematic IP reporting that can be applied by BEST, and the Kenya Tourism Recovery Marketing Campaign. The Kenya strategy provides a pertinent example as Kenya experienced a significant dip in leisure tourism following 2007-2008 civil unrest. The strategy demonstrates a successful plan for generating growth in the tourism sector following a period of decline.

## FINDINGS AND CONCLUSIONS

This executive summary shares overall conclusions arising from the evaluation. Findings and conclusions for each of the Evaluation Questions (EQs) and sub-questions are provided beginning on page 22.

- BEST's Theory of Change suggests that by improving Jordan's tourism competitiveness, then increased economic prosperity and jobs will be achieved. BEST has ambitious job creation, investment, and gender targets, and an unusual incentive bonus built into its USAID contract. The contract requires a focus on secondary destinations, which are not the places where most jobs in tourism are created. Thus, the contract, bonus and Theory of Change involve conflicts and confusions which do not give BEST a very clear mandate; almost any aspect of tourism can be covered.
- The technical expertise of the BEST team and its engaged experts is generally considered excellent; the IP has a high-level team of senior staff, some of whom have cross-cutting roles, and a well-resourced and motivated team. However, the management structure and administration system does not directly reflect the four components and there is scope to focus further.
- BEST's expertise is recognized by most industry players and in particular by MOTA and JTB as well as the Jordan Inbound Tourism Operator Association (JITOA).
- Effectiveness is undermined by an extremely wide-ranging contract within which USAID's prioritization is not always evident. Within very wide-ranging options however, BEST has identified and proposed a number of projects which have transformational potential for secondary destinations. These include the Distinctive Destinations initiative and the Jordan National Trail.
- BEST has undertaken significant work in human resource development for the tourism sector, in particular with 5-star hotels. It was initially instructed by USAID not to engage in the vocational sector as another activity (now concluded) was to cover this. BEST's Pathways to Professionalism Initiative is highly regarded by larger hotels and its work on wider hotel certification (and of restaurants in Aqaba) is appreciated by the Aqaba Special Economic Zone Authority (ASEZA) and MOTA.
- In terms of job creation, it makes little sense for BEST not to engage with vocational education which is an area of technical strength. There are major tourism developments underway (in the south of Jordan particularly) which report lack of qualified staff: If BEST can assist their training, many jobs can genuinely be filled with proven USAID support.

- BEST needs to focus more on gender and improving female participation, where progress is slow to date. At present there is no clear plan/strategy that explains how BEST will tackle gender and measure progress through its interventions. Activities on gender outlined in the 5-year Tourism Competitiveness Implementation Plan have not significantly progressed at midterm stage.
- The Activity continues to do some work in primary destinations where the contract called for the development of two Designation Marketing Organizations (DMOs). One has recently been established in Amman (the Jordan Convention Bureau) but much work is needed to make it independent and sustainable. The second DMO has not been delivered yet, nor has the development of a Tourism Research Centre progressed sufficiently at midterm stage.
- No significant strategic focus for grants is evident to date, and grants appear to be absorbing a lot of component leaders' time. Several complaints regarding slowness and bureaucracy of grants were raised in Key Informant Interviews (KIIs). It is noted that BEST is currently reviewing these areas.
- A significant area of evaluation concern is BEST's Monitoring and Evaluation (M&E) system, which is under-resourced and in need of substantial review. BEST focusses on 40+ indicators but lacks focus on key areas, especially gender. In terms of intended outcomes, specifically targets, a great deal of management time is still being spent trying to develop definitions and approaches that are focused on achieving what appear to be unrealistic targets for job creation. The Activity claims to have met its funds leveraged target, but this may require review. Progress on the gender target in particular appears slow.
- A failure to develop robust and strongly resourced M&E systems based on strong results/logframe-based project management and activity-specific indicators makes tracking of progress, and effective project management, difficult. Project reporting has tended to mask difficulties which have arisen, and areas where progress is slow. Project reports often tend to read like good news press releases rather than objective management reporting.
- There is scope for BEST to improve synergies with other USAID actions and other key players in Jordanian tourism, such as RSCN.
- Greater emphasis on clustering rather than supporting individual businesses may yield wider results: Apart from Salt, and possibly the Jordan Trail, BEST does not appear to have a strong cluster-based approach to regional tourism development. USAID tourism programs internationally often focus on cluster-based approaches with good results.
- In terms of more effective approaches, situations where BEST embeds consultants for longer periods, or funds skilled employees in client organizations to assist implementation appears to be more effective than conducting consultancy reviews and drafting strategies which organizations may be challenged to implement. However, stronger organizations like JTB certainly appreciate and often do implement consultancy support which they requested from BEST.
- Moving forward, there is opportunity to support promising sectors, such as Meetings, Incentives, Conferences and Exhibitions (MICE), and faith-based tourism. BEST's ability to source experienced, specialist advisors is appreciated by clients, and engaging more experts to help ensure full implementation of recommended initiatives as well as strategy development could be effective.
- BEST works closely with MOTA and is viewed as being very helpful to the Minister and her senior staff. Concerns were however expressed in several KIIs that the capacity of MOTA remains weak, despite many years of USAID support. Some consultees saw BEST as an alternative to MOTA to approach to get things done. This is not a healthy situation and

BEST may need to concentrate even more on strengthening MOTA and ensuring that MOTA itself becomes more valued by the industry.

- There may also be scope to help develop image-changing events in regional destinations and outside seasonal peaks in occupancy, particularly if these events can tie in with areas of BEST focus such as activity tourism.
- BEST staff are confident they will meet re-scheduled targets by activity-end, however the evaluation team questions the validity of some of the targets. Some key stakeholders also disagreed with how BEST was calculating the jobs resulting from their interventions.

## **SELECTED KEY RECOMMENDATIONS**

### **Recommendation 1: Activity Design**

- USAID should review the effectiveness of bonus-based contracts.
- Greater attention should be paid to contract design to avoid confusing and sometimes conflicting objectives.
- Targets such as jobs created and funds leveraged should be realistic.

### **Recommendation 2: M&E and Reporting**

- Lack of effective M&E is a key concern in terms of measuring the effectiveness and sustainability of BEST and should be addressed.
- Reporting to USAID should be standardized so that all actions reported are based on the same management reporting formats. Financial reporting should be included in quarterly reports.

### **Recommendation 3: Gender – Key KPI**

- Gender is a key area requiring more strategic focus by BEST in the years to 2020.

### **Recommendation 4: Jobs – Key KPI**

- There is a need for robust DQA review, to ensure that jobs being claimed are as a direct result of BEST activities.

### **Recommendation 5: Investment – Key KPI**

- There is a need for robust DQA review to ensure funds leveraged being reported are reasonable and directly result from BEST activities.

### **Recommendation 6: Improve grant administration**

- BEST needs to review the way in which grants are administered to improve efficiency and reduce delays.
- USAID should ensure that the US\$ 7 million Tourism Partnership Fund grants budget is spent through disbursement to the private sector, rather than being absorbed by IP consultancy (which should be funded through component budgets).
- BEST should develop gender-based and destination-specific initiatives (it is understood that these are being considered).

### **Recommendation 7: Continue to build Access to Finance component activity**

- BEST should continue to engage with financial institutions and other USAID activities to drive Access to Finance, whilst ensuring that the institutions are up to date and aware of tourism sector requirements to support and facilitate access to finance for tourism actors.

#### **Recommendation 8: Forster more synergies and linkages**

- BEST should ensure more linkages between grantees. It is understood that BEST is planning these linkages as projects mature.
- USAID and BEST should ensure stronger linkages between USAID activities and with the wider donor community.

#### **Recommendation 9: Support beneficiaries to implement existing initiatives**

- Longer term engagement of specialist staff may be needed to champion opportunities and assist implementation of initiatives under gender, faith, agri-tourism, Convention Bureau/MICE, activity tourism, etc. Segments with high potential and clear regional impact should be prioritized.
- The evaluation team notes that many consultants' reports have been provided by BEST and previous USAID interventions. Except for areas highlighted in this review (gender, M&E research, Business Enabling Environment, Exit Strategy, etc.), some beneficiaries felt that focus should shift from developing further consultancy reports to assisting beneficiaries more with implementing existing action plan recommendations.

#### **Recommendation 10: Provide more capacity development support to MOTA**

- The agreement with MOTA regarding support should be revisited and up-weighted in the context of creating a better business-enabling environment for the private sector.
- BEST initiatives regarding improving site management and Public-Private Partnership (PPP) through MOTA require a more strategic approach as progress is slow.
- A robust Tourism Business Climate Review should be undertaken to identify which are the key regulations that need to be addressed to improve Jordan's private sector tourism dynamic, and to provide BEST with a clearer strategy for intervention in this area.
- The BEST-supported National Tourism Strategy draft document (2017-2020) should be strengthened and revised to broaden its scope beyond BEST's specific targets and timescales, and to more fully engage with contract-defined partners (e.g. RSCN), other USAID activities and other donors. The National Tourism Strategy should cover a longer timeframe.

#### **Recommendation 11: Target projects with wider geographic representation**

- In accordance with its contract and developmental mandate, BEST should adopt a greater regional focus to stimulate secondary destinations (and primary destinations with lower occupancy or visitor management challenges).

#### **Recommendation 12: Devise more robust mechanisms to link specific marketing support to specific results**

- The M&E system needs to track and measure, targeted initiatives. This should be done by a strong M&E department independent of component leaders, and occasionally through independently commissioned progress reviews.

#### **Recommendation 13: Engage more in vocational education support to address tourism competitiveness issues**

- BEST should develop a two to three-year program to support vocational education in tourism with a regional focus aligned to its activity areas.
- BEST should consider expanding Pathways to Professionalism to include at least all 4 star and larger 3 star hotels. Currently only one 4-star hotel is included along with 24 5-star hotels across Jordan in the initiative. There may also be an opportunity to engage with restaurants.

**Recommendation 14: Adopt priorities by component**

- USAID and BEST should agree on priorities for the remainder of the activity. It is recommended that not more than four priority actions should be undertaken for each component, in addition to crosscutting initiatives on gender, grants, etc.

**Recommendation 14: Develop an Exit Strategy**

- BEST should develop an Exit Strategy and partnerships with other activities and donors need to be built up. A more strategic long-term approach is needed for some initiatives, which extends beyond the life of BEST.

# INTRODUCTION

This chapter covers a summary of the intervention and its components, the purpose of the evaluation and the evaluation questions which USAID has posed.

## ACTIVITY SUMMARY

This report provides findings, conclusions, and recommendations based on the midterm performance evaluation of BEST. The five-year activity was awarded by USAID to Chemonics International Inc. on June 1, 2015, and will end on May 31, 2020. The activity's subcontractors include Oxford Economics, which provides expertise in economic modeling, data collection and analysis, value chain and competitiveness strategy, and access to the Tourism Decision Metrics database. Subcontractor Bandwidth Management provides niche expertise in creating collaborative Designation Marketing Organizations (DMOs) and authentic community-based experiences, as well as Meetings, Incentives, Conferences, and Exhibitions (MICE) development. Local partners Better Business, EnConsult, and Turath provide organizational development, business enabling environment, and cultural site development support, respectively.

The BEST activity is to contribute to USAID's Development Objective #1: "broad-based, inclusive economic development accelerated." In particular, the Activity is to contribute to Intermediate Result (IR) 1.1 "private sector competitiveness increased."

According to USAID's factsheet,<sup>5</sup> BEST applies its approach through the following activities:

**Creating a business-enabling environment:** *The USAID tourism project works to put in place short and long-term policy reforms to promote tourism investment and improve the tourism experiences and sites in Jordan.*

**Tourism asset development:** *Jordan's cultural and natural attractions lie at the core of its tourism appeal. BEST works to develop these precious sites as needed and improve services in the surrounding areas and museums. The tourism product will be diversified as the project works closely with public and community support to enhance existing tourism products and create new ones, including trails and local activities.*

**Destination marketing:** *The marketing element is recognized as being of extreme importance to address the decline in Jordan's visitor numbers. By working with the Jordan Tourism Board and*

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<sup>5</sup> Available at: <[www.usaid.gov/jordan/fact-sheets/usaid-building-economic-sustainability-through-tourism](http://www.usaid.gov/jordan/fact-sheets/usaid-building-economic-sustainability-through-tourism)>

partners, strategic communication and marketing campaigns are to be put in place and sales channels of international markets utilized to attract more visitors and target new, lucrative markets.

**Industry development and destination excellence:** BEST is to improve tourism assets by enhancing the quality, appeal, and promotion of tourism education and training at the university and collegiate level in Jordan.

**Tourism Partnership Fund:** The Tourism Partnership Fund (TPF) is to provide grants and fund technical assistance to counterparts and beneficiaries for product and market development, tourism industry competitiveness, public-private partnerships and job creation. Regional presence is to be established through coordinators promoting community development and outreach.<sup>6</sup>

The IP's contract for BEST is based around four components:

- Component 1: Business enabling environment & industry partnerships
- Component 2: Jordan's tourism assets are developed, maintained, and improved in ways that increase demand
- Component 3: Destination marketing
- Component 4: Increased access to finance for Jordanian businesses and entrepreneurs in the tourism sector

In addition, the contract lays strong emphasis on improving the gender balance in Jordanian tourism. Key targets relate to jobs created, investment and gender.

## EVALUATION PURPOSE, AUDIENCE, AND INTENDED USES

This report responds to the USAID SOW, provided as annex A, requesting the USAID/Jordan Monitoring and Evaluation Support Project (MESP) to conduct a midterm evaluation of BEST performance. This report is meant to inform USAID's design and implementation decisions for similar future programming (including to what extent tourism intervention delivers results) and to provide better guidance on work planning moving forward for the next three years of BEST. The emphasis is therefore on lessons learned and areas where improvements can be made: the evaluation should not be read as a summary of BEST activities and achievements to date.

The audience for this report is expected to be:

USAID, specifically the USAID/Jordan, but also those working on tourism-related activities in Jordan and elsewhere, and in Washington;

1. Chemonics, the implementing partner (IP);
2. Jordanian stakeholders (e.g., those working within the government and tourism sector); and
3. The wider development community engaged in tourism sector development in the Middle East, upper-middle income countries structurally similar to Jordan, or those who are interested in the effectiveness grant aid coupled with technical assistance.

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<sup>6</sup> Ibid.

## EVALUATION QUESTIONS

### Effectiveness

1. Assess the overall effectiveness of BEST, specifically, whether and how did the activity achieve its intended outcomes?
  - a. Have deviations from submitted design changed the intended outcomes? Why and How?
  - b. Are there certain areas/activities and approaches that have been more effective? Why?

### Synergies

2. Assess the performance of BEST in developing synergies (coordination and collaboration) with other USAID activities that focus on similar objectives, for example, job creation and access to finance?
  - a. What added value, in case any, does BEST provide in areas that are also covered by other USAID activities?

### Learning

3. Based on the performance of BEST to date, both in terms of effectiveness and sustainability, what are some key lessons learned, by component and sub-activities that can inform the remainder of the activity?
4. Moving forward, should BEST continue with its comprehensive approach or should it consider a shift to a narrower approach focused on fewer components? If so, which ones and why?

### Sustainability

5. Which interventions under BEST, in case any, can be expected to sustain over time? Why and how? (Few areas of focus could be the Pathways to Professionalism, various site development grants, and partnerships with banks, etc.).

## REPORT STRUCTURE

This report first provides background on (1) the economic and political environment for tourism Jordan and its impact, and (2) summary details regarding the BEST implementation approach and associated milestones.

Second, this report provides an overview of methodological considerations that describe what, how, when, where, and why data were collected; as well as how the evaluation team analyzed these various data streams to produce the conclusions and recommendations provided in this report.

Third, the report outlines findings and conclusions organized by evaluation question. As per USAID guidance and to reduce repetition, the report treats the four high-level question topics as organizational guideposts and provides findings and conclusions for sub-questions under the larger discussion, as appropriate.

Finally, beginning on page 41 the report offers recommendations for specific use by USAID, but also for use by the IP and other stakeholders to improve future programming of similar scope and context.



This report further provides as annexes the evaluation’s SOW (A), design (B), references (C), timeline of implementation (D), activity performance metrics (E), case studies (F) and focus group reports (G).

## BACKGROUND

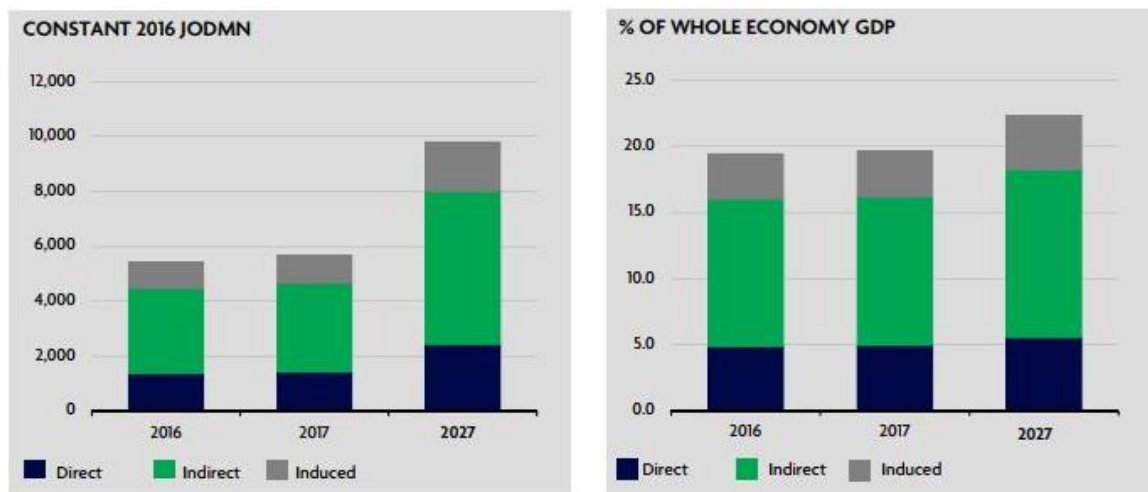
This section gives general background regarding Jordan and its tourism industry and outlines BEST’s approach.

### ECONOMIC AND POLITICAL ENVIRONMENT FOR TOURISM

According to activity documents, secondary data sources, and in-depth interviews with finance sector stakeholders, the enabling environment for tourism in Jordan, and in particular leisure tourism,<sup>7</sup> has been gravely impacted by regional instability since 2010. Annual growth in GDP in the period 2000 to 2009 was 7.1 percent, but there has been a steady decline to an average growth rate of 2.3 percent for 2009-2015.<sup>8</sup>

Tourism remains an important contributor to Jordan’s exports and foreign exchange earnings however. According to the World Travel & Tourism Council (WTTC) the direct contribution of Travel & Tourism to GDP in 2016 was JOD 1,369.7 million. MOTA reports a larger figure stating that tourism contributed JD 2,871 million or around 11% of Jordan’s GDP in 2016. Modest growth to 2027 is forecast by WTTC and while some recovery was evident in 2017 as a result of the scaling back of wars in Iraq and Syria, future regional stability remains unlikely.

Figures 1 and 2: Total Contribution of Travel and Tourism to GDP



Source: WTTC (2017) The Economic Impact of Travel & Tourism: Jordan 2016

7 Definitions applied regarding tourism are those defined by the World Tourism Organization (UNWTO) in UNWTO (1995) Concepts, Definitions, and Classifications for Tourism Statistics. Madrid.

8 World Bank Group (2017) World Development Indicators 2017. Washington DC.

WTTC (2017) *The Economic Impact of Travel & Tourism: Jordan 2016* reports that travel & tourism generated 72,000 jobs directly in Jordan in 2015 (4.5% of total employment) and this was forecast to grow by 1.8% in 2016 to 73,000 (4.5% of total employment). MOTA on the other hand uses a tighter definition and reports that tourism directly generated 50,359 jobs or 2.28% of total employment in Jordan (2016). It also generates 44,000 indirect jobs.

The World Tourism Organization (UNWTO) reports tourist arrivals to Jordan of 4.8 million in 2015<sup>9</sup> of whom MOTA estimates 3.8 million were overnight visitors.<sup>10</sup> 6.8 million visitors had been received in 2011.<sup>11</sup> During this period there has been a steady downward trend in arrivals.

The number of arrivals at the Petra World Heritage Site is traditionally taken as the benchmark for leisure tourism. This shows sharp decline since 2010, dropping by over 50% from 918,136 to 410,371 in 2015, with a slight increase to 464,154 in 2016. This four-year decline was not to the levels of 2002-2003, when the second Palestinian *Intifada*<sup>12</sup> was taking place and the second Iraq war began.<sup>13</sup> Figure 4 on page 28 illustrate these trends.

Prospects for 2017 look better: According to UNWTO<sup>14</sup> strong recovery is taking place across the Middle East, with Egypt, Tunisia and Palestine rebounding in the January to October period from previous years' declines. UNWTO reports that Morocco, Bahrain, Jordan, Lebanon, Oman and the United Arab Emirate of Dubai all report growth over the first three quarters of 2017.

Regional instability and then relative calm is clearly a key driver behind this decline and recovery: The rapid recovery of tourism during periods of relative calm is clearly evident in figure 3 (Petra tourism 2002-2015) and in recent UNWTO figures for 2017. In this recovery scenario (if it continues) Jordan's tourism industry will require trained staff, and if they are not available within Jordan the industry will seek them from elsewhere (Egypt, Syria, the Philippines, etc.).

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9 UNWTO e-library Jordan: Country-specific: Basic indicators (Compendium) 2011 – 2015, accessed December 13, 2017.

10 BEST (2017) Jordan National Tourism Strategy: Charting Jordan's Pathway to Growth and Success by 2020 (Version 3).

11 UNWTO e-library

12 A period of uprising and resistance, which saw, intensified Israeli-Palestinian violence, and which began in late September 2000 and ended around 2005.

13 March 20, 2003

14 UNWTO (2017) World Tourism Barometer accessed December 14, 2017.

In terms of tourism competitiveness, according to the WTTC Travel & Tourism Competitiveness Report 2017, Jordan is ranked 75 of 136 economies (a 55% score): This is almost unchanged from 2015 when the Kingdom was ranked 77 of 141 (55%). Jordan in 2017 is seen as less competitive than the United Arab Emirates (UAE), the clear regional leader at 29 out of 136 economies; Qatar (47); Bahrain (60), Israel (61); Saudi Arabia (63); and Oman (66). The regional destinations identified as less competitive than Jordan are Iran, Lebanon, Kuwait and Yemen.

WTTC notes that Israel is one of the most improved economies in 2017, rising 11 places in the global rankings. Its performance is mostly attributed to an improvement in contextual business conditions: The Israeli business environment (32nd, up 19 places) is reported as becoming more open to competition and to foreign investment. There may be a lesson for Jordan here. Improvements in ground infrastructure (36th), and in skills and labor regulations (21st) have also contributed to enhancing the business climate in Jordan's closest tourism competitor.

According to Jordan the United Nations High Commissioner for Refugees (UNHCR) Jordan hosts second highest number (89) of refugees per 1,000 inhabitants in the world. It also has the largest resettlement operation globally with 19,299 resettlement departures in 2016. The current UNHCR estimate is that 655,588 Syrians who have crossed the border now reside in Jordan.<sup>15</sup> In addition, Jordan hosts an estimated 140,000 Palestinians who do not hold Jordanian citizenship and an estimated 62,000 refugees from Iraq.<sup>16</sup> According to the Jordan Department of Statistics, in areas populated by refugees, Jordanian unemployment rates can be upwards of 15 percent. Some of these refugees have tourism experience and qualifications, but absorbing and finding work in tourism for this massive potential labor pool is contentious. They are not a target of the BEST activity.

In relation to governance the World Bank indicates that under its regulatory quality indicator, Jordan ranked 57.84 in 2005 and declined steadily to reach 55.29 in 2015.<sup>17</sup>

By looking at the absence of violence and terrorism as a measure of political stability, Jordan's percentile rank from the World Bank was 42.03 in 2005, this declined considerably through the years to rank around 26.67 in 2015, where a zero response is the lowest political stability and one hundred is the highest rank of political stability. In the past, Jordan was considered the most stable country in the Middle East in 2005, followed by Saudi Arabia (37.68 in 2005). In 2015 Jordan had

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<sup>15</sup> Figure for December 5, 2017, available at: < <http://data.unhcr.org/syrianrefugees/country.php?id=107>> . Accessed December 11, 2017.

<sup>16</sup> UNHCR (2017). Available at < <https://reliefweb.int/report/jordan/registered-iraqis-jordan-30-april-2017>>.

<sup>17</sup> Data is available at < <http://info.worldbank.org/governance/wgi/#reports>>, accessed December 14, 2017.

dropped to second place behind Saudi Arabia; Jordan is followed by Egypt, Lebanon, and Iraq respectively.

Interviews with government and industry associations for this evaluation provided additional perspectives: While it was noted that military and international non-government organization (NGO) activity can boost business tourism occupancy in Amman, a common theme was that the economic and political environment remains a fundamental limitation to their businesses' growth. Limited capacity within MOTA was also specifically highlighted.

The situation affecting tourism is neatly summed up on USAID's Economic Development and Energy (EDE) webpage:

*Jobs are scarce outside large cities and are not being created fast enough to absorb a growing, youthful workforce whose education and skills do not always match the market's needs. Business development is hampered by regulatory and productivity challenges, as well as limited access to capital and an environment that inhibits innovation.<sup>18</sup>*

Finally, it is important to remember that there is ample global evidence to show that the tourism sector is one of the fastest to recover and deliver jobs following political crises: examples include Greece, Kenya, Rwanda, and Columbia. Although there is no sign of an overall peace-scenario in the region, Jordan's relative security can be pointed to, and scope for business regulatory reform exists, quality can be significantly improved, and tactically directed marketing may yet yield focused results. If the political situation remains stable (as in mid-2017) rapid recovery to 2010 levels is theoretically possible by 2020. However, because there has been a downsizing of available experienced labor due to emigration and the steady contraction of inbound tourism since 2010, challenges in achieving recovery remain.

*Tourist are back but buses are old, guides have fled to countries where there was work, restaurants are tired, hotels are not ready – it's creating a negative experience for those tourists who come. – Jordan tour operator.*

## BEST APPROACH

BEST's implementation approach is wide-ranging and seeks to cover almost all aspects of Jordan tourism. This approach was summed up by the former BEST staff as

*A chef needs different ingredients to make a dish.*

The initiative builds on previous USAID interventions in tourism by the same IP over the past decade, in particular Siyaha (Tourism) and Jordan Tourism Development Project II activities. The USAID contract lays emphasis on a change in approach to focusing on secondary destinations and emphasizes job creation, investment and gender issues (the contract is discussed under evaluation question I).

## THEORY OF CHANGE

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<sup>18</sup> Available at: <https://www.usaid.gov/jordan/economic-growth-and-trade>

The Theory of Change (also discussed under EQ 1) which underpins the BEST approach illustrates this wide-ranging approach, focused on job creation and economic growth.

The development hypothesis is:

*IF the business climate for and the competitiveness of the Jordanian tourism sector improves, THEN Jordan's economic growth and job creation will increase.*

The theory of change suggests that a promising avenue of job creation in Jordan is through the tourism sector, so job creation will occur when there is increased demand for, and satisfaction with, tourism related products and services. Demand for tourism increases with additional tourist arrivals and improved experiences following arrival in Jordan. By improving firms' capacity, financing, marketing and site management, they (i.e. the private sector) will be able to attract more tourists and encourage them to spend more money on tourism products. With increased tourist spending, actors in the value chain will add additional staff to meet demand.

The activity is expected to deliver the following:

- An enabling environment supportive of competitiveness in the tourism industry;
- Development, maintenance, and improvement of Jordan's tourism assets in ways that increase demand;
- Expansion, development, and deepening of source markets; and
- Increased access to finance for Jordanian businesses and entrepreneurs in the tourism.

The tourism activity was also expected to directly support Special DO 4 "Gender Equality and Female Empowerment Enhanced" through a focus on identifying interventions with strong potential for greater employment opportunities for women, engaging women entrepreneurs in sector competitiveness strategies and private sector advocacy organizations, and via improvements in government policies and regulations that benefit women. The assistance was considered particularly important given the domestic unrest and social pressures occurring in Jordan in the light of regional instability.<sup>19</sup>

## **SCOPE AND BREADTH OF BEST ACTIVITIES**

There are five sections to the contract: One general section and four specific sub-activity areas.

The general section required the development of a 5-year tourism activity-specific competitiveness implementation plan for the tourism sector. The 5-year tourism activity-specific competitiveness implementation plan was to clearly articulate approaches to overcoming seasonality and promoting growth in the regions and amongst female-owned businesses.

Activities required included a sub-awards program (the Tourism Partnership Fund [TPF]). The IP is expected to broker public-private partnerships (PPPs) as the way to ensure that tourism resources are protected and enhanced. The IP is to leverage the billions of dollars in new projects that are in the pipeline (sic.) in various cities and tourist sites in Jordan.

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<sup>19</sup> The contract specifically refers to the impact of the Arab Spring, which commenced in December 2011 and continued through 2011 to mid-2012.

The IP is expected to foster collaboration between the public and private sectors to develop and implement a plan of action for improving the enabling environment in a way that supports increased investment, business development, and economic growth.

The four specific sub-activity areas which are as follows:

- I. Enabling environment supports competitiveness in the tourism industry
- II. Jordan's tourism assets are developed, maintained, and improved in ways that increase demand
- III. Source markets expanded, developed, deepened
- IV. Increased access to finance for Jordanian businesses and entrepreneurs in the tourism sector

Under activity area I (enabling environment) the IP is charged with:

- Improving key aspects of the business enabling environment
- Developing new investment incentive programs
- Supporting public institutions
- Strengthening institutional relationships at the national level
- Increasing collaboration between policymakers and private sector at all levels to ensure policy
- Strengthening business associations and chambers in the tourism sector
- Facilitating the establishment of working groups to monitor and resolve specific, localized issues.

Under activity area 2 (Jordan's tourism assets are developed, maintained, and improved in ways that increase demand) the IP is expected to ensure:

- Jordan's tourism assets are developed, maintained, and improved in ways that increase demand
- Facilitate establishment of an indigenous, sustainable research and analysis capability
- Improve and upgrade existing tourism experience
- Support development of new or assist with scaling up nascent tourism assets and products.
- Support development and expansion of place-centered trip circuits and tour routes.
- Ensure tourism curriculum matches the market demand.
- Pursue concessions to better protect and preserve Jordan's natural assets.
- Increasing linkages to the mega projects and hotels, as well as large tour operators and other tourism-related companies.

For activity area 3 (source markets expanded, developed, deepened) the IP's commitments are to:

- Enhance marketing and promotion efforts to attract tourists from key source markets.
- Expand and cultivate Jordan's travel agent and tour operator networks

Activity area 4 relates to increased access to finance for Jordanian businesses and entrepreneurs in the tourism sector. This requires facilitation of the following:

- Increased access to finance for Jordanian businesses and entrepreneurs in the tourism sector
- Increased access to debt financing
- Provide capacity of start-ups and SMEs to produce the financial documents and business plans.

Finally, the contract notes that:

- The IP was required to develop a full Gender Action Plan

- Monitoring and evaluation activities must be structured to track progress towards gender equality and women’s empowerment at the policy level,
- The IP was required to use UN Gender Equity Seal as an auditable standard and certification system
- If significant adverse effects are expected, a Scoping Statement and Environmental Assessment (EA) is to be conducted by the implementer prior to the start of activities.

The contract defines target areas as:

*Henceforth, secondary destinations and sites include, but are not limited to, Ajloun, Jerash (sic.), Kerak, Madaba, Shobak, Salt, and Tafleh.*

It also calls for the establishment of DMOs in two primary destinations.

## **INCEPTION PERIOD**

USAID contracts generally allow for a 90-day period during which IPs may review proposed contractual outputs. In this case, no amendments to the contract were proposed.

## **5-YEAR TOURISM COMPETITIVENESS IMPLEMENTATION PLAN**

The BEST 5-year Tourism Competitiveness Implementation Plan is the key guiding document for the intervention. According to the plan, activities are designed to complement Jordan’s National Tourism Strategy (2018-2022), which will be developed with BEST support.<sup>20</sup> BEST proposes to use its Tourism Competitiveness Index (TCI) as one of the tools to measure progress in, and benchmark Jordan’s domestic and international tourism competitiveness on a bi-annual basis. The TCI (launched in 2017) is to allow Jordan to monitor the performance of the tourism sector against the implementation of the National Tourism Strategy (not yet in place). The Implementation plan outlined the activity’s proposed actions in its initial years. This key document is summarized at annex C.

### **Partner institutions**

The key partner institutions are MOTA, JTB, and regional governorates and economic zones. The original contract for BEST stressed that the activity should be developed with RSCN and ACOR. The degree to which this occurred is discussed in the section addressing EQ 2.

## **EVALUATION METHODOLOGY**

This section describes the overall methodology that was used to answer the evaluation questions. The evaluation’s design is provided as Annex B, which includes final qualitative and quantitative data collection instruments. BEST performance monitoring data included in this report is inclusive through September 2017, unless otherwise stated.

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<sup>20</sup> As of December 2017, Jordan’s National Tourism Strategy is still in draft form, and is a relatively short document built around BEST targets

## TIMELINE AND PROCESS OVERVIEW

The evaluation team's initial review of BEST activity documentation began in August 2017. Over the course of September and October, the evaluation team developed the study's design and work plan, including the generation of open ended topic guides for key informant interviews and input to a national phone survey questionnaire for Jordan SMEs, with an additional cohort of tourism-related businesses. Focus groups were also conducted.

Primary data was collected through November and focused on in-depth interviews with key informants from USAID, the BEST IP, banks and purposively-selected grant recipients, and other beneficiaries. In-depth interview respondents were selected to provide the evaluation team with a range of perspectives, including those who (1) received financial and technical support, (2) participated in training; as well as those representing (3) industry associations (4) national Government, (5) regional governorates/ special development zones, (6) genders, and (7) varying locations. Phase I concluded on 30 November 2017.

Phase II began on December 3 and was concluded on December 18. Phase II consisted of additional in-depth interviews and focus groups with a leading women's association, training participants and beneficiaries of the Jordan National Trail, together with further research into participation Pathways to Professionalism participating hotels, Salt, and a follow-up interview with BEST staff.

Co-generation of recommendations with the USAID team took place between January 7 and 15 when preliminary presentations of findings were also made. Further consultation with the IP to discuss findings also took place. The Midterm Evaluation Report was presented to USAID on February 4, 2018.

## DATA COLLECTION METHODS

The evaluation team collected, reviewed, and analyzed both secondary and primary data for this evaluation.

## SECONDARY DATA SOURCES

Major secondary sources consulted for this evaluation included the following activity and context documents. These documents were the source of the activity monitoring data used in this report. For a full list of documents used to ground the evaluation in the overarching regional and Jordanian context, see Annex C.

1. BEST-USAID contract
2. BEST 5-year Tourism Competitiveness Implementation Plan
3. BEST Work Plans
4. BEST Quarterly Reports
5. BEST Consultants' Reports
6. BEST Databases:
  - a. Grants awarded database
  - b. Rejected applications database



- c. Training records
  - d. M&E systems and ChemResults/DevResults
7. MOTA statistical data relating to tourism

## PRIMARY DATA COLLECTION

The team developed instruments to collect both qualitative and quantitative data. Table 2 shows how each of these instruments were utilized for each respondent type. The instruments are provided in this report in Annex B (Evaluation Methodology).

TABLE 1: SUMMARY OF PRIMARY DATA SOURCES				
RESPONDENT TYPE	INTERVIEWS	FOCUS GROUP PARTICIPANTS	DATA COLLECTION METHOD	INSTRUMENT
USAID	15		In-depth interview	KII questionnaire 2
Financial institutions	2		In depth interview	KII questionnaire 3
National & regional government & JTB	7		In-depth interview	KII questionnaire 4,5,6
Private sector businesses	10	7	In-depth interview/ focus group	KII questionnaire 7
Other Associations, Commissions, NGOs & INGOs	7	7	In-depth interview/ focus group	KII questionnaire 8 & focus group topic list
Educational institutions	1		In-depth interview	KII questionnaire 9
Training participants	2	14	In-depth interview	KII questionnaire 7 & focus group topic list
Other USAID actions	4		In-depth interview	KII questionnaire 8
<b>TOTAL</b>	<b>48</b>	<b>28</b>	-	-

## DATA ANALYSIS PROCEDURES

This evaluation primarily relied on four types of analysis:

### 1. Before and after

This line of analysis explores patterns and trends that may be observed in the data and the primary and secondary data collected.

### 2. Planned versus actual

This line of analysis focused on tracking the setting and achieving of targets on products, outcomes and outputs laid out on the Monitoring and Evaluation Plan and the 5-Year Competitiveness Implementation Plan. Any significant changes introduced in the yearly work plan during the execution of the project were noted. The analysis reflects the learning

process of all the actors involved regarding specific socio-economic and institutional conditions in Jordan's tourism industry.

### **3. Performance versus benchmarks**

Understanding how the BEST intervention model and processes are positioned on the local, regional and international arenas enriched the interpretation of the lessons learned and gave the team additional insights for recommending actionable and specific improvements. The team was selective on the kind of program to be considered, noting the activity's emphasis on competitiveness.

### **4. Content analysis**

The team reviewed the content and relevance of Technical Reports commissioned under best to form an objective view as to relevance to achieving the action's overall objectives. The team also analyzed the content of key informant interviews to obtain feedback from those most directly involved.

The evaluation team further conducted content analysis of in-depth interviews and focus group discussions. Descriptive statistics are provided based on survey data from tourism SMEs.

## **DATA STORAGE AND TRANSFER**

Data storage procedures for this evaluation are governed under the provisions set out in the MESP contract signed between USAID and MSI. Survey data collected for this evaluation will be cleaned for submission to the Development Data Library in a machine-readable format. Respondent identifying information will be redacted in accordance with MSI and MESP ethical guidelines.

## **STUDY LIMITATIONS**

An evaluation is not an audit. The evaluation team received top line information only on IP expenditure relating to each component with no breakdowns, although listings of data relating to grant awards was supplied.

## **TEAM COMPOSITION**

### ***Mr. Robert Travers:***

Team Leader responsible for methodology preparation, allocation of team responsibilities, ensuring international best practice and quality standards applied, participation in key interviews, data gathering, data analysis, best practice case studies, recommendations and report writing.

### ***Ms. Helen Van Wengen:***

Subject matter expert (tourism) responsible for tourism inputs, advising on stakeholder selection, tourism trends, participation in and recording of interviews, supervising focus groups, survey interpretation and participation in data analysis, recommendations and report writing.

### ***Mr. Rajan Kapoor:***

M&E & economics expert responsible for input on banking, investment and M&E issues, liaison with USAID and MSI Head Office. Participation in methodology preparation, survey analysis, recommendations and report writing.

***Ms. Afnan Al Hadidi:***

M&E & project management expert responsible for liaison with BEST and advisory support on best practice in evaluation techniques and assessment of project management. Participation in interviews in Arabic and supervision of focus group research in Arabic.

***Mr. Ragheb Fityan:***

M&E expert with responsibility for analyzing DevResults and advising on BEST monitoring system and other trend data analysis. Participation in interviews in Arabic and supervision of focus group research in Arabic.

***Mr. Bandar Al Huniti:***

Research assistant supporting the team with desk research, logistics, interviews in Arabic.

In addition, MSI contracted a specialist research agency staff member Ms. Wafa Al Ameireh to undertake and report on focus groups.

## **BEST'S PERFORMANCE MONITORING UNTIL SEPTEMBER 2017**

Some issues regarding key crosscutting indicators and key challenges are discussed below. Indicator performance to date, as recorded by BEST, is as shown in annex D. USAID's evaluation questions are then addressed in the next section.

### **JOBS CREATED**

A key finding from BEST's own indicator records is that comparing BEST indicator figures from years 1 and 2 targets up to September 30, 2017; in terms of jobs BEST achieved 186 jobs created above a target of 150 for year 1&2. However, this target appears to have been significantly changed from the original contract concept, which required 25,000 jobs to be created, 17,000 of which were to be outside Amman.

The debate over the definition of jobs created indicator has absorbed a considerable amount of time and resources from both IP and USAID. The current dispute may have distracted BEST from the primary focus of the activity, as targets are not mutually agreed. It does not reflect well on either the IP or USAID that this key matter had been left largely unresolved at midterm stage (September 2017). BEST has been creative in proposing means of "creating jobs", but USAID has a standard definition regarding jobs for this, or any other intervention. This is particularly important in that other USAID interventions in Jordan and in tourism specifically, are also targeting jobs created.

The evaluation team notes that in an economy which supports between 50,000 (MOTA figure, 2016) and 72,000 (WTTC figure, 2015) jobs, the creation of 25,000 jobs, 17,000 of which were to be outside Amman, with an investment of US\$ 36 million (considerably less than the cost of one luxury

hotel)<sup>21</sup> was overly optimistic: In 2015 WTTC had estimated that tourism jobs in Jordan would grow at an annual rate of 4% to 2025.<sup>22</sup> Delivering jobs at an average cost to USAID of US\$ 1,800 per job is also very optimistic.

## FUNDS LEVERAGED

Looking at the private sector investment in targeted sectors delivered because of USAID-funded assistance, BEST appears to be exceeding the targets according to the M&E system. BEST is required to achieve an additional US\$ 11 million in funds leveraged, whereas the target achieved to September 2017 is recorded as US\$ 96.7 million. However, it is not very clear why BEST activities have caused the targets to be exceeded by such a huge amount at just year 2 of the project through joint activity. The extent to which this is directly a result of BEST activity is questionable. The contract illogically states that BEST is to “to leverage the billions of dollars in new projects *that are in the pipeline*”, implying joint activity with ongoing developments, most of which are in Aqaba and Amman, and neither of which are listed in the contract as secondary destinations to focus on.

BEST’s 5-year Tourism Competitiveness Implementation Plan listed a series of partners by activity that were to invest in joint activities. The present evaluation did not involve an audit of actual investment secured from these partners, but USAID may wish to undertake a Data Quality Assessment (DQA) on how this investment is being delivered through specific BEST initiatives. Exceeding full intervention target so quickly in a declining tourism economy raises questions about the realism of the target, or the means by which BEST is counting it as having been achieved within two years of start-up.

## GENDER

The evaluation team notes that BEST is considerably behind the target in the percentage change in female participation in tourism workforce to September 2017, according to its own M&E system. This indicates that female participation has increased by 1.89% whereas the target needed to be achieved for years 1 and 2 was 7%.

## FINDINGS REGARDING OTHER INDICATOR FIGURES

Indicators are outlined in annex D, together with reported results to quarter 3 of 2017, and overall targets (2020). The team’s review indicates that out of 43 remaining indicators BEST is recorded as achieving or exceeding its targets for 28 indicators. On the other hand, BEST is behind target for 14 indicators.

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21 The Amman Fairmont Hotel, which opened in 2017, involved an investment of US\$ 212 million (JOD 150 million) according to a Government of Jordan press release.

22 WTTC (2016) Travel & Tourism Economic Impact 2015: Jordan

According to its M&E system, BEST is behind target for person-hours of training completed in business enabling environment activities supported with USAID assistance. BEST achieved 1,732 hours whereas the desired target is 5,184 for years 1 & 2.

BEST is recorded as being below the target for number of hotels, restaurants, and desert camps classified, BEST achieved 153 whereas the target for year 1 & 2 is 243.

BEST has significantly exceeded the target of number of participants completing USAID-funded business training: BEST achieved 850 people trained, whereas the target for years 1 & 2 is 70. It was noted that non-nationals are being counted in some cases.

The number of source market residents targeted by marketing and promotion campaigns are also significantly exceeded.

The effectiveness of BEST's actions in these and other areas is discussed further in EQs 1 to 4.

### IMPLEMENTATION SPECIFIC CHALLENGES AND ADAPTATIONS

BEST reporting rarely mentions challenges and adaptations; however, we understand that many minor variations to the Implementation Plan and Annual Plans have been approved by USAID, usually verbally.

Discussions with BEST indicate that there have been challenges in the following areas:

- Length of time for legislative and regulatory reform processes
- Slowness of initial Distinctive Destinations selection process
- Engagement with ASEZA
- MOTA delays in establishing a Site Management Unit
- Managing expectations (e.g. Jordan Trail Association)
- Changing market conditions
- Continuous change in Petra Development & Tourism Regional Authority (PDTRA) management

### ACTIVITY MONITORING AND EVALUATION PLAN

Table 2 details BEST's AMEP assumptions with the activity's assessment of the situation at the end of the activity's second year. Annex D provides greater detail of the timeline of BEST implementation activities. Case Study 5 in Annex E suggests a means of standardizing project reporting.

**TABLE 2: BEST ORIGINAL ASSUMPTIONS COMPARED WITH UNDERSTANDINGS IN SEPTEMBER 2017**

ASSUMPTIONS / RISKS	MITIGATION	CURRENT SITUATION
The security situation impacting Jordan's tourism does not deteriorate further.	N/A	While prospects for a more peaceful situation and tourism growth looked good in mid-2017 with a scaling back of war in Syria, the US Presidential announcement of approval to move the US Embassy in Israel to Jerusalem in December 2017 has caused some unwillingness in local communities to cooperate further with USAID/BEST.
Key project counterparts, such as MOTA, Department of Archaeology (DOA), PDTRA and ASEZA undertake managerial, policy or development actions in a timely fashion and participate in activities as scheduled.	BEST will share planning documents and finalize plans and timelines in conjunction with counterparts.	There have been some delays in approval processes, for example with the Jordan National Tourism Strategy finalization.
Required USAID approvals are received timely to allow for AMEP plan execution without delay	BEST meets all its deadlines for complying with USAID timeframes.	USAID has been flexible and approved the BEST AMEP Delays in grant approval processes sometimes occurred.
Key counterparts are willing to collect and share data needed for project measurement needs.	Early discussion with counterparts about the data needed; ongoing training and support provided as needed to bolster their capacity.	To September 2017 counterparts have been willing to collect and share data.

Source: Assumptions/risks & mitigation from BEST AMEP

The absence of a BEST mitigation strategy should the regional security situation deteriorate is worth noting: Usually tourism programs in the region will switch resources to domestic tourism marketing and tactical initiatives and prepare for such situations. MOTA appears to have done this in a domestic tourism marketing campaign, but BEST has not been significantly involved, the evaluators understand.

## FINDINGS AND CONCLUSIONS

### EQ 1: WHAT IS THE OVERALL EFFECTIVENESS OF BEST, SPECIFICALLY, WHETHER AND HOW DID THE PROJECT ACHIEVE ITS INTENDED OUTCOMES?

*Have deviations from submitted design changed the intended outcomes? Why and How?*

*Are there certain areas/activities and approaches that have been more effective? Why?*

### FINDINGS AND CONCLUSIONS FOR OUTCOME 1: AN ENABLING ENVIRONMENT SUPPORTIVE OF COMPETITIVENESS IN THE TOURISM INDUSTRY

#### Overall effectiveness

BEST's Theory of Change suggests that by improving Jordan tourism's competitiveness, increased economic prosperity and jobs will result. BEST has ambitious job creation, investment and gender targets, and an unusual incentive bonus built into its contract. This has naturally led to a focus in some BEST areas of work on big players and successful enterprises that can potentially create the

most jobs, such as 5-star hotels. Improving competitiveness however also needs a focus on weaker players who are often more difficult to deal with. In addition, the contract requires a focus on secondary destinations, which are not the places where most jobs in tourism are created. Thus, the contract, bonus and Theory of Change involve conflicts and confusions which BEST has struggled to overcome.

BEST with its partner Oxford Economics has undertaken a detailed study on tourism competitiveness. This is similar to existing WTTC Jordan analyses (to which Oxford Economics is also a contributor) and provides a current benchmark of overall tourism competitiveness issues. The benchmarking data is useful and compares Jordan with selected other regional destinations. At midterm stage only the years 1 and 2 analysis has been undertaken and the proposal is to repeat the process every two years. As a result, it does not provide significant evidence of improvement at midterm stage, but does indicate areas on which to focus.

BEST is supporting MOTTA on creating a better business-enabling environment and has also assisted in updating or introducing 11 tourism regulations of varying strategic relevance. These were chosen through a process of industry consultation. However there remain significant business-enabling issues to be addressed. These include restrictions on Open Skies air access, disincentives for effective public-private partnership, the high cost of tourist visas and the exclusion of key potential markets for faith-tourism restrictions on the provision of tour services including high bonds, restrictions on tourist-friendly transport such as Uber, and the like. It is noted that BEST has made satisfactory progress in introducing a limited supply of Airbnb product, which does increase competitiveness despite complaints from some industry associations.

BEST has established the Classification Unit at MOTTA, the Research and Knowledge Unit and the Tourism Satellite Accounting unit. Results from these units are awaited. The project has supported MOTTA in developing the draft of the National Tourism Strategy to 2020 which is currently under review.

BEST has indicated that its target in terms of the number of regulations addressed has been achieved. Consultations undertaken suggest however that there are still many barriers to tourism enterprise that could be overcome.

*BEST should support fighting for open skies, attract flights and aid visa regulatory reform and source market acceptance through a filtered system. BEST focus on overcoming regulatory bottlenecks is badly needed. – JTB senior staff*

*We have no knowledge of BEST business enabling environment activity or access to finance. Business enabling could work in synergy with regulatory reform - Jordanian tourism association.*

BEST's work in the area of improving competitiveness through hotel training is generally very highly regarded, as its work on hotel certification (especially by Government entities, although the Jordan Hotel Association is more critical). The Pathways to Professionalism case study in Annex E and emerging work with universities illustrates this area of considerable BEST strength. In December 2017 Amman Applied University College (formerly the Jordan Applied University) was awarded UNWTO TedQual International Certification for three years with acknowledged BEST support, further illustrating this area of BEST effectiveness. BEST is also supporting other educational institutions towards international certification, which is directly related to improving tourism competitiveness and improving job prospects for young people. There may be scope to extend this expertise to the restaurant sector which is a major employer.

## Deviations

Developing an improved tourism law was planned as an intervention BEST would pursue with MOTA and the industry. It was however noted by BEST staff that a new tourism law requires a long legislative process, including a parliamentary vote, and for these reasons work on this area does not seem to have progressed.

The development of concessions for spurring investment in regions outside Amman does not seem to have progressed either yet, although good publicity for available existing funding options is being developed and passed to the tourism industry. Designing new investment concessions is a challenging area and BEST may require additional expertise to encourage more effective regional incentives within the Jordanian legal framework.

Overall design was so wide ranging that BEST cannot be seen to have deviated significantly from it. However, with so broad an intervention canvas, certain aspects inevitably receive more attention than others, and there may have been a tendency to focus on Amman-based organizations and known reliable contacts, perhaps at the expense of making further progress with more challenging destinations. This applies particularly to the south of Jordan where possibly the greatest job creation potential is, after Amman.

Most tourism jobs outside Amman are likely to be created in tourism development zones like Aqaba, Petra and the Dead Sea where substantial hotel construction projects are underway. After that regional settlements do have potential but it will be important to stimulate domestic tourism, and encourage more Jordanians to explore more of their country. Adventure tourism has new growth potential. In many rural locations faith-based tourism may also have potential, if responsible tourism approaches are fostered (i.e. ensuring local community benefit in addition to tour operator benefit).

### **Most effective areas/activities and approaches**

The provision of highly skilled consultants by BEST is appreciated, particularly by the more mature tourism entities.

*JTB was proactively supported by BEST bringing in three dedicated professional and effective consultants from grant money to build strategy and capacity and focus on segments.*

*Relationship with BEST is collaborative bringing improvement.*

*They brought consultants who made a difference – JTB senior staff*

*BEST helps us do bigger things! BEST is helpful if you need a consultant – Jordanian tourism association*

*BEST are professional, reliable, always there for us*

*We want to thank the BEST team for their support, help, and professionalism - grant-aided transport operator*

*We are very satisfied, BEST: the component leader was very engaged. – Gran- aided major hotel.*

Some organizations may however be less able to absorb high-level consultancy advice through reports. In this regard there is a clear preference apparent for approaches which embed consultants or skilled staff within organizations for longer periods of time to assist in implementing consultancy advice.



*Strategic Plans prepared by USAID/BEST consultants are strong, but implementation, follow up and action (partly due to lack of relevant talent on the ground) are missing. Strategic Plans not implemented are cause for frustration at the most fundamental level and when work is not done following a plan, the gaps become bigger. - Royal Commission senior staff member.*

*BEST should come and station experts in Aqaba to understand the real situation. – ASEZA tourism department.*

*We need ‘boots on the ground’ for this project. We need to establish ties in communities. Salaries for staff are what we need: Not consultants who come and go. - Adventure tourism NGO.*

*Where there is a local lead embedded at MOTA we achieve. – High-level Government member.*

### **Monitoring and Evaluation**

Lack of robust monitoring and evaluation (M&E) systems with BEST is a key concern in terms of measuring effectiveness and sustainability.

BEST lacks its own M&E data to more closely prove the connection between its specific support and the achievement of targets, for example support given to JTB cannot be claimed to result in the overall increase in visitors to Jordan with resulting average expenditure and jobs created. Specific M&E instruments need to prove the link between BEST-supported actual activities, increases resulting from specific campaigns in specific market segments, and jobs that might result as a direct result. Given the strong link (in the marketing area) between competitiveness and image, image tracking in markets or segments chosen for BEST support, should at least be carried out. As noted above there are too many general indicators in the Activity Monitoring and Evaluation Plan (AMEP) – most of which are contract indicators –outcome-specific custom indicators are few. The 41 additional indicators need to be re-visited and amended to be much more focused on the project goals and objectives. “Indicatorism” - wasted time on data collection and resources spent on identifying and measuring indicators is inefficient. BEST lacks its own tools and instruments in addition to the proposed biennial Tourism Competitiveness Index to collect primary data to feed indicator measurement. There is a need to improve project management and help decision-making and the prioritization processes for the remainder of the activity by generating and using robust M&E findings.

A strengthened M&E department should drive components and develop a more comprehensive results framework or logframe, focused on outcomes: At present there is strong leadership from component leaders regarding target reporting, however a strong M&E function with a clear challenging role needs to balance this leadership. This will require the appointment of a senior and independent M&E lead. The M&E system also needs to follow up completed sub-activities to ensure that the required standards and quality, and other commitments (jobs, gender, and investment) are maintained to at least 2020.

There is also a lack of consistency in reporting through not using standardized reporting formats, including the exclusion of detailed financial reporting. In particular, challenges need more detailed analysis in monthly reports, and management accounts should be more clearly linked to activity components to ensure better transparency and tracking of resource allocation by component.

Most of the indicators depend on secondary data, which is objective but can lead to significant gaps, especially if the third party does not deliver.

*JTB is the lead on key performance indicators. We find it hard to get them. We were overwhelmed (with grant applications) – BEST component leader A.*

*Measuring goals is a hard task: It will not be an easy task to obtain numbers to measure performance including women in business and seasonality change. - BEST component leader B.*

**Conclusion 1: BEST’s technical expertise is highly valued.**

**Conclusion 2: There is sometimes conflict between jobs target and the requirement to develop secondary destinations.**

**Conclusion 3: There are no substantive deviations from project design, but a need to focus on priority activities is apparent.**

**Conclusion 4: Better results can be achieved when focus is on assisting beneficiaries to actually implement consultancy advice.**

**Conclusion 5: BEST’s approach to M&E is inadequate and under-resourced.**

**Conclusion 6: There may be an opportunity to encourage more restaurants to be designated as tourism establishments with improved services to tourists.**

**Conclusion 7: Despite the challenge of bringing about legal and regulatory changes in Jordan, the area of business enabling is an essential focus area.**

## **FINDINGS AND CONCLUSIONS FOR OUTCOME 2: DEVELOPMENT, MAINTENANCE, AND IMPROVEMENT OF JORDAN’S ASSETS IN WAYS THAT INCREASE DEMAND**

### **Overall effectiveness**

The Activity has continued to conclude some interventions at primary heritage sites (Jerash, Petra) and plans to do so in Aqaba (Aqaba Castle and the Sharif Hussein House). It is working with MOTA to develop a site maintenance unit, but progress appears slow so far.

BEST is clearly working on new product development with its engagement with the Jordan National Trail, and this has the potential to help change the image of Jordan by broadening its product offer from heritage attractions. It also can tie together many other tourism-related aspects of Jordan throughout much of the country. The initiative will require long term support to truly get going and the organization’s directors report some frustration: Key to effective project management is the ability smoothly handle the political, technical, and people management challenges that will face BEST in many of its more challenging, change-making projects.

*Their minds are trapped in dealing with paper work for USAID rather than developing the Trail’s potential. Within two years we can create 200 jobs and more. - Jordan Trail senior*

It is noted however that BEST has successfully reengaged with the Association and that the recent National Geographic accolade for the Jordan Trail was facilitated by BEST. The USAID/BEST engagement is clearly valued:

*The BEST grant with all its frustrations brought the Jordan Trail ‘scale and speed’: We needed staff and BEST covered the salaries. We could not have hired the people, created the PR and excitement without BEST - Jordan Trail Association board member*

Support to MOTA to improve its operations includes a site management element. The Minister for Tourism is complementary regarding the support her department has received to date, however this area may require further effort in years 3, 4 and 5 to deliver tangible results:

*Where there is focus and a lead, there is success.*

*BEST are professional, helpful, and qualified but lack follow up.*

*Objective 2 of the Technical Agreement<sup>23</sup> 'is an orphan' (too broad, nobody looking after it, yet badly needs focus)*

*BEST are professional, helpful, qualified but lack follow up. The agreement (between BEST and MOTA) should be revisited and periodically audited.*

*Both parties (MOTA and BEST) have not handled or managed agreement properly and a push is needed - High level Government official*

In terms of the secondary destinations outlined as priorities in the contract, these are identified as including (“but not limited to”) Ajloun, Jerash, Kerak, Madaba, Shobak, Salt, and Tafileh.

In reality it is only Salt that has received substantive secondary destination support, building on the actions of the Japan international Cooperation Agency (JICA). Small individual projects have been supported in some of the other destinations (e.g. Jerash visitor center, restaurants in Ajloun and Madaba, a community initiative in Tafileh). The Jordan Trail has potential to connect some, possibly all, of these destinations for hiking tourism, and some may benefit from other initiatives (e.g. faith-based tourism). Destination-specific cluster-based approaches have not been planned by BEST, other than one Distinctive Destination.

*On paper at least, there was a change to support secondary sites and local communities, but we do not see evidence of that playing out in reality – United Nations agency*

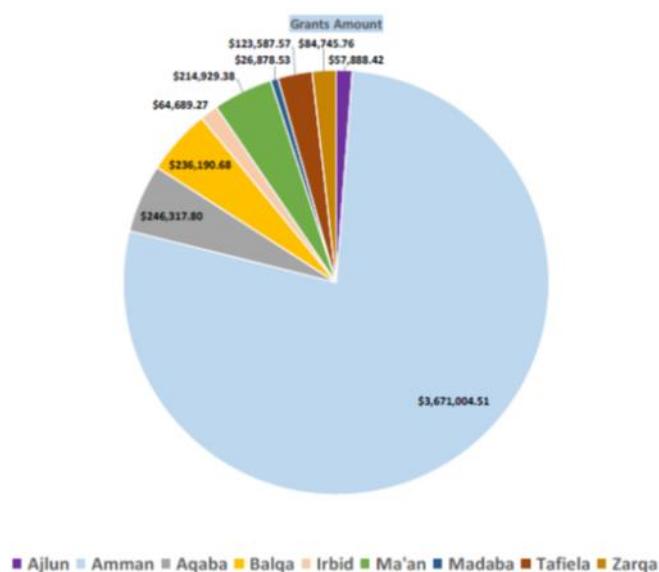
BEST has also assisted the completion of a Master Plan in Ajloun, however consultees clearly stated that it is better to follow through with implementation support than just provide strategy documents and consultancy reports.

Figure 3 outlines the geographic spread of grant awards to date by amount. It does not indicate a focus on secondary sites, rather the focus to date appears to be on national organizations and Amman-based clients. It is noted that all grant awards are approved by a panel and by USAID.

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<sup>23</sup> Objective 2 refers to PPP development and support for a Site Management Unit within MOTA.

Figure 3: BEST grants awarded by governorate (USD)<sup>24</sup>



Source: BEST Grants database

Source: CIS-USAID online system, available at: [www.USAIDawards.usaidcis-jordan.org](http://www.USAIDawards.usaidcis-jordan.org)

Generally successful USAID tourism development projects which seek to develop destinations use clustering approaches involving many players in the chosen location (as BEST is potentially doing in Salt); and often require long term, preferably on-site, technical assistance. In locations other than Salt, BEST’s approach appears to be to back potential winners (often one selected enterprise) rather than develop holistic destination-wide approaches.

**Most effective areas/activities and approaches**

Although the Distinctive Destinations project has taken a long time to get going (and seems somewhat endangered due to political developments) it does represent a fairly thorough approach to helping a secondary destination to develop. BEST is applying its organizational, HRD, marketing and access to finance expertise to one location which has been identified as having tourism potential. The initiative enjoys Government support and builds on the work of other donors (e.g. JICA), although improvements are being called for. The action only plans to deliver one Distinctive Destination by 2020 however.

**Conclusion 8: The Distinctive Destination initiative although a slow process appears to have good potential to be applied elsewhere.**

**Conclusion 9: An absence of cluster-based focus is apparent in some grants, with just one business in a location often being supported.**

**FINDINGS AND CONCLUSIONS FOR OUTCOME 3: EXPANSION, DEVELOPMENT, AND DEEPENING OF SOURCE MARKETS**

<sup>24</sup> Chart indicates grants given to organizations based on headquarter location. The chart does not capture funding streams of Amman based grantees that then may have allocated resources or supported activities outside of Amman.

## Overall effectiveness

BEST's work in marketing is appreciated by its main beneficiary, the JTB and is regarded by BEST as a key achievement:

*There has been a real paradigm shift. They have totally transformed the way they operate.*

*They have a new marketing strategy and BEST has helped them to get an international firm to help them assess the Jordan Brand abroad*

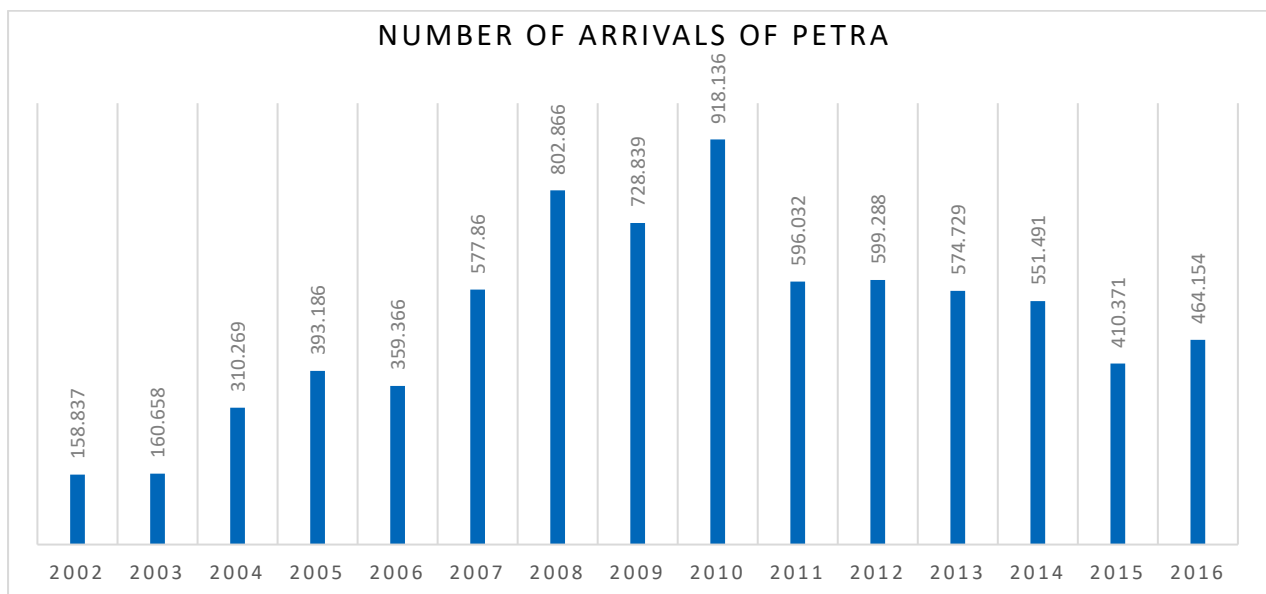
*They have even shifted their organizational structure*

*Look at the partnership with National Geographic*

*They are also co-funding initiatives with foreign tour operators in source markets – BEST former Chief of Party (CoP)*

All of these statements are true, and JTB management is grateful for BEST's consultancy interventions. JTB notes that BEST has been very helpful in sourcing the specialist consultants that it needs. In overall terms Jordan's tourism performance is hardly spectacular, an issue, which is generally blamed on political circumstances, however since BEST started an increase in leisure visitors from 2015 to 2016 is evident, and prospects for 2017 look better.

Figure 4: Total arrivals Petra 2002-2016



Source: PDTRA.<sup>25</sup>

In contrast to Jordan in the 2010-2015 period, overnight tourism to Israel has remained steady at around 2.8 million overnight visitors per annum, although day visitors (mostly cruise) have declined sharply.<sup>26</sup> Arrivals to Dubai rose year by year (from 8.41 million in 2010 to 14.87 million in 2016)<sup>27</sup> driven by good air access and unaffected by regional conflicts. Destinations in the Caucasus like Georgia (up from 2 million international arrivals in 2010 to 5.9 million in 2016)<sup>28</sup> and Armenia (from 684,000 in 2010 to 1.2 million in 2015)<sup>29</sup> have seen considerable growth from nearby markets including the Middle East, and by facilitating increased air access. Clearly there remain marketing opportunities to be captured, and BEST's ability to commission specialist research should continue to assist JTB and MOTA.

The 5-year Tourism Competitiveness Implementation Plan noted that the Jordanian tourism sector is reliant on regional tourism ("almost half of tourists originate from Gulf and Arab countries"). It also noted that in times of crisis, the regional market has always provided the Jordan tourism sector with a cushion. The only initiative proposed in the Competitiveness Plan relating to regional markets related to assisting the Jordan Motorcycle Club, a very elite group. BEST has delivered this support and it may generate some good regional PR, but it is unlikely to bring about transformational change.

BEST is now helping JTB to focus on motivational segments (heritage, activity, religion, etc. in selected – mostly Western - markets). This should be both effective and measurable. M&E for each activity is not currently sufficiently developed however. It needs to be recognized that support for marketing is just one part of competitiveness, and BEST needs to link its product development initiatives, access to finance and marketing activities together so that results can be measured:

- a) on the ground at BEST supported sites and clusters; and
- b) in the target markets in terms of perception and actual travel to Jordan.

Using general indicators of tourism growth to estimate jobs created is not a specific enough indicator of BEST support: In most cases tourism growth results from many factors beyond BEST's direct intervention.

JTB has suggested to the evaluation team that USAID should review its eligibility rules regarding support:

*BEST would do better supporting feeder market initiatives and access to Jordan than supporting in-country PR events*

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25 Available at: <[www.visitpetra.jo/Pages/viewpage.aspx?pageID=150](http://www.visitpetra.jo/Pages/viewpage.aspx?pageID=150)> Accessed 23 November 2017

26 Israeli Central Bureau of Statistics. Available at: <[http://cbs.gov.il/publications/17/1658\\_tayarut\\_2015/pdf/t01.pdf](http://cbs.gov.il/publications/17/1658_tayarut_2015/pdf/t01.pdf)>. Accessed December 7, 2017.

27 The Statistics Portal online. Available at <[www.statista.com/statistics/284636/visitor-arrivals-in-dubai-from-international-destinations/](http://www.statista.com/statistics/284636/visitor-arrivals-in-dubai-from-international-destinations/)>. Accessed 7 December 2017.

28 Georgia National Tourism Administration (2013 & 2016) Georgian Tourism in Figures

29 World Bank data available at < <https://data.worldbank.org/>>. Accessed December 12, 2017

*USAID puts restrictions on expenditures that would help us (focused events within source markets, air tickets that would support B2B initiatives and linkages). A shift in support is needed – JTB senior staff.*

The evaluation team notes that support to JTB (in the context of BEST’s contract and objectives) cannot be seen as a subsidy to JTB and does need to move to exit phase, however there may be scope to focus support more around BEST’s other initiatives being developed, such as Distinctive Destinations, the Jordan Trail and religious tourism. The issue of sustainability in supplying specialist market research does arise, and so the contract obligation to work to establish a sustainable Tourism Research Center becomes more urgent as BEST enters its final phase. Little progress has been made on this so far.

A key finding is that BEST’s M&E system for marketing, as elsewhere, is not sufficiently tied in to its specific activities. Targets for M&E do not always have to be the key ones: There may also be tactical opportunities for growth if the message of Jordan’s own security can be better communicated. This could be measured in terms of changes in target market attitudes.

BEST has not cooperated significantly in cooperative marketing activity with ASEZA to date, and only one private sector business received grant aid there. Proposals were drawn up under a previous initiative with the same IP to market Aqaba and develop a DMO as a public-private initiative. These have not been implemented, possibly partly due to resistance within local government in Aqaba. BEST has also indicated that existing players (JTB, MOTA) may oppose such a move. Consultations with ASEZA’s economic development commissioner (in November 2017) indicated that the timing may now be right to revisit public-private partnership in marketing there. The evaluation team notes that the IP contract requires the development of DMOs at two primary destinations.

*USAID should build on Aqaba’s success & building momentum – ASEZA official*

A Visitor and Convention Bureau for Aqaba had also been suggested under the previous USAID tourism activity (Jordan Tourism Development Project II 2008-2013), and in the context of BEST’s Destination Marketing Organization target, this could be revisited. It will be important to place BEST’s regional development objective and contractual obligations above vested interests in Amman in this regard.

*ASEZA needs support for opening new markets, strengthening tourism departments, developing charter traffic, strengthening statistics – ASEZA Tourism Division staff*

ASEZA consultees were very complementary regarding BEST’s support in developing hotel and restaurant inspection systems and clearly seemed interested in a closer engagement.

According to PDTRA, BEST has not cooperated with then yet: <sup>30</sup>

*We have had little contact from BEST in recent times. There was one 3-hour training with a man talking about DMOs – PTRDA senior staff*

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<sup>30</sup> UNESCO has indicated that Destination Management rather than Destination Marketing needs to be the priority around this World Heritage Site.

(The evaluation team notes that PTDRA has seen considerable staff changes, so this comment may not be fully informed).

The evaluators did note that BEST has provided some input on the museum, which is currently under construction and funded by JICA. It is understood that BEST plans to reengage with opportunities that arise if a one-way system through the World Heritage Site is implemented. However, Petra is clearly a primary destination which still has significant destination management needs.

Faith based tourism has not yet received the focus from BEST to develop existing experiences and potential market offerings that Jordan has within its borders and has not effectively exploited. The evaluation team is aware that BEST is now beginning to re-engage with its faith-based tourism and that initially there were some difficulties that delayed engagement. A number of consultees have suggested that BEST needs to avoid a too Christian emphasis, as a key strength of Jordan that needs to be marketed more is its peaceful interfaith element. A consultation with the Royal Commission for the Baptism Site suggested that BEST needs not only to help JTB market Christian sites like Bethany-beyond-the-Jordan, but also interfaith opportunities and Islamic sites. The Royal Commission consultee pointed out that there are at least five important sites in the north, five in the center, and five in southern Jordan that if linked and developed could keep religious tourist in the Kingdom for longer even if they were visiting the greater region.

*The Big Message should be that in Jordan Muslims and Christians live in harmony. –Royal Commission employee.*

## **Deviations**

There do not appear to be significant deviations in this aspect of the activity at midterm stage.

## **Most effective areas/activities and approaches**

The provision of specialist consultancy in response to specific requests from JTB appears to be the most effective approach evident from consultations undertaken. JTB senior staff are appreciative of specialist international expertise supplied by BEST in response to JTB specific requests regarding e-marketing, for example.

The initiation of the Jordan Convention Bureau, while not directly anticipated in the contract, is a very positive move. This is however at a very early stage (no live website coming up on Google searches at the moment) and will require further engagement to prove itself to the industry.

**Conclusion 10: BEST’s support to JTB and its marketing support to other organizations is valued.**

**Conclusion 11: BEST’s M&E system is not measuring the effectiveness of individual marketing initiatives.**

**Conclusion 12: Support for marketing regions and secondary destinations is under-developed so far.**

**Conclusion 13: Confusing contract design has blurred focus between primary and secondary destinations.**



## FINDINGS AND CONCLUSIONS FOR OUTCOME 4: IMPROVED ACCESS TO FINANCE FOR JORDANIAN BUSINESSES AND ENTREPRENEURS IN THE TOURISM SECTOR

### Overall effectiveness

Despite much good work and effort by BEST, banks are pessimistic about the future in the tourism sector in general. If they do not see the commercial results they are looking for or expect, they will refocus resources and efforts on other sectors. This is reflected in modest results, despite the good efforts of BEST:

BEST undertook trainings regarding Access to Finance with 75 SMEs and 110 credit officers. Eighteen loans have resulted. These loans total US\$ 8,193,503 (years 1 and 2).

It is noted that these loans have quite a high female engagement (17% of businesses supported are owned by women), and a strong regional focus (44% outside Amman).

The evaluation team understands that BEST is planning new initiatives, including a Microfund for Women which will help to address the gender issue, and a Development and Employment Fund for tourism businesses.

Consultations undertaken indicated that for banks, working with SMEs in the tourism sector is already a very difficult area to operate. The banks targeted by BEST have not seen the results they were looking for in the tourism sector.

*The tourism sector is weak. SMEs are not naturally attractive to banks. - Bank representative 1.*

*Most candidates were refused because they were very weak candidates despite BEST's help on the applications. The rejection rate was high. – Bank Representative 2.*

*“Bank entered into partnership [with BEST] to expand its customer base. This isn't really happening with the partnership.” – Bank representative 2.*

Moving forward, banks still do not see much growth or potential in the sector.

*Our Bank has to spend resources and time on events and loan applications, but isn't seeing the results they want. –Bank representative 2.*

*There were a lot of promises at the start and high expectations, but then so many referrals were weak. –Bank representative 2*

*Our branches have targets, so they will inevitably shift their focus to areas that produce better results.” –Bank representative 2*

In terms of BEST's approach one leading Islamic bank felt that the BEST Activity does not understand the bank's operational structure and model adequately and that representatives from BEST could be more engaged.

*Our Bank asked BEST to provide possible names of attendees [for workshops], but BEST never responded to bank's request.” – Bank representative 3.*

*At this point, it does not seem that BEST staff fully understand what the Bank [Islamic] does and its operational model (Sharia-compliant lending). – Bank representative 3.*

It is acknowledged that Islamic finance and tourism do not always align in Jordan, but given the potential of regional markets there may be scope to explore opportunities further: Jordan does have some successful Sharia-compliant hotels and the Islamic hospitality market is forecast to be one of the fastest growing hotel segments in the Middle East. This has been acknowledged by the IP in its press releases.<sup>31</sup>

At midterm stage, despite a number of initiatives and cooperation with other USAID programs, there is some progress but possibly not enough. From some banks' perspective communication between BEST and banks has been quite weak. As a result, it was felt that BEST staff did not develop a deep enough understanding of bank operations or appreciation of the results banks were seeking.

Clearly however access to finance is a critical issue for tourism expansion/recovery. This was also noted by the IP that:

*Access to finance will be key to growth. The tourism sector is starved of financing.* – former BEST CoP.

It is understood that BEST is currently working on a loan product that is directed to females and plans to increase work on increasing domestic investment. These initiatives would be welcome and the link between this component and funds leveraged is clear.

## **Deviations**

There do not appear to be significant deviations in this aspect of the activity at midterm stage.

## **Most effective areas/activities and approaches**

Training provided by BEST staff for bank employees on the tourism sector has been considered helpful. The training was professionally delivered and provided new insights for bank staff into the tourism sector, illustrating BEST's competence and professionalism in this regard

**Conclusion 14: BEST has made modest progress in this area but banks remain skeptical.**

**Conclusion 15: At the time of the evaluation relations between BEST and the Islamic Bank appeared strained.**

## **EQ 2: ASSESS THE PERFORMANCE OF BEST IN DEVELOPING SYNERGIES (COORDINATION AND COLLABORATION) WITH OTHER USAID ACTIVITIES THAT FOCUS ON SIMILAR OBJECTIVES, FOR EXAMPLE, JOB CREATION AND ACCESS TO FINANCE?**

### **WHAT ADDED VALUE DOES BEST PROVIDE IN AREAS THAT ARE ALSO COVERED BY OTHER USAID ACTIVITIES?**

In terms of developing synergies, BEST has worked well with the USAID/JLGF activity and its tourism expertise is valued. When consulted about cooperation the JLGF team was generally happy about the collaboration and did not report any major problems.

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<sup>31</sup> Chemonics (2017) Banking on Islamic Finance in Jordan, (online), available at: <https://www.chemonics.com>, accessed January 14, 2018.

*JLGF and BEST have conducted joint development of workshops. One workshop in Salt for 40 and two more in Amman.*

*The coordination [between the two activities] has been good.*

*We have coordinated on tourism training for banks*

*JLGF provides the loan guarantee and BEST provides the technical assistance – JLGF staff member*

Good cooperation is also reported with the USAID Takamol-Jordan Gender Project. BEST partnered with USAID Takamol to promote tourism opportunities for men and women, and supported 19 women in tourism to attend the funders' boot camp. The activity aimed to engage women working in tourism and expose them to the opportunity of becoming "angel investors" and supporting other tourism start-ups by women that Takamol invited to the boot camp to present their business ideas to the participants.

*For synergy between IPs sometimes I see it and other I don't, sometimes the mission conduct meetings, and we try as IPs to reach out to each other, but after period of time each one preoccupied with its work. – BEST component leader.*

Similarly, there was good cooperation with the USAID Jordan Competitiveness Project (JCP).

*JCP and BEST also came to terms on how to divide their efforts on medical tourism – former BEST CoP*

In terms of the LENS activity, BEST staff mention some referrals between the activities:

*Usually the mission call and in general we know that there is no overlap, and if there is any, it will be coordinated for example; LENS work on micro but we work on medium and large, so if anyone with micro came to us we send him to LENS, and they send us the medium and large. – BEST component leader.*

However overall, BEST does not appear to have a very strong cooperative relationship with LENS so far, and LENS is a key USAID player in terms of SME development:

*BEST does not have a good working relationship with LENS*

*LENS is overreaching*

*LENS is diluting the ability of BEST to work with local partners*

*BEST already has the partnerships and formula for working in tourism. LENS should focus on micro-enterprises.*

*USAID has already made an investment in tourism through BEST. There are plenty of other sectors, (LENS should) leave tourism alone." – former BEST CoP*

A consultee from another USAID activity (other than BEST) also felt that LENS was working hard to extend its role. One BEST grant recipient reported being specifically instructed by BEST not to engage with LENS, which is regrettable. Senior LENS staff

*We are all here to serve Jordan. Nothing else matters. – United Nations agency*

when consulted as part of this evaluation, described their relationship with BEST as "difficult". They stated that LENS has made a number of presentations to BEST, but BEST has never presented anything back or reached out in response to LENS's overtures. It would appear that the design of

the two activities involved obvious overlap resulting in eventual hostility. However, it is often the case that many donors support tourism and these conflicts should have been better managed by both the IPs and USAID to maximize resources for key projects for Jordan.

Another consultee from a different USAID tourism-related intervention (other than LENS) suggested that BEST - seen by them as a continuation of the USAID Siyaha program – lacks momentum compared to the previous IP incarnations of Siyaha, JTDP II (also known as Siyaha II), and Economic Growth through Sustainable Tourism Project (EGST) due (it was alleged) to a long period with the same senior staff. Some USAID staff expressed a similar view. The evaluation team does not see evidence of this, and BEST, through Mexico’s Magic Towns concept (Distinctive Destinations in Jordan), is clearly introducing some innovative new approaches. In addition, the IPs patronage network built up over many years and the seniority and experience of some of its component leaders is respected, especially by MOTA and JTB.

The USAID Sustainable Cultural Heritage through Engagement of Local Communities Project (SCHEP) reports little cooperation so far. The ACOR Director notes that there has not really been any specific work together at this point despite efforts at the start of the activity.

*BEST really just wants to work with more developed sites that are ready for tourism. ACOR works with sites that are not really developed yet. – ACOR senior staff*

*BEST was not genuinely interested in cooperation - SCHEP staff*

It was noted by SCHEP that now may be a better time to start real cooperation with BEST as a number of the SCHEP sites have developed quite a bit since initial discussions. SCHEP also noted that there are a number of activities that BEST is doing that will be complimentary to overall tourist experiences that can contribute to SCHEP’s site development: For example, SCHEP is working on Busayra site and this can be connected through the Jordan National Trail. Also, in Aqaba, SCHEP is working with Ayla site and with underwater archaeological sites next to hotels: BEST is working with the development of Sharif Hussein museum in Aqaba. These are complimentary and when finished, and can be part of a clustered tourist experience, SCHEP suggests.

In addition, the evaluation team noted that the USAID/Civic Initiatives Support (CIS) Program is also supporting a tourism project in Yarmouk. Such initiatives should be welcomed by BEST as additional investment and potential synergies.

Cooperation between organizations does seem to be an area requiring greater attention, but it is noted that this does not just apply to BEST:

*Information sharing is not that common in this country.*

*We are keen on cooperation, but we don’t hear from BEST. - United Nations agency*

*The industry is marred with lack of trust and full of individual agendas. – Tourism association.*

*Attitude barriers, politics and egos are mainly to blame. – JTB senior staff*

Other organizations, in particular RSCN and UNESCO, also report disappointment that BEST did not engage effectively with them (yet) following discussion on potential cooperation while the IP was drafting its proposal: Both of these organizations are important players for the sustainable development of tourism sites. Nor has BEST developed significant interventions with the Department of Antiquities (DoA) which was referred to in the contract.

*We thought the plan RSCN drew up with BEST for the bid would be implemented, but no contact was made after the contract was landed: We are quite surprised. We were expecting a strategic partnership with BEST.*

*BEST should look at RSCN as their key implementation partner – RSCN senior staff*

*USAID<sup>32</sup> is a major player – we do not see communication from them, USAID comes to us to ‘get ideas’ – then we don’t hear from them again.*

*We welcome any type of engagement, but we received none (stressed explicitly and repeatedly) – United Nations agency.*

As planned for furthering gender, BEST reports that it approached UN Women to gauge the level of energy for partnership with the project in promoting the Gender Equality Seal in tourism employment. BEST was informed that UN Women did not plan to support the initiative. BEST decided not to pursue this partnership for the present.

On the other hand, there is clear evidence of BEST reaching out to partners it targets:

*They (BEST) approached us: We are thankful for their efforts. – University tourism department.*

BEST clearly has considerable technical expertise to share, particularly in relation to training and HRD, marketing and PR, specific specialist consultancy and rebuilt influence with JTB, but it will require a more open mindset and the rapid development of robust and detailed Memorandums of Understanding (MOU) with a wider range of partners if more effective coordination and collaboration is to be developed and a New National Tourism Strategy implemented. This is, of course more MOTA’s role rather than BEST’s, and the need to intensify support for MOTA (strengthening it as the main focal point for tourism rather than BEST itself) is evident. BEST’s support through the King Abdullah Award for Excellence is certainly a good, and measurable, initiative.

*Where there is embedded support at MOTA we achieve – Senior Government member*

*MOTA should be enhanced as a regulatory body looking at quality and service rather than act as the enemy, closing establishments down without offering a plan for improvement. BEST should educate people at MOTA and act in a stronger advisory role. – JTB senior staff.*

*MOTA needs strengthening. (In the context of BEST being seen by the trade as alternative body to go to because MOTA is not active) – ASEZA Tourism Division*

*Ten years of USAID support has not upped MOTA’s capacity .- Industry Association.*

There also may be scope to bring about further efficiency by more closely working to link up grantees with other initiatives; for example by encouraging JETT transport links to initiatives like Salt, or tying in the Al Mattan community initiative (accommodation is not currently operational) more closely with the Jordan Trail.

It is clear that BEST chooses who it wishes to cooperate with and who not to, and that the reasons for these choices are not always clear. Its perceived role as the lead USAID tourism intervention

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<sup>32</sup> Generally meaning BEST or its predecessors implemented by Chemonics

may have impacted its willingness to develop synergies and partnerships. In addition, confusion about who can 'claim' tourism jobs created has also added to an unwillingness to engage cooperatively.

**Conclusion 16: The evaluation team does not accept the view that BEST should be the sole USAID intervention on tourism. While BEST has clearly been given a lead role by MOTA to develop the National Tourism Strategy, its resources are not sufficient to address all of Jordan's tourism needs. With just US\$ 36 million BEST needs to cooperate with all potential players and encourage them to engage in tourism, in order to maximize resources available.**

**Conclusion 17: USAID has not adopted a strong role in ensuring cooperation and synergy between its actions.**

**Conclusion 18: BEST does not yet have a cooperation agreement to cover key interventions with RSCN.**

**Conclusion 19: BEST does not have enough MOUs with other USAID activities regarding joint tourism interventions.**

**Conclusion 20: There is significant room to increase synergies and partnerships with organizations operating in the tourism space.**

**Conclusion 21: MOTA is positioned as a lead coordinating agency for donor support regarding tourism.**

**EQ 3A: BASED ON THE PERFORMANCE OF BEST TO DATE, BOTH IN TERMS OF EFFECTIVENESS AND SUSTAINABILITY, WHAT ARE SOME KEY LESSONS LEARNED BY COMPONENT AND SUB-ACTIVITIES THAT CAN INFORM THE REMAINDER OF THE ACTIVITY?**

### **BEST expenditure until September 2017**

Monitoring financial conditions is one of the most important, yet often neglected areas of management reporting. The IP has advised the evaluation team that its contract does not require BEST to track expenditures by component or contract line item, hence the evaluation team has been unable to obtain detailed financial breakdowns to review BEST expenditure. The evaluation team was however given overall figures which imply the Activity is close to its half way stage in terms of overall expenditure of resources. The IP advises that the amounts outlined in Table 3 are 'best estimates' based on an allocation factor that has been derived by the IP based on the technical work

carried out under the contract thus far. It is noted that an evaluation is not an audit, so no further examination of these figures has been undertaken.<sup>33</sup>

**TABLE 3: BEST EXPENDITURE BREAKDOWN (JULY 2015 – SEPTEMBER 2017)**

TOTALS – DIRECT BILLED TO COMPONENTS + OPS TOTAL	
Business Enabling Environment	\$361,358.64
Destination Marketing	\$1,461,083.05
Tourism Destinations & Experiences	\$2,154,623.81
Job Creation, Decision Support and Destination Excellence	\$1,397,226.41
Operations	\$11,140,007.95
<b>TOTAL</b>	<b>\$16,514,299.85</b>
FINAL TOTALS – OPS COSTS ALLOCATED BASED ON % OF DIRECT BILLING	
Business Enabling Environment	\$1,110,394.64
Destination Marketing	\$4,489,663.75
Tourism Destinations & Experiences	\$6,620,798.47
Job Creation, Decision Support and Destination Excellence	\$4,293,442.99
<b>TOTAL</b>	<b>\$16,514,299.85</b>

Source: *Chemonics International Inc.*

The BEST 5-year Tourism Competitiveness Implementation Plan did suggest how much will be spent on each proposed activity in its annex 2, but the evaluation team were advised that providing more detail on actual expenditure to date would be very difficult and no further financial detail (other than grants awarded) was supplied.

33 Chemonics advises that the methodology for developing these allocation factors is as follows. "There are technical costs that can be segregated by component: (labor, materials, grants, subcontracts, etc.). However, there are also certain 'fixed' operational costs (office lease; communication; equipment, vehicles and freight; support staff; etc.) that need to be taken into consideration, as the project cannot function without them. Using these assumptions, that the technical implementation drives our projects, we have calculated the technical LOE and come up with a factor ranking that we have applied to the total 'operational' costs. Thus, if 18% of our technical work has occurred under component 1, we'll take 18% of the operational costs and include them as costs attributed to that component. The labor costs used to make the allocation by percentage include: all LT expats/TCNs, expat/TCN STTA, local professional staff, local STTA, and subcontractors. Grant funds were allocated per the component under which the grants were disbursed. The cost of general project operations and management, including COP, DCOP, administrative staff, finance, communications, grants staff, and misc. local subs. All local support staff were allocated to operations as were all travel, allowances, ODCs, EVFs, training, and indirect costs (fringe, OH, fees). These costs were allocated across the technical components based on the technical allocation percentage factors". Source: Moates, P. (2017) Chemonics International Inc.

## Gender

In terms of gender BEST has advised the evaluation team that it proactively seeks ways to address discrepancies in how men and women participate in and benefit from the tourism industry. BEST gender-related activities have included female participation in the following:

- Al Marj Development and Training Company
- Al-Baqea Tourism Cooperatives
- Al Kifah Cooperative Society
- Friends of Jordan Festivals,
- Mountain Breeze Resort
- Jordan Trail Association
- Jordan Express Tourist Transportation Company
- Berenice Beach
- Support Jordanian Tour Operators
- JTB's cooperative Marketing Activities

The evaluation team did however note that SMART indicators to increase female participation in many of these initiatives were not being applied.

It is noted however that BEST-facilitated loans do have a high female-ownership element (8 out of 18 loans – 44%)

Till November 2017, BEST advised that it has facilitated trainings and awareness sessions reaching 763 females across seven Jordanian governorates (Ajloun, Amman, Aqaba, Balqa, Irbid, Ma'an, Tafilah). The evaluation team notes that a Gender Awareness Training Module has not been developed for application to all staff and beneficiaries, as would be standard in many gender-related projects. BEST has conducted a focus group with the Business and Professional Women's Association in Annex E. This does not indicate a very strong gender focus by BEST in terms of joint activity with women entrepreneurs as yet.

BEST is also currently supporting Ammon Applied University College (AAUC) to boost awareness among young women about the opportunities available in tourism and hospitality and encourage them to enroll in related programs at AAUC. Outreach began in April, and by year end 40 schools in Amman, Jerash and Madaba were visited to create awareness of the programs and careers in tourism. BEST indicates that 5,000 pupils have just been made aware of these opportunities.

Work on the UN Gender Seal has not progressed as was planned, owing to UN Women not being willing to cooperate according to BEST.

Despite these initiatives the evaluation team sees insufficient focus on gender and improving female participation, where BEST indicator progress is particularly slow to date. In addition, the evaluation team notes that non-Jordanians (Philippines nationals) are being included in Pathways to Professionalism gender reporting.

It would appear that activities on gender in the 5-year Tourism Competitiveness Implementation Plan have not been sufficiently progressed, and the USAID-IP contract requires a detailed Gender Action Plan to be developed which has not been done at this midterm stage.

*Nobody is talking about gender awareness: BEST is not doing this – University tourism department.*



## Grant Administration

Many concerns were also raised regarding the USAID grant process which is considered slow, bureaucratic and prohibitively complex: This was also directly commented on by the Minister for Tourism, describing USAID/BEST procedures as “prohibitively difficult”, “brutally lengthy” and “complicated”.

At present BEST shares grant applications processing widely amongst its staff, but the specialist grants department, or a choice of sub-contracted consultants, might be trained up to more quickly deal with grant application support and grant processing. This would also have the advantage of moving grant applications at arms-length from BEST component leaders, reducing a danger of them being accused of favoritism by outside observers, or those who do not receive grants.

*Support is needed for those private sector enterprises and associations who do not know how to apply for a grant effectively and are therefore not able to secure funds. They are the ones who need assistance. – JTB senior staff.*

Time-bound targets may be needed, including time-bound targets for USAID approval. Calls for grants appear quite open (e.g. for innovation), and are not at present strongly tied in to BEST’s other interventions. It is understood that BEST plans to address this in its next grant call. At present a substantial portion of the US\$ 7 million allocated for third party grants is being absorbed by BEST capacity development advice (i.e. the amount awarded includes an internal cost for BEST consultancy). The eligibility of using grant moneys in this way might be challenged.

There may also be potential to develop with JTB a Tourism Recovery Grant Scheme, targeting in-market tour operators that sold Jordan prior to the 2011 decline in visitor numbers, to encourage them, and possible new entrants, to once again sell the destination. The EU-funded tourism recovery campaign for Kenya may provide a model (case study at Annex E).

In terms of **Component 1: Business enabling environment & industry partnerships**, there remain considerable challenges. A lesson learned is that BEST should adopt a more thorough analytical approach to identifying business enabling issues and that BEST should not consider its targets achieved in this area which still has potential to deliver transformational change, albeit difficult to deliver.

BEST has developed very considerable credibility in the area of HRD, which is clearly linked to job creation. A strong partnership with MOTA and JTB is also evident. and the institutional capacity of JTB continues to strengthen. In addition, progress has been achieved by BEST team in supporting MOTA’s King Abdullah Award for Excellence program.

For **Component 2: Jordan’s tourism assets are developed, maintained, and improved in ways that increase demand**, a key lesson learned is the need for better collaboration with other institutions, and to increase efforts to strengthen MOTA regarding its own asset management systems at heritage and other sites.

Under **Component 3: Destination marketing support**, BEST-supported specialist consultancy input is much appreciated by JTB, based on its requests. BEST’s advice on restructuring was also valued. Destination marketing for regions is less developed so far, particular with Aqaba where substantial tourism developments are coming on stream: Previously Aqaba had its own USAID tourism support action, but this has now ended.

Given that regional tourism makes up the bulk of visitors to Jordan, especially from Saudi Arabia, whose population has a bigger spending power than visitors from Europe, the United States and Asia,<sup>34</sup> sufficient emphasis may not have been given to technical advice regarding regional markets aligned with air connectivity in the years ahead. For marketing, M&E methodology is weak and requires elaboration in terms of follow up surveys and cost/benefit analyses, given the importance of this component to the Kingdom's image, perception and competitiveness.

**Component 4: Increased access to finance for Jordanian businesses and entrepreneurs in the tourism sector** remains an important area to deliver despite difficulties. Cooperation with the USAID Jordan Loan Guarantee Facility (JLGF) has been useful. Tourism does remain a hard sell, and BEST may need to consider other ways of providing access to finance including better cooperation with LENS on facilitating micro-finance for example. It is noted that BEST is currently reviewing this area and proposing new initiatives.

In terms of sustainability, BEST will need to develop an Exit Strategy in 2019. This will require much closer cooperation with other funding agencies and NGOs, because some of BEST's initiatives are likely to require ongoing support, for example the Jordan National Trail, carrying forward the pilot Distinctive Destination, Salt, and, possibly, future other BEST-supported Distinctive Destinations. These urban initiatives need to be in those Municipalities or Special Economic Zones that have sufficient resources to sustain them.

**EQ 3B: MOVING FORWARD, SHOULD BEST CONTINUE WITH ITS COMPREHENSIVE APPROACH OR SHOULD IT CONSIDER A SHIFT TO A NARROWER APPROACH FOCUSED ON FEWER COMPONENTS? IF SO, WHICH ONES AND WHY?**

The review does not indicate that BEST should reduce the number of components, but rather that the number of activities within each component should be prioritized and reduced in number, based on their job creation potential, partner-investment commitment (funds leveraged), regional focus and commitments to improve gender balance.

A key USAID concern is the need to bring about transformational change through the chosen interventions: this will require BEST to focus specifically on those of its initiatives which have the potential to change Jordan's tourism dynamic, including bringing jobs to secondary (or at least regional) destinations.

**Conclusion 22: Hosting activities in municipalities, Special Economic Zones or donor/NGO-supported locations that have sufficient resources to sustain them after BEST support is key to sustaining activity results.**

**Conclusion 23: At the midterm point, there is sufficient data and experience to indicate a need for increased focus on selected priority activities within each component by BEST.**

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<sup>34</sup> Hospitality Net (2017) *Jordan reviews tourism sector as revenues remain static since last year*. Available at: <<https://www.hospitalitynet.org>>

#### **EQ 4: WHICH INTERVENTIONS UNDER BEST, IN CASE ANY, CAN BE EXPECTED TO SUSTAIN OVER TIME? WHY AND HOW?**

BEST has carefully chosen its interventions by working mostly with established, reliable operators. It has built up a strong patronage network and interventions do seem potentially sustainable over time, if not necessarily by the end of the activity in some cases.

In terms of grantees, the teams review suggests that the Jordan National Trail will be difficult to sustain based on the current business model and it is recommended that wider research be done into how other national trails are sustained: None-the-less the evaluation team considers it a worthy concept to continue supporting, not least because it can tie together so many tourism sites (clustering) and has a clear regional focus and image-changing potential, in that it highlights Jordan's activity tourism potential and regions beyond the main sites.

Most other grants appear well chosen in terms of individual businesses and associations, although there may be challenges with community-based projects such as Al Mattan.

Pathways to Professionalism appears to be an initiative very relevant to job placement and appears well received. The evaluation team understands that BEST has plans to ensure its sustainability after BEST support.

Distinctive Destinations can only be sustainable if MOTA or municipalities/Special Economic Zones have sufficient resources to invest in tourism upgrades and tourism events to deliver this "brand". The ability to leverage funds from partners to support the initiative needs to be taken into account to ensure sustainability.

A number of KIs foresee difficulties continuing Pathways to Professionalism and academy activity when BEST funding ends. Surprisingly, these include the InterContinental Group (IHG) initiative, which could be considered to have a strong Corporate Social Responsibility (CSR) element that benefits the Group. BEST may need to pay greater attention to long-term commitments for ongoing funding from grant-holders and sponsors when assessing potential initiatives to support. It may well be however that IHG will sponsor a continuation of the Dead Sea initiative, and its extension to Aqaba, which would be welcome.

In relation to Distinctive Destinations, BEST needs to ensure that municipalities engaged have the resources to carry the initiative forward after BEST funding ends. A basket of Distinctive Destinations will be needed to give the initiative international impact and sustainability.

**Conclusion 24: BEST has generally well-chosen interventions, but there is scope for more strategic alignment and synergies between interventions, and sustainability needs further thought in some cases.**

## **RECOMMENDATIONS**

The USAID Evaluation Policy states that recommendations should be action-oriented, practical, and specific. Based on the findings and conclusions provided in this report, recommendations were generated collaboratively with USAID in order to ground truth their applicability to Agency bureaucratic and resource realities. The below list is meant to represent manageable but vital considerations for consideration regarding BEST at midterm stage, and for future Agency

investments of a similar scope. The emphasis is on lessons learned and areas where improvements can be made.

### **Recommendation 1: Activity Design**

- a. USAID should review the effectiveness of bonus-based contracts. The experience of BEST indicates that they skew the development mandate unduly towards a limited target range, and may lead to difficulties regarding verification. In particular target goals need to be tested for realism and more clearly stated and defined.
- b. Greater attention should be paid to contract design to avoid confusing and sometimes conflicting objectives (e.g. focus on secondary destinations but activities specified in primary ones). The BEST contract is open to multiple interpretations and a lesson learned is that contracts need to be more closely reviewed and revisited by both parties to promptly address any areas of confusion or misunderstanding. Based on the BEST experience, AMEPs and their implementation should also be more rigorously reviewed,
- c. Targets should be realistic: Creating 20,000 jobs from an investment of US\$ 36 million (an average USAID cost of \$1,800 per job) is unrealistic in a tourism economy which currently supports c. 50,000 jobs.

### **Recommendation 2: M&E & Reporting**

- a. Lack of effective M&E is a key concern in terms of measuring the effectiveness and sustainability of this Activity. USAID should instruct the IP to immediately put in place a robust and well-resourced M&E department within BEST.
- b. BEST's 44 indicators need to be re-visited and amended to be much more focused on the Activity goals and interventions. BEST has scope to narrow down the 44 indicators, and related activities, to be more focused on its Theory of Change.
- c. Indicators need to be prioritized to focus more on outcomes: It is important to measure progress towards overall results (outcomes) of outputs. Indicators that measure outputs (e.g. numbers trained, number of focus groups established) are less helpful than indicators which measure outcomes (e.g. effectiveness of training towards project objectives, progress of working groups towards project objectives). Outcomes which can be proven to be as a direct result of BEST activity should be prioritized.
- d. Closer review of IP AMEP proposals appears needed, and areas requiring clarification should be promptly dealt with during the inception phase.
- e. USAID should ensure consistency between various actions and interventions by insisting on standard definitions for jobs created and filled.
- f. Monitoring financial conditions is one of the most important, yet often neglected areas of management reporting. Financial reporting should be included in quarterly reports. Reporting to USAID should be standardized so that all actions report based on the same management reporting formats. Reports which do not outline difficulties, challenges and proposed solutions should be rejected.

### **Recommendation 3: Gender – Key KPI**

- Gender is a key area requiring more strategic focus by BEST in the years to 2020. More specific indicators for gender would be desirable in the recommended BEST review of its AMEP in this regard and develop custom indicators.
- Grantees should have gender KPIs that they report on, and follow up systems from BEST should be in place through M&E.
- BEST should have a full-time cross cutting gender specialist who can assess, monitor, evaluate and support the focus on agreed targets to through BEST initiatives and actions.

- Focus on gender should be included in all areas of the activity: It is a major contractual requirement and one of the top three KPIs under Special DO4: “Gender Equality and Female Empowerment Enhanced”.

#### **Recommendation 4: Jobs – Key KPI**

- There is a need for robust DQA review, to ensure that jobs being claimed are as a direct result of BEST activities and in accordance with Project Indicator Reference Sheet (PIRS) definitions.

#### **Recommendation 5: Investment – Key KPI**

- There is a need for robust DQA review to ensure funds leveraged being reported are reasonable, in accordance with the PIRS and directly result from BEST activities.

#### **Recommendation 6: Improve grant administration**

- a. BEST needs to review the way in which grants are administered to improve efficiency and reduce delays. It should consider appointing local experts to assist grant applicants in application development and claims processing at arms’ length for BEST component leaders.
- b. Set time-bound targets for processing grants and monitor progress should be established for both BEST and USAID.
- c. Grant calls should target BEST initiative areas, such as Distinctive Destinations, or linked to a cluster opportunity (e.g. Jordan Trail, Faith Tourism Route etc.).
- d. Rather than one year, short-term grants, USAID should consider facilitating a longer commitment for larger, cluster initiatives.
- e. USAID should ensure that the US\$ 7 million Tourism Partnership Fund grants budget is spent through disbursement to the private sector, rather than being absorbed by IP consultancy (which should be funded through component budgets).

#### **Recommendation 7: Continue to build Access to Finance component activity.**

- BEST should continue to engage with financial institutions and other USAID actions to drive Access to Finance, whilst ensuring that the institutions are up to date and aware of tourism sector requirements to support and facilitate access to finance for tourism actors.
- BEST should develop gender-based and destination-specific initiatives (it is understood that these are being considered).
- BEST should consider widening scope of Access to Finance with other USAID activities based on their areas of specialization (e.g. USAID/LENS on micro-finance, etc.).

#### **Recommendation 8: Forster more synergies and linkages**

- a. BEST should ensure more linkages between grantees, for example connecting JETT (bus routes) to Salt City; linking agri-tourism experiences and the Jordan Trail to Distinctive Destinations. A full review of current grantees is recommended and synergies explored after which introductions and linkages can be made and optimized in a cohesive and collaborative manner. It is understood that BEST is planning these linkages as projects mature.
- b. USAID and BEST should ensure stronger linkages between USAID activities, and with the wider donor community. Linkages, which may offer scope for better results are between BEST and LENS, as well as between BEST, RSCN and UNESCO.

- c. BEST should engage more directly with the Royal Commission for the Baptism Site and develop a cluster-based approach to assisting the many religious sites of Jordan of different faiths, especially multi-faith sites. It is understood that BEST is beginning to work on this.
- d. BEST might also up-weight engagement with the Royal Film Commission in the context of jobs, gender and regional/secondary destination exposure.
- e. BEST might engage with sustainable tourism-related events organizers in regional/secondary destinations where a link to boosting hotel occupancy can be proven.

### **Recommendation 9: Helping clients to implement more initiatives**

- a. Longer term engagement of specialist staff may be needed to champion opportunities and assist implementation of initiatives under gender, faith, agri-tourism, Convention Bureau/MICE, activity tourism, etc. Segments with high potential and clear regional impact should be prioritized.
- b. Providing salary support for developing /new tourism initiatives by cluster organizations appears to be effective and could be expanded where relevant.
- c. The evaluation team notes that a large number of consultants' reports have been provided by BEST and previous USAID interventions: With the exception of areas highlighted in this review (gender, M&E research, Business Enabling Environment, Exit Strategy, etc.), focus should shift from developing further consultancy reports to assisting clients implement existing action plan recommendations.

### **Recommendation 10: Provide more capacity development support to MOTA**

- a. The agreement with MOTA regarding support should be revisited and up-weighted in the context of creating a better business-enabling environment for the private sector.
- b. \With MOTA, the objective must be to strengthen MOTA to become self-reliant, respected by the industry and strong as a leader to drive National Tourism Strategy. It is noted that BEST does supply valued support to MOTA, including through the King Abdullah Awards process. BEST needs to help MOTA to be seen more as the expert lead for tourism as BEST's own role fades out at Activity end.
- c. BEST initiatives regarding improving site management and public-private partnership (PPP) through MOTA require a more strategic approach as progress is slow.
- d. A robust Tourism Business Climate Review should be undertaken to identify which are the key regulations that need to be addressed to improve Jordan's private sector tourism dynamic, and to provide BEST with a clearer strategy for intervention in this area.
- e. The BEST-supported draft National Tourism Strategy draft should be strengthened and revised to broaden its scope beyond BEST's specific targets and timescales, and to more fully engage with contract-defined partners (e.g. RSCN), other USAID actions and other donors. It should cover a longer timeframe.

### **Recommendation 11: Target projects with wider geographic representation**

- In accordance with its contract and developmental mandate, BEST should adopt a greater regional focus to stimulate secondary destinations (and primary destinations with lower occupancy or visitor management challenges).
- More resources should be allocated to challenging projects. BEST staff should spend more time/resources with key client organizations that require strengthening (e.g. MOTA, PDTRA, Jordan Trail Association), rather than focusing most resources on stronger players (e.g. JTB, JITOA). For example, selected staff might be deployed to

work with weaker key partners three days a week. It is recognized that there may be a conflict between ‘targets’ and a ‘developmental mandate’ in this regard, however the Theory of Change clearly requires BEST to address competitiveness weaknesses.

- BEST should consider downsizing its Amman-based operation and redeploying staff to the south, in particular Aqaba, where major investments are coming on stream with significant job creation potential, and Wadi Musa where destination management remains weak.

### **Recommendation 12: Devise more robust mechanisms to link specific marketing support to specific results**

- Closer M&E tracking with JTB on joint marketing initiatives is recommended to measure progress under joint initiatives.
- When BEST supports awareness campaigns, social media campaigns and PR initiatives overseas, awareness measurement should be part of BEST’s M&E system. Marketing KPIs (cost/benefit) should be set and monitored and be an integral part of the M&E system for each substantial marketing initiative supported. Specific, measurable, achievable, relevant and time-bound (SMART) goal dashboards should be drawn up to reflect efforts and results *versus* resources spent.
- The M&E system needs to track and measure, targeted initiatives within specialist veins (e.g. activity tourism). This should be done by a strong M&E department independent of component leaders, and occasionally through independently commissioned progress reviews.

### **Recommendation 13: Engage more in vocational education support to address tourism competitiveness issues**

- a. BEST should develop a two to three-year program to support vocational education in tourism with a regional focus aligned to its activity areas.
- b. BEST should review the opportunity to support a National Hospitality Academy in Jordan to embed hospitality education, as well as attracting students from abroad. There is potential for Jordan to become a regional hub of excellence in hospitality.
- c. BEST should consider expanding Pathways to Professionalism to include at least all 4 star and larger 3 star hotels. Currently only one 4-star hotel is included along with 24 5-star hotels across Jordan in the initiative. There may also be an opportunity to engage with restaurants.
- d. Focus on languages needs to be included (especially English). The ability to converse with guests with a good basic comprehension and use of hospitality focused language capability is needed. It is recommended that Vocational Training Corporation (VTC) makes English mandatory in their vocational training. English should be a subject as part of the VTC curriculum as well as in universities and other educational institutions offering tourism /hospitality courses.

### **Recommendation 14: Recommended priorities by component**

Prioritization is a matter for BEST and USAID to agree. It is recommended that not more than four priority actions should be undertaken for each component, in addition to crosscutting initiatives on gender, grants, etc.

#### **Component I:**

## **Business enabling environment & industry partnerships**

- BEST should focus more attention on enhancing the Business Enabling Environment reform: BEST should undertake a comprehensive Tourism Business Enabling Environment Review and focus on the key challenges identified. There may be a need to focus BEST resources on those business reform initiatives and industry partnerships which will deliver transformational change, for example:
  - Improved air access
  - Deregulated/expanded tourist transport
  - Opening of new enterprises
  - One stop shop approaches
  - Regional initiatives
- Tourism recovery requires trained job seekers: BEST should immediately reengage with the vocational sector and set out its strategy for the remaining activity period.
- The Tourism Research Center initiative should be reactivated but with more preparation. In addition to universities and research companies, RSCN might be considered as a possible partner as it has substantial research expertise into sustainable and community-based tourism in the MENA region.

## **Component 2:**

### **Jordan's tourism assets are developed, maintained, and improved in ways that increase demand**

- National Tourism Strategy
  - The National Tourism Strategy process should be concluded, but with wider targets than those of BEST. At least a five-year timescale should be applied.
- Distinctive Destinations
  - There is potential for more focus on Distinctive Destinations (more than one pilot). The Distinctive Destinations initiative should be up-scaled so that there will be more than one before BEST ends, so that Jordan has a portfolio of Distinctive destinations – Aqaba, Madaba and Wadi Musa are possible initial candidates.
  - BEST should adopt cluster-based approaches rather than just backing one or two companies in a destination.
  - The level of funds awarded to the Distinctive Destination initiative are amongst the highest grants awarded under USAID/BEST. More robust M&E is needed to ensure that funds make a tangible and lasting positive impact in terms of attracting more tourists, creating jobs, attracting investment and involving more women in enterprise. A city development is a major undertaking and huge funds are needed to make a difference: More USAID programs and other donors need to be engaged.
  - Develop partnership agreements with USAID/SCHEP, and RSCN, as per the contract.
- Adopt a regional focus
  - Develop a robust support program in Aqaba where there are significant opportunities for jobs, leverage of funds and a significant gender challenge.
  - BEST has the potential to engage more with PDTRA regarding job creation around the proposed one-way system and new rear exit to the World Heritage Site, and better destination management outside it. Engagement with UNESCO should be included to ensure that actions avoid Petra being put on UNESCO's World Heritage in Danger List, with negative competitiveness implications.
- Jordan National Trail



- The Jordan National Trail Business Plan should be reviewed in the context of a longer timescale and other international models for funding national trail development and management. It is understood that BEST has examined the Lebanese model, however other models such as Camino Walks, or examples contained in UNWTO’s 2015 publication on *Cultural Routes and Itineraries* may also provide other useful concepts to consider
- There is potential to cluster more SMEs and assist more sites potentially connected to popular sections of the Jordan National Trail, for example around Tafilah/Dana.
- BEST should engage more closely with other partners such as USAID/LENS, USAID/SCHEP, RSCN and others to lever greater resources.

### **Component 3:**

#### **Destination marketing**

- Destination Marketing Organizations
  - Strengthen the new Jordan Convention Bureau and develop it as an independent, private sector led organization.
  - BEST might work to develop a public-private DMO for Aqaba (as initiated under the second “Siyaha” intervention, JTDP II), possibly in the format of a Visitor and Convention Bureau. It will be important to place BEST’s regional development objective above Amman-centered vested interests in this regard. There may be scope for BEST to foster better partnership between ASEZA and JTB through jointly funded activities.
  - DMOs should have measurable DMO targets set out on a DMO dashboard to make decisions on marketing campaigns, lead times, target markets to be exploited etc.
- Faith-based tourism
  - BEST should upscale its initial activities in this area,
  - M&E systems for BEST’s marketing support in this area need to be developed.
- Marketing support for key initiatives
  - Priority initiatives such as Distinctive Destinations and The Jordan National Trail should continue to receive marketing support.
- JTB and tour operator support
  - BEST should keep current marketing approaches under review noting the need to further develop regional and domestic marketing if political uncertainty continues. Campaign outputs should positively impact the perception of target markets and more detailed and independent M&E is required through the commissioning/organization of campaign assessments, focus group research, Gallup poll questions, etc.
  - If regional political circumstances are favorable, BEST might consider Tourism Recovery grant scheme to enable tour operators to reengage with former suppliers to Jordan, and to attract new ones.
  - An Exit Strategy regarding marketing support to established organizations needs be initiated.

### **Component 4:**

#### **Increased access to finance for Jordanian businesses and entrepreneurs in the tourism sector**

- Communication and engagement with USAID/JLGF should be stepped up with specialized resources to facilitate communication, buy in and understanding with banks as there remains

a gap in this regard between 'tourism and finance' and a divide that needs to be bridged if collaboration is to be successful going forward. It is understood that BEST is planning new initiatives in this regard.

- Alternative Access to Finance opportunities should be explored with USAID/LENS (e.g. microfinance) and promoted to BEST-supported SME clusters.
- Specific gender-focused Access to Finance initiatives should be developed.
- Specific destination-specific initiatives should be continued in Distinctive Destinations and related to destinations along the Jordan National Trail.

#### **Recommendation 14: Develop an Exit Strategy**

BEST should develop an Exit Strategy, as not all of its projects will be sustainable by 2020. In this regard partnerships with other actions and donors need to be built up. Examples of projects to focus on developing with hand-over partners might include Distinctive Destinations (more than one), the Jordan Trail and Pathways to Professionalism (extended).

# ANNEX A: EVALUATION STATEMENT OF WORK



## USAID Building Economic Sustainability through Tourism (BEST)

### Mid-term Evaluation

### Statement of Work (SOW)

#### INTRODUCTION

USAID/Jordan requests an external mid-term performance evaluation of the USAID/ Building Economic Sustainability through Tourism (BEST) Activity, a five-year cooperative agreement with Chemonics International Inc., with a total value of \$36,149,869.00, covering the performance period of June 1, 2015, ending on May 31, 2020.

#### BACKGROUND AND ACTIVITY DESCRIPTION

The Jordan BEST activity is a five-year activity that the U.S. Agency for International Development (USAID) awarded to Chemonics International Inc. on June 1, 2015, ending on May 31, 2020. The activity's subcontractors include Oxford Economics, which provides expertise in economic modeling, data collection and analysis, value chain and competitiveness strategy, and access to its world-class Tourism Decision Metrics database. Subcontractor Bandwidth Management provides niche expertise in creating collaborative destination management organizations and authentic community-based experiences, as well as meetings, incentives, conferences, and exhibitions development. Local partners Better Business, EnConsult, and Turath provide organizational development, business enabling environment, and cultural site development support, respectively.

Jordan BEST will contribute to USAID's Development Objective #1: "Broad-based, Inclusive Economic Development Accelerated." In particular, it will contribute to IR 1.1 "Private Sector Competitiveness increased." The Jordan BEST activity is intended to improve the business climate and increase economic growth and job creation in Jordan's tourism sector. The activity will target job creation for both females and males, with specific interventions designed to increase women's participation in the tourism workforce, as well as reduce the consequences of seasonality, working in partnership with the Government of Jordan (GoJ) and business leaders to support entrepreneurship, growth, and competitiveness. The opportunities for the sector will be geared towards generating sustainable employment in the sector and stimulate enterprise development in core tourism and tourism supply chain businesses based on demand, revenue potential, and accessibility. Activities will preserve local traditions and cultural heritage while controlling or mitigating negative impacts on natural and cultural resources as well as wildlife habitats.

Jordan BEST's activities are arranged in four components

- Component 1: Business Enabling Environment & Industry Partnerships
- Component 2: Jordan’s tourism assets are developed, maintained, and improved in ways that increase demand
- Component 3: Destination Marketing
- Component 4: Increased access to finance for Jordanian businesses and entrepreneurs in the tourism sector

Details of the activity to be evaluated:

Development Objective:	USAID/Economic Development and Energy Office
Activity Title:	Building Economic Sustainability through Tourism (BEST)
Award Number:	AID-278-C-15-00010
Award Dates:	June 1, 2015 to May 31, 2020
Funding:	\$36,149,869.00
Implementing Partner:	Chemonics International Inc.
COR:	Kail Padgitt
Alternate COR:	Shatha Al Haj

## PURPOSE OF THE EVALUATION

The objective of this evaluation is to provide USAID with findings and strategic recommendations related to the effectiveness of the Activity’s interventions. The evaluation results will help inform USAID’s implementation decisions Year 4 and 5 of BEST’s programming.

## OBJECTIVES AND THEORY OF CHANGE

Jordan remains one of the most stable countries in the Middle East, but it is surrounded by countries in turmoil and must overcome a generalized perception of danger for potential visitors, particularly those unfamiliar with the separate countries of the Middle East region. Jordan must act decisively if it is to meet the challenges of fostering an environment that promotes inclusive economic expansion. Tourism assets and resources in Jordan are boundless and of iconic global status; however, the sector must be competitive in an international marketplace with rapidly changing consumer preferences and a demand for authentic, engaging local experiences. Jordan has yet to return to its tourism peak of 2010 and must better promote itself as a secure and desirable destination, overcoming market perceptions and capitalizing on opportunities to capture market share from traditional regional leaders.

Jordan BEST’s development hypothesis is:

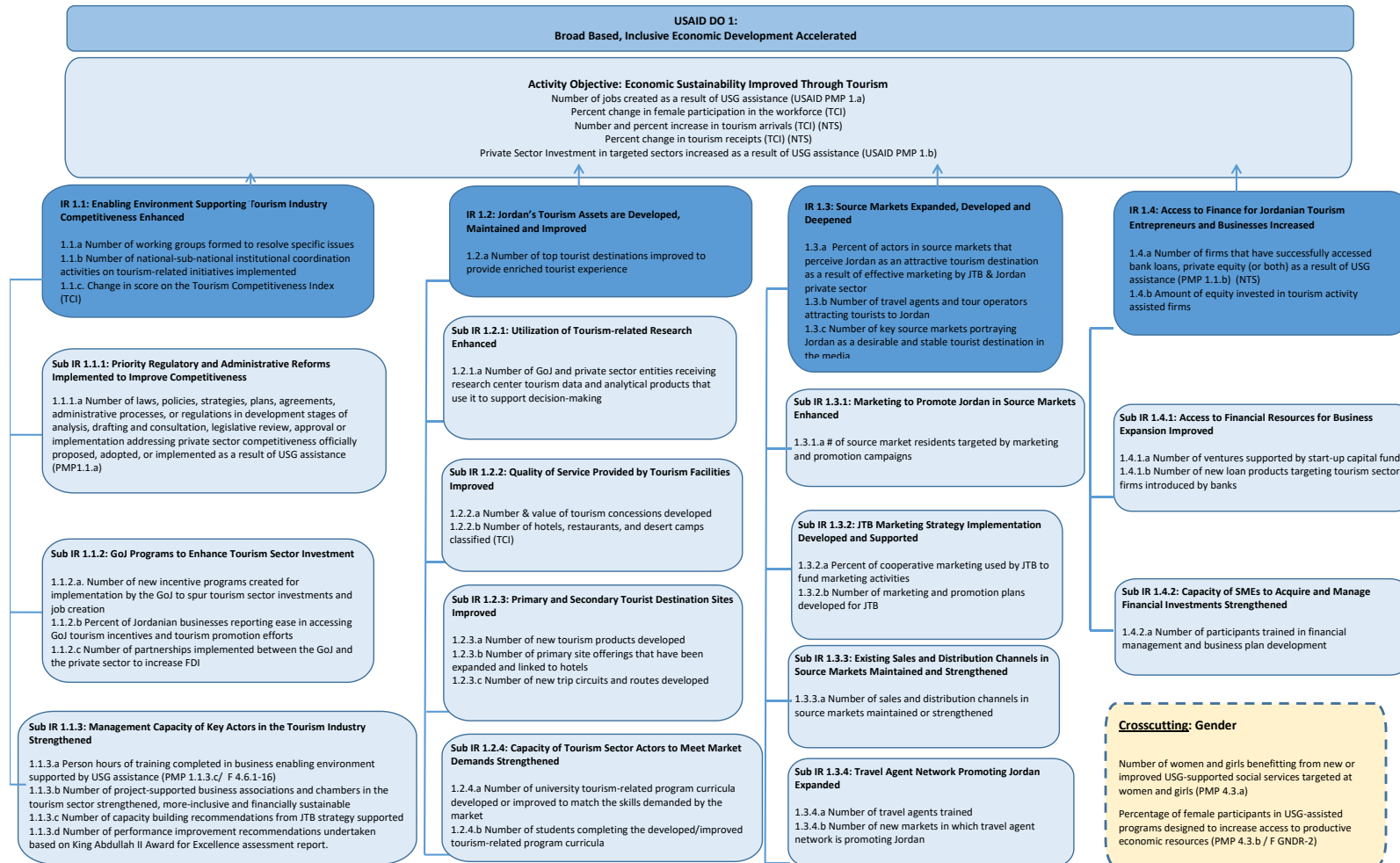
IF the business climate for and the competitiveness of the Jordanian tourism sector improves, THEN Jordan's economic growth and job creation will increase.

The theory of change suggests that a promising avenue of job creation in Jordan is through the tourism sector, so job creation will occur when there is increased demand for, and satisfaction with, tourism related products and services. Demand for tourism increases with additional tourist arrivals and improved experiences following arrival in Jordan. By improving their capacity, financing, marketing and site management, firms will be able to attract more tourists and encourage them to spend more money on tourism products. With increased tourist spending, actors in the value chain will add additional staff to meet demand.

Among activity indicators, the core key performance indicators include:

- a. Number of jobs created
- b. Change in female participation in the workforce, and
- c. Amount of private sector funding leveraged.

# USAID BEST LOGIC MODEL



## EVALUATION QUESTIONS

In addressing the stated purpose, the evaluation will explicitly answer the questions stated below.

### EFFECTIVENESS:

1. Assess the overall effectiveness of BEST, specifically, whether and how did the project achieve its intended outcomes?
  - a. Have deviations from submitted design changed the intended outcomes? Why and How?
  - b. Are there certain areas/activities and approaches that have been more effective? Why?

### SYNERGIES:

2. Assess the performance of BEST in developing synergies (coordination and collaboration) with other USAID activities that focus on similar objectives, for example, job creation and access to finance?
  - a. What added value, in case any, does BEST provide in areas that are also covered by other USAID activities?

### LEARNING:

3. Based on the performance of BEST to date, both in terms of effectiveness and sustainability, what are some key lessons learned, by component and sub-activities that can inform the remainder of the activity?
4. Moving forward, should BEST continue with its comprehensive approach or should it consider a shift to a narrower approach focused on fewer components? If so, which ones and why?

### SUSTAINABILITY:

5. Which interventions under BEST, in case any, can be expected to sustain over time? Why and how? (Few areas of focus could be the Pathways to Professionalism, various site development grants, and partnerships with banks, etc.).

## EVALUATION DESIGN AND METHODOLOGY

The external evaluation will use quantitative and qualitative approaches to assess how effective the Activity was in meeting its objectives and to provide recommendations on how to make future interventions with similar objectives more effective and more sustainable.

Data collection will cover interviews with USAID staff, USAID implementing partners, Government of Jordan stakeholders, and activity staff and beneficiaries by component.

## EVALUATION TEAM COMPOSITION

In order to meet the requirements of team composition, ensure data quality, and contribute to building capacity of local evaluation specialists, the following is suggested for team composition:

1. Team leader (Economic Growth and Competitiveness Experience, USAID Evaluation Experience)
2. Evaluation Specialist (USAID Evaluation Experience)
3. Subject Matter Expert/s (2) (Tourism and Marketing Experience)

The MESP Senior M&E Specialist, a MEL Manager and evaluation specialist will also support the evaluation team.

Larger data collection (qualitative and/or quantitative), in case necessary, will be conducted by Mindset, MESP’s data collection partner.

## PERFORMANCE PERIOD

The evaluation will be conducted from September through January 2017, with data collection conducted in October/November and final report submitted by January 2017.

Logistics for the assessment and evaluation will be provided by MESP.

## DELIVERABLES AND TIMELINE

MESP finalize SOW, begin desk review of BEST, develop work plan.	July, 2017
MESP develop evaluation methodology and tools, finalize work plan and submit evaluation design report	<b>TBD</b>
Field Work	<b>TBD</b>
Debriefing presentation for USAID and BEST on evaluation findings, initial conclusions and recommendations	<b>TBD</b>
USAID and Evaluation team collaboration on developing the recommendations <ul style="list-style-type: none"> <li>• USAID Participation in the team FCR Session</li> <li>• Meeting/s between the evaluation team and USAID to develop actionable recommendations</li> </ul>	<b>TBD</b>
MESP submit draft report	TBD
<ul style="list-style-type: none"> <li>• The evaluation report will not exceed 30 pages and must adhere to USAID’s Evaluation Policy; it must include a table of contents, list of acronyms, and executive summary as well as a copy of the SOW and data collection instruments;</li> <li>• The report will address each of the key questions identified in the relevant sections of the SOW and any other factors the team considers to have a bearing on the objectives of the evaluation;</li> </ul>	



<ul style="list-style-type: none"> <li>• The key evaluation questions must be answered, and recommendations must be stated in an actionable way with defined responsibility for the action;</li> <li>• Sources of information will be properly identified and listed in an annex;</li> <li>• The assessment and evaluation reports will be published on USAID’s Development Experience Clearinghouse at edec.usaid.gov.</li> <li>• Upon request from USAID or closure of MESP, both electronic and hard copy data files will be transferred to USAID. In the meantime, electronic files are on the MESP file and hard copies are warehoused at MESP.</li> </ul>	
<p>MESP submit final evaluation report</p>	<p>January 2018</p>

## ANNEX B: EVALUATION DESIGN

### Building Economic Sustainability through Tourism (BEST) Evaluation Design

#### INTRODUCTION

USAID/Jordan has requested an external mid-term performance evaluation of the USAID/Building Economic Sustainability through Tourism (BEST) Activity, a five-year contract with Chemonics International Inc., with a total value of \$36,149,869.00.

#### PROJECT DESCRIPTION

The Jordan BEST activity is a five-year activity that the U.S. Agency for International Development (USAID) awarded to Chemonics International Inc. on June 1, 2015, ending on May 31, 2020. The activity's subcontractors include Oxford Economics, which provides expertise in economic modeling, data collection and analysis, value chain and competitiveness strategy, and access to its world-class Tourism Decision Metrics database. Subcontractor Bandwidth Management provides niche expertise in creating collaborative destination management organizations and authentic community-based experiences, as well as meetings, incentives, conferences, and exhibitions development. Local partners Better Business, EnConsult, and Turath provide organizational development, business enabling environment, and cultural site development support, respectively.

Jordan BEST will contribute to USAID's Development Objective #1: "Broad-based, Inclusive Economic Development Accelerated." In particular, it will contribute to IR 1.1 "Private Sector Competitiveness increased." The Jordan BEST activity is intended to improve the business climate and increase economic growth and job creation in Jordan's tourism sector. The activity will target job creation for both females and males, with specific interventions designed to increase women's participation in the tourism workforce, as well as reduce the consequences of seasonality, working in partnership with the Government of Jordan (GoJ) and business leaders to support entrepreneurship, growth, and competitiveness. The opportunities for the sector will be geared towards generating sustainable employment in the sector and stimulate enterprise development in core tourism and tourism supply chain businesses based on demand, revenue potential, and accessibility. Activities will preserve local traditions and cultural heritage while controlling or mitigating negative impacts on natural and cultural resources as well as wildlife habitats.

Jordan BEST's activities are arranged in four components:

- Component 1: Business Enabling Environment & Industry Partnerships
- Component 2: Jordan's tourism assets are developed, maintained, and improved in ways that increase demand
- Component 3: Destination Marketing
- Component 4: Increased access to finance for Jordanian businesses and entrepreneurs in the tourism sector

## EVALUATION QUESTIONS

In addressing the stated purpose, the evaluation will explicitly answer the questions stated below.

### EFFECTIVENESS:

1. Assess the overall effectiveness of BEST, specifically, whether and how did the project achieve its intended outcomes?
  - a. Have deviations from submitted design changed the intended outcomes? Why and How?
  - b. Are there certain areas/activities and approaches that have been more effective? Why?

### SYNERGIES:

2. Assess the performance of BEST in developing synergies (coordination and collaboration) with other USAID activities that focus on similar objectives, for example, job creation and access to finance?
  - a. What added value, in case any, does BEST provide in areas that are also covered by other USAID activities?

### LEARNING:

3. Based on the performance of BEST to date, both in terms of effectiveness and sustainability, what are some key lessons learned, by component and sub-activities that can inform the remainder of the activity?
4. Moving forward, should BEST continue with its comprehensive approach or should it consider a shift to a narrower approach focused on fewer components? If so, which ones and why?

### SUSTAINABILITY:

5. Which interventions under BEST, in case any, can be expected to sustain over time? Why and how? (Few areas of focus could be the Pathways to Professionalism, various site development grants, and partnerships with banks, etc.).

## UNDERSTANDING OF THE EVALUATION QUESTIONS

Evaluation design has been drafted in accordance with USAID guidelines. Annex I outlines the Getting to Answers (G2A) matrix.

### EFFECTIVENESS:

As an activity, BEST seeks to transform Jordan into a globally competitive tourism destination. The activity works to strengthen the country's tourism facilities and services, improve the management and promotion of tourism sites, boost marketing efforts and encourage tourism of secondary sites (these include Jerash, one of Jordan's most popular tourist attractions). It also seeks to increase the employment of women and youth working in the tourism sector, where demand for skilled workers is high.

In examining effectiveness, the team will measure the performance of the action against its objectives by focusing not only at the output level, but also by seeking to establish outcomes to date, and whether outcomes appear likely to be achieved within the activity timeframe. To do this the team will combine both secondary and primary data and include the point of view of different actors across various stakeholder groups in Jordan's tourism industry. We will assess the extent to which BEST's strategy and intervention has been effective in working towards transformational change in Jordan's tourism offer and competitiveness, noting that a series of previous USAID interventions have been working in tourism for over the past decade.

We note the activity's emphasis on job creation, investment, regional emphasis outside Amman and gender, and will focus our examination accordingly. We are aware of the difficult circumstances in which Jordanian tourism has operated since the design of the intervention, so will pay particular attention to deviations in design and evaluate the extent to which these are related to tactical opportunities and ensuring the effectiveness of BEST inputs.

To better capture the effectiveness of BEST, our research design includes both quantitative and qualitative data, from primary and secondary sources and an analysis that will seek before and after comparisons.

The team will draw on similar interventions in the region and internationally to consider whether BEST's approaches are the most efficient to addressing key challenges which face Jordan in terms of visitor experiences, product presentation and marketing challenges. This comparative perspective (comparing it against other similar interventions) will assess how well suited the approach to date has been in achieving competitiveness objectives such as improving the business climate and access to finance for the private sector, as well as whether there are more efficient approaches to accomplishing the same objectives.

The effectiveness of the activity will be examined at both the aggregate and disaggregate level, for example by gender, location, tourism product, etc. This will be facilitated by critically examining the existing BEST beneficiary dataset as well as through the qualitative data collected through other MESP SME surveys. This includes a representative survey of registered tourism businesses. Other stakeholders' perspectives such as tour operator associations and non-governmental organizations (NGOs - both in Jordan and international) active in tourism will be taken into account throughout.

The perspectives of USAID, BEST, other USAID relevant projects and the implementing partner will also be captured to ensure that considerations associated with activity design and implementation is sufficiently factored into the overall analysis. In addition, we will consult with other implementing agencies with interests in specific BEST projects to obtain their views, for example the Japan International Cooperation Agency (JICA) in Salt, and the United Nations Educational, Scientific and Cultural Organisation (UNESCO) regarding interventions at candidate World Heritage Sites (such as Jerash).

Sub-groups of interest, for example Aqaba, Jerash and Salt tourism enterprises, M-SMEs on the Jordan Trail and women entrepreneurs, may be examined using focus groups. The evaluation team will seek to understand their experiences as well as to capture potential areas of improvement for these sub-groups.

We will also pay attention to the needs of young people and objectively review the progress of initiatives like Pathways to Professionalism.

Lastly, in gauging effectiveness, the evaluation will also look at the broader context and factors beyond BEST's sphere of influence such as larger trends in tourism and regional geopolitical situation.

#### SYNERGIES:

We understand that BEST works through the following activities:<sup>35</sup>

- *Creating a business enabling environment:* Put in place short and long-term policy reforms to promote tourism investment and improve the tourism experiences and sites in Jordan.
- *Tourism asset development:* BEST works to develop precious cultural and natural sites as needed and to improve services in the surrounding areas and museums. The action works closely with public and community support to enhance existing tourism products and create new ones, including trails and local activities.
- *Destination marketing:* The marketing element is of extreme importance to address the recent decline in Jordan's visitor numbers. In particular BEST works with the Jordan Tourism Board and partners.
- *Industry development and destination excellence:* BEST is working to improve tourism assets by enhancing the quality, appeal, and promotion of tourism education and training at the university and collegiate level in Jordan. However vocational training is not part of BEST's mandate at present.
- *Tourism Partnership Fund:* The Tourism Partnership Fund (TPF) provides grants and fund technical assistance to counterparts and beneficiaries for product and market development, tourism industry competitiveness, public-private partnerships and job creation. Regional presence is established through coordinators promoting community development and outreach.

Some of these activities overlap with or have relevance to other USAID initiatives and the United States Ambassador's Fund. We are aware that USAID has in the past organized a tourism coordination process. We will obtain feedback on the extent of added-value from cooperation by consulting with USAID and other USAID activities and actions. These may include the Sustainable Cultural Heritage through Engagement of Local Communities Project (SCHEP), the Jordan Loan Guarantee Facility (JLGF), the USAID Jordan Competitiveness Program (JCP), the USAID Jordan Local Enterprise Support Project (LENS) and the Jordan Workforce Development (WFD) Project.

#### LEARNING:

The research effort will capture the most significant lessons that different actors identify as contributing to developing transformational change in Jordanian tourism. Particular attention will be directed towards drawing actionable recommendations from these lessons: We understand that this is essential at a midterm stage. We will seek to identify lessons learned from successful and less successful interventions to date which can be applied to make the action more effective, synergistic and sustainable.

Liaising closely with USAID, BEST and taking into account industry and Government feedback, we will

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<sup>35</sup> Source: < <https://www.usaid.gov/jordan/fact-sheets/usa-id-building-economic-sustainability-through-tourism> > accessed October 22, 2017.

also identify case studies from the project that illustrate success to date. We will also look closely at areas where transformational change might be possible, but where challenges remain. We will also explore developing case studies to suggest possible models for possible BEST rapid intervention in the remaining action timeframe.

We understand that BEST is a major intervention in tourism for Jordan and that it has built on a series of previous, equally significant tourism interventions by USAID. These have touched many parts of the Kingdom and many industry sectors and tourism products. Moving forward, we will consider through objective analysis, whether BEST should continue with its comprehensive approach or if it should shift to a narrower approach focused on fewer target areas and components.

#### **SUSTAINABILITY:**

We understand that sustainability is a key challenge for aid-supported interventions: many of the challenges facing Jordanian tourism delivery are deep-seated and have existed since before the BEST intervention. In addition, tourism has seen a sharp decline due to political factors since the activity was designed. For the question focusing on sustainability, the aim is to assess the extent to which the action has contributed to creating the conditions for improvements and for initiatives supported to be sustained after the intervention ends.

Sustainability issues will be addressed from different perspectives (economic, social and environmental), highlighting the approaches and practices that are viewed as more effective.

The evaluation will also examine a representative sample of beneficiaries to gauge their experiences and performance since support was initiated. The evaluation team will also examine whether and the extent to which the BEST intervention impacted the willingness of lending institutions to extend loans to tourism enterprises to date and in the future.

Using primary and secondary data, the evaluation team will also review BEST's sector interventions and identify external constraints that may affect prospects of sustainability. We will seek to identify which interventions under BEST can be expected to sustain themselves over time, after USAID support ends.

#### **APPROACH TO ANSWERING THE EVALUATION QUESTIONS**

BEST is a wide-ranging activity which includes extensive technical support, direct financing through RDQs and grants, support to industry associations and other interventions. It also covers many locations with a focus outside Amman (although many leading players in tourism are Amman-based). The team will work to obtain an increasingly detailed understanding of BEST's intervention model.

Taking the activity's wide scope into account, the team will utilize a range of evaluation tools to obtain broad, objective and representative evidence, and focus in on key areas of interest as the evaluation evolves. In all cases the team will seek to define outcomes and effectiveness (for example the impact of trainings on participants), rather than outputs (the number of trainees held or the number of people assisted).

In terms of data collection approaches, the evaluation team will utilize qualitative (key informant

interviews and focus groups) and participant observation (detailed site visits and on-site interviews) to capture the opinions and perspectives of the different stakeholders. Site visits will be undertaken to selected experiential products where it is deemed relevant (for example to follow up on issues raised or to develop case studies). The timetable for the evaluation is outlined in Annex 2.

In terms of quantitative research the team will draw on findings from an extensive private sector survey (including an extended tourism quota) being undertaken as part of the Economic Growth and Competitiveness Assessment currently being undertaken by MESP.

**Qualitative Sampling Approach:** The qualitative approach will purposively select up to thirty different beneficiaries, including:

- Government of Jordan
- Professional representative associations
- Educational institutions
- Grant applicants (successful and unsuccessful)
- Other private sector entities
- Foreign beneficiaries (such as journalists and tour operators)

The team will undertake a mix of face-to-face and focus group consultations with different stakeholder groups. Approximately five focus groups are planned as follows:

- Aqaba/Wadi Rum tourism businesses
- Jerash tourism businesses
- Salt tourism businesses
- Jordan Trail micro-enterprise operators and tour guides
- Participants in Pathways to Professionalism

In all cases we will seek a certain degree of homogeneity within focus groups to allow for an open interactive discussion between the focus group participants. Focus groups will be led by professional focus group facilitators and observed by the evaluation team. We will not mix Government and the private sector in focus groups to enable participants to talk freely. (Face-to-face interviews will be undertaken with Government employees). Most focus groups will be conducted in Arabic.

Details of target beneficiary and other organizations to be targeted for consultation are attached in Annex 3.

**Quantitative Sampling Approach:** The quantitative sample is based on an extensive database (KINZ) of over 10,000 registered tourism enterprises in Jordan covering different sectors within the leisure and tourism sector, such as hotels, restaurants, transport companies, attraction operators, etc. The KINZ database can be disaggregated by location and business type. Our survey sample for the tourism sector will consist of close to 500 businesses to ensure a 95% confidence level with a margin of +/- 5%. The questionnaire and further details of questions are attached in Annex 4.

## DATA COLLECTION METHODS

### OVERVIEW

This evaluation will rely on secondary and primary data collection.

### **Secondary data collection:**

The team will review and incorporate into the analysis relevant secondary data sources, following are some key pieces of secondary data that they team has considered:

- USAID BEST RFP and original contract
- BEST work plans and AMELP
- BEST quarterly and annual reports
- BEST beneficiaries database
- BEST workshop and trainings attendees
- BEST database of grant applicants (successful and unsuccessful)
- Reports and statistics of the United Nations World Tourism Organisation (UNWTO), the World Travel & Tourism Council (WTTC), the Central Bank of Jordan (CBJ) and the Ministry of Tourism and Antiquities (MoTA).
- Press reports and academic publications regarding Jordan tourism.
- DevResults & ChemResults

### **Primary data collection:**

For primary data collection, the evaluation team will rely on using mixed methods: qualitative, and quantitative research.

*Qualitative Research:* Under qualitative research the evaluation team plans on doing key informant interviews (KII), in-depth interviews (IDIs) focus groups and participant observation (PO). Below is the summary of the data collection method by respondent type:

Key informant in-depth interviews will be conducted with the following key informants.

The team anticipates a total of up to 30 such interviews:

#### *USAID*

- EDE Team
- Other USAID EDE activities

#### *BEST staff*

- Acting Chief of Party
- Former Chief of Party
- Monitoring and Evaluation team
- Component Heads
- Regional implementers
- BEST subcontractors and local partners

#### *Government of Jordan*

MoTA (Ministry of Tourism and Antiquities Departments)



- The Minister of Tourism and/or Secretary General of MoTA
- Policy leads
- Staff who participated in BEST activity
- Jordan Projects for Tourism Development

#### Department of Statistics

- Secretary General

#### Jordan Investment Commission

- Secretary General
- Tourism Unit

#### Special Economic Zones

- Commissioners with responsibility for tourism

#### Municipalities

- Tourism and enterprise staff
- *Private sector*

#### Representative associations

- Jordan Inbound Tourism Operators Association (JITOA)
- Jordan Hotel Association (JHA)
- Jordan Restaurant Association (JRA)
- Jordan Tour Guides Association (JTGA)
- Adventure Travel Trade Association (ATTA)

#### Enterprises

- Selected hotels, guesthouses, hostels and restaurants in target areas
- Tourist transport companies
- BEST-supported start-ups
- Concessionaires at target heritage/natural sites, etc.

#### Other associations, commissions, NGOs & INGOs

- Royal Commission for the Baptism Site
- Royal Film Commission (RFC)
- Royal Society for the Conservation of Nature (RSCN)
- Jordan Trail Association
- Pathways Advisory Committee
- King Abdullah II Center for Excellence
- JICA
- UNESCO

#### Banks

- Central Bank of Jordan (CBJ)
- Association of Banks in Jordan
- Jordan Ahli Bank

- Housing Bank
- Islamic Bank

#### Educational Institutions

- Centre of Accreditation and Quality Assurance
- Jordan University
- Madaba Institute of Mosaic Art and Research

Further detail is outlined in Annex 3.

#### SAMPLING APPROACH FOR DATA COLLECTION:

The evaluation team will be conducting both qualitative and quantitative research with SMEs that benefited from BEST technical assistance. The sampling approach will be purposive and developed based on the following key considerations:

- BEST Technical Assistance focus, including location
- Implementing partner and USAID feedback
- Scale of support from BEST
- Gender issues (e.g. female-run enterprises)

**Qualitative sampling approach:** The evaluation team plans on conducting around 30 purposively selected in-depth interviews. The qualitative approach covers a number of different beneficiaries, as outlined in Annex 3.

In terms of process, the evaluation team will identify beneficiaries and will request BEST to contact them directly to gauge their availability and interest in participating in this research. Those who agree to participate in the research will then be independently contacted by the evaluation team to set meeting appointments and to conduct in-depth interviews or (where appropriate) mini- focus groups. The evaluation team is also following up with Banks to arrange interviews with beneficiaries.

#### QUANTITATIVE SAMPLING APPROACH:

The quantitative sample is based on registered tourism businesses by location.

In terms of process, the MESP has built a sampling frame using registered enterprises across most sectors of the economy, including tourism.

#### Table 1: Sample data collection methods for the five evaluation questions

Data Collection Methods	Evaluation Questions
Desk Review	1, 2, 3, 4, 5
Group Discussions	1, 2, 3, 4, 5
Key Informant Interviews	1, 2, 3, 4, 5
Participative Observation and Site Visits	1, 2, 3, 4, 5
Survey	1, 5

## DATA ANALYSIS METHODS

The analysis will be undertaken using the data collected through qualitative and quantitative research. The evaluation team will carry out content analysis of technical reports and key informant interviews, in-depth interviews and focus group discussions. Using the secondary and primary data, the team will make planned (strategies and implementation approaches) versus actual (performance) to date, and take into consideration likely future performance based on performance to date.

In summary this evaluation will primarily rely on four types of analysis:

### 1. Before and after

This line of analysis explores patterns and trends that may be observed in the data and the primary and secondary data collected.

### 2. Planned versus actual

This line of analysis focuses on tracking the setting and achieving of targets on products, outcomes and outputs laid out on the Monitoring and Evaluation Plan and the changes introduced on the yearly work plan during the execution of the activity. The analysis will reflect the learning process of all the actors involved regarding specific socio-economic and institutional conditions in Jordan’s tourism industry.

### 3. Performance versus benchmarks

Understanding how the BEST intervention model and processes are positioned on the local, regional and international arenas will enrich the interpretation of the lessons learned and will give the team additional insights for recommending actionable and specific improvements. The team will be very selective on the kind of program to be included in the comparison, noting the activity’s emphasis on competitiveness.

### 4. Content analysis

The team will review the content and relevance of Technical Reports commissioned under BEST to form an objective view as to relevance to achieving the action’s overall objectives. The team will also

analyze the content of key informant interviews.

## GETTING TO ANSWERS

**Action:** Building Economic Sustainability through Tourism (BEST)

**Team Members:** Robert Travers, Rajan Kapoor, Helen Van Wengen, Raghiv Fityan, Afnan Al Hadidi, Bandar Al Hunaiti

Evaluation Questions	Type of Answer/ Evidence Needed  (Check one or more, as appropriate)		Methods for Data Collection,  e.g., Records, Structured Observation, Key Informant Interviews, Mini-Survey <sup>36</sup>		Sampling or Selection Approach,  (if one is needed)	Data Analysis Methods, e.g.,  Frequency Distributions, Trend Analysis, Cross-Tabulations, Content Analysis
			Data Source(s)	Method		
1. <b>Effectiveness:</b> Assess the overall effectiveness of BEST, specifically, whether		Yes/No	USAID <ul style="list-style-type: none"> <li>Embassy-based team</li> <li>Other USAID activities</li> </ul>	<ul style="list-style-type: none"> <li>Desk Review</li> <li>Key Informant Interviews</li> </ul>	<i>Purposive:</i> Evaluation team will prioritize selecting	1. Before and after  2. Planned versus

<sup>36</sup> Data from evaluations are a deliverable and methods should indicate how data will be captured, i.e., for focus groups USAID requires a transcript.

<p>and how did the project achieve its intended outcomes?</p> <p>1. Have deviations from submitted design changed the intended outcomes? Why and How?</p> <p>2. Are there certain areas/activities and approaches that have been more effective? Why?</p>			<p>and BEST actions</p> <p><i>Government</i></p> <ul style="list-style-type: none"> <li>● MoTA (Tourism and Antiquities Departments)</li> <li>● Special Economic Zones</li> <li>● Municipalities</li> <li>● Central Bank of Jordan</li> <li>● Department of Statistics</li> </ul> <p><i>Private sector</i></p> <p>Representative associations</p> <p>Enterprises</p> <ul style="list-style-type: none"> <li>● Selected hotels, guesthouses, hostels and restaurants in</li> </ul>	<ul style="list-style-type: none"> <li>● Participant Observation</li> <li>● Focus Group Discussions</li> <li>● Site Visits</li> <li>● Private Sector Survey (EDE Assessment)</li> </ul>	<p>interviews based on a criteria that include expended resources, transformation potential, regional footprint. Team will also include interventions that may be less successful as indicated by USAID and IP.</p> <p><i>Quota controlled for EDE Survey</i></p>	<p><i>actual</i></p> <p>3. <i>Performance versus benchmarking</i></p> <p>4. <i>Content analysis</i></p>
	X	Description				

	X	Comparison <sup>37</sup>	<ul style="list-style-type: none"> <li>target areas</li> <li>• Tourist transport companies</li> <li>• BEST-supported start-ups</li> <li>• Concessionaires at target heritage/natural sites, etc.</li> </ul>			
	X	Explanation <sup>38</sup>	<p><i>Other associations, commissions and NGOs</i></p> <p><i>Banks &amp; the Association of Banks in Jordan</i></p> <p><i>Educational Institutions</i></p> <p><i>Overseas beneficiaries</i></p>			
2. <b>Synergies:</b> Assess the performance of BEST in developing synergies		Yes/No	<ul style="list-style-type: none"> <li>• USAID EDE Team</li> <li>• USAID BEST</li> <li>• USAID LENS</li> <li>• USAID JLGF</li> </ul>	<ul style="list-style-type: none"> <li>• <i>Desk Review</i></li> <li>• <i>Key Informant Interviews</i></li> </ul>	<i>Purposive</i>	<p><i>1. Before and after</i></p> <p><i>2. Planned versus</i></p>

<sup>37</sup> Comparison – to baselines, plans/targets, or to other standards or norms

<sup>38</sup> Explanation – for questions that ask “why” or about the attribution of an effect to a specific intervention (causality)

<p>(coordination and collaboration) with other USAID activities that focus on similar objectives, for example, job creation and access to finance?</p> <p>I. What added value, in case any, does BEST provide in areas that are also covered by other USAID activities?</p>			<ul style="list-style-type: none"> <li>USAID SCHEP</li> </ul>			<p><i>actual</i></p> <p>3. Performance versus benchmarking</p>	
	X	Description					
	X	Comparison					
	X	Explanation					



<p>3. <b>Learning:</b> Which interventions under BEST, in case any, can be expected to sustain over time? Why and how? (Few areas of focus could be the Pathways to Professionalism, various site development grants, and partnerships with banks, etc.).</p>	<p>X X X</p>	<p>Yes/No Description Comparison Explanation</p>	<p><i>USAID</i></p> <ul style="list-style-type: none"> <li>● Embassy-based team</li> <li>Other USAID activities and BEST actions</li> </ul> <p><i>Government</i></p> <ul style="list-style-type: none"> <li>● MoTA (Tourism and Antiquities Departments)</li> <li>● Special Economic Zones</li> <li>● Municipalities</li> <li>● Central Bank of Jordan</li> <li>● Department of Statistics</li> </ul> <p><i>Private sector</i></p> <p>Representative associations</p> <p>Enterprises</p> <ul style="list-style-type: none"> <li>● Selected hotels, guesthouses, hostels and restaurants in target areas</li> <li>● Tourist transport companies</li> <li>● BEST-supported start-</li> </ul>	<ul style="list-style-type: none"> <li>● Desk Review</li> <li>● Key Informant Interviews</li> <li>● Participant Observation</li> <li>● Focus Group Discussions</li> </ul>	<p><i>Purposive</i></p>	<p>1. Before and after</p> <p>2. Planned versus actual</p> <p>3. Performance versus benchmarking</p> <p>4. Content analysis</p>
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			<ul style="list-style-type: none"> <li>• ups</li> <li>• Concessionaires at target heritage/natural sites, etc.</li> </ul> <p><i>Other associations, commissions and NGOs</i></p> <p><i>Banks &amp; the Association of Banks in Jordan</i></p> <p><i>Educational Institutions</i></p> <p><i>Overseas beneficiaries</i></p>			
<p>4. <b>Learning:</b> Moving forward, should BEST continue with its comprehensive approach or should it consider a shift to a narrower approach focused on fewer components? If so, which ones and why?</p>		Yes/No	<p>USAID</p> <p>BEST</p> <p>Government</p> <ul style="list-style-type: none"> <li>• MoTA</li> <li>• Special Economic Zones</li> <li>• Municipalities</li> </ul>	<ul style="list-style-type: none"> <li>• Desk Review</li> <li>• Key Informant Interviews</li> <li>• Participant Observation</li> <li>• Focus Group Discussions</li> <li>• Site Visits</li> </ul>	Purposive	<p>1. Before and after</p> <p>2. Planned versus actual</p> <p>3. Performance versus benchmarking</p>

			<i>Private sector</i> <i>Representative associations</i>  <i>Educational Institutions</i>  <i>Overseas beneficiaries</i>			4. Content analysis
	X	Description				
	X	Comparison				
	X	Explanation				
		Description				

		Comparison				
		Explanation				
5. <b>Sustainability:</b> Based on the performance of BEST to date, both in terms of effectiveness and sustainability, what are some key lessons learned, by component and sub-activities that can inform the remainder of the activity?		Yes/No	<p><i>USAID</i></p> <ul style="list-style-type: none"> <li>Embassy-based team</li> <li>Other USAID activities and BESTactions</li> </ul> <p><i>Government</i></p> <ul style="list-style-type: none"> <li>MoTA (Tourism and Antiquities Departments)</li> <li>Special Economic</li> </ul>	<ul style="list-style-type: none"> <li>Desk Review</li> <li>Key Informant Interviews</li> <li>Participant Observation</li> <li>Focus Group Discussions</li> <li>Site Visits</li> <li>Private Sector Survey (EDE Assessment)</li> </ul>	<p><i>Purposive</i></p> <p>Quota controlled for EDE Survey</p>	<p><i>1. Before and after</i></p> <p><i>2. Planned versus actual</i></p> <p><i>3. Performance versus benchmarking</i></p>

			<p>Zones</p> <ul style="list-style-type: none"> <li>• Municipalities</li> <li>• Central Bank of Jordan</li> <li>• Department of Statistics</li> </ul>			4. Content analysis
	X	Description	<p><i>Private sector</i></p> <ul style="list-style-type: none"> <li>• Representative associations</li> <li>• Enterprises</li> <li>• Selected hotels, guesthouses, hostels and restaurants in target areas</li> <li>• Tourist transport companies</li> <li>• BEST-supported start-ups</li> <li>• Concessionaires at target heritage/natural sites, etc.</li> </ul>			
	X	Comparison	<p><i>Other associations, commissions and NGOs</i></p>			
	X	Explanation	<p><i>Banks &amp; the Association of Banks in Jordan</i></p>			

			<i>Educational Institutions</i> <i>Overseas beneficiaries</i>			
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## WORK PLAN

The team’s schedule of planned activities is listed below. The inception phase ends with the approval of the Evaluation Design. In the subsequent phase, the team will be involved in data collection through secondary data collection and primary interviews, ending approximately the end of November. The final phase encompasses the analysis of data, leading to findings, conclusions and co-generation of recommendations along with USAID. During this phase, additional data collection may continue to fill in gaps discovered during the F/C/R process. The team will present preliminary findings to USAID at periodic stages of the assignment, including prior to finalizing the report.

Activity	Responsible	Dates	Location
<b>Inception Phase</b>			
Initial meeting with EDE Team	Evaluation Team	August 10	Amman
Team Planning Meeting	Evaluation Team	October 11	Amman
Development of Evaluation Design and initial document review	Evaluation Team	October 12 – 22	Amman
Initial Meeting with Program Office	Evaluation Team	Oct 15	Amman
Initial Meeting with BEST	Evaluation Team	Oct 18	Amman
Evaluation Design submission	Team Leader	Week of October 22	Amman
<b>Data Collection Phase</b>			
Data Collection through key informant interviews (KII), site visits, focus groups (FGD), and EDE Private Sector Survey	Evaluation Team	October 22 – Nov 20	Amman and relevant governorates
<b>Analysis, Briefings and Report Development</b>			
Midterm briefing with USAID	Evaluation Team	Nov 9	Amman/Remote
Initial data analysis of qualitative and survey data	Evaluation Team	Nov 21 – Dec 14	Amman/Remote
Pre Report Briefing with USAID	Team Leader	Dec 14	Amman

Co-Generation of Recommendations	Evaluation Team/USAID	December 18 - 31	Amman/Remote
Submission of Draft Report	Team Leader	January 26	Amman/Remote
Summary Briefing with USAID	Evaluation Team	Jan 31	Amman

## DETAILED CONSULTATION LIST

Stakeholder Interview List
<b>USAID Stakeholders and Implementing Partners</b>
USAID EDE Team Lead Russ Bauer
USAID BEST COR Kail Padgitt
USAID CO/AAO Rima Kayyal
USAID LENS
USAID LENS COR Shatha Al Haj
USAID JLGF
USAID SCHEP (ACOR)
USAID SCHEP COR Yassar Bayado
USAID Economic Section
<b>USAID BEST</b>
BEST (Chemonics) Acting Chief of Party Preston Moates



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BEST (Chemonics) Deputy Chief of Party Ibrahim Osta

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BEST (Chemonics) Component Leaders

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BEST (Chemonics) Monitoring and Evaluation Officer

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**Government of Jordan - National**

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HE The Minister of Tourism

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Ministry of Tourism and Antiquities (& DoA)

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Jordan Tourism Board – JTB (board members & department heads)

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Jordan Convention Bureau

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National Tourism Council

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Jordan Investment Commission

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**Government of Jordan - Regional**

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Salt Development Corporation

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Petra Development and Tourism Region Authority (PDTRA)

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Governorate Municipalities

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Wadi Rum Protected Area

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Aqaba Special Economic Zone Authority (ASEZA)

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Aqaba Development Corporation (ADC)

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**Private Sector including Private Sector Association**

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Adventure Travel Trade Association (ATTA)

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Agri-tourism Association

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Jordan Hotel Association (JHA)

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Jordan Inbound Tourism Operator Association (JITOA)

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Jordan Restaurant Association (JRA)

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Jordan Projects for Tourism Development

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Employers to Pathway Committee

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Ajloun – Castle restaurant and Madaba Food Basket (food experiences)

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Aqaba Hotels

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Jordan Express Tourist Transportation (JETT)

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IHG Academy Dead Sea Hotels

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Other – tba by USAID / BEST

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**Other Associations, Commissions, NGOs & INGOs**

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Jordan Trail Association

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Jordan Tour Guides Association

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Jordan Motorbike Association

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Royal Society for the Conservation of Nature (RSCN)

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Royal Film Commission

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King Abdullah II Center for Excellence

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The Royal Commission of the Baptism Site

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Japan International Cooperation Agency (JICA)

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UNESCO

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### **Banks**

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Central Bank of Jordan

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Jordan Ahli Bank / Housing Bank / Arab Islamic Bank / Capital Bank

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Associations of Banks in Jordan

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### **Education**

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Luminus Training Center

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University of Jordan

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Centre of Accreditation and Quality Assurance

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Madaba Institute of Mosaic Art and Research

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### **Foreign Stakeholders**

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JTB overseas offices

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Airbnb

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Other tbd – following input from BEST

## DATA COLLECTION INSTRUMENTS

### KEY INFORMANT INTERVIEWS

#### Questions for USAID EDE Team

##### Standard Introduction

The team will customize introductions to each stakeholder group below.

Good morning/afternoon and welcome. Thank-you for taking the time to talk with me today. My name is \_\_\_\_\_ and I work for MSI with the USAID Monitoring and Evaluation Support Project (MESP). MESP provides monitoring and evaluation support to the US Agency for International Development (USAID) Jordan. Our team is currently working on a mid-term performance evaluation of the BEST activity.

We are soliciting your input in regards to your interaction with the BEST activity, noting opportunities, challenges and lessons learned. At the close of the interview, you will have an opportunity to share anything you think is relevant to the topic that was not covered in the interview, or ask questions. The interview should take between 45 minutes and one hour. Your responses are confidential. Nothing you say will be personally attributed to you. In the case that we would like to use a direct quote, we will ensure to get your approval. Are you willing to participate in the interview? Do you have any questions before we start?

##### Background

- I. What has been your role in relation to BEST?
  - a. For how long have you been in that role?

##### Effectiveness

2. In terms of activity design:
  - a. To what extent was BEST modeled after previous tourism activities? (i.e. Siyaha, JTD II, EGST)
    - i. What were some of the main themes/strategies behind the design?
    - ii. Were any assessments conducted to inform activity design?
  - b. To what extent were external factors considered in the design (i.e. Syrian crisis)?
  - c. In your opinion, has the broad-based approach been appropriate? (i.e. having numerous sub-activities across a diverse array of components: access to finance, enabling environment, destination marketing, site development, and grant component)

3. In terms of implementing:
  - a. Has implementation mirrored the original design? (i.e. Award document and workplan year 1 and year 2)
  - b. Were there any major course corrections or changes?
  - c. Were the activity objectives and targets realistic? (e.g. job creation target, funds leveraged)
  - d. Has the BEST team been able to effectively track progress towards the targets?
  - e. Has BEST been effective at engaging with such a diverse array of beneficiaries and stakeholders? (i.e. Financial institutions, GoJ entities, sector associations, SMEs, etc)
4. Have gender and gender related issues been adequately addressed by BEST?
  - a. Are there specific gender requirements for grantees?
  - b. Access to finance components?
  - c. Capacity building with GoJ?
5. Does BEST have components or approaches designed to promote inclusion of socially or economically marginalized groups?
  - a. Targeted grants?
  - b. Specific outreach?

#### Synergies

1. In your opinion, how effective has BEST been at collaborating with other EDE activities such as JLGF, JCP, LENS, and SCHEP?
  - a. What have been the successes?
  - b. What have been the major challenges?
2. USAID Tourism Working Group?
3. Has there been collaboration with other donors working in the tourism sector i.e. JICA in As-Salt?
4. Has BEST been able to effectively work with GoJ counterparts?
  - a. National level (i.e. MoTA, JIC capacity building, JTB marketing strategy, NTS MoTA)
  - b. Regional/local level: Tourism Ajloun Master Plan, Magic Town As-Salt

#### Learning

1. What do you see as the major achievements or successes of BEST? (i.e. funds leveraged target met)
  - a. What factors assisted or made those achievements possible?
2. What were some of the challenges?
  - a. How were they overcome?
3. Has BEST been able to effectively capture lessons learned and transform the knowledge into programming decisions? (i.e. adequate M+E staff, indicator data quality in ChemResults and DevResults, follow up with grantees)
4. If BEST could be redesigned and/or re-implemented, what changes would you propose in light of what you know now?

#### Sustainability

1. Which of BEST's interventions or approaches are more likely to be sustainable without additional support? Why?
2. Is there anything that we have not discussed already that is important for understanding this activity?

### **Questions for Financial Institutions**

#### Background

1. Could you please describe your current role?
  - a. For how long have you been in that role?

#### Effectiveness

1. Could you describe your organization's collaboration with the USAID BEST activity?
  - a. When did the collaboration begin?
  - b. What was the rationale and/or motivation for your organization to start the collaboration?
  - c. Could you describe any new financing tools or approaches your organization developed as a result of the engagement with BEST?
  - d. Was there a capacity building component?
2. Who were your target beneficiaries?
  - a. Were you able to reach them effectively?

In terms of implementing:

3. How effective was your organization at engaging with beneficiaries?
4. Were expectations clearly outlined and understood by your organization and BEST?
5. Were there any major adjustments or changes made to the implementation strategy?
6. Is there a gender component built into your activities?
7. Does your organization have approaches designed to promote inclusion of socially or economically marginalized groups?

#### Synergies

1. Has there been any collaboration between your organization and other financial institutions working with BEST?
  - a. If so, could you describe the interaction?
2. Has there been any collaboration or cooperation between your organization and other USAID activities?
  - a. If so, could you describe the interaction?
  - b. Have they been effective?

#### Learning

1. What do you see as the major achievements or successes of your organization's work with BEST?
  - a. What factors assisted or made those achievements possible?
2. What were some of the challenges?
  - a. How were they overcome?
3. Has your organization been able to effectively capture performance data and transform the knowledge into effective programming decisions?

4. Moving forward, is there anything you would adjust or change about your organization's engagement with BEST?

#### Sustainability

1. Are your approaches and financing tools likely to be sustainable without engagement with BEST?
2. Is there anything that we have not discussed already that is important for understanding this activity?

### **Questions for Government of Jordan**

#### **Government - national:**

#### Effectiveness

1. Could you please give us your opinion on the overall state of tourism in Jordan?
2. Have there been any major positive developments that have taken place in the area in the past three years?
3. What are the main challenges currently and in the foreseeable future?
4. Could you describe your knowledge and/or interaction with the USAID BEST activity?
5. What do you believe are the impacts of the BEST intervention (economic, social, environmental, gender)?

#### Synergies

1. What has been your experience of engagement with BEST?
2. Has BEST been able to coordinate with government entities efficiently?
3. Are government ministries and agencies able to efficiently coordinate with each other in regards to the tourism sector?

#### Learning

1. Could you describe the current business enabling environment in the tourism sector?
  - a. What are the key challenges?
  - b. What kinds of changes are needed to improve the business enabling environment?
2. Are there any things that you think should have been done differently in terms of engagement with BEST? Or any specific approach that BEST is taking?

#### Sustainability

1. Do you believe that the various approaches or interventions of the BEST activity will continue after the activity has ended?
  - a. If so, which ones and why?
2. Do you have any other concerns or suggestions?

### **Jordan Tourism Board (JTB)**

#### Effectiveness

1. In which areas did you collaborate best with BEST over the past 2 years?
2. Which areas of the activity do you feel are highly efficient and why?
3. Which initiatives would you say were not worth repeating and why?

4. How well would you say BEST awarded grants to beneficiaries and service providers?
5. Which source market interventions worked and why? Which did not?

#### Synergy

1. How well do you think different components within BEST overlap and collaborate if at all?
2. How has BEST improved linkages and synergies between stakeholders?
3. How do you see the relationship and synergies between BEST and other stakeholders within tourism (e.g. JITOA, Hotel Association, MoTA, JIC)?
4. What activities that BEST has performed in collaboration with JTB are you most satisfied with and why? Which interventions were less successful?
5. How do JITOA, JISTA and other tourism operators perceive the work of BEST?

#### Sustainability

1. To what degree have BEST interventions contributed to Jordan becoming a stand-alone destination?
  - a. Which interventions were deemed successful? Which ones not?
2. How is the relationship between JTB, MoTA and BEST? What works well?
  - a. What improvements could be made and how?
3. How has BEST worked with JTB to move away from a generic source market marketing approach to a segment targeted approach (e.g. faith, MICE, medical tourism).
  - a. How successful has this approach been?
4. What has been the change in Jordan's Tourism Competitiveness Index (TCI)?
5. Do you agree with the way the index was reached? If not, why not and what would you do differently?
6. What interventions attributed to BEST enhanced Jordan's competitiveness position?
7. What program interventions have attracted private sector investment in the tourism value chain?
  - a. How significant were these investments if any?
8. What was the effect on jobs created (employment) as a result of training?
9. How well have source market strategies worked?
  - a. Which initiatives and why?
10. How has BEST contributed to improving the business environment through regulatory reforms?
11. How has BEST contributed to including secondary and remote destination experiences?

#### Learning

1. What areas do you feel BEST should focus on and why?
2. Which areas do you feel could be considered beyond the scope of BEST?
3. How has BEST supported capacity building for JTB, MoTA and any other related stakeholders?
4. How successful has the activity been in creating jobs, engaging women and enhancing access to finance from your standpoint?
5. Is the activity spreading itself too thin with the broad focus it pursues?
6. If you were tasked to improve the business climate and increase economic growth and job creation in Jordan in the tourism sector would you follow BEST's approach or do things differently?
7. What transformative sustainable change would you attribute directly or indirectly to the interventions by BEST?
8. What would you have done differently with the benefit of hindsight?



9. Where would your priority focus lie in terms of driving tourism forward for Jordan and how does that relate to BEST?
10. What other thoughts or comments would you like to share in context?

## MOTA

### Effectiveness

1. In which areas did you collaborate best with BEST over the past 2 years
2. Which areas of the activity do you feel are highly efficient and why?
3. Which initiatives would you say were not worth repeating and why?
4. How well would you say BEST awarded grants to beneficiaries and service providers?
5. Which source market interventions worked and why. Which did not?
6. How has BEST activity helped MoTA and JTB achieve positive changes in the tourism sector?
7. How did BEST support MoTA to enhance the performance standards under the King Abdullah II Center for Excellence to improvement scheme?
8. How has BEST supported capacity building for MoTA, JTB and other stakeholders?
9. How has BEST contributed to improving the business environment through regulatory reforms implemented by MoTA?
10. What BEST program interventions have attracted private sector investment in the tourism value chain?

### Synergy

1. How well do you think different components within BEST overlap and collaborate if at all?
2. How has BEST improved linkages and synergies between stakeholders?
3. How do you see the relationship and synergies between BEST and other stakeholders within tourism (e.g. JITOA, Hotel Association, MoTA, JIC)
4. What activities that BEST has performed in collaboration with JTB are you most satisfied with and why? Which interventions were less successful?
5. How do JITOA, JISTA and other tourism operators perceive the work of BEST

### Sustainability

1. To what degree have BEST interventions contributed to Jordan becoming a stand-alone destination? Which interventions were deemed successful? Which ones not?
2. How is the relationship between JTB, MoTA and BEST? What works well. What improvements could be made and how?
3. How has BEST worked with JTB to move away from a generic source market marketing approach to a segment targeted approach (e.g. faith, MICE, medical tourism). How successful has this been?
4. What has been the change in Jordan's Tourism Competitiveness Index (TCI)?
5. Do you agree with the way the index was reached? If not, why not and what would you do differently?
6. What interventions attributed to BEST enhanced Jordan's competitiveness position?
7. What program interventions have attracted private sector investment in the tourism value chain? How significant were these investments if any?
8. What was the effect on jobs created (employment) as a result of training?
9. How well have source market strategies worked? Which initiatives and why?

10. How has BEST contributed to improving the business environment through regulatory reforms?
11. How has BEST contributed to including secondary and remote destination experiences?

#### Learning

1. What areas do you feel BEST should focus on and why?
2. Which areas do you feel could be considered beyond the scope of BEST?
3. How has BEST supported capacity building for JTB, MoTA and other stakeholders?
4. How successful has the activity been in creating jobs, engaging women and enhancing access to finance from your standpoint?
5. Is the activity spreading itself too thin with the broad focus it pursues?
6. If you were tasked to improve the business climate and increase economic growth and job creation in Jordan in the tourism sector would you follow BEST's approach or do things differently?
7. What transformative sustainable change would you attribute directly or indirectly to the interventions by BEST?
8. What would you have done differently with the benefit of hindsight?
9. Where would your priority focus lie in terms of driving tourism forward for Jordan and how does that relate to BEST?
10. What other thoughts or comments would you like to share in context?

### PRIVATE SECTOR BUSINESSES

#### Overview

1. How did you first know about BEST activity?
2. Could you please tell us a little bit about your tourism business? When did you start your business and your main services?

#### Effectiveness

1. What positive tourism/urban improvement developments have taken place in the area in the past three years?
2. What are the impacts of the BEST intervention?
3. Did you receive any technical assistance from BEST? What type of technical assistance you received from the project?
  - a. Was it efficient?
4. What was the most important training you have received from BEST?
5. What is the overall level of satisfaction with the trainings/services provided by the BEST activity?
6. Does the assistance/trainings improve your work?
7. What kinds of change are needed in Jordanian tourism to transform it into a stand-alone destination?
8. When it comes to the overall outlook of your sector (tourism sector) since 2015, would you say that things are moving towards the right direction? Yes/no? Why?
9. What are the most important constraints/challenges that is facing the sector? Limitations that are facing the growth of your firm?
10. Have any changes been made to the business enabling environment in the past 3 years?

#### Synergies

1. What engagement has BEST had with your business?
  - a. What is your opinion on the effectiveness of your experience?

#### Learning

1. What kinds of changes are needed to improve the business enabling environment?
2. Are there any things that you think should have been done differently?

#### Sustainability

1. Do you think the results of your interactions with BEST will be sustainable?
2. Do you have any other concerns or suggestions?

### **OTHER ASSOCIATIONS, COMMISSIONS, NGOS & INGOS**

#### Overview

1. Could you please tell us a little bit about your organization and your role within the organization?
2. How did you first begin collaborating with the BEST activity?

#### Effectiveness

1. What positive tourism/urban improvement developments have taken place in the area in the past three years?
2. What are the impacts of your interaction with BEST?
3. What kinds of changes are needed to improve the business enabling environment?
4. Have any changes been made to the business enabling environment in the past 3 years?
  - a. If so - what are they? And how have they enabled business?

#### Synergies

1. What engagement has BEST had with your organization?
  - a. Has your experience of engagement with BEST been fruitful for your organization?
2. Has BEST been able to bring together relevant stakeholders?

#### Learning

1. In terms of your engagement with BEST, are there any things that you think should have been done differently that may have improved effectiveness?
2. Were you able to exchange ideas with BEST openly?
3. What kinds of change are needed in Jordanian tourism to transform it into a stand-alone destination?

#### Sustainability

1. Do you think the results of your interactions with BEST will be sustainable?
  - a. What factors can contribute to making sustainability a reality?
2. Do you have any other concerns or suggestions?

## **Education Institutions**

#### Overview

1. Could you please tell us a little bit about your organization and your role within the organization?
2. How did you first begin collaborating with the BEST activity?

Effectiveness

1. What kinds of change are needed in Jordanian tourism to transform it into a stand-alone destination?
  - a. How is BEST contributing to those changes?
2. In regards to your work with BEST, what have been the impacts?
3. Have any changes been made to your (tourism-related) graduates' job prospects in the past 3 years?

### Synergies

1. What engagement has BEST had with your organization?
  - a. Has your experience of engagement with BEST been fruitful for your organization?
2. Has BEST been able to bring together relevant stakeholders?

### Learning

1. What kinds of changes are needed to improve the business enabling or education/training environment?
2. Are there any things that you think should have been done differently?

### Sustainability

4. Do you think the results of your interactions with BEST will be sustainable?
  - a. What factors can contribute to making sustainability a reality?
5. Do you have any other concerns or suggestions?

## OVERSEAS STAKEHOLDERS

### Overview

1. Could you please tell us a little bit about your organization and your role within the organization?
2. How did you first begin collaborating with the BEST activity?
3. How did you first know about the BEST activity?

### Effectiveness

1. What positive tourism improvement developments have taken place in Jordan in the past three years that you have heard about?
2. What are the impacts of the BEST intervention?
3. Did you receive any technical assistance from BEST? What type of technical assistance did you receive from the project? Was it efficient? What were the outcomes and expected impact.
4. What kinds of change are needed in Jordanian tourism to transform it into a stand-alone destination? And what would attract more tourist to go to Jordan in your opinion and from your experience?
5. When it comes to the overall outlook of your sector (tourism sector) since 2015, would you say that things are moving towards the right direction? Yes/no? Why?
6. What are the most important constraints challenges that is facing the sector?
  - a. Limitations that are facing the growth of your firm in engaging with Jordan as a destination and promoting tourism to Jordan?
7. Have any changes been made to the business enabling environment in the past 3 years in terms of accessibility, service levels, experiences or other?
  - a. How did they impact your business or your ability to promote Jordan from your source market(s)?

### Synergies

1. Did BEST facilitate or encourage any networking or institutional linkages?

- a. What linkages were you able to capitalize on as a direct or indirect outcome of BEST interventions?

### Learning

1. Would you suggest any changes in the way you engaged with BEST moving forward?
2. Did you have an open platform for discussion and idea exchange with BEST?
  - a. With other relevant stakeholders?

### Sustainability

1. How sustainable are the interventions that BEST effectuated?
  - a. What factors can contribute to this?
2. Do you have any other concerns or suggestions?

## **FOCUS GROUPS**

### **INTRODUCTION:**

The purpose of each Focus Group is to assess how well the action is performing in ensuring sustainability of its interventions and moving towards transformational change in Jordan. Focus groups will also help to develop recommendations and identify best practices specific to the effectiveness of BEST's interventions and technical assistance.

The Focus Groups will be led by a professional facilitator and observed by the evaluation team. Focus Groups will be conducted in Arabic.

No information or data from the focus groups will be attributed to individuals. The information will be kept confidential and the findings from discussions will be reported in aggregate, rather than at the individual level.

Participants do not have to answer any questions that they are not comfortable answering.

A translated summary transcript will be available for USAID in English.

### **FOCUS GROUP LOCATIONS:**

Focus groups are planned as follows:

- Aqaba
- Salt
- Jordan Trail (location to be agreed)
- Female entrepreneurs (location to be agreed)
- Participants in Pathways to Professionalism (location to be agreed)

### **Focus group recruitment criteria**

Detailed focus group recruitment criteria will be developed after the team's initial consultation and interviews with the USAID and BEST activity team and will be shared with USAID and BEST, before the implementation of the focus groups.

## **Content:**

In common with best practice in focus group design, a professional facilitator will be engaged and briefed by MESP. The focus group will be based around topics for discussion rather than specific questions. The facilitator will be fully briefed on BEST interventions in the focus group location, but must not lead the focus group in the initial stages of the discussion. If the group does not indicate awareness of the BEST interventions, further probing may be used.

The topic list for the focus groups in Aqaba and Salt will be refined following further research into BEST activities on the ground, but it is likely to cover the following topics:

- Opening discussion state of tourism at present in the chosen location
- Positive tourism/urban improvement developments in the area
- Understanding of donor involvement in the area (general)
- Understanding of USAID interventions in tourism in the area (general)
- Understanding of and engagement with BEST (specific)
- Impacts of BEST intervention (economic, social, environmental, gender)
- Perceived sustainability of BEST intervention
- Concerns/suggestions

For the focus groups for Female Entrepreneurs and Pathways to Professionalism the topic list will be as follows:

- Opening discussion state of tourism at present
- Opportunities for employment (general)
- Opportunities for employment in Jordan
- Where in Jordanian tourism/leisure are there job shortages
- Awareness of support from USAID (general)
- Awareness of support from BEST (specific)
- Impacts of BEST interventions
- Perceived sustainability of BEST intervention
- Concerns/suggestions

## **QUANTITATIVE SURVEY: TOURISM SECTOR SEGMENTATION**

In order to incorporate a robust sample of businesses involved in the tourism sector into the existing private sector survey we will be oversampling the tourism related businesses. This involves building an additional sample of up to 500 additional businesses that are involved in the tourism industry, bringing the total targeted sample for the private sector survey to approximately 2,000 companies.

At present there are 10,000 entities on the database. For 95% confidence with a margin of +/- 5%, a sample size of 370 is required.

Because the tourism element is focused on a more detailed set of industrial activities the sampling units capture activity at the 4-digit “Class” level of ISIC, as outlined below:





ISIC Class Description	Sample Frame
Passenger Land Transport	656
Passenger Air Transport	36
Service Activities Incidental to Land Transportation	36
Service Activities Incidental to Air Transportation	16
Short Term Accommodation Activities	503
Camping Grounds, Recreational Vehicle Parks and Trailer Parks	18
Restaurants and Mobile Food Service Activities	4,487
Event Catering	361
Other Food Service Activities	67
Beverage Serving Activities	805
Motion Picture, Video and Television Program Production Activities	166
Renting and Leasing of Motor Vehicles	302
Activities of employment placement agencies	91
Temporary employment agency activities	27
Other human resources provision	124
Travel Agency Activities	790
Tour Operator Activities	416
Other Reservation Service and Related Activities	7
Organization of Conventions and Trade Shows	429
Technical and Vocational Secondary Education	46
Creative Arts and Entertainment Activities	23
Library and Archives Activities	4
Museums Activities and Operation of Historical sites and Buildings	5

Botanical and Zoological Gardens and Nature Reserves Activities	12
Operation of sports facilities	204
Activities of sports clubs	43
Other sports activities	13
Activities of amusement and theme parks	91
Other Amusement and Recreation Activities	223
<hr/>	
Total	10,001

# USAID | Jordan

## Private Sector Survey 2017

Private Sector Survey: Questionnaire

Version 5.0

October 22, 2017

## Screening Questions

1. Confirm location from database extract
2. Confirm size (employees) from database extract
3. Confirm ISIC category from database extract
4. Confirm respondent is either the owner or senior-level manager of business

Company Information

Question	Response Parameters
B1. When was the firm established?	Answer in month and year _____ (MM/YY)
B2. How was the firm established?  (Choose One)	<input type="radio"/> Always private from start up <input type="radio"/> Privatization of state owned firm <input type="radio"/> Joint-Venture with foreign partner(s) <input type="radio"/> Joint-Venture between Public and Private Sectors <input type="radio"/> Private subsidiary of formerly state-owned firm <input type="radio"/> Not sure
B3. What was the maximum number of FTE employees that your firm employed during its first year of operations?  (Choose One)	<input type="radio"/> Sole Proprietorship  <input type="radio"/> 2-9  <input type="radio"/> 10-24  <input type="radio"/> 25 +  <input type="radio"/> Do Not Know
B4. Which of the following best describes your motivation for starting your own company?	Open Ended _____ Enter Verbatim & Post Code (Pre-codes for anticipated responses itemized below) <ol style="list-style-type: none"> <li>1. I wanted to own my own business</li> <li>2. I wanted to work in this industry and starting a business allowed me to do this</li> <li>3. Starting a business allows me to work close to my family</li> <li>4. I wanted to work in the public sector but could not find a job</li> </ol>

B5. What is the legal status of your business?

- 5. I wanted to work for a large company but could not find a job
- 6. My family wanted me to take on one of the family businesses
- 7. I was not allowed to work outside
- 8. I had no choice, it was the only thing available
- 9. To generate income for my family

- Sole proprietorship
- limited liability company
- general partnership
- limited partnership company
- Other
- Don't know

B6. Is your business licensed by the local municipality?

- Yes
- No
- Don't know
- Refuse to Answer

B6i. If not, why not?

Open Ended \_\_\_\_\_ (enter Verbatim)

Use Pre-Codes #1 to #7 or enter response and post code.

1. Licensing Fees
2. I cannot go to the municipality to acquire the necessary license
3. I do not see any benefits
4. Not a requirement for my business
5. Lack of understanding of how and where to register
6. Amount of paperwork and reporting required
7. Registration and licensing complications make it impossible to re
8. Acquiring and renewing a license every year is too much work
9. Takes too much time

B7. Do you sign contracts or formal agreements with clients or suppliers?

- Always
- Often
- Infrequently
- Never
- Don't know
- Refuse to answer

B7i. If yes, who do you go to if these agreements are broken?

- None
- Family Dispute Resolution
- Local Community or Tribal Court
- Informal Meeting
- Court System
- Mediation or Arbitration (ADR)
- Other
- Don't Know

B8. What is the current ownership structure?

*(List % in each; must total 100)*

- Percentage invested by Private **Domestic** Interests (e.g. Jordanian Residents and Jordanian Firms)
- Percentage invested by Private **Foreign** Interests (e.g. Foreign Persons and Foreign Companies)
- Percentage invested by **Public** Interests (e.g. Jordanian Government Institutions)

B9. Among the owners of the firm, are there any females?

- Yes
- No
- Not Sure

B9i. If yes, what percentage of the firm is owned by females?

- Less than 5%
- Between 5% and 25%
- Between 25% and 50%
- More than 50%



B10. Among the owners of the firm, are there any persons between the ages of 18 and 35?

- Yes
- No
- Not Sure

B10i. If yes, what percentage of the firm is owned by persons between the ages of 18 and 35?

- Less than 5%
- Between 5% and 25%
- Between 25% and 50%
- More than 50%

B11. What is the highest level of education completed by the top manager?

- University Degree(s) (Bachelors or higher)
- Technical Degree (Associate / Vocational)
- Secondary School
- Primary School
- None of the above

*(Choose One)*

B12. Is your business in one location or do you have different locations (i.e. branches, point of sale, point of service)

- Single Location
- Multiple Locations
  - If Multiple, # of Locations \_\_\_\_\_

B13. Do you own or rent the space for your main business location?

- Own
- Rent

B14. When it comes to sales, does your business have a high or low season (seasonal) or are your sales consistent throughout the year?

B14i. if seasonal, have the challenges associated with seasonality of your business changed over the past 3 years?

B15. Into which of the following markets are you providing products or services?

*(Select all that Apply)*

- Other (specify) \_\_\_\_\_
- Seasonal
- Sales are consistent throughout the year
- Don't know (DO NOT READ)
- Significantly more challenging
- More Challenging
- Same
- Less Challenging
- None of the Above
- Within my Governorate
- Across many cities in Jordan
- To other countries in the Middle East and/or North Africa (MENA) Region
- To countries in Europe
- To countries in North America
- To countries in Asia
- To countries in Sub-Saharan Africa or South America

B16. Does the establishment have an internationally recognized quality certification?

*(Choose One)*

B16i. if yes, what certification(s)

- Yes
- No
- Not Sure

\_\_\_\_\_ Record Verbatim and Post Code Responses

B17. If you are a manufacturing firm, which of the following best describes your operations?

*(Choose One)*

- Original Brand Manufacturer (OBM)
- Original Design Manufacturer (ODM)
- Original Equipment Manufacturer (OEM)
- Local Manufacturer / Supplier (CMT)
- Not Sure
- Not Applicable

B18. What percentage of your inputs (in terms of value) come from the following supplying markets?

*(List % in each; must total 100)*

- Local markets in Jordan
- Markets in the Middle East and/or North Africa
- Markets in Asia, Europe, North America
- Other Supplying Markets

B19. Which of the following best describes your aspirations for the firm?

*(Choose One)*

B20. Check all of the following digital platforms that apply to your firm:

*(Select all that Apply)*

B21. Check all of the following that apply to your firm:

*(Select all that Apply)*

- For manufacturing firms, inputs refers to raw materials, semi-processed goods, finished products, or other materials that you transform into products to sell.
- For services companies, inputs refers to clientele.
- To provide a stable income that supports my family.
- To become a well-known supplier in Jordan.
- To become a well-recognized supplier in the Middle East & North Africa Region.
- To become a well-recognized supplier beyond the MENA Region.
- To transform the way my industry provides good and services.
- This firm uses email to communicate with buyers and suppliers
- This firm uses social media and/or other online platforms to advertise to potential customers
- This firm has a website that provides information to customers and suppliers
- This firm sells goods and services online
- Other \_\_ *(Explain and Post Code)* \_\_\_\_\_
- This firm uses software to manage finances
- This firm uses software to manage customer relationships
- This firm uses software to manage human resources
- The firm has its own smart application on the smart devices

## The Business and Social Environment

Question	Response Parameters	
<p>C1. What are the two most important constraints and/or limitations for your business today?</p> <p>(OPEN ENDED)</p> <p><i>Pre-codes are listed #1-24. Do not read them to the respondent. If the respondent answer matches a pre-code below, write the number for the pre-code. If the answer does not match any of the pre-</i></p>	<p>I. _____ (Open Ended and POST CODE)</p> <p>II. _____ (Open Ended and POST CODE)</p> <ol style="list-style-type: none"> <li>1. Low profits</li> <li>2. Lack of market, difficult access to market</li> <li>3. Problems with the site: venue too small, inadequate floor space or layout</li> <li>4. Lack of financial services</li> <li>5. No access to loans / No access to finance</li> <li>6. Low product, services quality</li> <li>7. Clients don't pay or take long time for them to pay</li> <li>8. Low motivation, not reliable or low skilled workers</li> <li>9. High workers turnover</li> <li>10. Inadequate, outdated machinery, frequent malfunction, difficulties getting spare parts, expensive repair services</li> <li>11. Legal issues</li> <li>12. Inadequate policies, insufficient incentives</li> <li>13. Over-Regulation</li> </ol>	<ol style="list-style-type: none"> <li>14. Lack of Regulation</li> <li>15. General country situation</li> <li>16. Issues related to utilities, expensive or un reliable energy, water, communication services</li> <li>17. Issues with inputs: difficulties accessing, low input or merchandise quality</li> <li>18. Lack of time for the business have multiple jobs, have multiple responsibilities</li> <li>19. Personal issues affecting the business</li> <li>20. Security concerns, thieves</li> <li>21. Too much paper work, time consuming and expensive processes to keep the business formal</li> <li>22. High taxes and government fees</li> <li>23. Harassment of authorities local or national authorities</li> <li>24. Other (write verbatim in I or II)</li> </ol>

codes, note as other (24) and record it verbatim.

C2. Name the two most problematic factors for doing business in your country:

(OPEN ENDED)

- I. \_\_\_\_\_ (Open Ended and POST CODE)
- II. \_\_\_\_\_ (Open Ended and POST CODE)

- |  |  |                             |
|--|--|-----------------------------|
| 1. Limited access to financing         | 2. Inadequately educated/skilled workforce | 3. Regional Instability     |
| 4. Restrictive Labor Regulations       | 5. Poor work ethic in the labor force      | 6. Taxes                    |
| 7. Foreign currency regulations        | 8. Policy Instability                      | 9. Inflation                |
| 10. Inadequate infrastructure          | 11. Crime and theft                        | 12. Poor Public Health      |
| 13. Inefficient government bureaucracy | 14. Corruption                             | 15. No Capacity to Innovate |

*Pre-codes are listed #1-15. Do not read them to the respondent. If the respondent answer matches a pre-code below, write the number for the pre-code. If the*

answer does not match any of the pre-codes, note as other and record it verbatim.

C3. How do you assess the general state of infrastructure (e.g., transport, communication s and energy) in your country?

Among the worst in the world    1    2    3    4    5    6    7    Among the best in the world

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C4. How is the quality (extensiveness and condition) of transport infrastructure for the following?

- Roads
- Airports
- Seaports

Among the worst in the world    1    2    3    4    5    6    7    Among the best in the world


C5. How efficient are the

Among the worst in the world    1    2    3    4    5    6    7    Among the best in the world

---

following services?

- Ground Transport (Buses, Taxis)
- Air Transport Services
- Seaport Services


C6. How reliable is the electricity supply?

*Extremely Unreliable*    1    2    3    4    5    6    7    *Extremely Reliable*

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C7. How reliable is the water supply?

*Extremely Unreliable*    1    2    3    4    5    6    7    *Extremely Reliable*

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C8. How efficient are the customs procedures?

*Extremely inefficient*    1    2    3    4    5    6    7    *Extremely efficient*

--	--	--	--	--	--	--

C9. How efficient are changes in modes of transport to destination?

*Extremely inefficient*    1    2    3    4    5    6    7    *Extremely efficient*

--	--	--	--	--	--	--



C10. How prevalent is foreign ownership of companies?

*Extremely Rare*    1    2    3    4    5    6    7    *Extremely Prevalent*

--	--	--	--	--	--	--	--

C11. To what extent do taxes reduce the incentive to invest?

*To a great extent*    1    2    3    4    5    6    7    *Not at all*

--	--	--	--	--	--	--	--

C12. How intense is competition in local markets?

*Not intense at all*    1    2    3    4    5    6    7    *Very intense*

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C13. How competitive is the provision of the following services?

*Not at all competitive*    1    2    3    4    5    6    7    *Extremely Competitive*

- Professional Services
- Retail Services
- Transport & Logistics Services
- Financial Services
- Networks (T-com, Internet, Post)


C14. To what extent do domestic companies control the international distribution of their products?

*No Control*    1    2    3    4    5    6    7    *Complete Control*

--	--	--	--	--	--	--	--

C15. To what extent do companies collaborate in sharing ideas and innovating?

*Not at all*    1    2    3    4    5    6    7    *To a great extent*

- General State of Infrastructure

--	--	--	--	--	--	--	--

C16. To what extent are business services available?

*Not available*    1    2    3    4    5    6    7    *Abundantly Available*

- Research
- Marketing
- Business Support
- Accounting


C17. To what extent does the threat of

terrorism  
impose costs  
on business?

*Not at all* 1 2 3 4 5 6 7 *To a great extent*

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C18. To what  
extent does the  
large refugee  
populations  
impose costs  
on business?

*Not at all* 1 2 3 4 5 6 7 *To a great extent*

--	--	--	--	--	--	--	--

C19. To what  
extent can  
police services  
be relied upon  
to enforce law  
and order?

*Not at all* 1 2 3 4 5 6 7 *To a great extent*

--	--	--	--	--	--	--	--

C20. How  
efficient is the  
government in  
providing public  
goods and  
services?

*Very In-Efficient* 1 2 3 4 5 6 7 *Very Efficient*

--	--	--	--	--	--	--	--

C21. How  
efficient are the  
legal and  
judicial systems  
for companies

*Extremely In-Efficient* 1 2 3 4 5 6 7 *Extremely Efficient*

--	--	--	--	--	--	--	--

in settling disputes?

C22. To what extent does the government ensure a stable policy environment for doing business?

*Not at all*    1    2    3    4    5    6    7    *To a great extent*

--	--	--	--	--	--	--	--

C23. To what extent do government officials show favoritism to well-connected firms and individuals when deciding upon policies and contracts?

*Not at all*    1    2    3    4    5    6    7    *To a great extent*

--	--	--	--	--	--	--	--

C24. How common is it for companies to make undocumented extra payments or bribes in

- Imports and Exports
- Public Utilities

*Never Occurs*    1    2    3    4    5    6    7    *Very common*


connection with the following

- Tax Payments
- Awarding Contracts and Licenses
- Obtaining favorable judicial decision


C25. How do you assess the stringency of your country's environmental regulations?

*Very relaxed*    1    2    3    4    5    6    7    *Among the most Stringent*

--	--	--	--	--	--	--	--

C26. How do you assess the quality of the natural environment?

*Very Poor; Among the worst*    1    2    3    4    5    6    7    *Among the Most Pristine*

--	--	--	--	--	--	--	--

C27. How do you assess the enforcement of environmental regulations?

*Very Relaxed*    1    2    3    4    5    6    7    *Among the most Rigorous*

--	--	--	--	--	--	--	--

C28. What are the top 2 risks that you believe to be of most concern for doing business

- I. \_\_\_\_\_ (Open Ended and POST CODE using Pre-Codes below or other)
- II. \_\_\_\_\_ (Open Ended and POST CODE using Pre-Codes below or other)

- |   |                                   |                                 |
|---|-----------------------------------|---------------------------------|
| 1. Asset Speculation                      | 2. Failure of Financial System    | 3. Natural Catastrophes         |
| 4. Biodiversity Loss / Ecosystem Collapse | 5. Failure of National Governance | 6. Profound Social Instability  |
| 7. Information Infrastructure Breakdown.  | 8. Failure of Urban Planning      | 9. Spread of Infectious Disease |

in your country  
over the next  
ten years?

*Pre-codes are  
listed #1-30. Do  
not read them  
to the  
respondent. If  
the respondent  
answer  
matches a pre-  
code below,  
write the  
number for the  
pre-code. If the  
answer does  
not match any  
of the pre-  
codes, note as  
other and  
record it  
verbatim.*

10. Cyber Attacks
13. Data Fraud or Theft
16. Deflation
19. Energy Price Shock
22. Extreme Weather Events
25. Failure of Climate Change Adaptation
28. Failure of Key Infrastructure

11. Failure of Economic Planning
14. Fiscal Crisis
17. Illicit Trade
20. Inter-State Conflict
23. Large Scale Influx of Refugees
26. Manmade Catastrophes (Environ.)
29. Misuse of Technologies

12. State Collapse or Crisis
15. Terrorist attacks
18. Unemployment or Underemployment
21. Unmanageable Inflation
24. Water Crises
27. Weapons of Mass Destruction
30. Food Crises

## Company Performance

Question	Response Parameters
<p>D1. When it comes to the overall outlook of your sector over the last year, would you say that things are moving in the right direction or in the wrong direction:</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Right Direction               <ul style="list-style-type: none"> <li>▪ What is the main reason: _____ (RECORD VERBATIM AND POST CODE)</li> </ul> </li> <li><input type="radio"/> Wrong Direction               <ul style="list-style-type: none"> <li>▪ What is the main reason: _____ (RECORD VERBATIM AND POST CODE)</li> </ul> </li> <li><input type="radio"/> Don't Know (DO NOT READ)</li> </ul>
<p>D2. When it comes to the sales and profits (performance) of your business, over the last five years (ASK SINCE YOUR BUSINESS STARTED IF LESS THAN FIVE YEARS OLD), would you say that your sales and profits have</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Significantly improved</li> <li><input type="radio"/> Somewhat improved</li> <li><input type="radio"/> Remained the same</li> <li><input type="radio"/> Somewhat worsened</li> <li><input type="radio"/> Significantly worsened</li> <li><input type="radio"/> Refused to Answer (DO NOT READ)</li> <li><input type="radio"/> Don't Know (DO NOT READ)</li> </ul>
(Check one)	
<p>D3. Thinking of your sales and profit over the last 12 months, would you say that your sales and profits have:</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Significantly improved</li> <li><input type="radio"/> Somewhat improved</li> <li><input type="radio"/> Remained the same</li> <li><input type="radio"/> Somewhat worsened</li> <li><input type="radio"/> Significantly worsened</li> <li><input type="radio"/> Refused to Answer (DO NOT READ)</li> <li><input type="radio"/> Don't Know (DO NOT READ)</li> </ul>
(Check one)	

D4. Thinking of your sales and profit over the coming 12 months, would you say that your sales and profits are most likely to:

- Significantly improve
- Somewhat improve
- Remain the same
- Somewhat worsen
- Significantly worsen
- Refused to Answer (DO NOT READ)
- Don't Know (DO NOT READ)

(Check one)

D5. During the last 12 months would you say that your business allows you to:

- Live well above my living costs
- Live comfortably given my living costs
- I struggle to live
- I am losing money
- Don't know
- Refuse to Answer

D6. What are the two most important opportunities to improve the performance of your business, today?

- I. \_\_\_\_\_ Record Verbatim and Post Code
- II. \_\_\_\_\_ Record Verbatim and Post Code

- Don't Know (DO NOT READ)

(OPEN ENDED, post coded)

D7. Are you planning on doing any project or changing your business in any significant way, not mentioned above?

- Yes
- No
- Not Sure
- Refused to Answer (DO NOT READ)



D8. Are you planning to do any of the following actions related to your business over the next 12 months? (I will read for you some actions that you may be or may be not considering on doing. Please respond yes, no or not sure as it applies to you)

Use Pre-Codes #1 to #10 or enter response and post code.

Open Ended \_\_\_\_\_ (enter Verbatim)

1. Increase the number of workers?
2. Get machinery or equipment?
3. Increase the amount of raw material or merchandise you buy?
4. Buy, remodel or increase the size of the shop or factory?
5. Change the location or buy an additional shop, warehouse, sales point?
6. Include new products, services or markets on you production/trade/service line?
7. Start up a new business?
8. Improve the promotion campaign?
9. Adopt new or improved technologies?
10. Buy e vehicle for the business?

## Access to Finance

Question	Response Parameters							
<p>E1. To what extent do the costs of financial services impede business performance?</p>	<p style="text-align: center;"><i>Impedes to a great extent</i>    1    2    3    4    5    6    7    <i>Does not impede at all</i></p> <div style="text-align: center;"> <table border="1" style="width: 100%; height: 30px;"> <tr> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> </tr> </table> </div>							
<p>E2. Does the financial sector provide sufficient range of financial products and services?</p>	<p style="text-align: center;"><i>Not at all</i>    1    2    3    4    5    6    7    <i>To a great extent</i></p> <div style="text-align: center;"> <table border="1" style="width: 100%; height: 30px;"> <tr> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> </tr> </table> </div>							
<p>E3. Does the financial sector provide sufficient information about the range of financial products and services that are offered?</p>	<p style="text-align: center;"><i>Not at all</i>    1    2    3    4    5    6    7    <i>To a great extent</i></p> <div style="text-align: center;"> <table border="1" style="width: 100%; height: 30px;"> <tr> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> <td style="width: 14.28%;"></td> </tr> </table> </div>							
<p>E4. When it comes to the performance and growth of your business, would you say that access to finance is:</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Very Important</li> <li><input type="radio"/> Important</li> <li><input type="radio"/> Not at all important</li> <li><input type="radio"/> Don't know (DO NOT READ)</li> </ul>							

E5. What are the two most important financial needs of your business?

- I. \_\_\_\_\_ Record Verbatim and Post Code
- II. \_\_\_\_\_ Record Verbatim and Post Code

(OPEN ENDED, post coded)

- Don't Know (DO NOT READ)

E6. What are the two most important banking services for your business?

- I. \_\_\_\_\_ (Open Ended and POST CODE)
- II. \_\_\_\_\_ (Open Ended and POST CODE)

- 1. Checking Account
- 2. Savings Account
- 3. Credit Card
- 4. Business Loans
- 5. Fixed Term Savings Certificates
- 6. ATM and Debit Cards
- 7. Life, Accident and Other Insurance

- 8. Mortgage Loan
- 9. Wire Transfer (Domestic and International)
- 10. Electronic Payment
- 11. Phone Transactions
- 12. Services for Receiving Payments (Domestic and Foreign)
- 13. Savings / Credit Products
- 14. Other (write in verbatim in I or II)

*(Pre-Codes provided 1-14, DO NOT READ them, to record the answer choose and write the code from the list; if answer does not fit in a code use the 14. other and write the verbatim)*

E7. When it comes to the two most important banking needs of your business, what is your

- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied

<p>overall level of satisfaction?</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Somewhat dissatisfied</li> <li><input type="radio"/> Very Dissatisfied</li> </ul>														
<p>E8. How do you primarily finance your business?</p> <p>Use Pre-Codes #1 to #13 or enter response and post code.</p>	<p>Open Ended _____ (enter Verbatim)</p> <table border="0"> <tr> <td>1. The business generates self-sustaining revenues</td> <td>8. Group Loan</td> </tr> <tr> <td>2. Loan from commercial bank</td> <td>9. Credit Card</td> </tr> <tr> <td>3. loan from microfinance institution</td> <td>10. Savings</td> </tr> <tr> <td>4. revolving fund</td> <td>11. Other</td> </tr> <tr> <td>5. loan from family</td> <td>12. Don't Know</td> </tr> <tr> <td>6. loan from friends</td> <td>13. Refuse to Answer</td> </tr> <tr> <td>7. Loan from private money lender</td> <td></td> </tr> </table>	1. The business generates self-sustaining revenues	8. Group Loan	2. Loan from commercial bank	9. Credit Card	3. loan from microfinance institution	10. Savings	4. revolving fund	11. Other	5. loan from family	12. Don't Know	6. loan from friends	13. Refuse to Answer	7. Loan from private money lender	
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5. loan from family	12. Don't Know														
6. loan from friends	13. Refuse to Answer														
7. Loan from private money lender															
<p>E9. In the last 12 months have you applied for a loan for your enterprise/project or received financial support from an organization or financial institution/bank</p> <p>E9i. If no, why not?</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Yes</li> <li><input type="radio"/> No</li> <li><input type="radio"/> Don't Know</li> <li><input type="radio"/> Refuse to Answer</li> </ul> <p>Open Ended _____ (enter Verbatim)</p>														

Use Pre-Codes #1 to #11 or enter response and post code.

1. Didn't know what the options were
2. Didn't understand the process
3. didn't believe my business would be eligible
4. Loan or financing conditions were too difficult (rate, size, term, collateral)
5. My religion doesn't allow me to accept a loan

6. Fear of being unable to pay it back
7. I don't trust financial institutions / banks
8. I don't need to take out a loan
9. The bank or FI didn't have the right options for my company
10. Don't Know
11. Refuse to Answer
- 12.

E9ii. if yes, to whom did you most recently apply for a loan

- Bank
- Microfinance Institution
- International Donor or Donor Funded Project
- Government Program
- Money Lender
- Other
- Don't know
- Refuse to Answer

E9iii. If yes, were you approved

- Yes
- No

- Don't Know
- Refuse to Answer

E9iiia. Open Ended \_\_\_\_\_ (enter Verbatim)

If not approved, why not?

1. Did not have the required guarantee (guarantors or collateral)
2. Did not have sufficient earnings
3. Business climate too risky at the moment
4. Inadequate credit history
5. The reason for the loan was not sufficient for the financial institution
6. I don't know why not
7. Other
8. Don't know

Use Pre-Codes #1 to #8 or enter response and post code.

E9iiib. Open Ended \_\_\_\_\_ (enter Verbatim)

if you were approved, what was the

1. To improve or upgrade products as part of the current business
2. To add new products or business activities
3. To expand operations to another area

purpose for the financing?

Use Pre-Codes #1 to #12 or enter response and post code.

4. To buy more resources (materials or goods)
5. To pay for wages for staff
6. Expansion or purchase of property
7. Pay off company debt
8. To pay for children's education
9. To finance the needs of my family
10. To pay off personal debts
11. Other
12. Don't Know

E10. Over the past 3 years would you say that your access to finance has:

- Significantly Less Challenging
- Less Challenging
- Stayed the Same
- More Challenging
- Significantly More Challenging
- Don't Know

## Workforce and Employment

Question	Response Parameters
<p>F1. Please indicate which trend best describes your firm's overall employment level the last 3 years</p> <p>(Check one)</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Large reduction every year</li> <li><input type="radio"/> Gradual reduction every year</li> <li><input type="radio"/> Gradual increase every year</li> <li><input type="radio"/> Large increase every year</li> <li><input type="radio"/> Erratic; no clear pattern</li> </ul>
<p>F2. Do you expect to hire additional workers over the coming year?</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Yes (If yes, ask for best estimate of how many _____ (record estimate))</li> <li><input type="radio"/> No</li> <li><input type="radio"/> Not Sure</li> <li><input type="radio"/> Refused to Answer (DO NOT READ)</li> </ul>
<p>F3. Is the company owner(s) also manager(s) in the firm?</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Yes</li> <li><input type="radio"/> No</li> </ul>
<p>F4. Please indicate which trend best describes your firm's employment of women the last 3 years:</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Large reduction every year</li> <li><input type="radio"/> Gradual reduction every year</li> <li><input type="radio"/> Gradual increase every year</li> <li><input type="radio"/> Large increase every year</li> <li><input type="radio"/> Erratic; no clear pattern</li> <li><input type="radio"/> We don't hire women</li> </ul>



(Check one)

F5. What are the main challenges in terms of hiring and retaining women?

- Inadequate education and skills
- Poor work ethic
- Culture and Tradition
- Transportation
- Child Care
- High Salary Expectations
- Dis-Interest in Sector
- Other (Explain and Post Code)

(Check all that apply)

F6. Please indicate which trend best describes your firm's employment of youth (persons 18-35) the last 3 years:

- Large reduction every year
- Gradual reduction every year
- Gradual increase every year
- Large increase every year
- Erratic; no clear pattern
- We don't hire youth

(Check one)

F7. What are the main challenges in terms of hiring and retaining youth

- Inadequate education and skills
- Poor work ethic
- Culture and Tradition
- Transportation
- Child Care
- High Salary Expectations

(Persons 18 to 35)?

- Dis-Interest in Sector
- Other (Explain and Post Code)

(Check all that apply)

F8. Has your firm's employed foreign labor over the last 3 years:

- Yes
- No
- Do Not Know

(Check one)

F8i. If yes, are the foreign workers legally hired?

- Yes
- No
- Do Not Know

F8ii. If yes, where are most of your foreign

- Syria
- Palestine
- Iraq
- North Africa (i.e.
- South Asia (i.e. India, Pakistan, Bangladesh, Sri Lanka)
- Other \_\_\_\_\_ (Enter Verbatim and Post-Code Other Responses)

workers  
from:

(Check one)

F9. Would your  
firm like to have  
more freedom and  
flexibility to hire  
foreign labor?

- Yes
- No
- Do Not Know
- 

F9i. If  
yes, what  
specific  
additional  
freedom  
or  
flexibility  
would be  
most  
helpful to  
you?

- \_\_\_\_\_ Enter Verbatim and Post Code)

(Open Ended &  
Post Code)

F10. Excluding  
yourself, does your

- Yes
- No

business have any Jordanian workers?

Don't know

F10i. if yes, excluding the owner(s) does your business have any full-time Jordanian workers?

- Yes
- No
- Don't Know

F10ii. If yes, what is the main reason for full time Jordanian employees to leave the company (Pick

\_\_\_\_\_ (Open Ended and POST CODE)

- |   |  |
|---|--|
| 1. Employee hired by a competitor at a better rate    | 8. Family would not allow them to continue working           |
| 2. Employee left to start their own business          | 9. Social pressures meant they no longer wanted to work here |
| 3. Employee moved abroad for work reasons             | 10. Transportation costs were too high                       |
| 4. Employee does not see a career within the industry | 11. Family responsibilities meant they had to leave          |
| 5. Employee's salary demands are too high             | 12. Personal Reasons   |
| 6. Working hours were not suitable                    | 13. Other  |
| 7. Employee took government or public service job     | 14. Don't Know   |

one, and if needed the one who most recently left)?

*Open Ended; use pre-codes #1-14*

F11. How available are high-quality, professional training services?

*Not available at all*    1    2    3    4    5    6    7    *Widely Available*

Provided inside your firm


Provided by the Government

Provided by Private Institutions

F12. To what extent can companies find people with the skills required to fill their vacancies?

*Not at all*    1    2    3    4    5    6    7    *To a great extent*

--	--	--	--	--	--	--

F13. To what extent is pay related to employee productivity?

*Not at all*    1    2    3    4    5    6    7    *To a great extent*

--	--	--	--	--	--	--

F14. To what extent do laws and regulations allow flexible hiring and firing of workers?

*Not at all*    1    2    3    4    5    6    7    *To a great extent*

--	--	--	--	--	--	--

F15. How would you assess the quality of vocational training?

*Very Poor Quality*    1    2    3    4    5    6    7    *Very High Quality*

--	--	--	--	--	--	--

F16. How restrictive are laws and regulations related to the hiring of foreign labor?

*Not at all*    1    2    3    4    5    6    7    *Very Restrictive*

--	--	--	--	--	--	--

**“Connectedness”**

Question	Response Parameters
<p>G1. Does your business collaborate regularly with other businesses?</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Collaborate Extensively</li> <li><input type="radio"/> Collaborate Periodically</li> <li><input type="radio"/> Collaborate Rarely</li> <li><input type="radio"/> No B2B Collaboration</li> <li><input type="radio"/> Do Not Know</li> <li><input type="radio"/> Refused to Answer</li> </ul>
<p><i>(Check One)</i></p>	
<p>G1i. if yes, with which companies do you collaborate the most?</p>	<p>I. _____ Record Verbatim and Post Code</p> <p>II. _____ Record Verbatim and Post Code</p> <p>III. _____ Record Verbatim and Post Code</p>
<p><i>(May name up to 3)</i></p>	
<p>G2. Which company in Jordan do you most admire, and why?</p>	<p>➤ (which) _____ Record Verbatim and Post Code</p> <p>➤ (why) _____ Record Verbatim and Post Code</p>
<p><i>(May name up to 3)</i></p>	
<p>G3. Does your business work with any trade associations or other organized interest groups?</p>	<ul style="list-style-type: none"> <li><input type="radio"/> Yes</li> <li><input type="radio"/> No</li> <li><input type="radio"/> Do Not Know</li> <li><input type="radio"/> Refused to Answer</li> </ul>
<p><i>(Check one)</i></p>	

G3i. If yes, which organizations or interest groups do you find to be the most helpful or knowledgeable?

*(May name up to 3)*

G4. Does your business work with, or receive services from, any government agencies or institutions?

*(Check one)*

G4i. If yes, which government agencies or institutions do you find to be the most effective? knowledgeable?

*(May name up to 3)*

G5. Has your business received support or assistance from any

- I. \_\_\_\_\_ Record Verbatim and Post Code
- II. \_\_\_\_\_ Record Verbatim and Post Code
- III. \_\_\_\_\_ Record Verbatim and Post Code

- Yes
- No
- Do Not Know
- Refused to Answer

- I. \_\_\_\_\_ Record Verbatim and Post Code
- II. \_\_\_\_\_ Record Verbatim and Post Code
- III. \_\_\_\_\_ Record Verbatim and Post Code

- Yes
- No
- Do Not Know



international organizations in Jordan?

*(Check One)*

G5i. If yes, please name the organization(s) that you have received support or assistance.

*(May name up to 5)*

G5ii. If yes, can you please describe any support or assistance you received that you found to be particularly helpful or valuable?

*(Limit to 2 Examples)*

G5iii. If yes, can you please describe any support or assistance you

Refused to Answer

I. \_\_\_\_\_ Record Verbatim and Post Code

II. \_\_\_\_\_ Record Verbatim and Post Code

III. \_\_\_\_\_ Record Verbatim and Post Code

IV. \_\_\_\_\_ Record Verbatim and Post Code

V. \_\_\_\_\_ Record Verbatim and Post Code

I. \_\_\_\_\_ Record Verbatim and Post Code

II. \_\_\_\_\_ Record Verbatim and Post Code

I. \_\_\_\_\_ Record Verbatim and Post Code

II. \_\_\_\_\_ Record Verbatim and Post Code

received that you found to  
be of little or no value?

*(Limit to 2 Examples)*

## **ROLES AND RESPONSIBILITIES: EVALUATION TEAM MEMBERS**

### **Robert Travers:**

Team Leader responsible for methodology preparation, allocation of team responsibilities, ensuring international best practice and quality standards applied, participation in key interviews, data gathering, data analysis, best practice case studies, recommendations and report writing.

### **Helen Van Wengen:**

Subject matter expert (tourism) responsible for tourism inputs, advising on stakeholder selection, tourism trends, participation in and recording of interviews, supervising focus groups, survey interpretation and participation in data analysis, recommendations and report writing.

### **Rajan Kapoor:**

M&E & economics expert responsible for input on banking, investment and M&E issues, liaison with USAID and MSI Head Office. Participation in methodology preparation, survey analysis, recommendations and report writing.

### **Afnan Al Hadidi:**

M&E & project management expert responsible for liaison with BEST and advisory support on best practice in evaluation techniques and assessment of project management. Participation in interviews in Arabic and supervision of focus group research in Arabic.

### **Ragheb Fityan:**

M&E expert with responsibility for analyzing DevResults and advising on BEST monitoring system and other trend data analysis. Participation in interviews in Arabic and supervision of focus group research in Arabic.

### **Bandar Al Huniti:**

Research assistant supporting the team with desk research, logistics, interviews in Arabic.

## ANNEX C: BEST IMPLEMENTATION PLAN SUMMARY

The Implementation Plan proposes the following themed activities:

- **Sun and sand:** Noting Aqaba’s considerable potential and current challenges the plan proposed (only) to work with the Bernice Beach Club to develop a private beach. The logic outlined is that

“Berenice’s offering of wider access to their beach facilities at highly competitive packages, complimented by enhanced international marketing, will enable Aqaba to promote itself as a popular and affordable beach destination that will cater to growing all-inclusive markets from Russia and beyond.”

- **Historical and cultural:** Noting that these are recognized strengths that need to be further built upon by improving the visitor servicing and the sustainable utilization of Jordan’s cultural and heritage assets BEST planned to work with private sector partner, JoHistory, to enhance the company’s chariot race performance at the Jerash Hippodrome, implement a marketing and outreach campaign, and support their fund raising activities. This activity would also compliment BEST’s envisaged support to other historical re-enactment activities at Wadi Rum and either Shobak or Petra; together resulting in elevating Jordan as a destination with international historical appeal. BEST also planned to support Jerash as a destination with an improved product offering at the archaeological park.
- **Faith-based tourism:** The plan notes that Biblical tourism can become one of the flagships of Jordan’s inbound tourism generating increased spend, employment opportunities and benefits to communities in and around sites. Illustrative activities mentioned are
  - BEST supporting the trade and JTB in organizing a major familiarization trip to Jordan focused on faith travel by hosting tour operators, agents and media from key source markets, primarily North America.
  - The plan also notes that other preparatory sales trips and promotional outreach will also be supported and possibly a faith tourism conference in Jordan.
- **Adventure and eco-tourism:** Noting the potential of trekking and the good work of the Royal Society for the Conservation of Nature (RSCN) to date, in order to better promote Jordan as an eco and adventure tourism destination, BEST proposed supporting the development and promotion of Jordan National Trail. BEST highlighted that the Jordan Trail still requires great efforts to maximize its exposure and economic benefit through sound management and operations. Activities were to
  - Work with the newly registered NGO on the startup phase and on building their operational capacity.
  - In Year I, BEST would select two potential segments for first-phase development and explore potential economic opportunities for local

communities to develop businesses and services along these segments. Furthermore, BEST considered working with JTB to produce a custom Adventure Travel Map in conjunction with National Geographic to highlight this and other adventure trails. Further activity was not outlined in the 5-year plan.

- **MICE:** BEST's strategy for MICE was to build on previous USAID investment by supporting JTB and the trade in the development of the MICE sector. BEST proposed to create sales collaborations between clusters of accommodations and service providers to prepare bids for regional and international meetings and conferences. In particular, BEST proposed forging partnerships with major Aqaba developments that will have conference space available. It was also proposed to support the Mountain Breeze Resort in Amman, which was planning to enhance and diversify their product offering to cater to regional and international MICE business, by developing a new meeting space, creating fun and engaging experiences inside the resort, as well as with local communities around the area.
- In terms of the **regulatory and operating environment** for tourism, BEST states that the updated National Tourism Strategy will articulate a shared vision to further develop the sector. It states that during the first year of BEST, and as an outcome of the National Tourism Strategy update, activities will be started that will lead to improvements in the enabling environment for business growth and investment. These include improving tourism policy, regulatory and administrative weaknesses, some of which have been highlighted in the World Economic Forum (WEF) Travel and Tourism Competitiveness Index. Based on consultations, possible Year I policy and procedural enhancements included:
  - Instructions for enabling new site management bylaw
  - A nationwide updated restaurant classification system
  - One professional bylaw developed for adoption (tour guides by-law)
  - Improved Tourism Committee operations via transparent and standardized processes
  - Development and promotion of travel agents' guidebook for visitor handling and entry into Jordan
  - Development of a guide to motorcycle tourism in Jordan
- The policy regarding potential areas to be pursued for **incentives to investors** were to be explored following conclusion of the National Tourism Strategy. Suggestions mentioned related to designating part of the Petra region as a special investment zone eligible for deeper tax incentives. Other ideas include possible concessions for "spurring investment in regions outside Amman".
- In order to **improve public institutions**, the project planned to support MOTA (and potentially JTB) to attain better King Abdullah Award for Excellence scoring as Year I activity.
- On **gender** BEST proposed partnership with the USAID Gender Empowerment Project (Takamol) and various Jordanian women-focused institutions to promote women in leadership roles and address institutional biases in the industry that inhibit progress. By Year 5, BEST aims to double women's direct participation in the tourism workforce, to at least 10,000. Other specific activities that BEST proposed undertaking to address gender concerns are as follows:

- Develop a practical internship program as a first job placement initiative for women. (A specialized internship program to be developed to provide paid on-the-job training for students enrolled in tourism and hospitality programs in colleges and universities).
  - Conduct an assessment of industry-based practical internships schemes and engage industry representatives to advise on the likelihood of success of a national tourism sector internship program.
  - Develop part-time employment program for university students, focusing on females.
  - Design a part-time employment program for college and university students to promote tourism as a viable career option for subsequent launch with Jordan Restaurant Association (JRA), Jordan Hotel Association (JHA) and partner education institutions. A partner hotel and restaurant will be identified to pilot the program.
  - Support MOTA implement Gender Equity Seal with the UN Women. BEST will investigate continued willingness of UN Women to implement its Gender Equity Seal in Jordan. Based on availability and UN Women interest, BEST will work with MOTA and tourism associations to promote the Gender Equity Seal to tourism establishments. BEST will seek USAID facilitation with UN Women, as the organization has been slow in responding.
- For **secondary destinations** BEST proposes to develop a Jordan-specific tourism development model based on Mexico's successful *Pueblos Magicos* (Magical Towns) tourism development model. Illustrative interventions that BEST aims to undertake to address these product development constraints over the next 5 years are outlined for the following locations. Nothing World Bank and other interventions the plan states that BEST will work closely with relevant working groups to engage the community in the planning process and explain the financial benefits of site development. BEST will identify private sector funding to deploy free Wi-Fi coverage in key archaeological sites to enhance the visitor experience and promote Jordan in real time through social media networks of hundreds of thousands of international visitors. The plan states that BEST will work with organizations such as RSCN, Jordan River Foundation, and the King Hussein Foundation to engage local communities, using mechanisms such as Mexico's Magical Town's model; and that BEST will engage with MOTA, JTB, DoA, RSCN, and ACOR, along with the new public-private Site Management Council enabled by the recently passed bylaw to identify, develop, and conserve assets. To build private-sector support, BEST will proposed to use data-driven analysis from the Tourism Research Center to show market potential.

Actives were proposed, and *potential investors identified*, in the following locations:

- Primary sites –
  - **Amman** (Jordan Museum, Amman Guided Walking Trail);
  - **Dead Sea** (site plan focusing on drawing visitors out from hotels to extend stays and bring economic benefits to nearby communities and promote new investments);
  - **Aqaba** (historic church interpretation, Sharif Hussein House, Aqaba Fort, Bernice Beach);
  - **Petra** (significant interventions were proposed here: continuing to work with PDTRA to diversify the tourism product and create economic opportunity for the locals by introducing, for the first time, within Petra region the concept of

ecol-odges. Building on previous USAID support to Petra, BEST will extend technical support to help PDTRA fast track a number of strategic projects for the Petra Archaeological Park including the development of the Petra Museum, introducing the back exit road shuttle system as well as developing site experiences that enhances visitor appreciation of the site. It proposed supporting Petra Archaeological Museum planning for JICA implementation, upgrading visitor management, and providing long term conservation advisory support at Petra Archaeological Park); <sup>39</sup>

- **Wadi Rum** BEST planned support the Jordan Heritage Revival Company (JHRC) to create and manage heritage activities on iconic Jordanian sites such as Wadi Rum, Petra and Shobak. It also proposed enhancing standards of desert camps (under ASEZA) and enhancing standards for non-desert camps. Camps outside of the Wadi Rum reserve (under MOTA). Also BEST proposed coordination with RSCN to incorporate environment-friendly standards.
- Secondary destination activities (the actual focus of the contract) relate to
- **Marketing:** Activities in support of more effective destination promotion by JTB and the private sector trade were planned as follows:
  - Support JTB destination marketing capacity. BEST will work with JTB to consider new experiences or approaches that may be suitable for JTB to adopt. As efforts are needed in the immediate term to help JTB return Jordan to growth, BEST will deploy rapid capacity enhancement for JTB via the TPF by embedding international experts to work with current JTB staff on a knowledge transfer basis for destination marketing, communications, research, e-marketing and MICE.
  - BEST may organize a series of educational and training programs for JTB staff to enhance their world knowledge and marketing prowess. These may range from short sessions to more intensive retreats.
  - Stemming from joint assessments with JTB, BEST will work with JTB to update its marketing strategy.
  - BEST will support the development of JTB's tourism research department by providing short-term expertise and building internal capacity. Support will include research planning and procurement of market research prioritized with trade and JTB consultation.

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<sup>39</sup> UNESCO in 2017 has raised serious concerns about recent and planned development impacting Petra's outstanding universal values.

- In year 2 BEST will work with JTB and industry stakeholders to plan the brand revitalization process that will focus strategic marketing to high-value source markets, and promote collective marketing through unified market engagement by public and industry actors
  - In Years 2/3, BEST will support JTB in engaging its I I market-based representatives to collect data on market preferences to inform development of a brand that resonates with target markets. The brand will be promoted through multiple channels; opinion leaders such as the Royal Family will be engaged to promote a stable and desirable image of Jordan. BEST may support content development via grants featuring Jordanian sights and its multitude of authentic experiences.
  - Subject to agreement of MOTA/JTB and ASEZA, BEST proposed to support ASEZA and/or major development companies to setup a destination promotion and sales organization in Aqaba, including its Open Skies policy.<sup>40</sup>
  - The project would seek to expand Jordan's social media presence to enable wider reach and quick and direct conversion tools by working with JTB on a campaign with TripAdvisor. BEST will also investigate adding a travel conversion component to catalyze bookings of visitation options or specific products and experiences.
  - BEST will work with JTB and trade on developing their understanding of how e-marketing, bookings and sales, across multiple platforms, and increase their awareness on the latest digital tools that can be plugged into JTB's marketing efforts.
  - For smaller and rural establishments, BEST will introduce Air BnB for expanded sales.
  - Facilitate cooperative marketing by working with JTB to expand cooperative marketing to incentivize private sector investment. Travel agencies, tour operators, and hotels will be invited to apply for a funding match for marketing campaigns promoting Jordan through the TPF.
  - Through TPF, BEST will work with JTB and the trade to increase cooperative marketing opportunities in priority markets. Another benefit of cooperative marketing is demonstrating to GoJ that the private sector is a partner in destination marketing investment.
  - BEST will work with the JTB and the tourism trade to capture and quantify private sector destination promotion activities to assist JTB and the trade in demonstrating to GoJ private sector investments made in destination promotion.
  - BEST will increase JTB's cooperative marketing funding to 40 percent by project's end.
  - Organize familiarization trips for influencers.
  - To promote Jordan as a destination for tourism, conferences and filmmaking, BEST will work with various partners, such as JTB and the Royal Film Commission (RFC), to organize a familiarization trip for market/niche-specific influencers that have been prioritized by the trade and JTB.
- Under **access to finance**, BEST plans to work with private banks to identify opportunities to incentivize increased access to finance for SMEs, for example, by raising banks' awareness of stable financing opportunities outside of primary areas. In Year 1, BEST proposed to sign

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<sup>40</sup> BEST noted that JTB is hesitant to see such a concept materialize, however a possible scenario is allocating \$500,000 in TPF funding to leverage not less than \$1.5 million in investors and ASEZA funds was suggested.



memorandums of understanding (MOUs) with banks that have SME lending programs, such as the Housing Bank, and assist them with credit manager training and loan policy review, linking them to support from USAID's Loan Guarantee Program. BEST will planned to design tourism loan products by identifying financial institutions to pilot tourism-specific loan products with enterprises in the tourism value chain. Additionally, through awareness programs, BEST sought to ensure that tourism sector SMEs apply for financing from banks supported by the USAID Loan Guarantee Facility such as The Housing Bank. BEST will also link SMEs supported by other project interventions, such as the TPF, to participating banks.

- In terms of **Institutionalization of Data Collection**, in order to address this gap, BEST plans to conduct the following activities:
  - Collect and analyze initial tourism sector data to inform product
  - Facilitate implementation of International Tourism Visitors Survey in 2016: BEST will support GoJ in designing, conducting and analyzing the survey for subsequent decision making by policymakers, investors for product development and marketers to inform promotion. BEST will facilitate creation of a steering committee of representatives from MOTA, JTB, DoS, MoI, JHA and other interested parties to guide the execution of the 2016/17 TSA and related surveys.
  - Establish a Tourism Research Center. BEST will work with stakeholders to explore viability of developing a tourism research center (TRC) that will produce research and analyses to be used by the tourism industry and policymakers. BEST will build the capacity of the TRC to conduct research on visitor profiling, trip preferences, industry labor needs and other competitiveness factors. The TRC can also conduct an assessment of product development and investment needs at primary and secondary sites. The TRC can also partner with the Department of Statistics to produce the International Visitors Survey that will feed into the Tourism Satellite Accounts.
- Regarding **universities**, BEST proposes to develop a formal human resource strategy and implementation strategy jointly by private sector employers and education/training providers as a priority component of the National Tourism Strategy. It notes that specific efforts are needed by higher education institutions to share curricular approaches, course materials and innovative approaches. Industry needs to partner with educators by providing mentorships, guest lectures and high quality internships. To facilitate this collaborative process, it proposed bringing together employers and educators with key government stakeholders at the national conference in order to achieve a consensus on steps to be taken to improve the performance of colleges and universities to provide the high quality talent needed for Jordan to compete in the global, regional and local tourism marketplace.

## ANNEX D: PERFORMANCE MONITORING TABLE

TABLE X: BEST INDICATORS TO 30 SEPTEMBER 2017

#	Indicators	Achievements	Target (Year 1 & 2)	Target (Life of project)
1	Number of jobs created as a result of United States Government (USG) assistance (USAID PMP I.a)	186	150	700
2	Percentage change in female participation in tourism workforce (TCI)	1.89%	7%	14.2%
3	Number and percent increase in tourism arrivals (TCI) (NTS)	0.82% (3,742,844)	1% (3,749,356)	18.8% (4,410,134)
4	Percent change in tourism receipts (TCI)(NTS)	-0.62%	0%	15%
5	Private sector investment in targeted sectors increased as a result of USG assistance (USAID PMP I.b)	96.7 million	11 million	50 million
6	Ratio of private sector to public sector funds in USG- supported PPPs (USAID PMP I.d)	23.4	-	-
7	Number of working groups formed to resolve specific issues	42	24	30
8	Number of national-sub-national institutional coordination activities on tourism- related initiatives implemented	7	2	8
9	Change in score on the TCI	3.6	3.2	3.99
10	Number of laws, policies, strategies, plans, agreements, administrative processes, or regulations in development stages of analysis, drafting and consultation, legislative review, approval or implementation addressing private sector competitiveness officially proposed,	12	7	10 (6 per contract)

	adopted, or implemented as a result of USG assistance (PMP 1.1.a)			
11	Number of participants completing USG funded business training	850	70	330
12	Number of new incentive programs created for implementation by the GoJ to Spur tourism sector investment and Job creation	1	0	1
13	Percent of Jordanian business reporting ease in accessing GoJ tourism incentives and tourism promotion efforts	18.75%	20%	80%
14	Number of partnerships implemented between the GoJ and the private sector to increase foreign direct investment (FDI)	0	0	3
15	Person hours of training completed in business enabling environment supported by USG assistance (PMP 1.1.3.c/ F 4.6.1-16)	1,732	5,184	10,184
16	Number of project-supported business associations and chambers in the tourism sector strengthened, more-inclusive and financially sustainable	7	5	21
17	Number of capacity building recommendations from JTB strategy supported	9	4	10
18	Number of performance improvement recommendations undertaken based on King Abdullah II Award for Excellence assessment report	9	2	7
19	Number of top tourist destinations improved to provide enriched tourist experience	13	1	5
20	Number of GoJ and private sector entities receiving research center tourism data and analytical products that use it to support decision-making	0	100	3,100
21	Number & value of tourism concessions developed	6(\$596,257)	0	5 (\$850,000)

22	Number of hotels, restaurants, and desert camps classified (TCI)	153	243	698
23	Number of new tourism products developed	5	5	10
24	Number of primary site offerings that have been expanded and linked to hotels	3	6	13
25	Number of new trip circuits and routes developed	14	2	5
26	Number of university tourism-related program curricula developed or improved to match the skills demanded by the market	2	2	6
27	Number of students completing the developed/improved tourism-related program curricula	189	0	600
28	Percent of actors in source markets that perceive Jordan as an attractive tourism destination as a result of effective marketing by JTB & Jordan private sector	0	2%	22%
29	Number of travel agents and tour operators attracting tourist to Jordan	14	10	85
30	Number of key source markets portraying Jordan as a desirable and stable tourist destination in the media	6	30	100
31	Number of source market residents targeted by marketing and promotion campaigns	423.5 million	43 million	134.8 million
32	Percent of cooperative marketing used by JTB to fund marketing activities	0	15%	68%
33	Number of marketing and promotion plans developed for JTB	1	1	4
34	Number of sales and distribution channels in source markets maintained or strengthened	349	10	710
35	Number of travel agents trained	285	400	1,000
36	Number of new markets in which travel agent network is promoting Jordan	58	2	18

37	Number of firms that have successfully accessed bank loans, private equity (or both) as a result of USG assistance (PMP 1.1.b) (NTS)	18	10	65
38	Amount of equity invested in tourism activity assisted firms	10.5 million	568,000	4.02 million
39	Number of ventures supported by start-up capital funds	4	4	50
40	Number of new loan products targeting tourism sector firms introduced by banks	4	2	4
41	Number of participants trained in financial management and business plan development	163	75	330
42	Number of women and girls benefitting from new or improved USG-supported social services targeted at women and girls (PMP 4.3.a)	410	23	109
43	Percentage of female participants in USG-assisted programs designed to increase access to productive economic resources (PMP 4.3.a / F GNDP-2)	14.2%	20%	50%
44	Number of vulnerable people with increased access to productive economic resources as a result of USG assistance (Mission PMP 1.2.4.a)	21	-	-

Source: BEST

## ANNEX E: CASE STUDIES

### PATHWAYS TO PROFESSIONALISM & THE IHG ACADEMY



Sources: < [www.facebook.com/JordanPTP/](http://www.facebook.com/JordanPTP/) & < [www.siyaha.org](http://www.siyaha.org) >. Accessed 16 December 2017

### BACKGROUND

Launched in Quarter 2 of BEST (2016) the Pathway to Professionalism scheme is an innovative labor market initiative that responds to current challenges faced by hospitality and tourism employers in Jordan. The scheme is designed to create jobs, enhance professionalism and improve standards at hotels in Jordan, through an accredited and certified scheme based on national professional standards and structured training in the workplace.

Pathways to Professionalism is a partnership between the MOTA, the Ministry of Labor, all the 5-star hotels in Jordan and one 4-star hotel, theVTC and is supported by BEST.

According to the scope of work the purpose of the BEST intervention is to ‘provide support to increase economic growth and job creations in Jordan’s tourism sector’. The activity is expected, amongst other outcomes, to result in an enabling environment supportive of competitiveness in the tourism industry.

In accordance with USAID/Jordan goal for the 2013-2017 as set out in the USAID Country Development and Cooperation Strategy, the activity was to support the achievement of:

- Development Objective 1: Broad-based, inclusive Economic Development Accelerated
- Intermediate Result #1: Private sector competitiveness increased
- As well as increase female participation in the workforce by 15%

Providing on-the-job training for hotel employees, the program offers students the opportunity to obtain practical training in the hotel they work at, to later take a final exam in order to receive national certification and credit for professional development. Departments of focus are housekeeping, service

and kitchen. More departments including front office may be offered going forward.

The Pathways to Professionalism program is expected to result in positive change over time, in terms of how training is managed within the tourism industry in Jordan. Employers will have more ownership with regards to developing professional skills for entry-level recruits and employees will have the opportunity to continue their education in tourism and hospitality. The success of the Pathways to Professionalism will be dependent upon the commitment of the employer, the employee and external stakeholders such as the VTC. On completion of each level of training the employees can also apply for the national Council for Accreditation and Quality Assurance (CAQA), professional license. The license offers internationally accredited recognition for staff.

Employees selected must be over 18, people who did not complete their education, or unemployed at the time of application. Existing employees cannot be transferred onto the scheme, and it is supposed to be focused on Jordanians. We note that this is not always the case in reality and for the most part existing staff are being trained to achieve higher levels. The IHG Academy pilot however, does appear to recruit school people who did not complete their education, or the unemployed. Some of the staff trained additionally are non-Jordanian. At this point an agreement appears to have been made with USAID to include foreign labor without discriminating on the basis of nationality. As a result the graduating ladies in Aqaba, based on their names, were noted to be predominantly foreign labor.

There does not appear to have been a gender specific effort under Pathways to focus on women to date. However, there seems to be an intent to become more pro-active in this regard going forward as highlighted by the various (country) General Managers (GMs) and Human Resources (HR) Directors we interviewed.

Pathways to Professionalism was born after an initial trial at the Dead Sea in collaboration with IHG, under the name IHG Academy. IHG Academy is a global initiative and operates across the world. In Jordan, IHG, supported by BEST, the Jordan Hashemite Fund for Human Development (JOHUD), the Amman Chamber of Commerce and others piloted the Pathways to Professionalism initiative through a pilot that was called the IHG Academy. The initiative focused on initiatives to advance the skills of those who do not have the ability to attend university. The IHG Academy pilot directly addressed unemployment issues in the Jordan Valley by offering Jordanian youth professional training so they can begin careers as skilled workers in the hospitality industry. The Academy spread awareness among nearby communities to encourage more youth to consider hospitality and to encourage young women as well. After the initial qualifying training under the Academy, the trainees are given the opportunity to further their training in the Pathways to Professionalism scheme which covers three models, whereas the Academy just covered one.

IHG Academy is a global program. IHG Dead Sea hotels (Crowne Plaza and Holiday Inn) tailored the global initiative to Jordan and managed to get funding from BEST as well as the Amman Chamber of Commerce. The grant covered new computer lab and other acquisitions and technical support to develop the Dead Sea focused program. The initiative is not active at present, following a change in IHG group management, but there are plans to revive it if funding is available.

Under this initiative the local community was engaged and new trainees were recruited into the hotel. There they underwent one year's training prior to being engaged in paid employment (there were quite a number of drop-outs and replacements during the year, as was to be expected in this local, very rural

and poor economy). Local transport for recruits is also an important element of the initiative, because in this area many people do not have access to transport. The Chamber paid for basic insurance and social security and BEST helped with supplies and technical assistance. (BEST-SIM7-IHGI-015 – job creation grant).

The program brought some 25 new jobs to the hotels (between Crowne Plaza and Holiday Inn Dead Sea). One was a woman: She left however.

For next year IHG Academy wishes to engage 30 women from the community and put them through the same program. IHG says they are dedicating time, effort and resources but that they need donors to support the trainees during the year that they are not yet working. If successful the initiative will create 30 new jobs for females.

The IHG Groups says it will need a dedicated bus transfer and possibly a solution to look after children. The social security also needs to be paid as well as liability insurance. At present the Chamber says they are going to reduce funding from JOD 90K (US\$ 127K) to JOD 45K (US\$ 64K) and BEST too has made mention that they may reduce funds. Without these funds the HR director says they cannot survive and the initiative at the Dead Sea will not be sustainable.

The Academy concept is good in areas where awareness and paradigm shifts are needed from the local community to enter in to hospitality - and those places coincide with areas where hotel supply is big - like in Dead Sea and Aqaba. Without an awareness campaign and special support it is difficult to engage the communities. The two programs are different but they could dovetail.

## FACTS

### Findings 5-star General Managers and HR representation – KII

Four stakeholder KIIs were conducted with four 5-star general managers (GMs) including the outgoing and incoming Chair of Pathways to Professionalism; as well as representatives of their HR teams. BEST was said to have been pivotal in the creation, communication, and coordination of Pathways to Professionalism. Some hoteliers were more aware than others in their perceived understanding of BEST's exact role. In general, the feedback of BEST support was overwhelmingly positive. Dr. Joseph Ruddy and his team have been commended for their pro-activity and tenacity to resolve issues and BEST has been a strong and reliable partner as expressed by the vast majority of the interviewees. BEST and the USAID Mission have been noted to be actively involved in and fully supported graduations and brought Pathways to Professionalism from inception stage to the forefront, as a full-fledged NGO-private sector partnership. BEST has offered technical support and no funds were exchanged to hoteliers under Pathways to Professionalism.

Hoteliers did mention a need to have continued updates from BEST on support for the potential future development of the program and welcome closer communication in this regard.

Findings from KIIs with the GMs and their teams also noted that VTC seems to be pulling back and the hotels themselves are trying to step in and 'audit each other'. Concern was expressed in this regard, even though the hotels are proactively trying to overcome the challenge by testing each other's staff in their properties.



Other opportunities included the need for independent and ongoing audit to safeguard the integrity of Pathways to Professionalism; as well as the need to follow up on individuals and their progression as a result of Pathways.

Concern was raised that there is no focus on English at VTC level and standards of English are “non-existent or very poor”. Without exception all KIs said there was a need to prioritize hospitality tailored English at VTC/entry level, with the outgoing chair stating, “If no English is spoken, no matter how well trained, we cannot employ. All focus and energy should be on teaching English to the right standard”: Without exception this was considered a red flag by those interviewed.

Consultees under the program noted no focus on female participation so far.

It was noted that having Pathways to Professionalism running alongside IHG Academy is reason for confusion. One GM mentioned: During a KI with the former outgoing Chair of Pathways to Professionalism it was noted, “Everyone is free to do what they wish and pursue but I do believe an integrated program (Pathways) is better than having parallel programs running alongside each other (IHG Academy).

During subsequent communication with the Pathways to Professionalism lead for BEST, the team was advised that: “The two programs (Pathways to Professionalism and IHG Academy) are different. However, following the successful pilot of the IHG Academy program, it will be integrated into the Pathways to Professionalism scheme”. (Dr. Joseph Ruddy – BEST)

One of the GMs noted: “Linkages are missing in the program”. Other organizations and institutions offering training in hospitality at entry level in addition to VTC are Les Roches, the Universities of Jordan and Yarmouk (through their relatively new hospitality program additions) as well as Luminus Education. Currently Pathways to Professionalism does not yet fully engage with these institutions in a strategic manner. Interaction from hotels is ad hoc and individually driven. It was noted there might be an opportunity to work collaboratively with institutions that operate within the same industry as part of a linked value chain approach. BEST partnership with the Jordan Hotel Association appears weak with a difficult relationship with senior Hotel Association staff evident.

All GMs suggested including additional departments beyond housekeeping, kitchen and service to include for example front office. With time it was felt that middle management positions too needed to be considered and engaged with to ensure quality middle management in place and avoid brain drain as employees feel stuck at middle management level and move abroad to pursue better/other opportunities.

On the requirement for staff in the industry, the GMs contributed:

The number of people needed in hospitality over the next years will triple by 2019 (Country GM Kempinski) and the need for staff is tremendous. The quota for foreign staff will significantly drop, further driving the need to engage the Jordanian/local workforce. With the huge hotel supply coming up in Aqaba including mega resorts, the growth of hotels in Amman and the number of properties at the Dead Sea, the need for staff is immense.

One GM said:

The number of qualified staff at present will not be able to offer the services needed and the industry will be left with fully built and opened hotels and a lack of available qualified staff to hire. In addition the foreign labor for Aqaba is said to be reduced in the short term, further increasing the need to train locally engaged resources to gain employment within hospitality across the Kingdom, in particular in Aqaba, Dead Sea and Amman

“In addition to training entry level personnel, there is a need too to address mid management resources for the hotel industry going forward”. GMs offered that hotels would be highly supportive and engaged to work towards a national Hospitality Academy in Jordan, which would offer tailored education, benefit from international lecturers and positively affect the perception of an education and career choice in hospitality.

The GMs finally noted that training and accreditation should expand the 5-star category and fully engage with 4 and 3 star hotels as well as restaurants to ensure quality; standards are extended beyond the category. This is an important point for BEST to take on board, as in terms of BEST’s competitiveness focus, the biggest challenges are probably not with 5-star hotels. The Jordan Hotel Association was critical of BEST for “only focusing on big players” and “ignoring” the majority of its members. This illustrates the conflict between BEST’s focus on its jobs target (large hotels) and improving competitiveness overall as suggested in the Theory of Change.

## Conclusion

1. Partnership to Professionalism is moving beyond the confines of the VTC and are being embedded in industry
2. The support team at BEST is proactive.
3. Without adequate English language ability, staff cannot be engaged and trained.
4. Focus on female participation and engagement of women is not an area of focus. No KPIs are set to achieve SMART gender goals under an integrated approach.
5. Clarity between Pathways to Professionalism and IHG Academy is required, and the sustainability of the latter needs attention. Perhaps IHG can contribute more as a CSR initiative as it is unusual for IHG Academies internationally to be grant-aided.
6. Linkages amongst institutions, universities and hospitality players are not in place and few synergies exist
7. There is a huge need for bringing employees in to hospitality to satisfy the need of the industry with its supply needs over the coming years. There is a need to focus on engaging and training Jordanian / local labor going forward with a BEST focus on Aqaba and the Dead Sea outside Amman. (In Amman the desirability of working in hotels is still not fully accepted, especially for females. However, there is less of a challenge in terms of mindset than at the Dead Sea or in Aqaba).
8. The program illustrates a weakness in the Theory of Change and the absence of a vocational training role for BEST, in that competitiveness needs to focus on improving existing employees (Pathways to Professionalism) whereas creating new jobs for untrained new entrants is much more challenging.

## **Recommendations**

### **1. The Role of VTC - Monitoring and Evaluation**

Clearly define role of VTC and gain commitment from them to fulfill agreed role. Support a committed independent M&E body to audit, follow up and assess the Pathways to Professionalism including follow up on gender goals to ensure the integrity of the buy in to Pathways by professional players and actors.

### **2. Clarify future role of BEST**

Regularly engage with stakeholders and invite dialogue and discuss plans going forward, addressing an exit strategy.

### **3. Focus on English**

Graduates without English cannot be developed effectively for work in hospitality, especially the 5 star categories, as this is a minimum requirement and expectation. It is the 5 star properties where many of the employment and development opportunities are. Thus English is critical and should be an area of key focus and energy under Pathways to Professionalism.

### **4. Focus on Gender**

Engage a cross cutting gender specialist who can assess, monitor, evaluate and support the focus on agreed SMART goals to facilitate enhancing female participation in the workforce through multiple initiatives and actions. Focus on gender should be included in all areas of the activity and it is currently not specifically included or highlighted even though it is a major contractual requirement and one of the top three KPIs under Special DO4: “Gender Equality and Female Empowerment Enhanced”.

### **5. Integration / clarity of Programs (Pathways to Professionalism and IHG Academy)**

Pathways to Professionalism and IHG Academy scope, synergies, similarities and differences should be clarified and defined for the benefit of stakeholders and beneficiaries. There appears to be scope for an Academy concept, which is not branded by a specific hotel to be integrated into Pathways. The Academy model appears to have a grant element for a broader scope of technical support than Pathways.

The IHG Academy initiative should be integrated under the Pathways umbrella and be replicated at the two mega resorts in Aqaba and repeat the program with particular emphasis on women, driving awareness within and recruitment from the local communities to enter in to hospitality. BEST to move forward with integration. IHG should be encouraged to adopt this as a high profile CSR initiative.

Pathways program could be sculpted to support training for existing employees and have elements drawn from the Academy concept which focuses on new entries and creates jobs, through awareness and a year training. The program would then encompass the elements of awareness building and driving paradigm shifts in local communities to consider hospitality especially for females. As well as training existing staff, elevating standards, driving advancements and retention in the industry, which does not necessarily mean for retention at a particular property.

## **6. Linkages and synergies**

It is recommended that linkages between various actors are initiated and/or enhanced. Stronger collaboration and communication include working to engage with the various colleges, institutions and universities that offer hospitality courses in addition to ensure the connection with VTC is strengthened rather than the weakening of this link to continue.

We note that BEST is engaging with these stakeholders independently – and an opportunity to drive synergies effectively exists. This is a role BEST may be able to drive and facilitate.

## **7. Engage and train local workforce Refugee workforce**

Focus to be on engaging local workforce. Awareness and acceptance campaign need to continue to engage local communities especially in the Dead Sea and Aqaba as well as focusing on encouraging female participation in hospitality.

The aim is to accommodate local labor over foreign labor without compromising quality standards.

BEST to take a leading role in working towards Syrian integration and opportunities to bring refugee workers in to hospitality jobs to support the great need for resources from the industry on the one hand and the need for work and engagement from the refugee population, willing and wanting to work within hospitality. BEST to take proactive steps.

## **8. Consolidation and broadening of scope**

At this time consideration could be given to include other departments including front desk and guest relations and introduced where hotels have consolidated their team and have fully embraced pathways. BEST to proactively support inclusion of other departments like front office.

In the future it may be worth considering encompassing middle management training and advancement under Pathways, beyond the entry-level focus. In collaboration with hotels to perform feasibility study on establishing The Hospitality Academy to fuel the future of professional hoteliers and employees from within the Kingdom.

## **9. Broaden inclusion**

To meet BEST objectives Pathways to Professionalism should expand to include other hotels as well as restaurants. After successful inclusion of the 4-star hotels, 3 star properties should be engaged to offer an integrated approach. BEST should take a lead on this. A pre-requisite to embracing Pathways to Professionalism is the ability to support the program effectively. A GM and HR department is probably minimum requirements, so BEST needs to consider how it will improve competitiveness in other hotels also.

## **10. Engagement – A leader Champion is needed**

All stakeholders and partners as well as beneficiaries need a lead to champion the program, engage in communication on a regular and proactive basis. In all hotels that are included, the GM as a key lead fully supported by HR director and coordinator. A formalized structure for all stakeholders along with regular engagement and updates, proactive communications and follow up is required and requested.

### **Findings 5 star beneficiaries – focus group – existing employees**

Beneficiaries of Pathways to Professionalism (at IHG hotels Dead Sea – IHG Academy) were also interviewed. One focus group of 7 males participants and one KII with one female participant under Pathways was conducted. A lack of awareness of the project ‘BEST’ was evident, none of the participants knew ‘BEST’, and however all knew about Pathways to Professionalism and had a good idea about what the program objectives. All participants were existing employees. 3 out of 4 were promoted as a result of Pathways to Professionalism training and that there is a proactivity to share knowledge with colleagues who may not have had the opportunity to attend.

Participants indicated that training is key for female employees reducing the dependence of foreign labor. Improved skills and confidence were said to enhance work and promotions.

The participants said there was no follow up from trainers and no certificates received to date. There was no training to improve English skills and no materials to support theoretical training, which was highlighted as an area of challenge.

Under the IHG Academy graduates 28 male participants and one female participant graduated. The female decided to leave the hotel as confirmed by USAID/BEST M&E Specialist.

### **Conclusions**

1. Increase awareness amongst new recruits / students / trainees
2. Follow up with students pivotal
3. Training materials, theoretical content and materials require review

### **Recommendations**

#### **1. Increase Awareness with trainees**

Throughout the Pathways program there is ample opportunity to extend the Pathways to Professionalism program recognition to include BEST awareness. This message needs to be integrated within the training and trainers and monitoring of awareness building should take place. Materials need to reflect the cooperation with BEST and other stakeholders. This will aid the recognition of the donor/IP.

#### **2. Follow Up with students is pivotal**

More consistent follow up from BEST and engaged stakeholders is needed to support the trainees/ beneficiaries. Materials to support the theoretical exams should be reviewed in terms of content / availability. Timely follow up in ensuring certificates are received following graduation in a timely manner is key.

### 3. Review of student materials

Students made reference to the lack of materials to support theoretical exams. Recommended to ascertain the feedback in greater detail and take steps to resolve if needed.



From the start of the Activity until September 2017, 25 females graduated under Pathways to Professionalism program out of a total of 138 graduates (as confirmed by M&E specialist), representing 18.5% female participants graduated. From the 25 names provided, it appears that only one female is Jordanian. The remainder appears to be foreign labor. In follow up on this fact a response was received that USAID at mission level had made a determination with BEST not to discriminate on nationality and that this was part of the agreement with the private sector, though not noted in the original design of the program or M&E system.

#### Quotes

- *The program needs a lead (owner) and goals*
- *VTC is pulling back (and leaving it to the hotels)*
- *Laws and regulations should state you must be certified to work in hotels (you have to be medically tested and we should ad certification)*
- *Training should not only be a 5 star issue (we already train our staff in 5-star hotels)*
- *Everyone is free to do what he or she wish and pursue but I do believe an integrated program (Pathways) is better than parallel program running alongside each other (IHG Academy).*
- *There are many 'missing links' in this program*

- *Tourism is one of the greatest opportunities for jobs in Jordan and youth and women can make a good income*
- *We are here to serve Jordan*
- *Anything that is good for the country we will support*
- *The project has to have a leader and be embraced or else it will not work*
- *From 2018 we will fully embrace the program*
- *We need to develop the hoteliers of tomorrow*
- *All 5-star hotels would support a Hospitality Academy in Jordan*
- *English language in Pathways is key*
- *Communication towards the communities we are targeting is weak*
- *Once the midterm evaluation report is done, we would welcome the opportunity to meet with BEST and learn about the findings to brainstorm how we may move forward together and we recommend meeting with Marriott, Mövenpick, Four Seasons, Sheraton, Hyatt, Kempinski.*
- *The need for qualified staff is tremendous and priority should be on Jordanian employees*
- *Currently we are training existing staff – later on we will train new staff*
- *Pathways offers formal recognition by an official body. This is needed*
- *Pathways to Professionalism is extremely successful. Once consolidated we need to take it to the next level and broaden the program*
- *Our long-term goal is to have all employees certified*
- *Committing to Pathways is the only way forward. If we don't get committed we will have massive problems" (there is a massive need)*
- *Joe (Dr. Joseph Ruddy) is so pro-active. He knows everything and may well be thinking about the opportunities we discussed*
- *BEST kept at it, kept at it – very tenacious*
- *Audit is needed to verify if real training is taking place*
- *We are only scratching the surface*
- *Credit to Philip Papadopoulos for embracing the program and engaging the GMs to drive Pathways to Professionalism*
- *The more we can employ, the better*
- *This is a very young program. What has been achieved over the past 2.5 years is impressive. We must not stretch too far too soon.*
- *Pathways to Professionalism is one of the best things that has happened*
- *Focus and energy should be on English (hospitality) language*
- *It is up to us. We are going to drive this*
- *There will never be a lack of energy from Dr. Joe and the team should build on achievements and develop to become more embedded, robust, effective and efficient at serving stakeholders and beneficiaries, the hospitality industry and Jordan as a country.*

## JORDAN NATIONAL TRAIL



### BACKGROUND

The Jordan National Trail is a walking trail crossing and connecting the length of Jordan from Um Qais in the north to Aqaba and the Red Sea in the south of the Kingdom. The goal for the Jordan Trail Association (JTA) is to serve hikers as well as the local communities along the route. The first priority for JTA has been to work with hikers, guides, volunteers and sponsors to fix the route – noting on the USAID sponsored collateral “The Jordan Trail is still a work in progress!”

The concept for the Jordan Trail originated as a result of a growth in outdoor exploration in Jordan. The Trail concept was originally developed by a number of people and organizations that were integrally involved in the country’s growing outdoor scene.

In July 2015, the JTA was formed to take on the responsibility of the development of the trail and its maintenance, in addition to facilitating its accessibility by establishing strong connections for all concerned and providing comprehensive information regarding the Jordan Trail as a product to focus on in its 5-year Competitiveness Implementation Plan. As of mid-2016, the JTA received a grant from USAID, support from the Jordan Tourism Board and contributions from the private sector in addition to support by many local volunteers that aid the JTA in achieving its goals. The Jordan Trail facilitates in the economic development of local communities through job creation, and the country’s economy to create minimum impact tourism, which promotes an outdoor culture and environmental awareness according to its website.<sup>41</sup>

In December of 2016, the JTA hired the consulting services of Mohammad Asfour to lead the development of a sustainable business plan with assistance from Development Consultant Katie Larson, research services of Ghuzayyah Hijazi, and in collaboration with the board and management teams of the JTA.

According to the scope of work the purpose of the BEST intervention is to ‘provide support to increase economic growth and job creations in Jordan’s tourism sector’. The activity is expected, amongst other outcomes, to result in an enabling environment supportive of competitiveness in the tourism industry and to put Jordan on the international map, offering tourism experiences and engaging local communities along the trail, whilst attracting domestic and international hikers and tourists. It is very relevant to BEST’s focus outside Amman.

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<sup>41</sup> [www.jordantrail.org](http://www.jordantrail.org)> accessed December 16, 2017



In accordance with USAID/Jordan goal for the 2013-2017 as set out in the USAID Country Development and Cooperation Strategy, the activity was to support the achievement of:

- Development Objective (DO) I 'Broad-based, inclusive Economic Development Accelerated' and
- Intermediate Result (IR) #1: Private sector competitiveness increased
- As well as increase female participation in the workforce by 15%. The contract specifically states under special DO4 "Gender Equality and Female Empowerment Enhanced" through focus on identifying interventions with a strong potential to employ women.

## FACTS

### Findings Jordan Trail Association KII's

Two stakeholder KIIs were conducted. The first with the GM of JTA; the second with President individually, later to be joined by GM and Outreach and Community Relationship Manager of the JTA.

#### Grant process

It was noted that The Jordan Trail had been in existence for around seven years before the JTA was formed. The Jordan Trail was considered a Jordanian National Initiative and close consideration was given to moving ahead with the support grant from BEST, as the trail could now be branded as a USAID initiative.

A number of passionate enthusiasts and business entrepreneurs, hikers and supporters had worked together on a voluntary basis and worked hard in forming the early Jordan Trail. After seven years of working a plateau had been reached and an injection of funds to grow the Jordan Trail to the next level was considered necessary. At that time Trail initiators deemed themselves "ripe and ready to go big", and to take that step support was needed. The decision to formalize the Jordan Trail was made and in July 2015 the Jordan Trail Association was established.

Following a complex and intense application process, the JTA was awarded a one-year grant by BEST from April 2016. The fact that the grant was awarded for a period of one year only was a challenge according to the consultees, as it did not allow for strategic planning. With the prospect of only a one-year timeframe, it was difficult to recruit people to join the JTA as their future at JTA was curtailed to one year only, or part thereof.

#### Marketing and Way-marking support

As part of the grant BEST supported JTA with way-marking parts of the trail, business mapping of both hiker and homestay needs, training guides, branding, website design, marketing the trail and gaining market exposure as well as international media coverage including social media and the payment of salaries for key personnel under the first grant. The payment of the salaries of key persons allowed JTA to undertake the work required, and the technical support offered by BEST to enhance the marketing and website are considered to have been excellent. In the early days, apart from the fact that the process of reporting to BEST and endlessly 'justifying' actions and results, the relationship was considered positive.

## **BEST approach**

However, the relationship deteriorated when the engaged consultants delivered work that JTA said was said to be ‘copy paste’ and considered not sufficiently tailored to JTA and their unique circumstances. The recommendations made in the business plan by the consultants did not resonate with the JTA. This included the recommendation to drive revenues to JTA through membership to make the route “sustainable” in a relatively short timeframe. JTA resisted this as it was convinced that the Trail and Association should be inclusive rather than exclusive (the business plan BEST produced envisaged a membership-based approach). JTA felt they were “pushed to get members and pushed to become financially self-sustaining” as noted in a KII with the President of JTA.

JTA felt the ‘closed society membership program’ would negatively impact support from hikers and domestic tourists. The President of the JTA was embarrassed and infuriated by the insistence of having to accept the membership approach and advised the outcome and negative PR surrounding the Trail especially by hikers has had a strongly negative impact affecting all within the JTA.

Other advice from BEST consultants was not considered revolutionary or of great value by the Board of JTA who with their passion, background and business minds became frustrated at having to listen to advice of consultants they fundamentally did not respect in terms of ability to perform and deliver effective recommendations to advance the Jordan Trail as its Board envisions it. JTA suggested changing the consultant, however BEST advised that the consultants should remain engaged until the business plan was complete and delivered and to ‘sculpt’ the findings once delivered.

On reviewing the business plan in detail it appears to the evaluation team that JTA, having worked on the Jordan Trail for seven years prior, was not agreeable to be ‘instructed’ or ‘told what to do’ by BEST. The business plan in principle is a well-considered plan though not produced by adventure travel consultants but rather by well-versed general consultants, albeit with a bias to energy, water policy and membership as well as fundraising.

There have been strong differences of opinion about tiered membership, with various differences of opinion as well as challenges regarding the sense of ownership and a ‘don’t interfere’ attitude, and the relations with the consultants deteriorated. Recommendations made by the consultants were not received well by the JTA. Irritations, frustrations and a deterioration of relations ensued.

JTA complained about a ‘your judgment versus ours’ attitude from BEST, implying that BEST is not sufficiently client-orientated. JTA Board Members experienced more frustration and question why BEST should have a better decision-making ability than well-versed, mature business people on the Board of JTA. As one Mission official put it, the relationship with Jordan Trail was ‘somewhat politicized’ – also stating that perhaps JTA had ‘bitten off more than they can chew’. JTA mentioned that if they were not bogged down in endlessly reporting back and forth to BEST, they could ‘get on with the job’.

It is noted that BEST as a team needed to ensure due diligence and follow process and at times were frustrated that the JTA board and management did not seem as available as they may have been due to the fact that most people at JTA also had other jobs and commitments, slowing down the process.

Also, JTA mentioned that there were ‘many changes at BEST’ in the team looking after the JTA grant and that they spent much time informing new recruits of their work and mission and that time delays

and changes were unhelpful to them focusing on the work in hand. Micro-management was beyond toleration according to JTA.

JTA also referred to the fact that no ‘Adventure or Eco Tourism specialist’ was in charge of the grant. The fact that the BEST team did not seem to know about the issues the Trail faces or have sufficient understanding of where resources were needed and what actions should be prioritized, were further causes for frustration. Both BEST and JTA seemed at loggerheads and JTA is resentful of what they perceive as BEST staff feeling “they own us”. A strained relationship seems to have increasingly developed between BEST and JTA, which is unfortunate for all concerned, and not indicative of good project management by BEST.

The evaluation team understands that JTA has approached USAID mission directly stating their discontent with the relationship with BEST and requesting direct support from the USAID mission to support the Jordan Trail. The request was made to have a direct activity with USAID and for the Jordan Trail to ‘stand alone’. The team understands that the Mission denied this request. However, having aired JTA frustrations at Mission level, without the presence of BEST, and with the departure of the outgoing CoP for BEST, JTA feels that relations seem to have improved and a ‘fresh start can be made’.

A grant for a further two years was signed and delays were minimized. JTA mentioned that even with the two year grant commitment, the Jordan Trail would not be sustainable after the 2 -year term. Even though JTA is pleased to have extended the grant under a renewed two year commitment the JTA advises they will need more time to become a stand-alone operation, noting that most national trails receive government funding throughout their life. JTA management notes that there are three phases in trail development, spanning inception stage, growth stage and maturity stage – stating there is at least a 5-year minimum requirement to get the Jordan Trail to maturity stage, and that it could take ten years the Trail to be fully established.

### Synergies

In terms of working in collaboration with partners including USAID-LENS and RSCN there does not appear to have been any proactive role from BEST to drive possible synergies and efficiencies. JTA mentioned that they wanted to pursue a relationship with LENS in order to support Homestays within local communities through tour operators along the Jordan Trail. However the evaluation team understands that JTA was instructed not to meet with LENS. JTA is of the view that there is “a lot of ‘politics and dysfunction at the Mission.

The President of the JTA remarked that BEST had been the catalyst to progress, but that in retrospect they may have been able to grow organically at the same pace since 60% of time was wasted on needless tasks and tedious reporting and micro-management by BEST, which is a reason for key frustration.

### Current Needs

It is noted that where BEST is agreeable to spend grant funds, but these may not be match JTA’s actual areas of need: JTA says it needs support to pay the staff to do the heavy work along the Trail, but BEST is said not to want to support HR/permanent staff’.

JTA noted, “You can employ many consultants, but we need to maintain institutional knowledge. Not

everything can be known and done by a consultant. We need staff that stay. Who learn and allow JTA to become sustainable with institutionalize knowledge. We need staff who are aware how things are done”.

In terms of consultants BEST is said to have advised that JTA can “have as many as you like’ but don’t we agree to support permanent staff. JTA insist they need staff, not consultants, to engage with local communities and to maintain and develop the trail, which is ultimately in the hands of Mother Nature. The Trail can collapse, and may need to be rerouted etc. This requires work and staff is needed. “BEST does not understand our priorities”. With a fallen down Trail we don’t have a product. The first priority is the Trail. “And fixed staff with boots on the ground. Boots on the ground is what we need”

In terms of paradigm shift of communities along the trail, it was noted that some communities along the trail are “territorial people” and feel like “the trail owes them something”. Connecting with people is important and takes time. This is not a quick win, nor instant result and will pay off over time. JTA made mention that BEST is after quick results and ‘low hanging fruit’. Cultural shifts and relationships take time and that is an area that JTA feels BEST does not spend time and effort in this area, and lacks understanding of the situation. “After the foundations are laid, trust is gained and people are engaged, then opportunities will arise and jobs can be created.”

In terms of job creation, JTA states “BEST are very creative in how they define a job’. When ‘no jobs are created’ there is an issue with BEST. JTA feel that BEST “needs quick results” and is focusing on short-termism.

The GM of JTA stated: Within two years we will create 200 jobs and more. The potential for jobs along the Jordan Trail is high, however it only happens as a result of consistent and ongoing effort and focus, collaboration and relationship building.

### Moving forward

In terms of sustainability and transformational potential of the Jordan Trail, the JTA believes that the Jordan Trail will offer the opportunity to become both sustainable and a game changer for Jordan with the ability to connect the communities along the trail, connect sites and offer experiences which are unique and desired. The Jordan Trail runs like a spine from north to south, and the ability to connect and attract is indeed a complex task but one which will create jobs, attract adventure as well as regular tourist wishing to see the country from a different perspective and has the ability to put Jordan firmly back on the international map.

In that regard, an important step was made when on December 15, 2017 when, with BEST support, the Jordan Trail was hailed one of the top 21 “Best of World Destinations’ by National Geographic magazine which is considered a significant accomplishment, and a positive fact to continue to build, develop and expand the Trail, community network and active economy around the Trail.

Having noted the extensive strains and frustrations between JTA and BEST, the JTA acknowledges that the Jordan Trail could not have grown as exponentially as it has without the support from BEST.

*BEST has brought JTA scale and speed - President of JTA.*



## CONCLUSIONS

The relationship between JTA and BEST that had started well was probably marred by personality clashes and a ‘power struggle’, which led to a cold and even hostile relationship with BEST pulling back and JTA not wanting to engage so strongly with BEST. BEST management should be able to smoothly handle the political, technical, and people management challenges that will face its staff on a daily basis, but it is clear that there have been weaknesses here. The situation does not seem to have been well handled by BEST, although a renewed grant in late 2017 does indicate BEST’s willingness to persist.

1. The grant application process was deemed a complex and cumbersome process. A one-year grant was limiting from a planning and staffing perspective
2. A deterioration in the relationship and breakdown in communication was severe and many resources were wasted
3. Micro-management and the demand for paperwork takes up a significant amount of time and effort and affects resources to be spent on the job. Changes in team members and lack of specialist support slowed efficiency and effectiveness were noted
4. No linkages to other actors including USAID/LENS were facilitated by BEST even when requested by JTA. Reasons appear to be ‘control’ related
5. Grant funds are not always directed to cover needs (consultancy fees versus staff salaries)
6. Without USAID/BEST support, the step to become a truly national trail would have not yet have been conceivable
7. The Jordan Trail has the potential to become transformational for (adventure) tourism in Jordan as well as job creation as service providers integrate in to the value chain. The process of developing and delivering a National Trail will require long term commitment, and greater attention probably needs to be paid to the length of time it takes to develop National Trails, how they are funded and managed, and how much they cost to maintain.

## RECOMMENDATIONS

1. Simplification of the grant process is mentioned by virtually grantee the evaluation team has

interviewed and it is the same for Jordan Trail. It is recommended that the process is reviewed and template formats are shared as well as clear instructions. A simplified version of the application form, which is also in Arabic, should be considered. The possibility of engaging a non-biased application support desk to tackle this broadly reported challenge could be investigated.

2. Consider a longer more strategic view to certain projects, allowing to plan ahead, allow for time to allow initiatives to take root, for staff to buy in to more than a one year assignment. As soon as the year starts running, time is ticking. Not many effective people can be recruited for a one year post of this nature, and if they do, they may leave before the year is up to secure their next role. With close monitoring and evaluation and proactive communication there should be a break clause option for USAID/BEST. Within a mitigated risk context, a longer-term approach should be considered.
3. Better project management by senior BEST staff is needed to address issues of personality clashes, disagreements and potentially damaging situations as and when they occur or at least when they start becoming 'clear issues'. If a client is dissatisfied with the quality or direction of BEST consultancy outputs, the matter should be robustly investigated. A proactive approach of communication and mediation should be within the techniques and tools applied to avoid worsening of relations and becoming hostile, unproductive and damaging to an activity. A mediation approach should be implemented as soon as challenges appear. Big egos, different agendas, politics, and clashing characters cannot be allowed to jeopardize an initiative's outcomes. A confidential line can be offered or other solutions that will support raising the flag on issues and seek ways to address them before they spiral out of control as was the case between BEST and JTA as well as the IP and stakeholders and beneficiaries in general.
4. A more effective way of managing projects should be pursued. The level of "micro-management and paperwork was said to take up to 60% of resources. Especially in a context of passionate private sector entrepreneurs running a project, over-management by BEST may jeopardize the positive engagement, energy and results – and in essence stifle the project and its growth as opposed to enhancing it. Grantees, management styles, characters and abilities need to be considered and managed accordingly. With respectful relationships, effective communication, proper follow up and SMART and agreed objective, more impact can be achieved than by nit-picking the details.
5. It is recommended to keep changes in teams to a minimum over the life of a grantee working with the IP. Frequent changes in team members result in frequent 'introductions' and loss of knowledge which then has to be shared again, and again, The process of engaging new project managers and coordinators means loss of understanding and velocity to achieve results as the new staff are familiarizing themselves with the program and the context, rather than supporting and driving it. The teams who are still learning about the project are way behind the people who are driving the project and due to this disconnect nothing can be achieved effectively, allowing for frustration and lack of communication and support to drive results.
6. It is recommended that BEST makes greater efforts to engage a specialists that grantees will respect, according to the niche in which the grantee operates, in this case adventure tourism. The specialist can support in adventure / eco-tourism projects (a key niche under BEST). A specialist understands the need of the Trail, the challenges that can occur and can 'talk the same language' and seek solutions together. Where specialists are at work, they need to be able to have a counterpart who understands them and whom they respect. The relationship is stronger,

the dialogue better, the solutions more achievable and the results far superior. If you don't respect the knowledge of the person who is supposed to support you, nothing good will ensue. It is a relationship in name only and will always be interpreted of 'micro-managing' by those who do not understand the context. This can be avoided by ensuring a specialist who understands, can guide and add is the lead from BEST side in certain projects including adventure oriented ones.

7. Linkages should be created to drive efficiencies and synergies. BEST is recommended to take the lead on proactively engaging the likes of USAID/LENS, the ATTA (Adventure Travel Association), USAID/SCHEP as well as UNESCO (to connect protected sites like Wadi Rum and Petra) and the RSCN in particular. Given the nature of this project and the experience of RSCN in developing successful hiking trails in Jordan (for example Dana to Feynan) and in other countries, there may be scope for synergy. It is important to communicate with other actors, to find possible paths to synergy, to create donor knowledge on projects and to connect, share resources and ideas and support initiatives together with clearly defined roles. It appears that BEST was proactively opposed to JTA contacting USAID/LENS. It is recommended that USAID investigate the core of the reason for this denial to engage and instruct its IPs to address issues that jeopardize communication and cooperation for the greater good Jordan.
8. Grant funds and technical support most times have to fit certain criteria, which determine whether the funds are 'allowed' or 'disallowed'. We note that 'allowed funds' are sometimes not the right match to effectively address the need. As raised, there is no issue with engaging consultants yet there is a challenge in using the same funds for staff. As is the case for JTA, they need 'boots on the ground' (paid staff), not 'consultants in the office'. It is recommended to review the true needs of JTA in this respect and review how to fund which requirements in the most effective manner possible to enable results. Embedding seconded BEST staff within key organizations that can have a transformational impact on tourism in Jordan might be considered.
9. Without BEST support, the expansion of the Jordan Trail would not have been possible. It is recommended that both parties be reminded that the initiative is a mutually driven one and that they serve each other whilst working together. The evaluation team hopes that clarity may prevail in that regard and that an improvement in relations is instilled and that communication becomes more effective.

BEST also undertook a focus group in Ajloun amongst beneficiaries along the Jordan Trail. The result of this focus group is outlined in Annex F.

## RECOMMENDATIONS

- Review the JTA business plan, bringing in more data on how other National Trails are managed and funded. Ensure that timescales are realistic. Re-consider the membership concept.
- Follow up on the creation of a tourism map with services, GPS coordinates, contact details of Business Service Providers to share with hikers and tourist as well as guides who can recommend services throughout the Jordan Trail
- Continue positive engagement and trust building with the local communities and continue to connect and communicate to further buy-in, support and pride in the Jordan Trail, positively impacting a paradigm shift to embrace the Jordan Trail and allow for a more broad-minded attitude to engaging with it. Including female participation.

- Engage in gender-focused activities to include traditional as well as ‘new’ engagement opportunities in relation to the Jordan Trail e.g. capacity building for female guides.
- Conduct real life quality checks of the Trail and the experiences along the way through the suggested ‘mystery shopper’ in order to ascertain how the Jordan Trail experience(s) can be improved.
- Given that the success of the Trail requires substantial SME development support, a Memorandum of Understanding (MOU) with USAID/LENS (if extended) for joint cooperation might be developed. In this regard BEST might have responsibility for marketing, branding etc. and LENS for SME development and community engagement through developing clusters along the Trail. Both activities might place experts within the Jordan Trail Association to work together with it.

## QUOTES

- *We spend all our time going back and forth, justifying sound decisions. It is their judgment versus ours. They nitpick, fragment which makes matters drag on and causes severe delays which have adverse repercussions*
- *We are being pushed to have members, pushed to be sustainable and in that we are alienating the society we are trying to serve by becoming closed which is not what we want*
- *BEST is very creative on how they define a job*
- *We need ‘Boots on the ground’ for this project. We need to establish strong ties in communities. Salaries for staff are what we need. Not consultants who come and go.*
- *BEST think they own us*
- *Due to politics at The Mission JTA was not invited in decision-making relating to the JTA project. It is all about politics and dysfunction*
- *You don’t change a culture in 3 years. Women engaging change culture, sisters working, daughters being trusted to guide etc.*
- *Jordan Trail is of massive importance for the country. A new type of tourist has been attracted, who spends in communities, impacting communities and tourism – ‘Jordan is back on the map’*
- *The Jordan Trail is a National Initiative*
- *We want USAID to believe in the Jordan Trail*
- *The mind is trapped in dealing with paper work for BEST rather than developing the trail*
- *Within 2 years we will create 200 jobs and more*
- *We could not have hired the people, created the PR and excitement without BEST*
- *Other contributions from the Mission included ‘Jordan Trail could be the vein, to connect secondary sites and engage local communities, driving experiences’. “Along the Jordan trail providers could be engaged and receive grants in a more mosaic approach for grants”.*



*The Jordan Trail has put Jordan on the adventure tourism map. A continued focus on building the Jordan Trail, connecting with other partners, learning from other countries, which feature a national trail, is important. The Jordan Trail should become a national initiative, which is supported through its inception, growth and maturity stages to become a key magnet for tourism and jobs. Ability to develop tourism, create jobs, engage local community, preserve culture and heritage and develop positive and memorable experiences. JTA has transformational potential over time (approximately 5 – 10 years anticipated)*

## SALT: DISTINCTIVE DESTINATION PILOT



### BACKGROUND

In 2016, Salt received the inaugural ‘Distinctive Destination’ award under a program launched by MOTA and BEST. The ‘Distinctive Destination Program’ (DDP) extends unprecedented opportunities for skills development training and access to grants and other financing for initiatives that advance the local tourism industry.

Salt is a unique heritage city with a friendly and proud community that has the potential to offer an urban tourism experience unparalleled in Jordan. To fulfill this potential, incremental yet comprehensive work is required. The Salt Tourism Destination Plan (the Plan) presents a framework to create networks, experiences and products that can develop a cultural tourism industry in the heart of Salt. As such, this Plan goes beyond tourism marketing and promotion concepts, and adopts a comprehensive approach. This approach is designed to incrementally strengthen tourism in Salt from organizational, urban design, heritage conservation and business development perspectives.

The urban cultural heritage value of Salt is communicated through its urban character, its considerable architectural qualities and its important historical associations. All of this is central to an urban cultural tourism focus, and should be researched and exploited to advance interest in the destination.

There is considerable work to be done. Integral to the Salt tourism base is a quality urban experience. Most profoundly, to deliver that quality experience, an absolute change in the maintenance of public places and private properties is needed, as well as strategic reinvestment for conservation and reuse of the historic center’s buildings (*Salt Tourism Destination Plan 2017 – 2020*)

(Former) US Ambassador Alice G. Wells said the program gives communities the opportunity to get involved in transforming their areas into truly unique world-class destinations, all while benefiting the local economy.

*We predict that this program alone will create up to 300 jobs and benefit upwards of 50 businesses in Salt – HE the United States Ambassador.<sup>42</sup>*

It is an overarching tourism objective to improve local Salt economy and to stimulate a process of sustainable revitalization and tourism development. Safeguarding and rehabilitating the Salt cultural heritage buildings is a backbone of its urban cultural tourism program, and also a part of an economic development strategy. The other critical part of the strategy is sustainability, which begins with identifying opportunities that can directly benefit local businesses (*Salt Tourism Destination Plan 2017 – 2020*)

According to the scope of work the purpose of the BEST intervention is to ‘provide support to increase economic growth and job creations in Jordan’s tourism sector. The activity is expected, amongst other outcomes, to result in an enabling environment supportive of competitiveness in the tourism industry and to put Jordan on the international map, offering tourism experiences and engaging local communities along the Jordan Trail, whilst attracting domestic and international hikers and tourists.

In accordance with USAID/Jordan goal for the 2013-2017 Country Development and Cooperation Strategy, USAID/BEST was to support the achievement of:

- Development Objective (DO) I ‘Broad-based, inclusive Economic Development Accelerated’ and
- Intermediate Result (IR) #1: Private sector competitiveness increased
- As well as increase female participation in the workforce by 15%. The contract specifically states under special DO4 “Gender Equality and Female Empowerment Enhanced” through focus on identifying interventions with a strong potential to employ women.

## FACTS

### Findings Salt Development Corporation (SDC) KII & Desk Research

According to BEST, DDP is loosely based on Mexico’s *Pueblos Mágicos* (Magic Towns). To qualify for *Pueblos Mágicos* a city must demonstrate a mix of historical, cultural and aesthetic qualities. Each city has aspects that set it apart from others in the country, including folklore and legends or historical events and a unique everyday life. It must also be well preserved, retaining its heritage-based value both tangibly and intangibly. Twenty-eight new additions out of 180 applicants made it to the list in 2015, bringing the grand total of past and present *Pueblos Mágicos* to 111.<sup>43</sup> BEST on the other hand is just developing one city as pilot, so the impact of DDP will be considerably less in terms of market impact, until a basket of Distinctive Destinations is available.

A KII was conducted with the GM of SDC who was joined by the marketing coordinator.

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<sup>42</sup>The Jordan Times January 25, 2017

<sup>43</sup> Smithsonian Institute (n/d) Explore the “Magic Towns” of Mexico. Available online at <[www.smithsonianmag.com](http://www.smithsonianmag.com)>, accessed December 19, 2017.

The reported challenge was the slow process in moving ahead with the grant and the project. Delays from both sides were experienced due to the newness of the project, the lack of the parties being acquainted, not knowing whom to talk to and follow up with or whom to connect to. Now after some time, these challenges all appear to have been cleared up.

BEST's role during first grant paid for salaries of marketing coordinator and project manager as well as packaging and creating the Salt Brand, which was considered to be major support. Another key actor, JICA, has been very active in developing and supporting Salt City, took responsibility for the design. USAID also supported upgrades in equipment, upgrades, and guidebook for homestays.

Additional support had been given by BEST for an engineer to sketch the interior for houses to be developed – though the better use of funds was reported to be preferred to be spent on the actual upgrades rather than the sketches.

SDC held many awareness sessions for developing home stays: One homestay has been approved, with two others under review. The committee BEST, SDC, Municipality and MOTA will review the other 16 applications and select those business owners with whom homestays will be progressed.

During the first grant the focus was on supporting handicraft and homestays. Due to the nature of the focus, most beneficiaries were women as handcraft and food processing traditionally and by default is women led. The evaluation team understands that there was no focus on gender programs, initiatives, interventions, and that no gender-related KPIs were discussed, set or agreed.

The second grant is about supporting businesses (shops, businesses, trails, hotels) and may be far more male orientated. The second grant is in two stages:

- The move towards becoming the DMO for Salt
  - More staff, training, digital media, brochures and familiarization trips will be needed along with more funds
- The other stage is for SDC (via committee) to award grants up to JOD 30K (US\$ 42K)
  - Anything over JOD 30K (US\$ 42K) goes directly to BEST for review and approval, in accordance with procedures agreed with USAID.

There are various parties looking for grants including the Cultural Center where music training is given, and is an area for plays, songs and orchestra.

Tawasel who train on handicrafts are applying for a grant and they are trying to do a boutique hotel. In addition Saltus hotel and Beit Aziz may be applying for grants to support their accommodation. This is a property that was previously developed by MOTA and is leased to a private operator.

A simplified grant process has been created for grant applications under JD30K (in kind), which can be approved by SDC. The SDC GM noted that in this case “we do most of the work”. A guidebook, prepared by BEST was produced to support applications.

When asked about sustainability, the keen response was that there is a passion and willingness, however that funding needs to follow. SDC will need staff, support, finance and more time to continue their mission to fully support the development of Salt as a Distinctive Destination.

An area of support where SDC would like BEST to help more effectively is introducing Private Sector opportunities to SDC in a more pro-active manner. SDC would like to receive support from BEST to assist with a concept / idea and design in order to be able to proactively approach the private sector.

In terms of relating the USAID/BEST 'Access to Finance' initiatives – this was reported to never have been mentioned or addressed in relation to the initiative. The facilitating access to finance component is missing, indicating a possible lack of joined up coordination by BEST so far.

When asked about challenges a key issue mentioned that the local museum is closed on the main day for domestic tourism (Saturday). The Museum has been proactively marketed and a positive response was the result. Domestic tourists started to choose to come to Salt City over the weekend, particularly on Saturday. They wanted to start their visit with a visit to the promoted museum, which was found to be closed. Reactions are said to have ranged from disappointment, to anger and infuriation – with some visitors abandoning the idea of spending the day in Salt. As a result there was bad word of mouth and a negative outcome with the brand of the city being negatively impacted. In addition the funds to market and promote the Museum were simply considered 'water down the drain' and wasted.

Within the museum there is a Salt Brand Shop, which is an initiative by SDC and MOTA – where the trail starts and ends. Handicrafts are also for sale at the museum.

When asked why the museum was closed, it was noted that there is a 'government approach' – and the government is closed on Saturday, and so is the museum. It appears that there is a government team based at the museum and hence the staff automatically adopts government times and rules – rather than taking a market-focused approach to opening the museum up, welcoming, engaging and servicing, marketing and promoting Salt to those people who have taken the effort to engage and explore.

Other comments revolved around the trails not being clean which is critical to the experience.

There are currently two trails including the Daily Life Trail and the Harmony Trail (combining Christianity and Islam in co-existence in Salt).

SDC is trying to link with multiple actors, including BEST, MOTA, Museum management, municipality and the developers of Salt city center, and a committee has been formed who do fieldwork. This committee was established in 2013 and previously worked with JICA.

Another committee includes the SDC Board, the Mayor, and the Secretary General of MOTA.

BEST is not a part of that committee, though consideration may be given to involving BEST where a BEST interaction is involved.

Key successes that USAID/BEST supported SDC with the packaging and branding which was a big need and high priority and was successfully addressed, supporting with branding bags and boxes to sell produce and products under the Salt brand.

Other successful initiatives supported by BEST include social media training, Facebook page launch and upkeep, the engagement of a social media person, 12 training sessions on social media to SDC staff and

guides.

An additional training on the History of Salt was also deemed educational and informative and was provided by an experienced guide.

The GM of SDC said: “Bringing the life back to the old buildings of Salt, is in my opinion, the biggest accomplishment”

Note was made that ‘JICA is coming back’ to Salt. They are going to do the same as they did in the center of Salt (upgrade, develop) and now they will do it in the surrounding countryside.

In terms sustainability it was noted that there is a keen willingness to sustain the initiative, however that the ability to sustain is in question due to financial pressures. SDC also receives donations from the private sector and that is the main channel of funds received. Proactive measures are taken to increase rent paid on the funds in the bank and to cut cost by driving efficiencies. In addition, SDC is raising rents with tenants in their building ‘who can afford it’ to drive income. However, SDC GM reports to be under financial pressure stating “What we are doing we are still doing, but the question is how long can we keep doing that, because we are losing money”. Stakeholders need staff and finances for support as well as more time as well as ongoing support with marketing.

In terms of the mindset in the local community there is strong awareness on the initiative and a growing buy in from the local community believing in the potential of the city.

## CONCLUSIONS

1. BEST is building on the work and significant investment of JICA, and can bring its training, marketing and other expertise to Salt.
2. The DDP initiative will really only has significant, transformative market impact when a number of Distinctive Destinations are developed across Jordan.
3. The approach is multi-faceted involving many aspects of tourism development; in contrast to some other BEST grant interventions, which just involve one company in one location.
4. A challenge is the slow process in moving ahead with the grant and the project but settled in to a pace and was resolved
5. BEST is considered to have been very helpful to Salt Municipality in many areas especially branding, noting that in some instances grant funds could be more effectively spent
6. There is no specific focus on gender that the client is aware of
7. SDC will be assessing grants (in kind) up to JD30K and recommending larger grants to BEST
8. SDC states more funds, staff and time is needed to become sustainable
9. No awareness of BEST access to finance initiatives is apparent
10. Tourism to and Salt brand are negatively and significantly impacted due to the museum being closed on a key day for tourists (Saturday)
11. Cleanliness along the trails is an issue
12. Links within Salt are being pursued including MOTA, JICA ad some initial discussion with the Jordan Trail, but no other linkages were evident (i.e. JETT, Agri-tourism operating in the governorate, USAID/LENS, etc.)
13. Sustainability needs more time, funds and staff
14. The largest grant was awarded to SDC – noting that a city needs huge funds to develop

## RECOMMENDATIONS

1. Optimize communication to ensure that priority needs are addressed in order to optimize results. Try to match the grant to the specific need, rather than not quite hitting the essential requirement
2. Focus on gender is lacking and not integrated in to the initiative. A gender specialist and special focus with supporting plan, initiatives, capacity building and KPIs in this regard are needed
3. Review the process of SDC taking initial charge of grant applications under JD30K. Ensure a fair and equitable, audited process is being followed. Very careful review of giving the grant process out of direct BEST control, though enhancing efficiencies is welcomed and required to drive velocity in this regard
4. Ascertain the factors and requirements that SDC has in mind in terms of time frame, funds; staff in order to become sustainable. Map a mutual plan in this regard in order to achieve the sustainability phase in a realistic and effective manner
5. Open the museum on Saturday to keep tourist satisfied, engaged and coming back. To positively build on effective and proactive marketing by creating positive experiences and word of mouth referrals that build the Salt brand, rather than damage it
6. Cleanliness across Jordan in general is an issue and notes as an area of concern on the trails in particular. Awareness campaigns and clean up teams is required. Perhaps engaging the local community to keep the trail clean and be compensated according to its cleanliness. Perhaps ensuring a recycling area is set up and the rubbish collected can be transformed in to a useful item in order to work towards a more 'green attitude' which is desperately missing throughout the Kingdom to a great degree. Clean up campaigns and educational interventions are needed, not just for Salt but for Jordan as a whole
7. An opportunity exists to link Salt to the Jordan Trail (conversations have started) as well as ensuring JETT transportation offers a route to Salt (which they currently do not), to engage with USAID/LENS to work with the micro and small sized enterprises in Salt and around the trail, to engage UNESCO whom BEST originally engaged with but then it trailed off two years ago. To engage with the agri-tourism project in Balqa'a and in general to link, connect and create synergies between actors for the benefit of Salt. A group of actors and donor representatives can keep each other informed and support efforts synergistically between the parties to drive for effective and collaborative progress rather than working in silos.
8. Linking with JICA as they return to Salt is highly recommended. Their knowledge of Salt is good and their development standards high. Communication and collaboration is recommended with JICA in particular.
9. Plan to expand the DDP initiative so that Jordan can offer more than one Distinctive Destination. Consider destinations further from Amman: Perhaps Aqaba, Madaba and Umm Qais?
10. A case study of learnings for other potential 'Distinctive Destination Cities' is recommended. This can serve as a base for insights for other destinations which are planned to be added with time and can serve as a road map on what 'lessons learned and recommended paths to progress'.
11. The level of funds awarded to the Distinctive Destination initiative are amongst the highest grants awarded under USAID/BEST. Ongoing monitoring and evaluation is needed to ensure that said funds make a tangible and lasting positive impact to Salt being able to attract more tourists. A city development is a major undertaking and huge funds are needed to make a difference.

## NOTE

Over recent weeks it has been reported that, following the announcement of the US President's decision to authorize the move of the US Embassy in Israel from Tel Aviv to Jerusalem. There was an outcry in Salt with movements and youth organizations urging USAID-marked assets to be destroyed and a strong anti-US response evident. The situation requires investigation since the USAID/BEST support efforts are at risk of waste and disrepute and efforts to build Salt may be undermined in the light of recent events. The SDC too was reported to halt collaboration with USAID though that has not been verified and is third party hear-say, yet in context requires a fuller understanding in order to address the matter appropriately.

## QUOTES

- *No specific focus on gender*
- *No access to finance information*
- *Museum, which was heavily promoted, is not open on Saturday, the key tourism day which leaves visitors frustrated and annoyed and bad reviews follow. If museum open on Saturday there would be a high positive impact*
- *We do most of the work (when talking about applications for grants)*
- *What we were doing, we are still doing but the question is how long we can keep doing that because we are losing money*
- *Distinctive Destination program is excellent - Minister of Tourism*

The Distinctive Destinations program, a representative from the Mission noted, could be a potential driver with transformational potential though it is noted that development takes time.

## STIMULATING TOURISM RECOVERY: KENYA AND OTHER INTERNATIONAL EXAMPLES

Kenya is the leading tourism destination in East Africa and its long-term growth trend is positive. International tourism growth was robust until the political violence of December 2007 and early 2008. As a result, visitor numbers dropped by over 40%, from over 2 million in 2007 to 1.2 million in 2008, causing widespread hardship and downsizing of employment.

This Tourism Marketing Recovery Campaign funded by the European Union, was designed to assist full recovery to 2007 levels. In November 2008 the Kenyan Ministry of Tourism agreed to a €3 million grant for a global marketing campaign. The campaigns objectives were as follows:

- To rebuild the image of Kenya as a premier tourist destination and regenerate confidence and tourist arrivals to Kenya from both key traditional and emerging markets.
- To counter negative publicity and shift perception in the marketplace by developing positive publicity for Kenya as a tourist destination and projecting high visibility for the destination and increase positive awareness.
- To raise motivation for travel to Kenya and reverse the current downturn of visitors from key, developing and emerging source markets by recovering previous levels of visitors in 12 months and revive the trend towards an improved average yield per visitor.
- To recover lost business for Kenyan industry stakeholders and industry partners (tour



operators and airlines).

- To recover lost jobs both indirect and direct and tourism-related grass root benefits for the people of Kenya as well as recover revenue for the Kenya government.

There were three main activities:

Activity 1: Development through an advertising agency of an integrated campaign concept and plan.

Activity 2: Production of campaign material and media placement.

Activity 3: Source market targeted campaign on electronic media, print, outdoors and online options

The Kenya Tourist Board managed the campaign and was responsible for tracking its progress using an independent agency and reporting to an industry-government Project Steering Committee. An international tender was launched through the European Union system to select an international agency to design and place the campaign. Monitoring included tracking visitor arrivals, increases in Internet activity by market following campaign bursts, and an exit survey to estimate such issues as the percentage of tourists that have seen a campaign instrument to enable estimates of market penetration, and recording lost jobs recovered. In addition, a full project evaluation was commissioned.

The target markets were France, Germany, the United Kingdom, the USA, South Africa and India. Focus group research was commissioned in some of these markets to help campaign design. The key growth indicator agreed was increased in visitor arrival by market.

The project's target was to recover lost business for Kenyan industry stakeholders and overseas partners by 50%. The extent of tourism recovery by market area is shown in table X: It is clear that the overall target was achieved and, subsequently, it was exceeded.

**TABLE: Market area performance January to August 2007 & 2010**

Market	Jan-Aug 2007	Jan-Aug 2010	Recovery
United Kingdom	114,712	142,041	+84.8%
United States	134,214	113,747	+105.5%
France	35,851	33,801	+94.3%
Germany	53,614	37,185	+69.4%
Italy	54,832	54,885	+100.1%
India	23,648	31,414	+132.8%
South Africa	20,140	21,291	+105.7%

All visitors	689,290	260,691	+101.8%
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Source: Kenya Tourist Board.

Positive impact indicators were as follows:

- Growth in arrivals
- Growth in revenue (US market in particular)
- Reported recovery in tourism employment.
- Enhanced experience for the Kenya Tourist Board in running a multi-media global campaign with an international agency, production of design guidelines, and the production of advertising material.
- Enhanced experience for KTB in involving MDRs in guiding campaign placement.
- Support from the overseas tourism industry that were encouraged to develop offers and additional promotional activities to support the campaign.

All of this growth cannot of course be attributed to one marketing campaign. However, the campaign undoubtedly helped to speed up the recovery process. Since 2008 Kenya has seen further political crises, and further tourism recovery actions including the development of a National Tourism Recovery Strategy, announced in 2016. This will include a domestic tourism strategy as part of the wider campaigns to spur growth in the sector.

## OTHER DESTINATIONS

Tourism is recognized as one of the fastest economic sectors to recover once political instability ends. Following the devastating earthquake in Nepal on April 25, 2015, the travel industry rallied to raise funds for and provide aid to the country. Efforts to stimulate a recovery continue there.

In Mexico, the Mexico Tourism Board, regional destination marketing organizations, tour operators and local suppliers have become allies in times of crisis (such as earthquake recovery and the Zika virus). They work together to aggressively overcome challenges at a rapid pace and welcome tourists back to the destination.

After Hurricane Katrina, New Orleans saw money coming into the city too not only fix problems but to also to rebuild hospitality infrastructure. The city now has almost double the number of restaurants than it did before Katrina. And the city is building and redesigning the way it works and looks.

Shirting marketing focus is also a means of overcoming crises:

- As a result of the 2002 and 2005 bombings, Bali diverted its focus from its traditional Western holidaymakers to ones closer to home in Japan and Taiwan.
- In Macedonia, after years of unrest, the government boosted subsidies for tour operators focusing on visitors from Bulgaria, Serbia, and Bosnia.

- Egypt started targeting Indian tourists, historically not major visitors to Egypt, by offering visas on arrival and agreed to launch a direct flight between Cairo and New Delhi.

Marketing is not the only means of stimulating tourism recovery. Improving the business climate can also play a key part in stimulating recovery:

- In Thailand, following the May 2010 riots in Bangkok, the government announced tax incentives for companies hosting domestic or international trade shows and training seminars, galvanized the industry to develop its own campaigns and offers and initiated the Thailand Amazing Value global marketing campaign. Thailand also shifted focus from international tourism to domestic tourism. The Royal Thai government cooperated with the private sector to organize a “Thai Travel Fair,” cutting prices of local airlines and hotels, which increased the quantity and frequency of domestic travel. In 2010, Thailand also introduced a personal taxable income deduction for Thai residents on domestic tourism-related spending.

To enable better responses to tourism safety risks, UNWTO recommends that countries develop a national policy on tourism safety commensurate with the prevention of visitor risks, and form national tourism councils with executive committees responsible for risk management in key areas, according to the needs of each destination. South Africa, for example, established a Tourism Safety Task Group that included the Department of Environmental Affairs and Tourism, the South African Police Service, and the South African Tourism Board. Following 9/11, Australia developed an Australian National Tourism Incident Response Plan, establishing a response framework and actions for national, state, and territory governments to ensure rapid, detailed, and targeted responses to incidents with an impact on the tourism industry.

Another common risk anticipation measure is the establishment of tourism recovery funds. For example, in the wake of the Bali bombings, the Indonesian government’s Bali Recovery Fund (US\$7.2 million) and general Tourism Recovery Fund (\$6.5 million) helped the recovery of the sector.

Sources:

Kenya Tourism Board (2010) *Annual Report 2009*

PriceWaterhouse Coopers (2015) *Surviving disaster: How to reemerge as a tourism destination after a period of political instability.*

Travers, R (2016) *Tourism in the Age of Mega-Crises.* Saudi Travel & Tourism Investment Market

# ANNEX F: STANDARDIZED PERFORMANCE REPORTING

## EXAMPLE OF USAID VIETNAM

### INTRODUCTION

The evaluation team noted that many BEST reports were sometimes poorly structured and tended to focus on good news stories rather than being objective assessments of overall progress. MESP has wide experience in evaluating reporting outputs from USAID Jordan IPs, and does not consider BEST periodic reports to be an example of good practice.

To improve the standard of reporting by its IPs, USAID Vietnam has introduced a template for use in periodic reports for all projects. The template below may help the IP to cover more ground in its reporting to USAID, and may also provide a model for USAID to encourage more standardization of IP reporting in Jordan, including financial data.

### PROJECT OVERVIEW/SUMMARY

<b>Program Name:</b>	
<b>Activity Start Date And End Date:</b>	
<b>Name of Prime Implementing Partner:</b>	
<b>[Contract/Agreement] Number:</b>	
<b>Name of Subcontractors/Sub awardees:</b>	
<b>Major Counterpart Organizations</b>	
<b>Geographic Coverage (Cities and or countries)</b>	
<b>Reporting Period:</b>	

**ACRONYMS AND ABBREVIATIONS**

List all acronyms and abbreviations pertinent to the activity. The first time a word requiring an acronym or abbreviation is used in the body of the report, spell out the word in full with the acronym in parentheses. Thereafter, use only the acronym.

**PROJECT DESCRIPTION/INTRODUCTION**

Short and concise introductory section that gives a quick overview of the project, goals/objectives, target beneficiaries, geographical locations, etc. This is a standardized paragraph that can be used in each quarterly report. It should be **BRIEF**, no more than one page.

**SUMMARY OF RESULTS TO DATE**

Indicators	Baseline FY YYYY	Annual Target	Q1 FY12	Q2 FY12	Q3 FY12	Q4 FY12	Annual Performance Achieved to the End Reporting Period (%) of	On Target Y/N

Note: The Results Performance Column depicts level of achievement expressed as a percentage of Actual versus Planned.

## **ACTIVITY IMPLEMENTATION PROGRESS**

### **PROGRESS NARRATIVE**

This brief narrative (1 or 2 pages) should highlight key achievements and whether the program is on/off track as far as work plan/targets in terms of (1) overall program progress for year and (2) the current reporting period (quarter).

### **IMPLEMENTATION STATUS**

This should consist of a narrative of activities implemented per Intermediate Result Area, and include what was planned versus what was actually achieved.

### **IMPLEMENTATION CHALLENGES**

This should consist of an objective and honest assessment of the challenges that arise, and suggest possible responses.

### **PMP UPDATE**

Including data collection/quality issues; staff and sub-partner training on data quality protocols/methodologies; anticipated PMP revisions needed to indicators and/or out year targets.

## **INTEGRATION OF CROSSCUTTING ISSUES AND USAID FORWARD PRIORITIES**

### **GENDER EQUALITY AND FEMALE EMPOWERMENT**

This brief narrative should highlight the gender gaps and key gender achievements.

### **SUSTAINABILITY MECHANISMS**

### **ENVIRONMENTAL COMPLIANCE**

### **GLOBAL CLIMATE CHANGE**

Address only if your program does not receive GCC funding but can speak to impact in either adaptation and/or mitigation.

### **POLICY AND GOVERNANCE SUPPORT**

### **LOCAL CAPACITY DEVELOPMENT**

### **PUBLIC PRIVATE PARTNERSHIP (PPP) AND GLOBAL DEVELOPMENT ALLIANCE (GDA) IMPACTS**

### **SCIENCE, TECHNOLOGY, AND INNOVATION IMPACTS**

## STAKEHOLDER PARTICIPATION AND INVOLVEMENT

Government, regional organizations, NGOs, private sector, academia, civil society, other donors, etc.

## MANAGEMENT AND ADMINISTRATIVE ISSUES

Such as project staff changes, software and procurement issues, etc. Please also list all upcoming procurement actions that require A/COR approval/notification.

## LESSON LEARNED

Please provide a few examples of highlights of project learning. These can either be successes or failures, but show how adaptive learning is used in the program to improve implementation.

Partners are expected to provide at least one example of gender, sustainability and local capacity development each fiscal year.

## PLANNED ACTIVITIES FOR NEXT QUARTER INCLUDING UPCOMING EVENTS

Indicate opportunity/need for media and/or USAID/Vietnam or other USG involvement, particularly for USAID project monitoring site visits.

## HOW IMPLEMENTING PARTNER HAS ADDRESSED A/COR COMMENTS FROM THE LAST QUARTERLY OR SEMI-ANNUAL REPORT

If issues were raised please describe how you addressed them specifically.

## FINANCIAL MANAGEMENT

*Monitoring financial conditions is one of the most important, yet often neglected areas of management reporting. The **information contained in this section is utilized to make management decisions**, particularly as it is related to future work on and funding for the project.* <sup>44</sup>

*Discuss issues such as: unexpected expenditures, material changes in costs due to considerations outside of the control of the project, cost savings and cost savings plans.*

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<sup>44</sup> Note: the financial data provided in this section is an estimate of the financial condition, and does not constitute the contractually required financial reporting as defined in the Award Notice.

**Table I(a): PMP Indicator progress - USAID Standard Indicators and Project Custom Indicators**

[Strategic Objective]											
Indicator	Data Source	Baseline data		FY 2016		Quarterly Status – FY 2012				Annual Performance Achieved to Date (in %)	Comment(s)
		Year	Value	Annual Cumulative Planned target	Annual Cumulative Actual	Q1	Q2	Q3	Q4		
<b>Intermediate Result (IR):</b>											
<b>Sub-IR:</b>											
<b>Sub-IR:</b>											
<b>Intermediate Result (IR):</b>											
<b>Sub-IR:</b>											



## PROGRESS SUMMARY

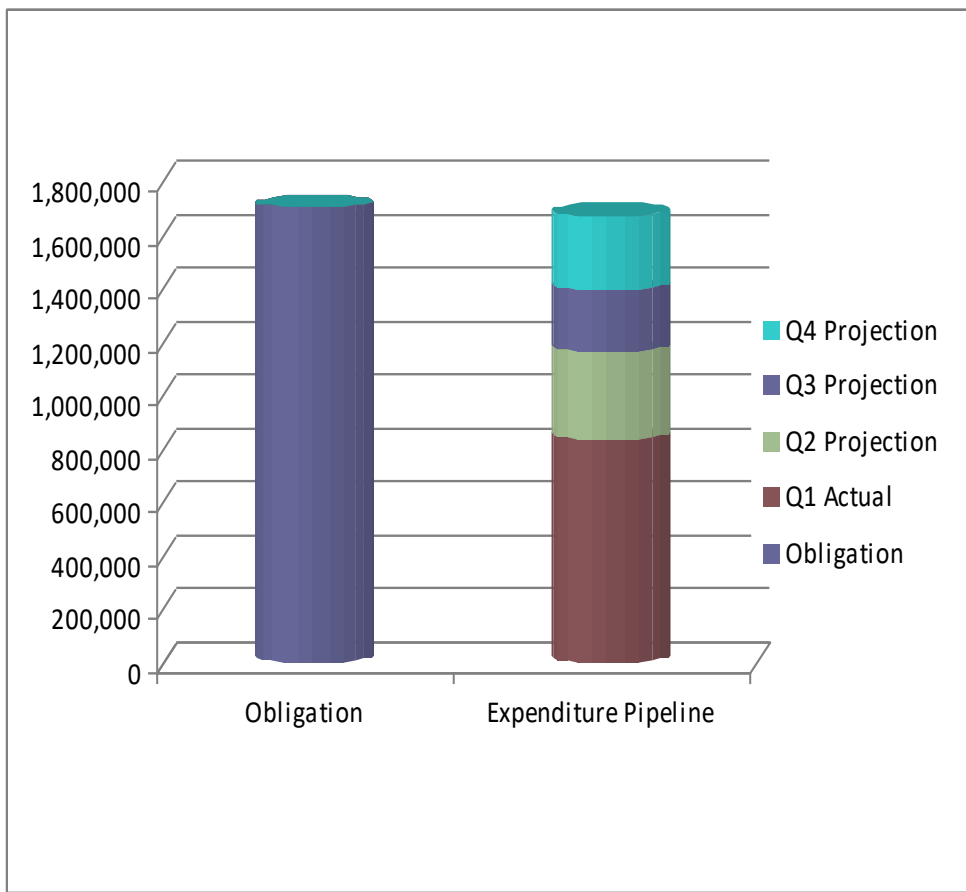
Achieved progress versus planned for the period disaggregated by gender, geographic area and other relevant factors (use table below).

## FINANCIAL MANAGEMENT

### Cash Flow Report and Financial Projections (Pipeline Burn-Rate)

The cash flow chart below is derived from the financial table also provided in this section of the report. This provides a visual representation of the “burn rate” of the project – both actual and projected. The main categories are: 1) Obligation (the funds authorized to date for expenditure on the project; this is NOT the Total Estimated Cost, but amount already obligated), 2) Actual expenditures through the current quarter, and 3) Pipeline projection (expenditures expected, by quarter, for the coming three quarters, based on planned project hiring, procurements, expansions, etc.).

**Chart I: Obligations & Current and Projected Expenditures<sup>45</sup>**



<sup>45</sup> The information used as an example in Chart I is a snapshot at the time of a given quarterly report, and should include the most recent quarter and the next three quarters. The staff management should constantly update this data, and the C/AOR should be familiar with the financial conditions at all times. This is a management tool.

## GPS INFORMATION

GPS information should be provided for all project sites, including both implementing organization offices and locations of all sites benefitting from project resources (communities, schools, clinics, etc.).

## SUCCESS STORY TEMPLATE

Partners are requested to submit at least one (1) success story (with a picture) per quarter; however, partners are welcome to submit more than one story each quarter.

### Success Stories/Lessons Learned Template

*One Story Per Template*

**Instructions:** Provide the information requested below. Remember to complete the Operating Unit Standardized Program Structure selections in order that your program element selections are pre-populated in the FACTS drop-down menu. “\*” Indicates required fields.

\* **Program Element:** \_\_\_\_\_ (e.g. Higher Education)

\* **Key Issues:** \_\_\_\_\_ (e.g. Higher Education)

**Title:** \_\_\_\_\_

**Operating Unit:** \_\_\_\_\_ USAID/Vietnam

**Please provide the following data:**

\* **Headline (Maximum 300 characters):** A good headline or title is simple, jargon free, and has impact; it summarizes the story in a nutshell; include action verbs that bring the story to life.

\* **Body Copy (maximum 5,000 characters):** The first paragraphs should showcase the challenge encountered and the context of the foreign assistance program. Presenting a conflict or sharing a first person account are two good ways to grab the reader’s attention. Continue by describing what actions were taken and finally describing the end result. What changed for the person or community? What was learned? How did this make a difference in the community or to the country overall? If this story is relating to a "best practice", what were the innovations in planning, implementation or partnering that made it different? If this story is about an evaluation, what program adjustments were made?

\* **Pullout Quote (1,000 characters):** Please provide a quote that represents and summarizes the story.

\* **Background Information (3,000 characters):** Please provide whether this story is about a presidential initiative, Key Issue(s), where it occurred (city or region of country) and under what item(s) (Objectives, Program Areas, Program Elements) in the foreign assistance Standardized Program Structure. Include as many as appropriate. See Annex VIII of the Performance Plan and Report Guidance for a listing of Key Issues. See the list and definitions for the Standardized Program Structure.  
[http://f.state.sbu/PPMDOcs/SPSD\\_4.8.2010\\_full.pdf](http://f.state.sbu/PPMDOcs/SPSD_4.8.2010_full.pdf).

\* **Contact Information (300 characters):** Please list the name of the person submitting along with their contact information (email and phone number).

# SUCCESS STORY

**[INSERT SUCCESS STORY HEADLINE]**

**[INSERT SUBHEAD HERE]**

[Insert Photo Credit]

REPLACE WITH PHOTO  
2.25" W

*USER INSTRUCTIONS:  
TO ACCESS OR MODIFY THE  
ITEMS IN THIS SIDEBAR, THE  
HEADLINE, OR THE COUNTRY  
LOCKUP AT THE TOP OF THIS  
PAGE, MODIFY THIS PAGE'S  
HEADER.*

# ANNEX G: FOCUS GROUP FINDINGS

## FOCUS GROUPS I & 2: PATHWAYS TO PROFESSIONALISM

### PATHWAYS – DEAD SEA FGD

PROJECT	# of FGDs 2	# of participants	# Male	# Female
PATHWAYS	Dead Sea	7	6	1
	Amman	7	7	0

### FOCUS GROUP I: DEAD SEA



#### AWARENESS:

- No participants recognized BEST;
- All participants recognize Pathways to Professionalism;
- All participants recognize the core idea of Pathways to Professionalism. Which is about working with high professions and standards;

#### EFFECTIVENESS:

- All participants felt sure that Pathways to Professionalism was effective;
- All participants felt that Pathways to Professionalism was very useful and it gave them lots of information and skills which they didn't have before;
- All participants were working at the hotels before they participated at Pathways to Professionalism;
- 3 out of 4 were promoted to a higher position as a result of Pathways to Professionalism;
- Participants felt happy about the theoretical and the practical part of the training and the benefit of the practical content and skills taught;

- Participants felt that they able to work in hospitality sector and to practice the skills learned as a result of observation of their colleagues. But as a result of the Pathways to Professionalism; training they understand the theoretical background behind each practice and they start practicing these skills with more confidence and professionalism;
- Participants mentioned that they teach their friends who works with them and didn't have the same opportunity at Pathways to Professionalism and they felt that this process was useful and helpful;
- The female participant shared the experience of Pathways to Professionalism and its impact on her work at the hotel with her female friends and they liked the idea and they have submitted their CVs to the hotel seeking jobs;
- Participants stated that Pathways to Professionalism is very important for females and it will decrease the use of foreigner labor;
- Participants stated that they gained new skills and professional skills that they didn't knew before;
- Participants stated that although they were not promoted to a higher position as a result of the training, the training affected them in positive way, they learned new skills, they understand many parts of their work, and they became more confident;
- They learned about the important of hygiene and why it's important and how it affects their work as well;
- The training makes their work easier and it changed their attitudes towards themselves and towards their work as well.

#### CHALLENGES:

- The theoretical exam was very difficult;
- No theoretical material of the training was available to be used as a resource material;
- No follow up with the trainees;
- They were promised certificates and they didn't receive them so far (December 2017);
- The training didn't take into account the different levels of experience between the trainees, and it was conducted based on the availability of the trainees only;
- No training was provided for English skills.

#### SUSTAINABILITY:

- More follow up from BEST is recommended;
- Build on the motivation of the project from the hotels, trainers and trainees.

#### COMMENT:

The HR Director after the Focus Group highlighted the importance of Pathways to Professionalism. The Director felt the training was weak because it was about Training of Trainers (TOT) and not about how to train the given material relating to the three components. In addition to that he stated that his target was to train 50 people, but he could only have trained 7 due to the delay in the implementation of the project.

## RECOMMENDATIONS:

- The training workshop should be designed for different levels of experience;
- Improve a theoretical materials and share it with the trainees;
- Conduct more training workshops to cover all hospitality sectors not just three.

## FOCUS GROUP 2: AMMAN



## AWARENESS:

- No participants knew about BEST;
- All participants know Pathways to Professionalism;
- No participants understood the implementation process of Pathways to Professionalism;

## EFFECTIVENESS:

- All participants stated that Pathways to Professionalism was effective and it helped provide them with job security with agreed contracts and insurance;
- All participants felt that the hospitality sector is an unreliable sector to work in, but in Jordan this sector has begun to improve because of a better security situation in the region;
- All participants felt that the hospitality sector faced many challenges and that the main ones were the competition between hotels and the challenge to reach a high quality service;
- All participants felt that Pathways to Professionalism was very useful and it gave them lots of information and skills which they didn't have before;
- All participants were working at the hotels before they participated at Pathways to Professionalism;
- 1 out of 7 were promoted to a higher position as a result of Pathways to Professionalism;
- Participants felt good about the theoretical and the practical parts | the training and the benefit of the practical content and skill;
- Participants felt that they use their training in work in hospitality and practice the skills learned as a result of their observation of their colleagues. But as a result of the training they



understand the theoretical background behind each practice and they start practicing these skills with more confidence and professionalism;

- Participants felt that they can teach their friends who work with them but didn't have the same opportunity through Pathways to Professionalism and they felt that this process was useful and helpful;
  - *I used to share my information and skills with others, especially the new trainees and employees and for Pathways to Professionalism information I shared it with all new colleagues, because I was in the same position and I should help them'*
- Additionally, participants felt that the training was very useful and affected their self-confidence and their self-recognition:
  - *I trust myself more, I have the right information from a solid resource, and I know how things are done in my work after the training, so I can talk with people with more confidence and discuss my work with anyone including my supervisor.*
- An output from the training was a certificate, and as most of the participants were undergraduates, the certificate was added value to their careers and to their life in general;
- All participants assured that although they know something more about giving information through the training, they got more details regarding their work and this was very helpful for them to achieve a higher quality services;
  - *The details were very useful... it helps me in my work, I can understand why hygiene is important and I can understand if I have any mistake how it will effect on me and on the hotel in general, I can understand now why professionalism is important*
- Participants felt that PATHWAYS TO PROFESSIONALISM is very important for the female workforce and it will decrease the use of foreign labor and they said that two female trainees were come to hotel as part of their education and they were hired at the hotel as a result of their assessment;
- Participants felt that they gained new skills and professional skills that they didn't know before;
- Participants felt that although they were not promoted to a higher position as a result of the training, the training affected them in positive way, they learned new skills, they understand many parts of their work, and they became more confident;
- They referred to the important of hygiene training and why it's important and how it affects their work as well;
- The training makes their work easier and it changes their attitudes towards themselves and towards their work;
- The training process was very smooth from their perspective and they like the contrast between the practical and theoretical parts;
- Each participant received the training material and after they finalized the training they gave it back to the hotel management;
- All participants were selected to gain the training by their supervisors or managers except one trainee who read the training advertisement on the advertising noticeboard at the hotel and asked his supervisor to participate at the training;

- All participants felt that the training affected the personal and communication skills and they gained more confidence;
- Commitment, confidence and the creation of social relationships were gained by the participants;
- In addition to the specialized and communication skills they gained new skills about security and safety, which was very useful inside and outside the hotels;
  - *we like the training, it was useful and serious, we felt that we were students and we need to study, and when we made mistakes they were taken seriously and they include these mistakes in our final assessment*

#### CHALLENGES:

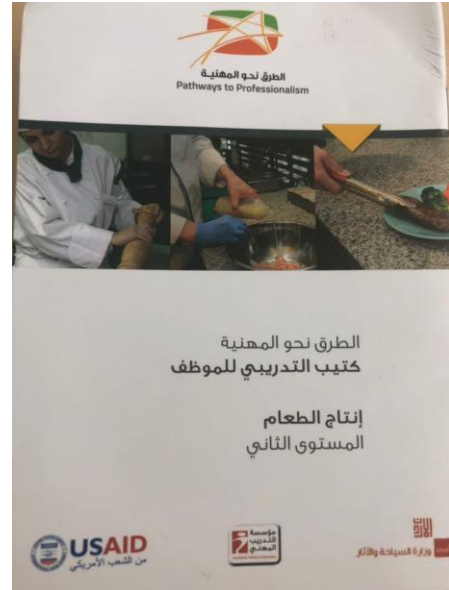
- The theoretical exam was very difficult;
- No theoretical material of the training to be used as a resource material;
- No follow up with the trainees;
- They training didn't take into account the differing levels of experience between the trainees, and it was conducted based on the availability of the trainees only;
- No training about English skills.

#### SUSTAINABILITY:

- More follow up from the USAID is recommended;
- Use the momentum of the project from the hotels, trainers and trainees;
- Open the training for more topics not just three;
- Provide the trainees a copy of the training material so they can review in the future
  - *I didn't take the book before the gave it to the hotel's management unfortunately*
- The time frame of the training cycle should be short to include more trainees during the project.

#### RECOMMENDATIONS:

- The training workshop should focus on the different level of experience;
- Improve a theoretical material and share it with the trainees as a resource;
- Conduct more training workshops to cover all hospitality sectors not just three.
- English language is a must;
- Computer skills are a must for each trainee;
- Include online learning in the training process;
- Re write the questions to be more clear;
- Give the trainees more time for the theoretical exam.



### FOCUS GROUP 3: BUSINESS & PROFESSIONAL WOMENS' ASSOCIATION

PROJECT	# Of FGDs	# Of participants	# Male	# Female
B&PWA	1	8	0	8



### AWARENESS

- One out of the nine participants knew the name of the project, BEST.
- All knew USAID
- According to the participants: tourism sector in Jordan faces different challenges like the lack of government investment, high prices of local tourism, and a lack of promotion through the media at the national and international level;
- Women's workforce involvement in the tourism sector is low in Jordan, but women usually conduct local tourism effectively.

## EFFECTIVENESS

- All the participants had participated in a USAID training workshop
- The training was about financial procedures
- All the participants benefited from the training regarding their personal life and their current projects;
- The participant felt that the training supported their way of thinking of the marketing process and they start thinking of the client\ market before producing anything;
- The trainer was good according to participants;
- Generally, BEST through training helped enhance women's awareness of the tourism sector and provided them with important skills and information, which they used and shared with others.
- It can be used as a basis for creating small projects for women.
- The training enhances women's understanding of the importance of the tourism sector to create income and the important of women workforce at this sector.

## CHALLENGES

- All the participants indicated that the training was too short to cover all the training topics and they indicated about that in the post-event evaluation conducted after two training days;
- Participants felt that transportation to Amman was the main challenge faced by them during the training;
- Local traditions and culture towards women working in the tourism sector and low tourism skills and education, in addition to the high cost of tourism education were the main challenges faced by women in tourism sector in Jordan;
- Trainees said that the training was conducted for one time only, and there was no follow up from the USAID side after that;

## SUSTAINABILITY

- Participants talked about the importance of TOT at this workshop and the need to share the knowledge and skills gained with other women in local communities
- A follow up, more advanced training workshop would be more effective in the future;

## RECOMMENDATIONS:

1. Integrate English and computer skill in the training models;
2. The training workshop should take into consideration year of experiences among the trainees;
3. Include more section in the training process not only three;
4. Decrease the time frame of the training to include more trainees from each hotel;
5. Enhance female participation through networking with local CBOs and NGOs;
6. Each trainee should have one copy of the training material;

- Documentation of the lesson learned and success stories and included them in the training material;



#### FOCUS GROUPS 4: JORDAN TRAIL ASSOCIATION

##### JTA

PROJECT	# Of FGDs	# Of participants	# Male	# Female
JTA	1	7	7	0



##### AWARENESS:

- All participants know BEST;
- Participants recognize the role of BEST;

#### EFFECTIVENESS:

- All participants felt that the Jordan Trail Association was somewhat effective;
- All participants felt that the local community benefit from the Jordan Trail comes from economic perspective both in family and individual levels
- Four families work closely through a part time system with food service providers and two families rely on a regular monthly salary;
- In addition to that participants felt that many restaurants on the Trail way hire new employees (nearly 2-3 on each section of the Trail);
- Word of mouth through social media, Facebook and Instagram are the main channels for marketing from participants' perspectives;
- From the north to the south the service providers promote for each other at the Kingdom level;
- Their participation at the Trail enhances participants' communication skills with tourists and enables them to find the best way to communicate with visitors;
- The project enhances local community awareness of the local tourism resource, and the acceptance of cultural exchange with tourists;
- The Association sometimes faces resistance from the local community and people refuse to host any external tourists: BEST helped change local community perspectives towards homestay, especially when they benefit from the project economically;

#### CHALLENGES:

- A lack of sustainability, the application was in English and most of service providers didn't have the ability to fill it;
- Lack of contact between the service providers and BEST management;
- Community perspective towards the Trail needs to be managed.
- Participants felt that BEST training was only partially effective because it was a theoretical training without a practical part, and didn't take the different level of experience in tourism of the trainees into account: Service providers have different levels of experience;
- No female guides have been trained;
- Female roles are possible but confined to traditional gender stereotype roles like cleaning homestays, cooking and any other tradition roles;
- Participants felt that females benefit from the Trail from an economic perspective and they share the profit with their families;
- Participants assured felt females particularly help when they have female tourist
- *My mother bought traditional dresses to promote our homestay with international tourists, especially female";*
- One participant said that the Association promised them more advance support to improve the homestays but they never came back;

- Participants said that the BEST provided them with very basic needs to create the homestays with a small amount of money but this doesn't support the sustainability of the project;
- All participants had their own businesses before the Trail and the Trail enhances their current work;
- It was felt there is no follow up from the Jordan Trail Association or BEST;
- There are challenges with the applied policies of MOTA.

#### SUSTAINABILITY:

- They see a need to revise the tourism service prices as they feel they are too high;
- Promote tourism on an international level by using social media;
- Improve the homestays by including air conditioning and heating etc. so that providers can work in all seasons;

#### RECOMMENDATIONS:

- Added the service details on GPS, names and contact details to the tourism map and make this available online so that the tourist can contact suppliers directly and use the web as a promotion tools for their work;
- Create a tourism map;
- Different s need different types of intervention, therefore, the Trail should take the diversity of communities into consideration when implementing its activities;
- The importance of an official entity\ umbrella organization of tourism service providers.
- Apply the mystery shopper as a method to identify the main gaps.

## ANNEX H: BIBLIOGRAPHY

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