USAID DEVELOPING SUSTAINABLE TOURISM ACTIVITY IN BOSNIA AND HERZEGOVINA (TURIZAM)

FISCAL YEAR 2021 -2022 QUARTERLY REPORT – QUARTER 2
January 1 – March 31, 2022

Prepared for USAID/Bosnia and Herzegovina
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# ACRONYMS

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<thead>
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<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
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<tr>
<td>BiH</td>
<td>Bosnia and Herzegovina</td>
</tr>
<tr>
<td>COVID-19</td>
<td>Coronavirus Disease 2019</td>
</tr>
<tr>
<td>CPCD</td>
<td>Center for Promotion of Civil Society</td>
</tr>
<tr>
<td>CZZZS</td>
<td>Center for Environmental protection</td>
</tr>
<tr>
<td>DMO</td>
<td>Destination marketing organization</td>
</tr>
<tr>
<td>EU</td>
<td>European Union</td>
</tr>
<tr>
<td>FBIH</td>
<td>Federation of BiH</td>
</tr>
<tr>
<td>FMoET</td>
<td>Federal Ministry of Environment and Tourism</td>
</tr>
<tr>
<td>FSA</td>
<td>BiH Food Safety Agency</td>
</tr>
<tr>
<td>GCAP</td>
<td>Green Cities Action Plan</td>
</tr>
<tr>
<td>GDP</td>
<td>Gross domestic product</td>
</tr>
<tr>
<td>GESI</td>
<td>Gender Equality and Social Inclusion</td>
</tr>
<tr>
<td>GIZ</td>
<td>Deutsche Gesellschaft für Internationale Zusammenarbeit</td>
</tr>
<tr>
<td>GoBiH</td>
<td>Government of BiH</td>
</tr>
<tr>
<td>GSTC</td>
<td>Global Sustainable Tourism Council</td>
</tr>
<tr>
<td>IPR</td>
<td>Intellectual Property Rights</td>
</tr>
<tr>
<td>MEL</td>
<td>Monitoring, evaluation, and learning</td>
</tr>
<tr>
<td>MOFTER</td>
<td>Ministry of Foreign Trade and Economic Relations</td>
</tr>
<tr>
<td>MTT</td>
<td>Ministry of Trade and Tourism (RS)</td>
</tr>
<tr>
<td>NGO</td>
<td>Non-governmental organization</td>
</tr>
<tr>
<td>NP</td>
<td>National Park</td>
</tr>
<tr>
<td>PA</td>
<td>Protected Area</td>
</tr>
<tr>
<td>PDO</td>
<td>Protected Denomination of Origin</td>
</tr>
<tr>
<td>PGI</td>
<td>Protected Geographical Indication</td>
</tr>
<tr>
<td>PTP</td>
<td>Pathways to Professionalism</td>
</tr>
<tr>
<td>REDAH</td>
<td>Regional Development Agency for Herzegovina</td>
</tr>
<tr>
<td>REG</td>
<td>USAID Regional Economic Growth Project</td>
</tr>
<tr>
<td>RS</td>
<td>Republika Srpska</td>
</tr>
<tr>
<td>SFF</td>
<td>Sarajevo Film Festival</td>
</tr>
<tr>
<td>SME</td>
<td>Small and medium-sized enterprises</td>
</tr>
<tr>
<td>STTA</td>
<td>Short-term technical assistance</td>
</tr>
<tr>
<td>TORS</td>
<td>Tourism Association of Republika Srpska</td>
</tr>
<tr>
<td>TCC</td>
<td>Tourism Competitiveness Coalition</td>
</tr>
<tr>
<td>TSA</td>
<td>Tourism Satellite Account</td>
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<tr>
<td>TSG</td>
<td>Traditional Specialty Guaranteed</td>
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EXECUTIVE SUMMARY

Chemonics International Inc. is pleased to submit to USAID/BiH the USAID Developing Sustainable Tourism in Bosnia and Herzegovina (Turizam) Quarterly Report covering the period between January 1, 2022 and March 31, 2022. The following is a synopsis of Turizam’s accomplishments organized by objective.

Objective 1: Enabling environment with harmonized policies and regulations necessary for noticeable growth in the tourism sector established. The draft of the Federal Tourism Development Strategy 2022-2027 was submitted to the Federal Ministry of Environment and Tourism (FMoET). For Republika Srpska (RS), the Implementation Plan for the RS Tourism Development Strategy was developed and submitted to the RS Ministry of Trade and Tourism (RS MTT). Both ministries’ staff will use the documents to formally plan and budget the ministries’ activities in the coming year of strategy implementation. The Tourism Development Strategy of Brčko District (BD BiH) for the period 2022-2027 was completely reworked and submitted to the Economic Department of the BD BiH Government. Turizam and the World Wide Fund for Nature (WWF) Adria documented through an exchange of correspondence their intention to collaborate on Visitor Management and Community Engagement Plan development for National Park Una and other related activities. Finally, Turizam encouraged the City of Trebinje to apply for the Green Destinations Story Awards with their Good Practice Story for the “Localizing and Decarbonizing the Supply Chain” category, clarifying the application process and guiding through the preparation of the necessary documentation. The City of Trebinje won first place.

Objective 2: Tourism quality, services, and branding strengthened, resulting in improved BiH tourism industry. Turizam held a series of technical meetings towards revising and modernizing the curriculum for cooks and for piloting the new curriculum in two model schools in Sarajevo - Secondary school Hadžići and Secondary School of Tourism and Hospitality Sarajevo. Turizam secured a preliminary commitment by FBiH Chamber of Economy (CoE) and RS Chamber of Commerce (CoC) as anchor institutions for administering the implementation of Pathways to Professionalism Program in leading hotels and restaurants. In Q2, Turizam worked on the UNWTO.TedQual certification program with three BiH universities, resulting in one submitted application and two in the final stages of preparation. Furthermore, Turizam continuously worked on the implementation of the Signature Experiences model by announcing the Request for Applications (RFA), followed by the 1-hour workshop for interested stakeholders. Finally, Turizam developed a social media strategy for Drill and Chill, climbing and highlining festival.

Objective 3: Tourism service providers, agriculture, and other tourism-related SMEs gain improved access to finance resulting in a substantial increase in investment. Turizam received USAID’s approval of the contract deliverable Micro, Small, and Medium Enterprises (MSME) Finance, Incentives Training and Roadshows Plan and Review. Turizam signed a Collaboration Letter with Bosna Bank International (BBI) for organizing the upcoming investment Sarajevo Business Forum 2022 (for a panel session related to the tourism industry).
Objective 4: Tourism and local agriculture products gain increased access to regional and global markets. Turizam hosted Chris Leadbeater, a famous travel journalist from the Daily Telegraph and Ilay Erkok, a well-known influencer and actress from Turkey. Supporting the FBiH CoE, Turizam launched the biggest BiH international promotion campaign and the country's first-ever TripAdvisor campaign. Turizam also organized three storytelling webinars on “Creating Compelling Tourism Content through Storytelling” tailored and targeted for three different audiences: tourist boards, BH tourism trade, and travel media. In addition, Turizam, in collaboration with the Resilience Council, hosted a familiarization trip for the Intrepid Travel team showcasing the country’s rich cultural offerings. In partnership with Visit Sarajevo (VS), FBiH CoE, Flydubai and Flynas, Turizam co-hosted a delegation of eight Bosnian travel agencies and four hotels on a roadshow in United Arab Emirates (UAE) and Saudi Arabia. In partnership with VS, Tourism Organization Republika Srpska (TORS), and Visit Bihać, Turizam organized a webinar with Rida International, an international tour operator with network of 600 travel agents, where BiH was presented to international tour operators, located in the Asian market. Furthermore, in partnership with Marmara Travel and Tourism, a leading outbound travel agent in Jordan and Palestine, Turizam supported and facilitated a familiarization trip for around 25 travel agents from Jordan and Palestine to visit BiH. Turizam worked with Sarajevo international Airport (SIA) on a new operational incentive scheme which resulted in establishing a new route by LOT, the largest Polish airline. Finally, in partnership with the Smithsonian Center for Folklife and Cultural Heritage, Turizam concluded three successful workshops aimed at demonstrating the transformation of cultural heritage elements into tourism experiences.

SECTION A
INTRODUCTION

A1. BACKGROUND

USAID’s Developing Sustainable Tourism in Bosnia and Herzegovina (Turizam) will fuel broad-based tourism-driven economic growth and promote social harmony by capitalizing on its rich cultural heritage and distinctive nature. It will support the Bosnia and Herzegovina (BiH) tourism industry to recover from the negative impacts of the COVID-19 pandemic and set it on a robust growth trajectory toward a sustainable tourism economy.

Turizam aims to accelerate economic growth in the tourism sector, which will lead to more jobs, provide sustainable income for producer organizations and tourism-related companies, help to change the “BiH brand”, and have a positive spill-over effect to other sectors, such as agriculture, transportation, and environmental protection.

USAID Bosnia and Herzegovina expects the activity will result in:

- Objective 1: An enabling environment with the harmonized policies and regulations necessary for noticeable growth in the tourism sector established.
• Objective 2: Tourism quality, services, and branding strengthened resulting in an improved BiH tourism industry.
• Objective 3: Tourism service-providers, agriculture, and other tourism-related SMEs gain improved access to finance resulting in a substantial increase in investment.
• Objective 4: Tourism and local agriculture products gain increased access to regional and global markets.

A2. ORGANIZATIONAL STRUCTURE AND CHART

To achieve the objectives of Turizam, the Activity’s startup structure organizes staff in thematic priorities that address the overlap in objectives and interlinked nature of tourism opportunities in BiH. It is comprised of three technical and one administrative teams, which may be realigned per implementation demands with the most effective team composition and organization. The teams are organized as follows:

• **The destination competitiveness team** focuses on the foundational needs of the activity, by facilitating coordination for strategies and policies at the state, entity, canton, and municipal level, driving business enabling environment development, gender integration, and sustainability; facilitating investments; building business acumen; and balancing interventions for economic development with conservation strategies.

• **The tourism products development team** engages and supports beneficiaries in product development, workforce development with an inclusive lens. The team expertly steers tourism inputs, such as agricultural and other rural products, toward exceptional quality to meet the packaging and marketing expectations of international clients.

• **The experience development and destination marketing team** identifies opportunities and tourism products with the most potential impact, works with stakeholders (i.e. tourism boards) to improve capacity and develop product marketing strategies at the destination and enterprise levels, and leverage experience design approaches to enhance value and attractiveness of BiH tourism offer.

• **The program services team** supports the technical teams as well as the Activity stakeholders as needed, to ensure program activities are flexible, and have a national and global outreach. The team provides logistical as well as technical support to implementation through well-organized activities focusing on procurement, grants and subcontracts, financial management, activity communications, and MEL and reporting.

The Activity’s staffing strategy is directly informed by its commitment to build local capacity through mentorship, skill transfer and empowerment to confidently and independently achieve excellence and ‘entrepreneurship’, as well as ascend into more senior roles, when the opportunity presents itself. This team is supported by senior qualified international experts and advisors providing both long term and intermittent assistance to all components.
through the life of Turizam. As Turizam is a dynamic activity that must continually adapt to
needs of implementation and demands for a fast-moving tourism local and global
environment, staffing configuration will be adapted to meet stakeholder development needs
and Activity targets through refinements, additions, or reductions.

A3. CONTEXT UPDATE

BiH has unique layers of history with fascinating heritage and is endowed with one of
Europe’s most distinguished natural landscapes. Yet, prosperity is hampered by fractious
governance, a tainted image, high unemployment, and outward migration of youthful talent.
Properly conserved, developed with innovation, and effectively marketed, sustainable
tourism can fuel broad-based economic growth across the tourism and related value chains,
including agriculture. Post COVID-19 traveler motivations will strongly align with healthier
trade options, including nature and adventure, which are all strengths for BiH. As a multi-
sectoral industry, tourism success depends on active collaboration among diverse public and
private stakeholders to serve as a powerful force for creating a single economic space,
robust job growth, and social cohesion.

The Country Development Cooperation Strategy (CDCS) notes that BiH has not fully
activated the tourism sector’s potential to facilitate steady economic growth and job
opportunities, especially in providing benefits for the young adult demographic. This is the
result of many factors, including the lack of year-round tourism offers, limitations on
environmentally protected areas, poor access to markets, and restricted digital visibility and
branding.

The most significant challenge to be overcome by BiH, and which has heavily impacted the
country’s tourism sector, is the COVID-19 pandemic. According to the current projection
of the Central Bank of Bosnia and Herzegovina (CBBiH) “Economic growth in the current
year and in 2022 is estimated to be stronger compared to the projections from May 2021,
which were prepared on the basis of the then available quarterly data from the end of 2020,
and the available information until the end of April.”¹ The International Monetary Fund (IMF)
said it expects Bosnia and Herzegovina’s gross domestic product (GDP) to rise 2.5% this
year, but the outlook is highly uncertain due to the war in Ukraine and domestic political
tensions. The IMF expects Bosnia’s average annual inflation to accelerate to 6.5% in 2022.
Last year, consumer prices in Bosnia rose by average 2%, after a decrease by 1% in 2020.²

COVID-19 Pandemic Update

The Central Bank of BiH regularly publishes projections of economic activity in BiH for the
current and previous calendar year. According to the last published projection, “the gross
domestic product (GDP) of Bosnia and Herzegovina grew by 7.6% year-on-year in the last
quarter of 2021, following a revised 6.9% annual increase in the previous quarter and a 2.5%
contraction in the fourth quarter of 2020.”³ According to the Agency for Statistics, “on a
quarterly comparison basis, GDP increased by 2.4% in October-December in seasonally-

¹ Projections of economic activity in BH in 2021 and 2022 revised upwards (cbbh.ba)
² Bosnia’s GDP to grow 2.5% in 2022, inflation to accelerate to 6.5% - IMF (seenews.com)
³ Bosnia’s GDP grows 7.6% y/y in Q4’21 - first estimate (seenews.com)
adjusted terms, after adding 1.3% in the July-September period, and following an increase of 2.1% in the fourth quarter of 2020. 

The UNWTO World Tourism Barometer and Statistical Annex published in March 2022 reported that globally “International tourism continued its recovery in January 2022, with much better performance compared to the weak start of 2021. World arrivals more than doubled (+130%) compared to January 2021, an increase of 18 million. This is the same increase as in the whole of 2021 compared to 2020.”

As of March 31, 2022, Bosnia and Herzegovina ranks 80th in the world regarding the number of confirmed cases (10,705 cases per 100,000 inhabitants), 16th globally in terms of the number of active cases (4,776 cases per 100,000 inhabitants), and 6th regarding fatalities (448 per 100,000 inhabitants). In BiH, wearing of facemasks is no longer mandatory in public settings. The airports and the border are open. Citizens of BiH returning to the country are not required to present a negative PCR test or any alternative documentation before entering BiH. Those who do not hold a BiH passport must present one of three documents: a negative PCR test, proof of completed vaccination at least 14 days prior to entry into BiH, or medical certificate showing recovering from COVID-19 between 14 and 180 prior to entry into BiH. Exceptions to this rule are citizens of Croatia, Serbia, and Montenegro who travel from their respective countries. The PCR test for persons traveling from EU countries must be done within 48 hours of arrival in BiH, for locations outside of the EU, the PCR test must be done within 72 hours of arrival.

The most recent figures from the Agency of Statistics show a 4.85% decrease in international arrivals for the period between January and February 2022 as compared to the period before COVID-19 (2019).

<table>
<thead>
<tr>
<th>Bosnia and Herzegovina Agency for Statistics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitor Numbers</td>
</tr>
<tr>
<td>Change %</td>
</tr>
<tr>
<td>Year</td>
</tr>
<tr>
<td>Domestic tourists</td>
</tr>
<tr>
<td>Foreign tourists</td>
</tr>
<tr>
<td>Total</td>
</tr>
</tbody>
</table>

Figure 1. Arrivals in BiH for Jan-Feb 2022 period

In terms of the overnights in BiH, the COVID-19 pandemic is still impacting the number and the most recent data published by the BiH Agency for Statistics state that there is an increase by 7.58% in total overnights in the period of January-February 2022 compared to the same period in 2019.

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4 Bosnia’s GDP grows 7.6% y/y in Q4’21 - first estimate [seenews.com]
5 UNWTO World Tourism Barometer and Statistical Annex, November 2021: UNWTO World Tourism Barometer (English version): Vol 19, No 6 (e-unwto.org)
6 Bosnia and Herzegovina Coronavirus Statistic: day by day + latest [georank.org]
7 granpol.gov.ba/Faq/Covid19?pageId=76
Most airlines providing service to BiH prior to the COVID-19 pandemic have now resumed flights; due to the incentives BiH airports provided to international airlines. New routes have been established between BiH and previously unserved locations.

### SECTION B

**PROGRESS BY OBJECTIVE**

#### B.1 OBJECTIVE 1: ENABLING ENVIRONMENT WITH HARMONIZED POLICIES AND REGULATIONS NECESSARY FOR NOTICEABLE GROWTH IN THE TOURISM SECTOR ESTABLISHED

If Bosnia and Herzegovina is to succeed in the post COVID-19 international tourism marketplace, which is anticipated to be extremely competitive, the industry needs to begin a process of ‘reinvention’ by developing a clearer vision of the future and improving competitiveness across the value chain. This will be achieved by working in partnership with the ministries of tourism and other public and private sector stakeholders from both Entities and the BD BiH. Such a partnership needs to be based on continued dialogue among industry actors to ensure dynamic policymaking and effective execution.

Objective 1. is divided into two Sub-Objectives:

1. Support Harmonized Tourism Competitiveness Strategies, Policies, and Regulations
2. Protect the Environment, Conserve Nature, and Promote Sustainability

**Quarterly Highlights**

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**Figure 2. Overnights in BiH in Jan-Nov 2021 period**

Most airlines providing service to BiH prior to the COVID-19 pandemic have now resumed flights; due to the incentives BiH airports provided to international airlines. New routes have been established between BiH and previously unserved locations.

<table>
<thead>
<tr>
<th>Year</th>
<th>2019-2020</th>
<th>2020-2021</th>
<th>2021-2022</th>
<th>19/21</th>
<th>19/22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td>117,816</td>
<td>145,356</td>
<td>144,409</td>
<td>29.21%</td>
<td>28.37%</td>
</tr>
<tr>
<td>Foreign</td>
<td>238,580</td>
<td>99,043</td>
<td>214,784</td>
<td>-55.26%</td>
<td>-2.98%</td>
</tr>
<tr>
<td>Total</td>
<td>356,396</td>
<td>244,399</td>
<td>359,193</td>
<td>-26.80%</td>
<td>7.58%</td>
</tr>
</tbody>
</table>

**Figure 3. BiH Airports passengers**

<table>
<thead>
<tr>
<th>Year</th>
<th>2019-2020</th>
<th>2020-2021</th>
<th>2021-2022</th>
<th>19/21</th>
<th>19/22</th>
</tr>
</thead>
<tbody>
<tr>
<td>January-Dec</td>
<td>1,919,292</td>
<td>522,948</td>
<td>1,207,970</td>
<td>-37.06%</td>
<td>-</td>
</tr>
<tr>
<td>January-Feb</td>
<td>190,714</td>
<td>208,410</td>
<td>46,068</td>
<td>-75.84%</td>
<td>-18.24%</td>
</tr>
</tbody>
</table>
• Federal Tourism Development Strategy 2022-2027 draft was submitted to the Federal Ministry of Environment and Tourism (FMoET). The Ministry informed Turizam the Strategy document will inform their work plan and budget planning;

• Implementation Plan for the Republika Srpska (RS) Tourism Development Strategy developed and submitted to the RS Ministry of Trade and Tourism (RS MTT). Once finalized and adopted, the ministry staff will use this document to formally plan and budget ministry activities in the coming year of strategy implementation;

• Tourism Development Strategy of BD BiH for the period 2022-2027 completely reformulated (reworked) and submitted to the Economic Department of the BD BiH Government;

• City of Trebinje won first place for the Green Destinations Story Awards with their Good Practice Story for the “Localizing and Decarbonizing the Supply Chain” category;

• Collaboration Letter signed between USAID Developing Sustainable Tourism in Bosnia and Herzegovina (Turizam) and WWF Adria on Visitor Management and Community Engagement Plan development for National Park Una and other related activities.

SUB-OBJECTIVE 1.1: Support Harmonized Tourism Competitiveness Strategies, Policies, and Regulations

ACTIVITY 1.1.1 Strengthening capacities and work of Tourism Competitiveness Coalition

In line with the foreseen activities included in the entity-level tourism strategies, Turizam engaged several different stakeholders to work together on workforce development activities. In RS, Turizam has supported the organization of job fairs in Banja Luka and Trebinje, involving the RS MTT, RS Chamber of Commerce (RS CoC), RS Employment Bureau and Association of Employers of Tourism and Catering of RS (HORECA RS). A similar initiative was discussed in FBiH with the FBiH Employment Bureau, while another activity is in progress with the Ministry of Education of Sarajevo Canton to introduce curriculum changes at a high school level for the cooking professional track.

Turizam is engaging members of Tourism Competitiveness Coalition (TCC) to revitalize the Herzegovina Wine Route (HWR). The project supported the development of a business plan for HWR, which involves many public and private stakeholders, including BiH Foreign Trade Chamber (BiH FTC), Herzegovina-Neretva Canton Tourism Board, six municipalities on the route, around 70 tourism sites/attractions, and over 100 private businesses.

Members of the TCC were also engaged in the organization and implementation of the United Arab Emirates (UAE) and Saudi Arabia roadshow that aims at increasing awareness of the country’s tourism offerings as well as developing and growing international sales network of local trade. Federal Chamber of Economy and Visit Sarajevo (VS) worked with Turizam to support participation of eight BiH travel agencies and four hotels in the roadshow in

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8 The official name of Contract Deliverable 2.1. is “Implementation and Harmonization Plans for Two Entity Tourism Development Strategies”. However, for the purpose of this reporting and future correspondence, we will be using the term Implementation Plan for the RS Tourism Development Strategy.
partnership with Flydubai and Flynas that resulted in meetings with almost 120 travel professionals representing around 60 travel agencies in UAE and Saudi Arabia.

**ACTIVITY 1.1.2 Facilitate the development of entity-level tourism development Strategies and implementation plans**

Following the adoption of the RS Tourism Development Strategy, Turizam, in partnership with MTT RS and other relevant tourism stakeholders, proceeded to develop an Implementation Plan for the RS Tourism Development Strategy for the period 2022-2024. The Plan focuses on the activities and projects to be implemented in 2022. A series of meetings were conducted to jointly elaborate the Plan which was currently pending approval by the MTT RS. The MTT RS sent an official email thanking the project team for the significant contribution and assistance in the development of this document, however, further clarifications were requested later by ministry staff pertaining to budgeting and actions assignments. Turizam will work with RS ministry staff in the coming reporting period to finalize the document.

![Figure 4. Implementation Plan for the RS Tourism Development Strategy](image)

Furthermore, Turizam finalized the Federation of BiH (FBiH) Tourism Development Strategy for the period 2022-2027, including all comments received from cantonal ministries, after the last working session in Neum in December 2021, and submitted it to Federal Ministry of Environment and Tourism (FMoET) for approval. The document was developed through focus groups in six different locations throughout the FBiH, verification meetings with the FMoET, and included submitted written comments on the text from six cantonal ministries/governments. The next step is the finalization of the document by FMoET and submission to the FBiH Government and Parliament for its adoption.

In this reporting period, Turizam completely reworked the Tourism Development Strategy of BD BiH for the period 2022-2027 and submitted it to the Economic Department of the BD BiH Government for approval. Information about its finalization was sent to the Mission. Turizam developed the document to achieve harmonized tourism strategies across BiH (FBiH, RS and BD BiH) using the same methodology and approach.

**ACTIVITY 1.1.3 Develop white paper policy/regulatory reform agenda to support policy, regulatory and institutional enhancements**

As stated in the previous reporting period, Turizam facilitated focus groups for tourism development strategies in both the FBiH and RS. Through these sessions, the team identified key business enabling environment issues affecting tourism sector actors and their needs. In the coming period, these needs will be further assessed, updated, and prioritized through additional focus groups and individual meetings with the TCC members. The result will be the development of an agenda of the policy and regulatory reforms the private sector expects from the Government. This document will be updated annually.

Following the focus groups meetings for the RS Tourism Strategy Development and the meetings for Implementation Plan for the RS Tourism Development Strategy for the period
2022-2024, Turizam held a meeting with the Union of Employers’ Association of RS to facilitate the organization of an awareness conference on the social and economic benefits of the tourism industry. This Conference will be utilized as a platform for additionally collecting data and discussion with the tourism industry representatives the reform needed for sustainable tourism development and growth in RS.

**Activity 1.1.4 Strengthen industry development and advocacy capacity of specialized NGOs and business associations**

Turizam selected the BiH FTC as a strategic partner for the development of the HWR and BiH wine tourism destination brand, conducted a needs assessment, and selected a consultant to develop a business and advocacy plan. The Business plan is being developed as part of the HWR development initiative and it is in its final phase.

The second association to be supported with the development of a business plan is HORECA from RS. The business plan will serve the Association to improve internal organization, specially of human capital needs, internal documents needed to be developed, fees calculation for the optimization of the work and advocacy plan for better positioning of the tourism industry in RS. The document is in progress.

**ACTIVITY 1.1.5 Strengthen data-driven policy formulation and marketing**

This activity will commence in quarter 3 (Q3) and 4 (Q4) of 2022.

**SUB-OBJECTIVE 1.2: Protect the Environment, Conserve Nature, and Promote Sustainability**

In April, 2021, the City of Trebinje, with the support of Turizam, applied for the Green Destination Top100 Award. Turizam encouraged the city to apply for the competition, clarifying the application process and guiding through the preparation of the necessary documentation. Trebinje was selected as a top100 green destination. Additionally, Trebinje was among the six cities nominated for the Green Destinations Story Awards category "Localizing/Decarbonizing the Destination Supply Chain", and ultimately won first place. This information was announced at the virtual ITB (Internationale Tourismus-Börse) Berlin conference on March 13, 2022.

In October 2021, Turizam received an official request for cooperation with the Cantonal public institution for protected natural areas of Sarajevo, to support them in the area of digital marketing. During Q1, Turizam held a series of meetings to define the suggestions proposed by the public institution for web page improvements. Turizam reviewed and provided technical assistance in drafting the scope of work (SoW) for tendering the process. In Q2, all of Turizam’s comments and suggestions were accepted, with the process resulting in a new visual identity and new web page [https://zppks.ba/](https://zppks.ba/). Following the completion, Turizam reviewed the new visual identity and web page, confirming that its recommendations were followed through.
ACTIVITY 1.2.1 Support increase of land area classified as protected and improve management of existing nature parks

During Year 1, Turizam developed a plan to increase land area classified as protected (based on available valorization studies), as a contract deliverable. This plan is based on extensive consultations with various public, private and conservation partners who contributed to formulating a practical approach to realization of the plan to double the percentage of Protected Areas. It builds upon current and ongoing initiatives. Actions illustrated in the plan are reflected in activities 1.2.3, 1.2.4.

On February 7, Turizam formalized and secured a partnership with the WWF Adria to support Turizam nature protection activities. WWF Adria is committed to conservation of nature and protection of biological diversity across the Western Balkans, where their efforts are strongly focused on improving management of protected areas and strengthening cooperation with local communities. As agreed, there is significant potential for synergies and support between WWF Adria work in BiH and Turizam objectives. Upcoming activities will include joint efforts on development of the new management plan for Una National Park, supporting increase of land area classified as protected through partnership with local and international organizations, improve awareness of economic and ecological value of protected areas to promote conservation and protected area expansion.

ACTIVITY 1.2.2 Develop enhanced nature park visitor management and community engagement plan for nature parks

The current management plan for National Park (NP) Una expired in December 2021. With the support of the WWF Adria, NP Una is developing a new plan, and Turizam is ensuring that sustainable tourism concepts and environmental conservation practices will be included.

This document will be a component of the overall park management plan and will help to improve the attractiveness and readiness of BiH, in general, and NP Una in particular, as a sought-after sustainable destination for the higher-yield outdoor and nature-based travelers. Therefore, on January 7, a Request for Proposals (RFP) for the Visitor Management and Community Engagement Plan for NP Una and second park, was announced. Turizam received two offers, and selected Nature & Adventure as a subcontractor. Nature & Adventure is a consulting firm from Croatia which was established as a result of education and multi-year professional work in the nature protection sector and experience acquired during several years of sporting activities in nature. The draft plan for NP Una will be completed in the next quarter.

ACTIVITY 1.2.3 Improve awareness of economic and ecological value of protected areas to promote conservation and protected area expansion

In order to improve awareness of the economic and ecological value of protected areas and to promote conservation and protected area expansion, Turizam has engaged a short-term technical expert (STTE) who has started working with local governments and local communities on targeted areas like Livno field, Zvijezda planina, Mediteranetum - botanical reserve-coastal area (Neum, Klek), area of Bjelašnica, and Rakitnica canyon. The objective of this consultancy is to provide targeted and timely training and Technical Assistance (TA) to
relevant ministry institutions and to local communities as an advocacy tool to better understand the economic and ecological value of protected areas.

On March 14, a workshop on the protection of the Livno field was conducted in Livno. The purpose of the event was to acquaint the councilors of Livno, Tomislavgrad and Bosansko Grahovo with the concept of protection and the draft Law on declaring the Livno field a protected area, so that they would have the information necessary to decide on the continuation of the Livno field protection process. In total, 37 people participated the event, which was live-streamed and followed by more than 1000 people online. The workshop included seven different presentations by partners and the Turizam short-term consultant, who was also moderating the workshop and the discussion. One of the conclusions of the workshop was that it is extremely important to further inform and involve the councilors of the municipalities of Tomislavgrad, Livno and Bosansko Grahovo in the process of amendments to the proposed law on the proclamation, and in the zoning process.

Turizam was invited to facilitate the conference “(Un) protected areas of Zenica-Doboj Canton” that took place on March 24. As a result, WWF Adria in BiH, UG Fojničani Maglaj and Eco-forum Zenica, on behalf of the Coalition for Nature Protection of the Canton and with the support of the Government of Zenica-Doboj (ZEDO) Canton requested Turizam to support awareness raising and legislative drafting around protected areas, namely Zvijezda mountain in Vareš, ZEDO Canton. As in Livno, Turizam will support similar activities and workshops in Vareš Municipality for establishing new protected areas.

**ACTIVITY 1.2.4 Develop and promote adoption of nature parks adaptive planning and management model**

Nature parks adaptive tourism planning and management model was finalized and submitted for internal review. Turizam aims to submit this deliverable to USAID in the next quarter.

The model provides a vision and recommends a road map that will help guide tourism activities to focus on and seek more effective approaches to sustainable tourism development in protected areas in BiH. The guidelines recommend steps and structures designed to help protected area managers, tourism professionals, policymakers, and other conservation and nature protection professionals to develop tourism management plans. The document provides a framework for nature parks tourism planning and management that will promote a set of internationally recognized standards to guide nature parks in BiH in conserving their natural environment and developing sustainable tourism management practices for protected area management. Infrastructure and visitor services improvements in nature parks should help to advance visitor understanding of key park values and, in turn, generate more revenue for protected areas in their quest for sustainability.

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9 [https://www.youtube.com/watch?v=5G9vQLDswg&t=39s](https://www.youtube.com/watch?v=5G9vQLDswg&t=39s), [https://fb.watch/bQ1F1GEk4x/](https://fb.watch/bQ1F1GEk4x/), [https://fb.watch/bQ1cBuykT4/](https://fb.watch/bQ1cBuykT4/)
B.2 OBJECTIVE 2: TOURISM QUALITY, SERVICES, AND BRANDING STRENGTHENED RESULTING IN IMPROVED BIH TOURISM INDUSTRY

Objective 2. is divided into three Sub-Objectives:

1. Improve Quality of Tourism Products and Services Across the Value Chain
2. Enhance Quality and Professionalism of Tourism and Hospitality Human Capital
3. Revolutionize Destination Branding and Secure Geographic Indications/Certification

Quarterly Highlights

- Initiated activities towards building awareness and recruitment campaigns through preparation of Tourism Job Fairs;
- Established a Task Force for Upgrading the Curriculum for Cooks, validated the Occupation Standard for Cooks with industry professionals, and held a series of technical meetings towards revising and modernizing the curriculum for cooks and for its piloting in two model schools in Sarajevo - Secondary school Hadžići and Secondary School of Tourism and Hospitality Sarajevo;
- Secured preliminary commitment by FBiH Chamber of Economy (CoE) and RS Chamber of Commerce (CoC) as anchor institutions for administering the implementation of Pathways to Professionalism Program in leading hotels and restaurants;
- Worked on the UNWTO.TedQual certification program with three BiH universities, resulting in one submitted application and two in the final stages of preparation;
- Continued creation of content for expanding short-course training opportunities and online courses on Turizam Academy;
- Turizam continuously worked on the implementation of the Signature Experiences model by announcing the Request for Applications (RFA) on February 16, 2022 followed by the 1-hour workshop for interested stakeholders on February 25, 2022. Turizam developed a social media strategy for Drill and Chill, climbing and highlining festival. The strategy includes analysis, content and advertising recommendations and communication messages for multiple target audience. The purpose of this strategy is to help Drill and Chill raise international appeal of the festival and the destination.

SUB-OBJECTIVE 2.1: Improve Quality of Tourism Products and Services Across the Value Chain

ACTIVITY 2.1.1. Launch Canada’s Signature Experiences for Bosnia and Herzegovina to the International Markets

In Year 1, Turizam adapted the Canadian model for Signature Experiences (SE) to Bosnia and Herzegovina. In Year 2, Turizam is in the process of identifying a local partner to take on the role of promoting these experiences and link them to international sales networks across business-to-business (B2B) and business-to-consumer (B2C) distribution channels in collaboration with trade and tourism board partners. The SE model will support the
country’s efforts to pivot into higher-yield tourism that capitalizes on Bosnia and Herzegovina’s unique tourism assets.

Throughout Q2, Turizam continuously worked on the implementation of the SE model by announcing a Request for Applications (RFA) on February 16, followed by a 1-hour workshop for interested stakeholders on February 25, 2022. So far, two applications have been received. Turizam will announce the decision during April 2022. The finalized business model will include selection criteria, guidelines, and policies for continued quality assurance.

**ACTIVITY 2.1.2. Support Adoption of BiH Green Brand**

As part of its Outdoor Cluster development activities, Turizam has already completed Adventure Tourism Certification Plan. The deliverable was submitted to USAID on March 28, 2022. The Certification Plan presents a number of international standards for adventure and sustainable tourism that should be taken under advisement for implementation in BiH in the upcoming years.

To build on GIZ-implemented Green Scheme activities, Turizam started discussions with Good Place to develop a plan for introducing Green Destination Standard and Good Travel Seal for Businesses and/or Good Key for a selected group of destinations and businesses in BiH. This plan will build upon further developments with Green Scheme in BiH. The proposal is planned to be finalized in the next quarter.

**ACTIVITY 2.1.3. Implementation of an Outdoors cluster plan**

The Outdoor Cluster Plan was approved by USAID on December 29, 2021. Primary and secondary adventure tourism products have been identified along with recommendations for long- and short-term actions for overcoming the identified key challenges for BiH adventure tourism’s development. Turizam continued working with the relevant stakeholders to address top priorities.

During the reporting period, Turizam has prepared the Outdoor Cluster Plan for publication and wide distribution with an accompanying letter to all participants in focus groups and the adventure tourism webinar, individual interviews, as well as to public organizations (relevant entity, BD BiH and cantonal ministries, and tourism organizations) inviting them to use the plan in their planning and implementation of activities in their respective areas. The promotion and distribution of the plan is scheduled to be completed by the end of April.

Although most of the challenges identified by the Outdoor Cluster Plan require a systematic and continuous effort from various public and private structure, Turizam will also support and facilitate selected activities. For example, Turizam will support training adventure tourism guides in accordance with internationals standards. Currently, no such training is being offered. Turizam will offer an introductory online course to introduce standards and requirements to those planning to become adventure tourism guides, as well as to those already providing this service but unaware of international standards and requirements. The Online training course for adventure guides will be developed and promoted during the next quarter.
As part of its support to the organization of the World Rafting Championship, Turizam will support the Rafting Club (RC) Kanjon through a grant to organize the rafting guide training that is scheduled to take place from May 7 to 11 and will be delivered by licensed IRF rafting guides on Vrbas river. Call for applications will be published jointly by RC Kanjon and Turizam.

**ACTIVITY 2.1.4 Improved Operational and Safety Standards for Outdoors Cluster**

Turizam translated the Outdoors Tourism Cluster Operational and Safety Standards guide and submitted to USAID on December 16, 2021, developed by Adventure Travel Trade Association (ATTA) The guide provides standards for rafting, hiking and biking sub-sectors based on globally accepted standards and will be distributed to relevant public and private sector stakeholders in each of listed activities.

The Operational and Safety Standards Guide will be promoted and distributed in the form of three separate documents focused on each sub-sector and shared with the two entities ministries for tourism to assist them in making decisions on the most appropriate ways to introduce the standards in their respective regions as well as mailed to all relevant private and non-government stakeholders with an accompanying letter. The adoption of these standards by relevant ministries/industry will improve quality, enhance customers’ trust spurring further development of these sub-sectors. To facilitate the adoption of the standards, the Project will develop appropriate trainings and share on Turizam’s Turizam Academy.

**ACTIVITY 2.1.5 Develop Most Beautiful Villages of Bosnia and Herzegovina program**

Alterural and PROI/Balkantina submitted applications following the RFA designed to support the Most Beautiful Villages (MBV) champion. Alterural scored more points in the selection process and following negotiations, the grant selection committee recommended to proceed with the approval of their application. The Grant Approval Request was shared with Turizam COR and is being processed, with the results expected to be announced in early April.

Once the grant is awarded (thereby confirming the selection of a local champion for MBV BiH label), Turizam will start providing technical assistance to the champion to start finalizing the activities related to the launch of MBV in BiH. The priority will be to appoint a quality commission and finalize the methodology, before launching the call for interested villages to apply for the label.

**ACTIVITY 2.1.6 Develop Hub and Spokes model**

In Year 1, Turizam agreed with Visit Sarajevo (VS) to introduce the Hub and Spokes model to link Sarajevo with nearby towns and villages. During Y2, Turizam and VS defined criteria for the selection of spokes through a rapid appraisal of spokes that can be linked to Sarajevo and have engaged with stakeholders in shortlisting key spokes to be linked. Distance from Sarajevo, the potential for the development of tourist offers, as well as the number of cultural, historical, natural and adrenaline attractions were taken into consideration when
selecting Spokes. This model was also used to promote the integration of the tourism product and collaboration among both FBIH and RS entities.

During Year 2, Q1, the Turizam team has already conducted the desk research and started with the focus groups. Municipalities/areas chosen to be considered as spokes are: Visoko, Travnik, Kakanj, Vareš, Kiseljak, Fojnica, Konjic, Bjelašnica/Igman, Kreševo, Zenica, Ilijaš, and Pale.

During the reporting period of Q2, the focus groups continued. The team visited the final four municipalities/areas, pre-defined during Year I. Those municipalities/areas were:

<table>
<thead>
<tr>
<th>Location</th>
<th>Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ilijaš</td>
<td>12</td>
</tr>
<tr>
<td>Bjelašnica</td>
<td>4</td>
</tr>
<tr>
<td>Zenica</td>
<td>13</td>
</tr>
<tr>
<td>Jahorina</td>
<td>14</td>
</tr>
</tbody>
</table>

Once the data from the focus group was collected, itineraries and cross-promotional strategies were tailored according to the offers, and initial feedback received from the participants. This was the first step in creating a communication plan which will raise awareness of tour operators and promoters of the new tourism offers and circuits created.

The Hub and Spokes model will be implemented by early Q4. Turizam will analyze lessons learned and prepare the model for replication in Mostar (Q4).

**ACTIVITY 2.1.7 Harmonize Local Quality Standards for Hospitality Establishments with Relevant International Standards**

Turizam conducted an assessment and benchmarked entity-based accommodation quality standards and systems against international ones, consolidated findings, and articulated recommendations within a comprehensive Accommodation Classification System Upgrade and Training Plan, which is in its final stages of preparation. This plan includes a situational analysis that outlines the different entity-specific accommodation quality systems and presents an overview of key authorities and regulations that govern accommodation classification in the BD BiH, FBIH, and RS. This report measures and calibrates the FBIH and RS accommodation classification standards against reputable standards such as HotelStars (for hotels), Eurogites (for rural households) and ISO Wellness standards (for residential spas).

In Q3, Turizam will finalize the Plan and continue with next steps of communicating the findings to relevant stakeholders and providing support in harmonizing local quality standards for hospitality establishments with relevant international ones. Specific recommendations will be given to entity authorities on upgrading their rulebooks and classification criteria thus approaching internationally recognized benchmarks.

**SUB-OBJECTIVE 2.2: Enhance Quality and Professionalism of Tourism and Hospitality Human Capital**

**ACTIVITY 2.2.1 Develop Tourism and Hospitality Human Capital Skills per New Strategy**
i. **Promote and Launch Implementation of the Human Capital Development Strategy and Plan**

The Human Capital Development (HCD) Strategy and Plan 2021-2027, developed in Year 1, is a dynamic document that continues to inform and anchor all Turizam activities on building the tourism industry’s human capital in BiH. As per the recommendations formulated in the HCD Strategy, in the reporting period Turizam has conducted several activities.

Detailed information on the implementation status of the activities connected to the HCD will be presented in relevant sections of the report below.

ii. **Implement Disability Inclusion Plan**

The Disability Inclusion (DI) Assessment and Plan is being reviewed, edited and it is in its final stages of preparation.

**ACTIVITY 2.2.2 Professionalize hospitality services by improving workplace skills and strengthening vocational education and training**

i. **Promote COVID-19 health and safety protocols among tourism value chain workers and enterprises**

Turizam helped the FMoET to migrate the content from https://safetravels.turizambih.ba/ (temporary subpage on Turizam’s website) to a permanent location at https://safetravels.ba/ (domain and hosting managed by the Ministry directly). As of March 31, a total of 171 businesses registered for the right to use the SafeTravels stamp in FBiH. Following the successful model from FBiH, at the request of BD BiH Government, Turizam also supported the development of a similar page for BD BiH. Although fully functional since early February, this page was still not promoted by the relevant authorities, as pandemic began slowing down.
ii. Improve workplace skills

Turizam continued collaborating with the TCC human capital pillar to identify priority interventions required to upskill employees. In Q2, Turizam explored options of offering to BiH tourism industry a selection of quality online learning modules from renowned providers, such as FLOW Hospitality and Typsy, which focus on essential skills for frontline workers (e.g., guest/customer services, receptionist, housekeeping, etc.) but also supervisory and management personnel. Both options were tested by the Turizam team to determine if the content is appropriate and applicable for this region and if the translation is functioning well. The launch of five courses from FLOW Hospitality on Turizam Academy is planned in Q3, while a similar pilot project is being agreed with Typsy targeting 100 employees in BiH tourism sector.

iii. Strengthening vocational education and training

Turizam joined forces with GIZ’s Technical and Vocational Education and Training (TVET) project and the Ministry of Education Canton Sarajevo to support the modernization of secondary vocational education for Cooks in two pilot schools in Sarajevo: School for Tourism and Hospitality and Secondary School Center Hadžići. In line with the Vocational Training Curriculum Assessment and Plan developed in Year 1, a focus group was organized with eminent education and industry professionals to validate the existing Occupation Standard for Cooks (developed by USAID and GIZ in 2014) as a basis for curricular modernization. A Task Force for Upgrading the Curriculum for Cooks was officially nominated by the Ministry of Education of Canton Sarajevo and its technical assistance has commenced. So far, three technical meetings of the Task Force were held. Consensus was reached on the plan, the distribution and ratio of practical to theoretical classes, and alignment of subjects against the Occupation Standard. The Task Force will proceed with programmatic revisions with the aim of enrolling first generations of students in September 2022.

To support programmatic modernization, Turizam made available the Vocational Booklet for Cooks developed in Y1 with the aim of adapting it to the upgraded curriculum and allowing for its adoption and utilization in pilot schools. The feedback received from the Task Force attests to the readiness of schools to adopt and use the material in its classes and beyond, as it supersedes any currently available material they own.

ACTIVITY 2.2.3 Implement industry-based ‘Pathways to Professionalism’ (PTP) training initiative

Under the guidance of the international expert for Human Capital Development, who successfully spearheaded the Pathways to Professionalism (PtP) scheme under the USAID BEST project in Jordan, a set of important documents and materials were developed in Q2 and are currently being reviewed and finalized by Turizam:

- Strategy and Implementation Plan for Pathways to Professionalism;
- Booklets for three key professions (Food Production, Food and Beverage Services and Housekeeping);
• Job Competency Portfolios for three professions allowing structured mentoring and assessment of trainees.

These materials represent important resources necessary for rolling out of Pathways programs in Q3 and Q4 in leading hotels and restaurants, together with PtP Master Trainers trained in Q1.

An important milestone was achieved in the reporting period, as Turizam liaised with entity chambers of commerce and received preliminary commitment from both FBiH and RS Chambers to take on the roles of administrators for the Pathways program. Turizam plans on formalizing cooperation with both Chambers in Q3, which will ensure long-term sustainability of the program.

**ACTIVITY 2.2.4 Building excellence in tourism higher education per UNWTO TedQual program**

Turizam worked with three universities (Tuzla, East Sarajevo, and Herzegovina) to prepare and submit the TedQual-compliance self-assessments. Twelve out of a total of fourteen webinars were successfully implemented and the second field visit of the international expert was successfully conducted. As a result of the technical support, evident progress was made by all three universities in improving their study programs in tourism: Advisory Boards were set up as a means to integrating industry in program design and delivery, alumni connections were enhanced, and program content innovated.

These activities resulted with one of the three universities--Faculty of Economics Pale--already completing and sending the application\(^{10}\) for the TedQual certification, while the other two higher education institutions are following suit. The University of Tuzla aims to submit its application by the beginning of May. The RS MTT recognized the efforts of the Faculty of Economics Pale and the importance of building an educated workforce. The full fee of the application for the faculty was paid and the Minister, Suzana Gašić, attended the ceremony of sending the application.

**ACTIVITY 2.2.5 Promote safe food handling in the adventure and hospitality sector**

A digital version of the developed safe food handling/hygiene guide was officially presented at the end of last quarter, followed by an awareness campaign through press releases and posts on Turizam social media channels. In partnership with the BiH Food Safety Agency (FSA), Turizam continued to promote the food safety issue throughout the country and has organized and delivered two workshops in Bihać and Banja Luka with participation of members from hospitality industry and other relevant stakeholders (food producers, Chambers of Economy, FBiH and RS Ministry of Agriculture, RS Inspectorate, Faculties, representatives from municipalities and municipal centers for culture and tourism etc.). Information about available safe food handling courses on Turizam Academy was shared with 63 participating food business operators (FBOs) and organizations of which 52 persons completed in total 148 courses.

\(^{10}\) [https://ekofis.ues.rs.ba/aplikacija-za-provjeru-kvaliteta-poslata-svjetskoj-turistickoj-organizaciji-unwto/](https://ekofis.ues.rs.ba/aplikacija-za-provjeru-kvaliteta-poslata-svjetskoj-turistickoj-organizaciji-unwto/)
Additional field workshops are planned in Q3 and Turizam will continue to use direct emails and social media posts to share information to hotels and FBOs on developed materials and available courses on Turizam Academy.

**ACTIVITY 2.2.7 Promoting Excellence Awards in the Industry**

Turizam has continued working with the FBiH Chamber of Economy (CoE) on reforming the Star of Tourism Award with the aim of opening it up to wider segments of the tourism industry, introducing objective and transparent standards and raising its public profile. The Turizam team has completed a detailed proposal including ten categories in which the award will be given, with detailed criteria and evaluation schemes. Furthermore, Turizam proposed a new, more modern design of the award. Following approval by FBiH CoE, a press conference will be held late April to present the new format of the award and to invite the tourism industry to apply. Turizam is also working on a promotional and sponsorship plan that will contribute to the award’s public profile and sustainability.

**ACTIVITY 2.2.8 Expansion of Online Training Activities through Turizam Academy**

As envisioned in the Online Training Plan, Turizam will incorporate the use of appropriate learning materials from the specialized learning platforms by making their content accessible to interested learners in BiH. Negotiations are in progress with two such international platforms: Flow Hospitality and Typsy.

**Flow Hospitality:** Following the review of the available courses that would be most relevant to our target audiences, we plan to sign an agreement to use five courses from Flow Hospitality: (1) The Waiter, (2) Services that Sell, (3) Guest Service, (4) The Housekeeper and (5) The Receptionist. These courses will be offered free of charge to participants via Turizam Academy, which will present the course details, and have a separate registration process for each of them. We will then promote the courses widely to different target groups (including employed and unemployed workers) and monitor the progress of the registered learners.

**Typsy:** Around 200 Typsy courses will be promoted through Turizam Academy, where the selected users would register. Turizam plans to promote the courses available on Typsy to larger stakeholders (hotels, tour operators, restaurants and similar) and motivate up to 100

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managers and key employees to take the selected relevant courses free of charge over a 3-month period.

So far, 1,168 registered learners completed 2,105 courses on Turizam Academy, which is currently offering 30 courses, nine webinars, and a range of downloadable content. The Turizam team is working on developing new courses based on the webinars and recorded seminars held as well as expert-developed guides and resource materials. The courses are being finalized and will be posted during the next quarter on Turizam Academy.

**ACTIVITY 2.2.9 Introduce Gender Equality Seal to the Industry**

Turizam has conducted a meeting with UN Women in late February. UN Women expressed their interest to get involved in the process and informed us about the Women Empowerment Principles (WEP), an initiative they have started to implement with the IT sector but are open to broadening the scope and including tourism as well.

In latest consultations, UNDP proposed Turizam to embed staff members in entity gender centers due to an acute lack of capacity in order to create the basic infrastructure for the adoption of the seal. Keeping in mind that the process of obtaining the UNDP Gender Equality Seal will take up a significant time and resources, Turizam explored the possibility of creating and deploying GES without such extensive support. Turizam has decided to partner with UN Women, start with WEP, and then enter the UN Women Equity Seal program.

On March 23, Turizam sent a letter to UN Women, expressing the interest to cooperate and proposed the following joint efforts and collaboration on introducing Women’s Empowerment Principles (WEPs) and Gender Equity Seal to expand women’s participation and promote safe and empowering working conditions in the tourism sector.

**SUB-OBJECTIVE 2.3: Revolutionize Destination Branding and Secure Geographic Indications/Certification**

**ACTIVITY 2.3.1 Improve Bosnia and Herzegovina Brand Positioning**

Turizam and the subcontractor Solimar International are developing a Brand Communications Toolkit and preparing to launch a training program targeting tourism organizations, national parks, and other relevant organizations. The toolkit and training will introduce best practices in developing and curating place brands and define the role of the tourism organizations and private sector in building and communicating the brand internationally. Place brand approach to destination brand developed was introduced as part of the entities’ tourism development strategies to help identify value and unique selling propositions of different destinations around the country using the same methodology and development approach. The training on toolkit use is planned in late April/early May (during Q3) and will be organized in three areas around the country.

**ACTIVITY 2.3.2 Develop digital brand communication plans for key assets or activities**
Turizam developed a social media strategy for Drill and Chill, climbing and highlining festival. The strategy includes analysis, content, and advertising recommendations and communication message. The goal of this strategy is to help Drill and Chill raise international appeal of the festival and the destination. The strategy was presented to Drill and Chill team in an online meeting and Turizam received positive feedback with very few comments that required strategy edit. The deliverable is being finalized based on the feedback received and will be submitted in Q3.

Based on the earlier discussion between Turizam and Terra Dinarica, Turizam team started a discussion with FarOut—the number one international platform for long distant hiking—to list Via Dinarica and raise international awareness, consideration, and bookings among targeted audience.

**ACTIVITY 2.3.3 Support attainment of quality marks, geographic indications or certifications**

To increase knowledge about the process and encourage producer organizations to work on product certification, Turizam developed two practical guides and two short leaflets: one focused on obtaining geographical indications and another on certification/trademarks. These guidelines provide all relevant information explaining the steps in the certification process, presenting and promoting already certified organizations in order to advance the process of acquiring Geographic Indication (GI) marks and certification marks to other organizations, and enable them to better promote and market their products.

A practical Guide for obtaining GI marks was developed in cooperation with the BiH Food Safety Agency (FSA) and in close coordination with two entity Ministries of Agriculture. It emphasizes that funding mechanisms for obtaining the GI marks by agriculture producer organizations are available from both ministries through their annual incentive programs. The developed guide is posted on the BiH FSA and on the Turizam Academy to be widely available to all interested producer organizations (POs) looking to implement GI marks. To promote this guide, Turizam in cooperation with BiH FSA started a series of workshops across the country, with the first ones delivered in Bihać and Banja Luka, and additional ones scheduled for April and May in Travnik and Tuzla.

A guide and two-page infographic were created to explain the steps in the certification process for the protection of handicrafts and other products and services. They largely focused on certification marks and were developed in cooperation with the BiH Institute for Intellectual Property Rights (BiH IPR). These documents are prepared and developed as required by BiH IPR in all three B/H/S language versions and posted on BiH IPR. The guide will also be posted on Turizam Academy and promoted through Turizam social media channels in order to be presented to interested POs looking to implement similar quality standards.
With Turizam’s technical assistance, two organizations from the hospitality sector received Halal certificate:

- Hotel “Pirg” from Bijeljina, working under Ethno Village Stanišići, received a certificate for its restaurant and accommodation facility, and
- Starby Company, serving visitors at the large HIFA petrol stations, received a certificate for their restaurants in Doboj East and Tešanj.

Another organization that received support in meeting all requirements for the certification mark issued by the BiH IPR is craft “Family S”, which is engaged in the production of berries, processed jams, and juices in Ilijaš near Sarajevo. This year, “Family S” will receive visitors to its plantation and offer food and other services, including “pick your own fruit.”

Coordination with donors continued as Turizam participated in the workshop organized by the UN Food and Agriculture Organization related to the management and support of GI marks. Turizam presented the recently produced guidelines at this workshop and we will continue to cooperate and work on finalization of a booklet that will contain information about more than 100 agriculture and food products from all over the BiH with potential to obtain the GI marks.
B.3 OBJECTIVE 3: TOURISM SERVICE PROVIDERS, AGRICULTURE, AND OTHER TOURISM-RELATED SMES GAIN IMPROVED ACCESS TO FINANCE RESULTING IN A SUBSTANTIAL INCREASE IN INVESTMENT

The banking sector in BiH is liquid, but risk averse. According to a 2018 World Bank study, the service and agricultural sectors disproportionately face borrowing impediments and women-owned/managed enterprises suffer from weaker networks and management skills and face discrimination. Lenders view the tourism industry as cyclical, seasonal, and highly risky, leading them to be averse to extending credit to tourism enterprises. Additionally, many tourism enterprises do not possess sufficient physical collateral, requiring new and creative loan products or credit guarantee solutions. Turizam’s general approach to facilitating credit is to promote a demand-side pull for finance and increase “bankable” demand for capital through matchmaking, improved business management, and preparedness to access $3 million in credit.

Objective 3. is divided into two Sub-Objectives:

1. Bridge Finance Gap for Tourism SMEs and Local Agriculture Producers
2. Fuel Tourism-Driven Investment and Public-Private Partnerships

Quarterly Highlights

- Received USAID’s approval of the contract deliverable Micro, Small, and Medium Enterprises (MSME) Finance, Incentives Training and Roadshows Plan and Review.
- Signed Collaboration Letter with Bosna Bank International (BBI) for organizing upcoming investment Sarajevo Business Forum 2022 (for panel session related to the tourism industry).

SUB-OBJECTIVE 3.1: Bridge Finance Gap for Tourism SMEs and Local Agriculture Producers

ACTIVITY 3.1.1 Update online finance directory

During this reporting period, Turizam worked on designing the structure for a web-enabled version of the online finance directory that will provide an interactive and user-friendly format for better promotion and access to information. The web-enabled version will include an additional chapter related to the investment opportunity. It is expected to be finalized in May 2022.

ACTIVITY 3.1.2 Publicize lending/incentive programs, and facilitate matchmaking between lenders and entrepreneurs

Turizam received USAID’s approval of the contract deliverable Micro, Small, and Medium Enterprises (MSME) Finance, Incentives Training and Roadshows Plan and Review. The next step for Turizam is to engage in awareness sessions and training throughout BiH.
The document proposes types of training and awareness-raising activities for MSMEs and bank officers to facilitate better access to finance in the future. Awareness sessions plan to bring together public and private sector stakeholders to create a better understanding amongst them (banks, relevant ministries, tourism sector MSMEs, etc.).

Turizam supported USAID CATALYZE Engines of Growth project’s (EoG) event for women entrepreneurs promoting technical support in the field of access to finance (held in Banja Luka and Bihać, March 10 and 11, 2022). Turizam’s support involved inviting women entrepreneurs from the tourism sector to attend this event and presented Turizam, especially the component related to the access to finance and investment.

SUB-OBJECTIVE 3.2: Fuel Tourism-Driven Investment and Public-Private Partnerships

ACTIVITY 3.2.1. Promote Public Private Partnerships in the tourism sector

Turizam engaged two local consultants to complete the assessment of governments’ regulatory and institutional capacities for utilization of different public private partnerships (PPP) models to commercialize publicly owned tourism assets. This included an overview of the legal framework enabling private investment in public property (sale, lease, contractual PPPs, concession, construction right, other forms) for each government level in BiH (state, entity, canton, municipality). Based on the findings, one of the consultants is working to identify most prospective publicly owned assets for potential tourism PPP deals and other private sector engagement models as part of an analysis to summarize and catalogue key tourism assets across BiH. The asset commercialization plan will be finalized in April (next quarter) for submittal to USAID. It will include the assessment as well as next steps.

Furthermore, Turizam and Bosna Bank International signed a Collaboration Letter to organize the Sarajevo Business Forum (SBF) 2022 (May 11 and 12). Both groups to achieve the joint objectives of:

- promoting tourism as a strategic economic industry in BiH by dedicating one of the key panels within the 11th SBF
- presenting developments and trends in regional and international markets for incoming tourism to BiH and highlight factors and initiatives to catalyze tourism growth in BiH
- engaging small and micro entrepreneurs
- inviting tourism projects to be presented at SBF
- preparing and distributing a destination brochure that would promote tourism assets and investment opportunities in BiH to participants of the 11th SBF and others.

B.4 OBJECTIVE 4: TOURISM AND LOCAL AGRICULTURE PRODUCTS GAIN INCREASED ACCESS TO REGIONAL AND GLOBAL MARKETS

The World Economic Forum’s 2019 “Travel & Tourism Competitiveness Report” ranks BiH 105th out of 140 analyzed countries and has the poorest ranking in Europe. Both private and public sector stakeholders acknowledge that the tourism sector is fragmented and underdeveloped due to mismanagement and lack of capacity. The industry suffers from
several constraints to growth, including fragmented offerings, a lack of qualified human resources, inadequate infrastructure, and poor promotion. The country lacks a national tourism board has weak marketing channels and tour operators, and projects and misrepresented international country. image is misrepresented. Turizam will help BiH quickly recover from the COVID-19 downturn and set it on a growth trajectory.

Objective 4. is divided into two Sub-Objectives:

1. Attract High-Yield Visitors Year Round
2. Market Local Agriculture and Handicrafts Products domestically and Internationally

Quarterly Highlights

- Turizam hosted Chris Leadbeater, a famous travel journalist from the Daily Telegraph, one of Britain’s main heavyweight/broadsheet newspapers, with the aim of promoting BiH as a winter destination;
- In continuous collaboration with Turkish Airlines Turizam supported the trip of Ilay Erkok, one of a better-known influencers and actresses from Turkey. The main goal of her visit was to promote the country as a winter destination and raise awareness of the youth regarding the winter asset that BiH has to offer;
- Supporting the Federal Chamber of Economy, Turizam launched the biggest BiH international promotion campaign and the country’s first-ever TripAdvisor campaign.
- Turizam organized three storytelling webinars on “Creating Compelling Tourism Content through Storytelling” tailored and targeted for three different audiences: tourist boards, BH tourism trade and travel media;
- Turizam, in collaboration with the Resilience Council, hosted a familiarization trip for the Intrepid Travel team showcasing the country’s culturally rich offerings. During the trip, Intrepid Travel conducted a series of workshops aimed at educating the local trade on the best practices to elevate the quality of the experiences offered in the country to attract higher yield customers;
- In partnership with Visit Sarajevo, Federation Chamber of Economy, Flydubai and Flynas, Turizam co-hosted a delegation of eight Bosnian travel agencies and four hotels on a roadshow in United Arab Emirates (UAE) and Saudi Arabia;
- In partnership with Visit Sarajevo (VS), Tourism Organization Republika Srpska (TORS), and Visit Bihać, Turizam organized a webinar with Rida International, an international tour operator with network of 600 travel agents, where BiH was presented to international tour operators, located in the Asian market;
- In partnership with Marmara Travel and Tourism, a leading outbound travel agent in Jordan and Palestine, Turizam supported and facilitated a familiarization trip for around 25 travel agents from Jordan and Palestine to visit BiH;
- Turizam worked with Sarajevo international Airport (SIA) on new operational incentive scheme. As result of the mentioned scheme, Turizam and SIA have succeeded attracting and establishing a new route by the largest Polish airline. The route will serve demand from Poland for leisure travel as well as connecting flights serving North American traveler;
- Turizam facilitated discussion between SIA and Royal Jordan to establish first ever direct route between Jordan and BiH. The route is expected to start in May 2022.
and service demand from Jordan, Palestine, and Gulf to BiH, as well as demand from BiH to visit Jordan and Palestine;

- In partnership with the Smithsonian Center for Folklife and Cultural Heritage Turizam concluded three successful workshops aimed at demonstrating the transformation of cultural heritage elements into tourism experiences through the presentation of The Ultimate Toolkit for Designing and Packaging Immersive Cultural Heritage Experiences.

**SUB-OBJECTIVE 4.1: Attract High-Yield Visitors Year Round**

**ACTIVITY 4.1.3 Raise international appeal of BiH as a tourism destination**

As stated in the Work Plan for Year II, the Turizam team plans to “Support TORS and VS co-host up to six influencers, blogger and media trips focused on top BiH niches such as adventure, wine, and culinary”. Turizam hosted Chris Leadbeater, a famous travel journalist from the Daily Telegraph, one of Britain’s main heavyweight/broadsheet newspapers. Considering the Winter Olympics in Beijing in 2022, the aim was to promote BiH as a winter destination by writing a travel article about Sarajevo and how it hosted the Winter Olympics of 1984. The article was published in February and posted in the Daily Telegraph13.

In accordance with the above-mentioned objective, the Turizam team supported an additional influencer trip in continuous collaboration with Turkish Airlines. Ilay Erkok, one of the better-known influencers and actresses from Turkey, was invited to promote the country as a winter destination and raise awareness of the youth regarding the winter asset that BiH has to offer. The campaign performance included five posts and five stories. The posts reached between 81,402 and 171,482 accounts across Instagram.

Turizam supported the launch of the biggest BiH international promotion campaign and the country’s first-ever TripAdvisor campaign. The aim of this campaign was to promote the Federation of Bosnia and Herzegovina and the country, as an attractive tourism destination in Germany, Turkey, Austria, Serbia, and Croatia.

The campaign was presented to the public and the trade on 18th of February through a webinar. The 129 attendees had the opportunity to share any questions and uncertainties they had regarding TripAdvisor. Additionally, an in-depth analysis was presented, which included the key markets interested in Bosnia and Herzegovina, as well as insights about the needs of tourists in the post-covid period. In the upcoming period (Q2), a summer campaign will be launched, and the results of the campaign will be regularly presented to the Turizam team. The campaign so far achieved 18 million impressions and 22,000 clicks, with the best results noticed in Germany.

**ACTIVITY 4.1.4 Improve tourism boards international destination promotion capacity**

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No activities were done during the reporting period.

**ACTIVITY 4.1.5 Increase tourism trade capacity to diversify and expand international sales channels**

During the reporting period, Turizam organized three storytelling webinars on “Creating Compelling Tourism Content through Storytelling” tailored and targeted for three different audiences: tourist boards held on 26 January, BH tourism trade on 27 January, and travel media on 28 January with travel bloggers, influencers, traditional and digital media representatives. The number of attendees reached 80 in total. The Webinar presented the Storytelling Method for Tourism that puts a destination’s generations-old heritage at the forefront of what it shares with the world.

Turizam, in collaboration with the Resilience Council, hosted a familiarization trip for Intrepid Travel, a leading operator of Sustainable Experience Rich travel. Intrepid Travel has significant expertise in developing experiential activities in communities and supporting various stakeholders to prepare to manage, operate, and maintain their business as a supplier.

The purpose of the trip included showcasing the country’s culturally rich offerings, distinctive community-based experiences, and the Hercegovina Wine Route, amongst others. This provided Intrepid Travel the opportunity to design new and distinguished programs to serve their affluent travelers. During the trip, Intrepid Travel conducted a series of workshops aimed at educating local trade on best practices that Intrepid Travel brings to elevate the quality of the experiences offered in the country to attract higher-yielded customers. The workshops took place on January 31 in Banja Luka, on February 2 in Sarajevo, and on the February 3 in Mostar and attracted 100 local trade professionals. Intrepid also provided educational materials and toolkits to be used on the Tourism Academy.

In partnership with Visit Sarajevo, Federation Chamber of Economy, Flydubai and Flynas; Turizam co-hosted a delegation of eight Bosnian travel agencies and four hotels on a roadshow in United Arab Emirates (UAE) and Saudi Arabia. The roadshow aimed to promote BiH as an attractive destination in those markets and to develop and grow BiH travel agents’ network there. Local participants had the opportunity to meet 19 travel agencies in Dubai, 12 travel agencies in Riyad, and 10 in Jeddah. The team will conduct bi-yearly check-ins to measure the results of the roadshow in relation to increased demand and bookings.

In partnership with VS, TORS, and Visit Bihać; Turizam organized a webinar with Rida International, an international tour operator with a network of 600 travel agents, where BiH was presented to international tour operators, located in the Asian market. Turizam asked nine representatives, to join live from their locations in Sarajevo, Banja Luka, Mostar, Višegrad, Jahorina, Trebinje, Livno, Japodski otoci, and Mostar. Around 200 travel agents from Far East markets, including Malaysia, Indonesia, Thailand, and Philippines attended the webinar.

In partnership with Marmara Travel and Tourism, a leading outbound travel agent in Jordan and Palestine; Turizam supported and facilitated a familiarization trip for around 25 travel
agents from Jordan and Palestine to visit BiH and get familiarized with the tourism offering in the country to help them design and sell packages. The Familiarization trip also included B2B workshop between BiH trade (outbound, inbound and hotels) to meet and discuss areas of collaboration to increase demand from the three destinations.

**ACTIVITY 4.1.6 Catalyze digital transformation of the tourism sector**

The activity is expected to start in Q3, Year 2.

**ACTIVITY 4.1.7 Support development of the lucrative incentive tourism market**

The activity is expected to start in Q3 Year 2.

**ACTIVITY 4.1.8 Improve appeal of BiH as a destination for association and corporate meetings**

The activity is expected to start in Q3 Year 2.

**ACTIVITY 4.1.9 Support Improved Air Access**

Turizam worked with Sarajevo international Airport (SIA) on new operational incentive scheme. The suggested scheme considered the new realities imposed by the pandemic and what airports in competing destinations are offering. The goal is to provide a compelling scheme and options for new airlines to consider SIA to start new routes and also incentivize existing airlines to add new routes or increase frequency.

As a result of the mentioned scheme, Turizam and SIA have succeeded attracting and establishing a new route by the largest Polish airline, LOT Airlines. The new route will commence as of May 30, 2022, with year-round service (five weekly flights during the summer and three weekly flights during the winter season). The route will serve demand from Poland for leisure travel as well as connecting flights serving North American traveler.

Furthermore, Turizam facilitated discussion between SIA and Royal Jordan to establish the first ever direct route between Jordan and BiH. The route is expected to start in May 2022 and service demand from Jordan, Palestine, and Gulf to BiH, as well as demand from BiH to visit Jordan and Palestine.

**SUB-OBJECTIVE 4.2: Market Local Agriculture and Handicrafts Products domestically and Internationally**

**ACTIVITY 4.2.1 Develop Slow Food travel destination in Trebinje**

Turizam is exploring a mechanism to support the Slow Food Association from Trebinje to become a Slow Food Travel Destination. In addition, technical assistance is envisioned to support Trebinje Slow Food Association in developing its capacities to be able to lead this process. Discussion is in progress with Slow Food International (SFI).
**ACTIVITY 4.2.2 Introduce the "Learning by Doing" approach**

The activity is expected to start in Q3, Year 2.

**ACTIVITY 4.2.3 Propel the Herzegovina wine route to an internationally recognized brand**

Intensive work on the development of the Herzegovina Wine Route (HWR) has continued. An advanced draft of business plan has been developed discussing the HWR strategic direction, Association’s core business functions, governance model, financial sustainability and income generation, and defining the next steps. This will be further presented and discussed with key stakeholders to secure their buy-in and move on with specific activities.

A database of wineries has been updated to include 40 wineries with tourism experiences, located in six municipalities (Mostar, Čitluk, Ljubuški, Čapljina, Stolac, and Trebinje) representing both entities. In addition to wineries, the database currently includes around 100 experiences and 70 sites/attractions, with more entries being added continuously.

Turizam will now focus on auditing the wineries and selected experiences and sites to assess their readiness to join the HWR and identifying the gaps to offer recommendations for improvement. With this information, the first batch of promotional materials will be produced, and the selected businesses and locations will be featured online. In parallel, Turizam is working with the BiH Foreign Trade Chamber to help them finalize the Rule Book for the Wine Tourism association, which is needed to formalize the Iter Vitis application process.

**ACTIVITY 4.2.4 Accelerate growth of agripreneurship to grow domestic and export sales**

Turizam assisted the Women Association of agricultural producers “Janjski kajmak” from Šipovo in developing their visual identity logo. This association has potential for the attainment of Protected designation origin (PDO) or Protected Geographic Indication (PGI) for their key dairy products “Janjski kajmak” and “Janjska pletenica” cheese. Adequate branding and logo are needed not only for visibility and better presentation, but also for the attainment of geographic indication mark.

![A logo developed for Šipovo Women Association “Janjski kajmak”](image)

Turizam established a cooperation with the USAID funded Farmer-to-Farmer (F2F) program implemented by the International Executive Service Corps (IESC) and has developed a scope of work for their volunteer technical support to enhance agripreneurship in BiH. The focus
of this activity will be to improve market access for agriculture products in general and especially through tourism. Through working with the IESC, local agriculture and food producers (where possible including handicrafts, for example wool products) and other partners would receive trainings in marketing, new product development and promotion to offer adequate products, targeting domestic, regional and international markets.

**ACTIVITY 4.2.5 Launch folkloric, crafts, culinary experiences, festivals linked to seasonal crops/harvesting traditions**

Turizam expanded the database of festivals and events from around 170 events reported last quarter, to almost 300 events and festivals around the country. Agreement has been reached with the BiH Foreign Trade Chamber to develop a modern, online calendar, hosted permanently on their website, and this is now being resolved. Once developed, this calendar of events will be promoted to the tourism industry so that they can direct the tourists towards the events relevant to them (based on the dates, location, and type of the event). This will help promote the various events and festivals around the country and make sure that they are integrated in the tourism offer.

Turizam in partnership with the Smithsonian Center for Folklife and Cultural Heritage concluded three successful workshops aimed at demonstrating the transformation of cultural heritage elements into tourism experiences through the presentation of The Ultimate Toolkit for Designing and Packaging Immersive Cultural Heritage Experiences. The three workshops were held in Sarajevo (March 21-22) with 42 participants, in Banja Luka (March 24-25) and was attended by 40; and in Mostar (March 28-29) with 38 attendees. A diverse audience included representatives of cultural institutions and museums, tourism organizations, students, craftsmen, agencies, experience providers, and many others. Following the workshop, Turizam, together with the subcontractor conducted filed visits including authentic Museums, discussing the further development, digitalization, and enhancement of their social media presence.

**SECTION C**

**TECHNICAL AND ADMINISTRATIVE SUPPORT**

**C. 1 PROGRAM SERVICES TEAM UPDATES**

In the reporting period, the project team worked mostly from the offices in Sarajevo, Banja Luka, and Mostar. With a strong field focus, the team is frequently travelling and ensuring the project’s presence and visibility with stakeholders through site visits and events.

The Program Services Team led the efforts in organizing, supporting, and communicating about numerous project activities, deliverables and events taking place in the reporting period.
C. 1. 1 Project Communications

The communications component report for the previous period listing different social media channels as follows: Facebook (88 posts; 1,118 new fans), Instagram (73 posts; 549 new followers), LinkedIn (70 posts, 314 new followers), YouTube (21 public videos; 3,000 views; 14,300 impressions), Twitter (18 posts, 25 new followers).

The project issued two newsletters during the reporting period, for February and March, to over 2,500 recipients in BHS and English, of which approximately half had opened the letters.

Turizam signed a partnership agreement with the official FBiH News Agency FENA to receive regular coverage of its activities, leading to the production of 1 video and 4 photo stories. During this period, Turizam was mentioned in a total of 266 articles in local media, which is a considerable coverage.

The project also supported communication efforts of a range of external partners, including carrying out a branding survey and creating three draft versions of the future Herzegovina Wine Route logo and redesigning the packaging of the Janjski cream cheese product with protected geographic origin.

The communications team has also continued maintaining the Turizam Academy site. The engagement statistics are shown below:

Turizam Academy was visited by 3,324 users (person who lands on any page of the site); 3,202 new users, of which 68,9 are mobile users and 30,3% desktop users; 11,170 page views (total number of pages viewed, repeated views of a single page are also counted).

C. 1. 2 Project Grants Program
APS no. 1
- Published on Sep 16, 2021; third round closed on Mar 15,
- Total number of concept papers received and processed: 160, of which:
  - 76 were rejected;
  - 45 are under review;
  - 39 were approved to proceed to the application phase;
- 13 received grant applications under review.

RFA no. 1 – Most Beautiful Villages
- Evaluation completed, Approval Request submitted to USAID for Alterural application.

RFA no. 2 – Signature Experiences
- Published on Feb 15; closed on Mar 18;
- Three applications received, under review.

C. 1. 3 Project Monitoring, Evaluation, and Learning (MEL)

In the monitoring, evaluation, and learning (MEL) component, tracking the results continued as planned during the quarter. According to the MEL table showing progress against targets, Turizam is on track to accomplish its Year 2 targets (see below in Annex B.). The supporting documents and lists of attendees on various events, meetings, webinars, workshops, etc. are collected from the relevant teams on regular basis to substantiate the reported results.
ANNEXES

ANNEX B. PERFORMANCE MONITORING, EVALUATION, AND LEARNING PROGRESS AGAINST TARGETS

The Monitoring, Evaluation, and Learning (MEL) component of the Turizam Activity prepared the final Monitoring, Evaluation, and Learning Plan and submitted it to the USAID Mission. The MEL Plan was approved at the end of the first quarter of Year 2. The progress against targets for two quarters are presented in the table below.

<table>
<thead>
<tr>
<th>No</th>
<th>Indicator</th>
<th>Overall Activity Baseline/Year</th>
<th>Actual 2021</th>
<th>Target Year 2 2022</th>
<th>Cumulative Actual 2022</th>
<th>Life of Activity Cumulative Target*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Share of tourism in nominal GDP (%)</td>
<td>9.8%/2020</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>5</td>
</tr>
<tr>
<td>2</td>
<td>Number of new full-time equivalent (FTE) jobs created in the tourism market economy</td>
<td>0/2020</td>
<td>No data</td>
<td>375</td>
<td></td>
<td>2,985</td>
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<tr>
<td>Activity</td>
<td>Description</td>
<td>Purpose</td>
<td>Baseline</td>
<td>FY 2020</td>
<td>Change</td>
<td>FY 2021</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
<td>---------</td>
<td>----------</td>
<td>---------</td>
<td>--------</td>
<td>---------</td>
</tr>
<tr>
<td>3</td>
<td>Number of part-time, seasonal and other types of jobs not considered full time officially registered jobs in Turizam-assisted enterprises and other private sector partners/beneficiaries</td>
<td></td>
<td>0/2020</td>
<td>0</td>
<td>25</td>
<td>250</td>
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<tr>
<td>4</td>
<td>Travel and Tourism Competitiveness Index Rank</td>
<td>#105/2019</td>
<td>No data</td>
<td>N/A</td>
<td>N/A</td>
<td>#85</td>
</tr>
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<td>6</td>
<td>CBLD-9: Percent of Turizam-assisted organizations with improved performance</td>
<td></td>
<td>0/2020</td>
<td>N/A</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>7</td>
<td>Number of firms receiving Turizam-funded technical assistance for improving business performance</td>
<td>Baseline for 2020 to be published</td>
<td>0/2020</td>
<td>343</td>
<td>300</td>
<td>451</td>
</tr>
<tr>
<td>8</td>
<td>Percent change in women’s participation in tourism workforce</td>
<td></td>
<td>Baseline for 2020 to be published</td>
<td>N/A</td>
<td>1%</td>
<td>13%</td>
</tr>
<tr>
<td>9</td>
<td>GNDR-2 Percentage of female participants in Turizam-assisted programs designed to increase access to productive economic resources (assets, credit, income, or employment)</td>
<td></td>
<td>0/2020</td>
<td>52%</td>
<td>50%</td>
<td>46%</td>
</tr>
<tr>
<td>10</td>
<td>Youth -3: Percentage of participants in Turizam-assisted programs designed to increase access to productive economic resources who are youth (15-29)</td>
<td></td>
<td>0/2020</td>
<td>26%</td>
<td>20%</td>
<td>25%</td>
</tr>
<tr>
<td>11</td>
<td>STIR-10 Number of innovations supported through Turizam assistance</td>
<td></td>
<td>0/2020</td>
<td>8</td>
<td>14</td>
<td>5</td>
</tr>
<tr>
<td>12</td>
<td>STIR-14 Number of investments in the digital ecosystem</td>
<td></td>
<td>0/2020</td>
<td>5</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>13</td>
<td>Number of new tourism products and experiences launched</td>
<td></td>
<td>0/2020</td>
<td>4</td>
<td>20</td>
<td>2</td>
</tr>
<tr>
<td>14</td>
<td>Number of strategies, policies, and regulations necessary for the tourism sector growth adopted with Turizam assistance</td>
<td></td>
<td>0/2020</td>
<td>8</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>15</td>
<td>Percent change in size of land area classified as protected</td>
<td>2.64%/2020</td>
<td>No data</td>
<td>0%</td>
<td>N/A</td>
<td>2.25%</td>
</tr>
<tr>
<td>16</td>
<td>Number of strategies, policies, and regulations necessary for the tourism sector growth drafted with Turizam assistance</td>
<td></td>
<td>0/2020</td>
<td>8</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>17</td>
<td>Percent change in income in protected areas from tourism activities</td>
<td>0%/2020</td>
<td>0%</td>
<td>5%</td>
<td>80%</td>
<td></td>
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<tr>
<td>Activity Sub-Purpose</td>
<td>Description</td>
<td>0/2020</td>
<td>2021</td>
<td>2023</td>
<td>2024</td>
<td></td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------</td>
<td>--------</td>
<td>------</td>
<td>------</td>
<td>------</td>
<td></td>
</tr>
<tr>
<td>18 EG3.2-28</td>
<td>Number of hectares under improved management practices or technologies that promote improved climate risk reduction and/or natural resources management with Turizam assistance</td>
<td>0/2020</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
<td>23.71</td>
</tr>
<tr>
<td>19</td>
<td>Percent change in sales of firms receiving Turizam-funded assistance</td>
<td>0/2020</td>
<td>0</td>
<td>5%</td>
<td></td>
<td>20%</td>
</tr>
<tr>
<td>20</td>
<td>Change in number of tourism nights recorded (in 000)</td>
<td>1,235.97 mil/2020</td>
<td>988.75</td>
<td>150</td>
<td></td>
<td>1,528.7</td>
</tr>
<tr>
<td>21</td>
<td>Percent of hotels/spas/guesthouses classified per new standards</td>
<td>0%/2020</td>
<td>0%</td>
<td>0%</td>
<td></td>
<td>70%</td>
</tr>
<tr>
<td>22</td>
<td>Number of tourism, hospitality, and related value-chains entrepreneurs, operators, and employees trained in technical, quality, safety, supervisory and managerial disciplines as a result of Turizam assistance</td>
<td>0/2020</td>
<td>2,588</td>
<td>1,600</td>
<td>2,354</td>
<td>13,900</td>
</tr>
<tr>
<td>23</td>
<td>Number of service employees, entrepreneurs and operators training activities held</td>
<td>0/2020</td>
<td>50</td>
<td>50</td>
<td>46</td>
<td>305</td>
</tr>
<tr>
<td>24</td>
<td>BiH Country Brand rank</td>
<td>Rank 116/2019</td>
<td>109</td>
<td>116</td>
<td>N/A</td>
<td>96</td>
</tr>
<tr>
<td>25</td>
<td>Number of new local traditional products, processes and businesses that have achieved protected status or brand certifications</td>
<td>0/2020</td>
<td>2</td>
<td>15</td>
<td>5</td>
<td>110</td>
</tr>
<tr>
<td>26</td>
<td>EG 2-12. Number of private sector enterprises with increased access to finance due to the Turizam assistance</td>
<td>0/2020</td>
<td>0</td>
<td>2</td>
<td></td>
<td>30</td>
</tr>
<tr>
<td>27</td>
<td>Amount of investments in the tourism sector facilitated (000$)</td>
<td>$0/2020</td>
<td>0</td>
<td>100</td>
<td></td>
<td>$25,000</td>
</tr>
<tr>
<td>28</td>
<td>Amount of finance secured by enterprises (in 000 US$)</td>
<td>$0/2020</td>
<td>0</td>
<td>50</td>
<td></td>
<td>$3,000</td>
</tr>
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<td>29</td>
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### Activity Outcome/Output 4.1: High-yield visitors attracted year-round

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### Activity Outcome/Output 4.2: Local agriculture and handicrafts products placed for sale at local and international markets

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# ANNEX C. REPORTS AND DELIVERABLES COMPLETED

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<th>Date resubmitted</th>
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<th>Date Approved</th>
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*Once the report is submitted for COR approval, there can be several versions of the document submitted by the project following COR comments. The column Last/Final Version Submitted Date informs when the last version in the reporting period was submitted for approval.
### ANNEX D. LIST OF ALL EVENTS (TRAININGS, WEBINARS, WORKSHOPS, AND CONFERENCES) ORGANIZED DURING QUARTER 2

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ANNEX E. LIST OF MAJOR ACTIVITIES PLANNED FOR NEXT QUARTER

B.1 OBJECTIVE 1: ENABLING ENVIRONMENT WITH HARMONIZED POLICIES AND REGULATIONS NECESSARY FOR NOTICEABLE GROWTH IN THE TOURISM SECTOR ESTABLISHED

SUB-OBJECTIVE 1.1: Support Harmonized Tourism Competitiveness Strategies, Policies, and Regulations

- Finalize the Federation of Bosnia and Herzegovina Tourism Development Strategy 2022 – 2027;
- Continuation of work on developing the TCC White Paper Policy and Regulation Reform Agenda document;
- Turizam will provide technical assistance to the members of TCC RS (Union Employer’s Association of RS and HORECA), in creating a concept and organization of an awareness conference on the social and economic importance of the tourism industry to take place in the next reporting period (mid-May 2022).

SUB-OBJECTIVE 1.2: Protect the Environment, Conserve Nature, and Promote Sustainability

- Workshop „Development of planning documents for Una National Park“ as a part of the Visitor Management and Community Engagement Plan Deliverable;
- of Joint Implementation Plan with National Park Una and collaboration letter with WWF Adria;
- Workshops for the local communities, stakeholders and NP management as a part of the Visitor Management and Community Engagement Plan Deliverable;
- Signing of Joint Implementation Plan with National Park Sutjeska;
- Raising awareness activities on nature protection and economic benefits of protected areas in Vareš and Livno.

B.2 OBJECTIVE 2: TOURISM QUALITY, SERVICES, AND BRANDING STRENGTHENED RESULTING IN IMPROVED BIH TOURISM INDUSTRY

SUB-OBJECTIVE 2.1: Improve Quality of Tourism Products and Services Across the Value Chain

- Provide further technical assistance to Rafting club Kanjon for organization of the World Rafting Championship 2022 in creating sponsorship packages, letter for mobilization of donor organizations support, design of structure of Adventure Tourism conference. The event is taking place from May 25 to June 1, in Banja Luka (Vrbas river) and Foča (river Tara);
- Translation and publicizing of adventure safety standard guide;
- Online conference/webinar focused on introduction of safety and operational standards in adventure tourism and guides training in cooperation with regional SERDA project including exchange of experience and know-how from the region;
- A series of meetings to explore options for formalizing adventure tourism cluster either through creating a new form or reviving ATA BiH;
• Finalize Accommodation System Upgrade and Training Plan and provide recommendations to
dentity ministries on upgrades to classification criteria;
• Finalize and approve the Disability Inclusion Plan;
• Implementation of the Hub and Spokes model in and around Mostar in cooperation with
tourism board, and other relevant organizations and institutions.

SUB-OBJECTIVE 2.2: Enhance Quality and Professionalism of Tourism and Hospitality Human Capital

• Through Flow Hospitality and Typsy, offer to tourism industry a selection of online courses on
practical workplace skills for front-line staff (receptions, guest services, etc.);
• Formalize cooperation modalities with model school(s) on upgrades to vocational programs in
tourism and launch technical assistance;
• Pilot Pathways programs in a selection of leading hotels and restaurants;
• Continue with webinars within the TedQual program for universities and support their
preparations for final submission of the application and audit;
• Prepare and possibly launch an awareness and recruitment campaign (e.g., job fairs for tourism)
to enhance public, and specifically youth, interest in the sector as a career choice and for
entrepreneurial activities;
• Work with the FSA and other partners such as HORECA RS to promote safe food
handling/hygiene to tourism establishments to raise awareness and improve safe food handling
and hygiene using developed guide, materials, and available courses on Turizam Academy.
Promote the guide and courses through an appropriate combination of seminars/webinars,
distribution of developed materials and promotion on Turizam social media networks (focus is
on social media posts and direct information releases);
• Define categories, evaluation criteria and prepare the presentation for Launch of the Star of
Tourism Award and announcing the beginning of application process in a press conference with
the FBiH Chamber of Commerce.

SUB-OBJECTIVE 2.3: Revolutionize Destination Branding and Secure Geographic
Indications/Certification

• Further promote and distribute two practical guidelines and leaflets that are developed to better
inform producer organizations about the steps and procedures needed for obtaining the
geographical indications (PDO, PGI and TSG) and certification marks (one focused on
agriculture and food and another more focused on handicrafts and services);
• Organize and participate in meetings to promote the possibility of introducing certification
marks and to promote the possibility of regional branding and marketing, to use a group
certification mark and to promote the mark to key stakeholders in the tourism value chain;
• Continue with provision of technical assistance to organizations interested in introducing
certificates and quality marks for their products and work on promotion of the organizations
that were successfully awarded the certificates and quality marks;
• Work with certified organizations and, if necessary, support them in designing labels and
promotional materials to promote their products and connect them with buyers in the tourism
value chain.
OBJECTIVE 3: TOURISM SERVICE PROVIDERS, AGRICULTURE, AND OTHER TOURISM-RELATED SMES GAIN IMPROVED ACCESS TO FINANCE RESULTING IN A SUBSTANTIAL INCREASE IN INVESTMENT

SUB-OBJECTIVE 3.1: Bridge Finance Gap for Tourism SMEs and Local Agriculture Producers

- The new web-enabled version of the online finance directory designed and available to the sector;
- Conduct roadshows to promote the new online finance directory and available finance resources, as well promoting it in the public using social media channels, stakeholder testimonials, Sarajevo Business Forum, etc.;
- Provide business development support advisory to qualified and vetted tourism enterprises interested in seeking bank loans and capacity building for loan/risk officers to enhance their understanding of the tourism sector to aid in making more accurate loan evaluation;
- Conduct awareness sessions to interested tourism enterprises to assist in business planning and preparing loan applications and project proposals.

SUB-OBJECTIVE 3.2: Fuel Tourism-Driven Investment and Public-Private Partnerships

- Turizam will co-organize and moderate one of the key panels at the 11th Sarajevo Business Forum (May 11 and 12, 2022), dedicated to the promotion of tourism as a strategic economic industry in BiH. The panel will bring together international experts from various tourism value chain segments (transport and communication, marketing and promotion, logistics, and accommodation).

OBJECTIVE 4: TOURISM AND LOCAL AGRICULTURE PRODUCTS GAIN INCREASED ACCESS TO REGIONAL AND GLOBAL MARKETS

SUB-OBJECTIVE 4.1: Attract High-Yield Visitors Year Round

- Joint Destination presentation with Visit Sarajevo and TORS, in partnership with LOT Airlines, targeting Polish outbound travel agents and tour operators to educate them on the tourism offering of the country, coupled with B2B meetings between a delegation of local trade participants and Polish based trade to explore business opportunities;
- Brand communication tools training for tourism boards, informed by the brand plan through three training sessions for tourist boards and private sector on the use of the developed messaging;
- Joint Destination presentation with Visit Sarajevo and TORS to Qatar Airways international sales team, to support the relaunch of the Doha – Sarajevo route;
- BiH Destination Presentation in Cairo with Egyptian Travel Agents Association, in partnership with Turkish Airlines, coupled with B2B meetings between a delegation of local trade participants and Egypt based trade to explore business opportunities;
- BiH Destination Presentation in Amman, Jordan, in partnership with Royal Jordanian, coupled with B2B meetings between a delegation of local trade participants and Jordan based trade to explore business opportunities;
- Hosting The Travel Corporation, that operates with 40 award-winning travel and hospitality brands that span across 70 countries;
- Turizam will organize a second round of two-part training program for providers of accommodation & experiences in rural areas, and those who plan to do so, to introduce best practices in Managing, Promoting and Selling Authentic and Successful Rural-based Accommodation and Experiences for Post COVID-19 Travelers.

SUB-OBJECTIVE 4.2: Market Local Agriculture and Handicrafts Products domestically and Internationally

- Support the activities leading to the development and promotion of Trebinje as a Slow Food Travel Destination and provide training and strengthen the capacity of the local organization;
- Turizam and BiH FTC will sign the Joint Implementation Plan (JIP) for establishing the Herzegovina Wine Route (HWR). The JIP is being drafted according to the specific role that BiH FTC will assume in managing the wine route and defines Turizam’s technical support;
- Herzegovina Wine Route Business Plan package containing Membership Policy, Constitution of the Wine Route, Assessment tool for admission to membership, and HWR Rulebook are being harmonized with Chamber internal procedures and will be put to adoption;
- Start the Membership Admission process for HWR;
- Provide support to producer organizations in designing labels and promotional materials, promote their products and connect them with buyers in the tourism value chain;
- Work on developing partnerships with tourism establishments that distribute local products to enhance the promotion of existing products and develop B2B opportunities with new producers;
- Finalize the “Harvest calendar” and make it available on Turizam and BiH Foreign Trade Chamber websites that will feature all events and festivals around the country relevant for tourism sector. Available data will contain filters enabling search by region, period, type, etc. and will be also presented on an interactive map (in BHS and English language);
- Provide support to organizations in new product development and branding;
- Support organizations that have expressed interest in improving packaging, designing new packaging, and promoting their products on the market.