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# Performance Evaluation of the Regional Economic Growth (REG) Project

**October 2017**

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# **PERFORMANCE EVALUATION OF THE REGIONAL ECONOMIC GROWTH (REG) PROJECT**

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# TABLE OF CONTENTS

- Table of Figures..... v**
- Acronyms..... vi**
- Executive Summary ..... I**
  - 1. Introduction..... I
  - 2. Project Background ..... I
  - 3. Evaluation Methods and Limitations..... 2
  - 4. Findings and Conclusions ..... 3
    - Evaluation Question 1: To what extent has the project proved successful in assisting companies: become exporters, develop new products, access finance, and improve workforce skills? For the Ukrainian financial sector stability program: To what extent has the project proved successful in improving financial sector stability, growth and inclusion?..... 3
    - Evaluation Question 2: Which of the activities in the targeted sectors will remain sustainable and active after the life of project (LOP)?..... 4
    - Question 3: How effective was the project in attracting investment funding (from a firm's perspective) and co-funding (from the project's perspective) to support development actions and how well was that funding tracked and quantified? ..... 5
    - Evaluation Question 4: What are the strengths and weaknesses of the REG management structure?6
  - 5. Recommendations ..... 6
- 1. Introduction ..... 8**
  - Evaluation Purpose..... 8
  - Evaluation Questions ..... 8
- 2. Project Background..... 10**
  - Brief history of project and scope of activities..... 10
  - Project Organization and Staffing ..... 10
  - Project Activities to Date..... 11
- 3. Evaluation Methods and Limitations ..... 12**
  - Methodology..... 12
    - Secondary Data..... 12
    - KIIs and FGDs ..... 12
    - Online Surveys ..... 12
  - Limitations..... 17
    - Design Limitations..... 17
    - Implementation Limitations ..... 17
- 4. Findings and Conclusions..... 18**

Evaluation Question 1: To What Extent Has The Project Proved Successful In Assisting Companies: Become Exporters, Develop New Products, Access Finance, And Improve Workforce Skills? For The Ukrainian Financial Sector Stability Program: To What Extent Has The Project Proved Successful In Improving Financial Sector Stability, Growth And Inclusion? .....	18
Overall Findings .....	18
Findings .....	20
Conclusions .....	44
Evaluation Question 2: Which Of The Activities In The Targeted Sectors Will Remain Sustainable And Active After The Life Of Project (LOP)? .....	45
Evaluation Question 2a.i. Were there typological commonalities in the intervention that will remain sustainable?.....	46
Overall Findings .....	46
Findings .....	47
Conclusions on Sustainability of REG Interventions.....	51
Evaluation Question 2a.ii: Were there typological commonalities in the companies/organizations where sustainability was achieved?.....	52
Overall Findings .....	52
Findings .....	53
Conclusions on Sustainability of REG-assisted Businesses .....	57
Evaluation Question 2.B.: What Are The Differences Observed Regarding Working With Business Associations And Chambers Versus Individual Firms?.....	59
Overall Findings .....	59
Findings .....	59
Conclusions .....	61
Evaluation Question 3: How Effective Was The Project In Attracting Investment Funding (From A Firm's Perspective) And Co-Funding (From The Project's Perspective) To Support Development Actions And How Well Was That Funding Tracked And Quantified?.....	61
Overall Findings .....	61
Conclusions .....	63
Evaluation Question 4: What Are The Strengths And Weaknesses Of The REG Management Structure? .....	63
Evaluation Question 4.A.: What Do USAID Mission Staff Identify As The Strengths And Weaknesses Of The Consultation Process? .....	63
Overall Findings .....	63
Conclusions .....	64
Evaluation Question 4.B.: How Well Did REG Coordinate With Bilateral Projects (E.G., Enhance Trade Facilitation) Or Fill Gaps Where Bilateral Activities Did Not Exist (Buy-Ins)?.....	65
Overall Findings .....	65

Findings .....66  
Conclusions .....67  
Evaluation Question 4.C.: What Do Missions In The Region Identify As Constraints Or Issues To  
Access/Utilize The Project? .....68  
Findings .....68  
Conclusions .....68  
Evaluation Question 4.D.: What Do REG Staff Identify As Management Constraints and Issues? .....68  
**5. Recommendations ..... 69**

# TABLE OF FIGURES

FIGURE 3.1 BUSINESS SURVEY RESPONSE RATES .....	13
FIGURE 3.2 NUMBER OF REG BUSINESS SURVEY RESPONDENTS PER SECTOR.....	14
FIGURE 3.3 BSO SURVEY RESPONSE RATES .....	14
FIGURE 3.4 NUMBER OF REG BSO SURVEY RESPONDENTS PER COUNTRY .....	15
FIGURE 3.5 NUMBER OF REG BSO SURVEY RESPONDENTS PER SECTOR .....	16
FIGURE 3.6 USAID SURVEY RESPONSE RATES .....	16
FIGURE 4.1: BENEFICIARY RATINGS OF REG ACTIVITIES BY ACTIVITY TYPE AND SECTOR .....	19
FIGURE 4.2: REG EFFECT: ALL SECTORS.....	20
FIGURE 4.3: AGRIBUSINESS ACTIVITIES .....	20
FIGURE 4.4: REG ACTIVITY RATINGS: AGRICULTURE/AGRIBUSINESS.....	23
FIGURE 4.5: REG EFFECT AGRIBUSINESS .....	23
FIGURE 4.6: ICT ACTIVITIES.....	25
FIGURE 4.7: REG ACTIVITY RATINGS: ICT .....	27
FIGURE 4.8 REG EFFECT: ICT .....	27
FIGURE 4.9: TOURISM ACTIVITIES .....	31
FIGURE 4.10 REG ACTIVITY RATINGS: TOURISM.....	32
FIGURE 4.11 REG EFFECT: TOURISM.....	33
FIGURE 4.12: ENTREPRENEURSHIP ACTIVITIES .....	35
FIGURE 4.13 REG ACTIVITY RATINGS: ENTREPRENEURSHIP .....	36
FIGURE 4.14: REG EFFECT: ENTREPRENEURSHIP .....	37
FIGURE 4.15: TRADE FACILITATION ACTIVITIES.....	40
FIGURE 4.16: REG ACTIVITY RATINGS: TRADE FACILITATION.....	41
FIGURE 4.17: FINANCIAL SECTOR ACTIVITIES.....	42
FIGURE 4.18: ALL RESPONDENTS: WILLINGNESS TO PAY FOR SERVICES .....	46
FIGURE 4.19: AGRIBUSINESS: WILLINGNESS TO PAY FOR SERVICES.....	47
FIGURE 4.20: ICT COMPANIES: WILLINGNESS TO PAY FOR SERVICES .....	48
FIGURE 4.21: TOURISM COMPANIES: WILLINGNESS TO PAY FOR SERVICES .....	49
FIGURE 4.22: ENTREPRENEURS: WILLINGNESS TO PAY FOR SERVICES.....	50
FIGURE 4.23: FORECAST OF SUSTAINABILITY OF REG SERVICES.....	51
FIGURE 4.24: GROWTH IN ALL REG-SUPPORTED BUSINESSES .....	53
FIGURE 4.25: GROWTH IN REG-SUPPORTED AGRIBUSINESSES.....	53
FIGURE 4.26: GROWTH IN REG-SUPPORTED ICT BUSINESSES.....	54
FIGURE 4.27: GROWTH IN REG-SUPPORTED TOURISM BUSINESSES.....	55
FIGURE 4.28: GROWTH IN REG-SUPPORTED ENTREPRENEURS.....	57
FIGURE 4.29: BSO'S ABILITY TO MAINTAIN SERVICES WITHOUT THE SUPPORT OF REG .....	59
FIGURE 4.30: ESTIMATED GROWTH IN INVESTMENT .....	62
FIGURE 4.31: REG'S ESTIMATED EFFECT ON OBTAINING FINANCE .....	62
FIGURE 4.32: REG CONSULTATION WITH USAID MISSIONS.....	64
FIGURE 4.33: REG'S RELATIONSHIP WITH BILATERAL PROJECTS .....	65

# ACRONYMS

ATWS	Adventure Travel World Summit
AWWB	AdventureWeek Western Balkans
B2B	Business to Business
BiH	Bosnia and Herzegovina
BSO	Business Support Organization
CEFTA	Central European Free Trade Association
CFTC	Commodities Futures Trading Commission
COP	Chief of Party
FAM	Familiarization Tour
FAO	Food and Agriculture Organization
FARMA	Fostering Agricultural Markets Activity
FTW	For the Win
E&E	Europe and Eurasia
EU	European Union
FGD	Focus Group Discussion
ICT	Information and Communication Technology
IMF	International Monetary Fund
IP-FSS	International Partnership for Financial Sector Stability
LbD	Learning by Doing
LOP	Life of Project
KII	Key Informant Interview
M&E	Monitoring and Evaluation
NBU	National Bank of Ukraine
NTFC	National Trade Facilitation Council
PFD	Partnerships for Development
RCI	Regional Competitiveness Initiative
REG	Regional Economic Growth
SEC	Securities and Exchange Commission
SMEs	Small and Medium Enterprises
SOW	Statement of Work
TA	Technical Assistance
TFA	Trade Facilitation Agreement
TFC	Trade Facilitation Committees
TSO	Technical Support Office
USAID	U.S. Agency for International Development
WTO	World Trade Organization

# EXECUTIVE SUMMARY

## I. INTRODUCTION

### Evaluation Purpose

The purpose of the evaluation is to provide the United States Agency for International Development (USAID) with an independent, external assessment of the Regional Economic Growth (REG) project. The two main objectives of the evaluation are:

1. Analyze the progress and effectiveness of the interventions to date and assess the current state of the selected sectors; and
2. Analyze the effectiveness of the existing management structure including coordination with missions.

The primary intended audience for this evaluation is the USAID Europe and Eurasia (E&E) Regional Technical Support Office (TSO) and the economic growth teams at various USAID Missions. The evaluation is intended to inform the future design of USAID Bureau for Europe and Eurasia economic growth activity.

### Evaluation Questions

1. To what extent has the project proved successful in assisting companies: become exporters, develop new products, access finance, and improve workforce skills? For the Ukrainian financial sector stability program: To improve the financial sector stability, growth, and inclusion?
2. Which of the activities in the targeted sectors will remain sustainable and active after the life of project (LOP)?
  - 2a. i Were there typological commonalities in the intervention that will remain sustainable?
  - 2a. ii Were there commonalities in the companies/organizations where sustainability was achieved?
  - 2b. What are the differences observed regarding working with business associations and chambers versus individual firms?
3. How effective was the project in attracting investment funding (from a firm's perspective) and co-funding (from the project's perspective) to support development actions and how well was that funding tracked and quantified?
4. What are the strengths and weaknesses of the REG management structure?
  - 4a. What do USAID Mission Staff identify as the strengths and weaknesses of the consultation process?
  - 4b. How well did REG coordinate with bilateral projects (e.g., enhance trade facilitation) or fill gaps where bilateral activities did not exist (buy-ins)?
  - 4c. What do missions in the region identify as constraints or issues to access/utilize the project?
  - 4d. What do REG staff identify as management constraints and issues?

## 2. PROJECT BACKGROUND

### Brief History of Project and Scope of Activities

REG is a five-year project which began in 2013 to support inclusive and sustainable economic growth in the Europe and Eurasia (E&E) region through greater integration and harmonization of regional markets.



It operates in Albania, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Georgia, Kosovo, Macedonia, Moldova, Montenegro, Serbia, and Ukraine.

There are two components: (1) increased private sector competitiveness and enterprise development, and (2) increased financial sector stability, growth, and inclusion. The first component focuses on strengthening regional value chains by providing training to comply with international standards, gain needed certifications, and assist private companies in accessing EU markets. The second component supports increased financial sector stability, growth, and inclusion.

### **Project Organization and Staffing**

REG field staff are concentrated in the Western Balkans. The Chief of Party (COP) is based in Bulgaria, while team leaders are based in Macedonia, Bosnia and Herzegovina, and Bulgaria.

### **Project Activities to Date**

REG has implemented a variety of activities in six sectors (agribusiness, ICT, tourism, financial sector support, entrepreneurship, and trade facilitation). According to the REG monitoring and evaluation (M&E) data, the REG Project implemented a total of 218 activities since its inception. Almost 40 percent of these activities have benefitted agribusiness.

Among the six subject areas targeted by REG, there has been a major emphasis on business development and trade promotion, which account for about 37 percent of REG's activities. This has been complemented by work on standards and certifications, which assist businesses to comply with market requirements, and accounting for another 25 percent of REG activities.

Based on REG M&E data, a total of 4,644 persons have participated in REG activities. Almost half of the REG activity participants were involved in activities related to the ICT sector. Agribusiness is the sector with the next-highest number of participants. Financial sector supervision has only been conducted in Ukraine (International Partnership for Financial Sector Stability (IP-FSS) was a buy-in to REG).

## **3. EVALUATION METHODS AND LIMITATIONS**

### **Methodology**

The evaluation employed a mixed methods approach to achieve a diverse and holistic evaluation. These included analyses of secondary data sources including REG work plans, performance management plans, progress reports, and technical reports. Additionally, the evaluation team employed three on-line surveys through Survey Monkey in seven different languages, face-to-face key informant interviews (KIIs), and focus group discussions (FGDs).

### **Limitations**

**Design Limitations:** Although the evaluation covers all 12 countries in the region, funding was only available for visits to six countries (Serbia, Bosnia and Herzegovina, Macedonia, Kosovo, Albania, and Azerbaijan). Therefore, the findings for countries not visited are restricted to secondary data from the REG project, the results of three surveys, and e-mail and phone calls.

**Implementation Limitations:** There were no major limitations encountered in the implementation of the evaluation, although implementing an on-line survey in seven different languages was challenging.

## 4. FINDINGS AND CONCLUSIONS

**Evaluation Question 1: To what extent has the project proved successful in assisting companies: become exporters, develop new products, access finance, and improve workforce skills? For the Ukrainian financial sector stability program: To what extent has the project proved successful in improving financial sector stability, growth and inclusion?**

### Agribusiness

The REG Project devoted a significant amount of time and effort to the agribusiness sector; in fact, almost 40 percent of REG activities targeted this sector. The assistance, which focused on market development and certifications needed to enter Western European and Gulf of Arabia markets, was highly appreciated by participants. According to the participants who were either surveyed or interviewed, REG helped them to improve their human resource capacity in both marketing and operations. While there was anecdotal evidence of effects on performance, (e.g. sales and exports), overall there was relatively little quantitative data showing that REG had major effects on performance, at least within the timeframe of the project.

### ICT

The second largest beneficiary of REG's activities was the ICT sector. REG was particularly useful in providing opportunities for business networking and market linkages with prospective business partners. The evaluation team found no quantitative evidence of REG ICT activities having a strong effect on sales and exports, even though there was some anecdotal evidence from focus groups of companies establishing linkages with Western customers, which could be attributed to some degree to REG. It should be noted that there can be a significant time lag between establishment of business relationships and conversion to contracts. All beneficiaries believed that they had learned a lot and this is consistent with good overall satisfaction with acquisition of skills, as indicated in the survey results.

### Tourism

REG's contribution in building the regional network is highly valuable and serves as an instrument for expanding markets and increasing sales. None of the countries in the Western Balkan region are large enough to offer a complete tourism experience, so cooperation among them is important for attracting tourists, especially tourists from more distant regions. Most beneficiaries expressed clear satisfaction with REG support for new product development, expanding of business networks and customer base, and highly valued activities that aimed to improve skills. However, it is difficult to directly attribute concrete performance results regarding increased sales to REG.

### Entrepreneurship

Entrepreneurship was the third largest subject area in terms of activities and number of participants. The survey found a high level of satisfaction with the activities amongst two-thirds of participants. REG had a significant effect on the mindset of the participants by inspiring them, many of whom referred to life changing experiences, and enhancing their skills as shown in the survey results. None of the interviewed beneficiaries spoke of deals resulting from REG support and this is consistent with the survey results, which do not show obtaining finance and sales as having been influenced by REG. This is not surprising since globally only a small percentage of start-ups are successful in obtaining equity funding.

### Trade Facilitation

Given that trade facilitation addresses the movement of goods across national borders and following that CEFTA is a mechanism for facilitating regional cooperation, a regional approach in trade facilitation is necessary. However, projects that focus on particular regions rather than countries often have a difficult time getting deeply involved in issues related to specific countries, so it should be taken into consideration

that different governments have very different needs in trade facilitation and some activities have to be customized (e.g. capacity building). As it was stressed by the chairperson of the National Trade Facilitation Council (NTFC) in Kosovo, bilateral capacity building measures are more effective. When organizing regional events, the political context and administrative barriers need to be taken into consideration.

### **Financial Sector Stability (Ukraine)**

REG's work on the IP-FSS has been highly appreciated by the USAID Mission to Ukraine. However, it is difficult to form concrete conclusions about its effectiveness in improving financial sector stability, growth, and inclusion in Ukraine based on the information available to the evaluation team.

## **Evaluation Question 2: Which of the activities in the targeted sectors will remain sustainable and active after the life of project (LOP)?**

### **Question 2a.i. Were there typological commonalities in the intervention that will remain sustainable?**

The sustainability of REG interventions without further donor support depends on: 1) the continued availability of such services in the market; and 2) the willingness of companies to pay for them. According to survey data, beneficiaries are only moderately willing to continue to pay for participation for activities that are currently supported by REG. REG-supported businesses generally expressed higher willingness to pay for the cost of services in face-to-face meetings with the evaluation team and less willingness in their survey response. Of special interest to the businesses, are trade missions (in-bound and out-bound) that facilitate business contacts and certifications training that increase market access.

**Access to markets and customers:** This has been the 'bread and butter' of REG. Participants have generally been very positive about their experiences at these events. They have made new contacts and gained a much better understanding of market requirements. However, participation in foreign trade fairs is also relatively expensive. Larger, more sophisticated companies should be able to do this on their own, but smaller businesses may not be able to afford the costs.

**Develop new products:** This work was mainly done in the tourism sector. While participants see the value, they may not be able to afford the cost of international consultants like the ones REG hired to lead learning by doing (LbD) events.

**Access to finance:** REG has done very little in this area; only one activity of 218 was specifically related to access to finance. However, business persons rate this among their biggest obstacles.

**Workforce training:** Workforce is also identified as a priority for the businesses interviewed. However, there is not a clear commitment to workforce development due to the fear of losing trained staff to other companies. And in fact, REG did not do a lot of workforce training, other than certifications.

**Technology and processes:** Businesses are very interested in accessing the latest new technology, and the willingness to pay for such access appears high.

### **2a.ii: Were there typological commonalities in the companies/organizations where sustainability was achieved?**

There are three common characteristics found in the REG-assisted businesses that were found to have good prospects for growth and profitability: 1) the availability of good business opportunities; 2) the motivation to take advantage of those opportunities; and 3) capacity in terms of management and workers, plant and equipment, and access to finance. These are further supported by the value placed on training, networking and market-linkage, and the presence of business support organizations.

## **Agribusiness**

According to interviews with REG staff, USAID agribusiness projects, and REG beneficiaries, there are excellent business opportunities for agribusinesses within the E&E region, especially in the Western European and Gulf markets, for high quality fresh and frozen products that are particularly well-suited to the agro-climatic conditions in the region. Berries in the West Balkans and hazelnuts in Azerbaijan are but two examples of high growth, high margin products that have excellent export potential. The companies assisted by REG were found to be highly motivated, and many possess a reasonable level of capacity that can be significantly improved with targeted assistance in marketing and certifications.

## **ICT**

The ICT sector is relatively fast-growing within the E&E region and especially within the West Balkans, providing opportunities for outsourced services as well as for provision of in-house services. Companies understand the importance of developing skills, obtaining certifications, and participating in regional and international B2B events to establish market linkages, which can take years to convert to sales. Furthermore, technical assistance to the sector can be effectively and efficiently delivered through cooperation with relatively strong sector-dedicated business support organizations. Thus, it is concluded that the companies assisted by REG are both motivated and possess the capacity to improve with targeted assistance although their capability for growing is currently limited by shortages of qualified workforce and the need to develop workforce skills.

## **Tourism**

To fully take advantage of REG-supported events such as for example Famtrips or International Trade Fairs, companies must possess a certain level of operational capacity. Furthermore, during the interviews, a lack of qualified human resources was mentioned as one of the biggest constraints for tourism development. Therefore, participation in training events organized by REG, for improving various business and management skills, marketing, etc., was of paramount importance and one of the commonalities for companies that achieved sustainable results.

## **Entrepreneurship**

Whereas some start-ups that participated in REG activities have the characteristics of growing businesses, not all have been successful. However, failure is normal for start-ups and should not be interpreted as indicative of non-sustainability of entrepreneurial endeavor. The founders interviewed are all highly motivated and determined to carry on being entrepreneurs, even if it means establishing a new company. In some cases, entrepreneurs had decided to persevere while supplementing income from unrelated activities. REG support has resulted or at least contributed to a seemingly lasting effect on the mindsets of many entrepreneurs. However, it should be noted that the evaluation team interviewed those who were in business and willing to talk. It is not known how many of firms that participated in REG events failed.

### **2.b.: What are the differences observed regarding working with business associations and chambers versus individual firms?**

It is difficult to draw definitive conclusions based on the data available to the evaluation team on the differences between working with associations/chambers versus individual firms. *A priori*, working through associations can significantly broaden outreach. Based on the available data on REG interventions, those involving intermediaries were more successful than those that did not.

### **Question 3: How effective was the project in attracting investment funding (from a firm's perspective) and co-funding (from the project's perspective) to support development actions and how well was that funding tracked and quantified?**

Co-funding by project participations is an important aspect of REG, although it is difficult to quantify exact amounts. It has not been possible to quantify the levels of investment attracted to businesses by the REG Project. Many businesses indicated that investment had increased over the past three years, but did not attribute that to assistance from REG.

#### **Evaluation Question 4: What are the strengths and weaknesses of the REG management structure?**

##### **4.a.: What do USAID Mission Staff identify as the strengths and weaknesses of the consultation process?**

In general, REG has done an excellent job of keeping Missions informed of its activities, according to feedback received from USAID field personnel in KIs and the USAID survey. Missions noted that coordination is much stronger for the four buy-in activities than it is for the core regional activities.

##### **4.b.: How well did REG coordinate with bilateral projects (e.g., enhance trade facilitation) or fill gaps where bilateral activities did not exist (buy-ins)?**

In general, REG has done a commendable job of coordinating with USAID bilateral projects and maintaining regular communication, and effective cooperation. In some cases, like Azerbaijan, such coordination is an important element in the strategies of both REG and the bilateral project. In other cases, it appears that such collaboration is done on an ad hoc basis. REG does not do as well, according to the survey respondents, of filling gaps where bilateral projects do not exist.

##### **4.c.: What do missions in the region identify as constraints or issues to access/utilize the project?**

While the placement of project staff in each country may not have been possible due to lack of funding, it did reduce the level of interaction between most USAID missions and REG staff. As a result, the project's core activities tended to be undertaken more as 'targets of opportunity' rather than as part of a well-developed project strategy. Mission buy-ins have been more strategic.

##### **4.d.: What do REG staff identify as management constraints and issues?**

REG management and staff share many of the same concerns expressed by USAID staff about the challenges of serving clients in six different sector/thematic areas who are spread across 12 countries in three distinct regions. While they expressed an interest in having coordinators based in each of the sub-regions to improve coordination, they cited budget issues that preclude such an approach. They noted that the collective expectations of 11 USAID Missions often exceed the relatively modest budget allocated to REG. REG management also noted the differences between core activities and buy-ins. They contrasted the continuity of staff, especially local staff, in USAID field missions that facilitates implementation of buy-ins, versus the more frequent changes in Washington-based staff that have posed more challenges in managing core activities.

## **5. RECOMMENDATIONS**

### **5.1 Clarify and prioritize the objectives of any new regional economic growth project**

The E&E Bureau and E&E Missions should agree on clearly prioritized objectives for any new regional project that is managed by the E&E Bureau. Among such possible objectives are the ones that were explicitly or implicitly included in the REG Project:

- 1) Continuing a presence in countries, such as Serbia, Albania, and Macedonia, where bilateral budgets for economic growth activities have been reduced or eliminated.

- 2) Taking advantage of economies of scale by addressing certain common needs on a regional rather than bilateral basis, such as the funding of international trade missions.
- 3) Addressing issues that can be best addressed on a regional or sub-regional basis, such as WTO and EU accession, and tourism development and promotion.
- 4) Providing a buy-in mechanism for technical expertise that might not be available from other sources (e.g. Ukraine IP-FSS).
- 5) Providing a quick response to Mission's most urgent and specialized technical needs.

## **5.2 Prioritize Geographic Scope**

The E&E Bureau should decide whether to include all sub-regions and countries in a new regional project. If all sub-regions and countries are included, then E&E should consider ways for prioritizing assistance. For example, depending on the program's objectives noted above, a country that is already receiving bilateral funding in economic growth does not need the same level of support as a country that is not receiving bilateral support.

## **5.3 Ensure Regional/Country Presence of Implementers**

If the E&E Bureau decides that its new regional projects should address common issues faced within a sub-region, such as tourism within the West Balkans, then it should deploy a contractor representative within the assisted sub-region, as well as countries within the sub-region.

## **5.4 Clarify relationships between Bilateral and Regional Programs and Implementers**

The E&E Bureau should establish clear roles and responsibilities for regional and bilateral implementers within the context of prioritizing objectives for regional programming. If a new regional project focuses on issues that can best be addressed on a regional basis or sub-regional basis, then the Bureau should strongly consider tourism and trade facilitation as priorities.

## **5.5 Improve Performance Management and Reporting Systems**

The E&E should improve performance management and reporting systems during the remainder of the REG Project and for any follow-on regional projects. Progress against agreed-upon performance indicators should be reported on a regular basis and measured against life of project targets. Each indicator should measure only one type of result. Beneficiaries should be requested to answer short and simple evaluation questionnaires after the completion of each project activity; follow-up should be done with one year to measure the effect of the activity.

# I. INTRODUCTION

## EVALUATION PURPOSE

The purpose of the evaluation is to provide the United States Agency for International Development (USAID) with an independent, external assessment of the Regional Economic Growth (REG) program (see Annex I for the evaluation Statement of Work (SOW)).

The two main objectives of the evaluation are:

1. Analyze the progress and effectiveness of the interventions to date and assess the current state of the selected sectors; and
2. Analyze the effectiveness of the existing management structure including coordination with missions.

The primary intended audience for this evaluation is the USAID Europe and Eurasia (E&E) Regional Technical Support Office (TSO) and the economic growth teams at various USAID Missions. The evaluation is intended to inform the future design of USAID Bureau for E&E economic growth activity.

## EVALUATION QUESTIONS

Key evaluation questions and sub-questions addressed in the evaluation are listed below. The SOW included an illustrative allocation of how time and resources should be spent in percentage terms after each question.

1. To what extent has the project proved successful in assisting companies: become exporters, develop new products, access finance, and improve workforce skills? For the Ukrainian financial sector stability program: To improve the financial sector stability, growth and inclusion? (20%)
2. Which of the activities in the targeted sectors will remain sustainable<sup>1</sup> and active after the life of project (LOP)? (50%)
  - 2a.i. Were there typological commonalities in the intervention that will remain sustainable?
  - 2a.ii. Were there commonalities in the companies /organizations where sustainability was achieved?
  - 2b. What are the differences observed regarding working with business associations and chambers versus individual firms?

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<sup>1</sup> According to the REG evaluation SOW, “Sustainability refers to processes and/or activities that the business associations/chamber and companies will be able to perform after the life of the project without external support, including to prepare bankable projects, develop new products, market existing products on the and be able to penetrate new markets, and to maintain and/or introduce new standards”.

3. How effective was the project in attracting investment funding (from a firm's perspective) and co-funding (from the project's perspective)<sup>2</sup> to support development actions and how well was that funding tracked and quantified? (10%)
4. What are the strengths and weaknesses of the REG management structure? (20%)
  - 4a. What do USAID Mission Staff identify as the strengths and weaknesses of the consultation process?
  - 4b. How well did REG coordinate with bilateral projects (e.g., enhance trade facilitation) or fill gaps where bilateral activities did not exist (buy-ins)?
  - 4c. What do missions in the region identify as constraints or issues to access/utilize the project?
  - 4d. What do REG staff identify as management constraints and issues?

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<sup>2</sup> According to the REG evaluation SOW, 'Firm's perspective includes investments from the Business Angels network, investment funds, venture capital funds, EU Pre-accession funds, and similar funding opportunities. Project's perspective includes other donor funding, and private sector investments'.



## **2. PROJECT BACKGROUND**

### **BRIEF HISTORY OF PROJECT AND SCOPE OF ACTIVITIES**

USAID's Regional Economic Growth Project is a five-year project to support inclusive and sustainable economic growth in the E&E region through greater integration and harmonization of regional markets. The project is implemented by SEGURA Consulting LLC, Deloitte, and CEED. The key counterparts of the REG program are host country governments, business associations, and the private sector. The REG Project operates in Albania, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Georgia, Kosovo, Macedonia, Moldova, Montenegro, Serbia, and Ukraine. The project began in 2013, and this performance evaluation covers the results of the REG Project from 2013 to July 2017.

The REG Project seeks to provide a cost-effective platform for high quality training and introduce international best practices into private sector businesses, financial sector management, and adherence to regulatory standards. The REG Project initiated activities to this end in six different areas: agriculture/agribusiness, information and communications technology (ICT), entrepreneurship/start-ups, tourism, and trade. The REG Project activities aim to train companies in business development/grade promotion, standards and certification, entrepreneurship, business operations or technology, product development, trade facilitation, financial markets, workforce development, and finance.

There are two components of the REG Project: (1) increased private sector competitiveness and enterprise development, and (2) increased financial sector stability, growth, and inclusion. The first component focuses on strengthening regional value chains by providing training to comply with international standards, gain needed certifications, and assist private companies in accessing EU markets. Additionally, this component works to improve the business-enabling environment through training businesses on how to navigate the complex regulatory framework of international markets. Finally, the first component focuses on fostering entrepreneurship training and support services by connecting entrepreneurs with funding sources and strengthening their capacities through competitiveness and capacity building.

The second component, increased financial sector stability, growth, and inclusion, works to this end in two ways. The first is to support international standards on financial sector stability through building capacity in compliance with deposit insurance and capital market supervision. Additionally, the REG Project works to improve financial institutions' resilience and access to finance through regional integration of capital markets.

The evaluation was sub-contracted through International Development Group LLC in consultation with the implementation team from SEGURA Consulting LLC. The evaluation lasted six months, and the cost of the evaluation was \$273,753.

### **PROJECT ORGANIZATION AND STAFFING**

Given the regional nature of the REG Project, the main REG staff members are stationed across the E&E region. REG's Chief of Party (COP) is based in Sofia, Bulgaria near the West Balkans sub-region. He travels to each of the 12 countries in the E&E region approximately once a month. There are six team leaders for the REG subject areas. Three REG team leaders are based in Skopje, Macedonia for the agribusiness, information and communication technology, and trade facilitation subject areas. A fourth team leader is based in Sarajevo, Bosnia and Herzegovina for the tourism subject area. The fifth leader is based in Sofia, Bulgaria, for the entrepreneurship subject area. The sixth team leader, was based full-time in Kyiv, Ukraine

for the financial markets buy-in subject area. Since the buy-in is winding down and will close by the end of the calendar year, this person is now working part-time.

## **PROJECT ACTIVITIES TO DATE**

REG has implemented a variety of activities in six sectors. According to the latest REG monitoring and evaluation (M&E) data provided to the evaluation team on July 27, 2017<sup>3</sup>, the REG Project implemented a total of 218 separate activities or events since its inception in early 2014 through the end of 2016. This includes: agribusiness activities (61); followed in order by ICT (50), tourism (37), financial sector support (35), entrepreneurship (25), and trade facilitation (10).

Among the six subject areas targeted by REG, there has been a major emphasis on business development and trade promotion. This emphasis on market development has been complemented by REG's work on standards and certifications, which assist businesses to comply with market requirements.

REG also reported on July 27, 2017 that a total of 6,261<sup>4</sup> persons had participated in its activities from 2014 through 2016. More than half of the REG activity participants were involved in activities related to the ICT and agribusiness sectors. However, the high number in the ICT sector is partially due to the inclusion of two large ICT events in Kosovo and in Georgia in which REG played a relatively minor role as one of several organizations that sponsored the events.

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<sup>3</sup> In the list provided to the Evaluation Team on April 7, 2017, there were only 139 activities. The additions consist of activities that were inadvertently omitted, as well as activities that are sub-activities of items that were already listed. Explanations of the differences by sector are provided in additional footnotes.

<sup>4</sup> The information provided to the evaluation team on April 7, 2017 showed a total of 5,464 participants. However, after eliminating duplicate names and persons from outside the 12 countries in the E&E region, the total number of participants from the 12 E&E countries was 4,644.

# 3. EVALUATION METHODS AND LIMITATIONS

## METHODOLOGY

The evaluation employed a mixed methods approach to achieve a diverse and holistic evaluation. These included analyses of secondary data sources including REG Project documents. Additionally, the team employed three on-line surveys through Survey Monkey in seven different languages, face-to-face key informant interviews (KIIs), and focus group discussions (FGDs).

### Secondary Data

The evaluation team reviewed project documents to give relevant perspective and background to the evaluation. The main documents include: the contract between USAID and the implementation contractor (SEGURA), work plans, performance management plans, periodic progress reports, and technical reports.

### KIIs and FGDs

The evaluation team conducted 43 KIIs and 23 FGDs over the five-week period in six countries (Serbia, Bosnia, Macedonia, Kosovo, Albania, and Azerbaijan). 150 persons representing 117 different organizations were interviewed. A complete list of meetings is included in Annex II. These meetings were conducted using the guidelines included in Annexes III and IV.

### Online Surveys

The evaluation team conducted three on-line surveys using Survey Monkey software. The first and largest survey covered businesses assisted by REG; it was translated into six languages: Serbo-Croatian, Albanian, Macedonian, Azerbaijani, Ukrainian, and Russian. The second survey covered business support organizations (BSOs) that have been used by REG to expand its outreach to individual businesses; it was translated into five languages: Serbo-Croatian, Albanian, Macedonian, Ukrainian, and Russian. The third survey was focused on the 11 USAID Missions in the E&E Region and was conducted in English.

Survey questionnaires were initially drafted by the evaluation team in English and then shared with the USAID E&E Bureau staff, designated USAID field staff, and REG Project staff for feedback. After the inclusion of comments, the first two surveys for businesses and BSOs were translated. All survey instruments included the original questions in English. The survey questionnaires are included in Annexes V, VI, and VII.

### Business Survey

For the business survey, the evaluation team relied on a project participant list provided by the REG Project implementation contractor, SEGURA, to identify participants from the 12 countries in the E&E region with valid e-mail addresses.<sup>5</sup> The original participant list included 5,464 names. Of this total, there were 4,278 unique names associated with one of the 12 E&E countries, but only 3,009 possessed unique e-mail addresses. Of this total, 2,810 addresses were reached through Survey Monkey, and 625 responses were received from participants in the 12 E&E countries. Figure 3.1 provides details of the surveys sent and the response rates. The overall response rate was 22.2 percent. The country with the highest number of respondents was Kosovo, closely followed by Macedonia. The country with the least number of respondents was Belarus with only two respondents.

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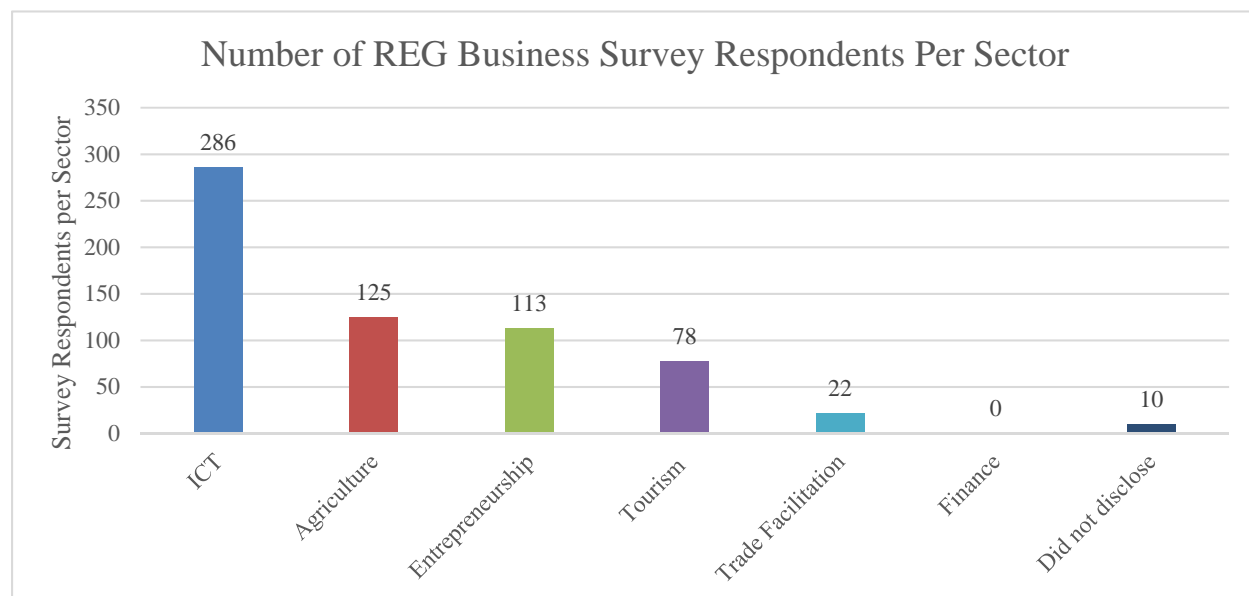
<sup>5</sup> The survey is based on the list provided on April 7, 2017 by SEGURA.

**FIGURE 3.1 BUSINESS SURVEY RESPONSE RATES**

<b>Business Survey Response Rates</b>				
<b>Country</b>	<b>Survey Language</b>	<b>Sent</b>	<b>Responded</b>	<b>%</b>
Albania	Albanian	266	68	25.6%
Armenia	Russian	71	19	26.8%
Azerbaijan	Russian/Azerbaijani	60	13	21.7%
Belarus	Russian	11	2	18.2%
Bosnia	Serbian	512	102	19.9%
Georgia	English	128	24	18.8%
Kosovo	Albanian	643	144	22.4%
Macedonia	Macedonian	586	123	21.0%
Moldova	Russian	39	9	23.1%
Montenegro	Serbian	66	16	24.2%
Serbia	Serbian	392	89	22.7%
Ukraine	Ukrainian	36	16	44.4%
		<b>2,810</b>	<b>625</b>	<b>22.2%</b>

Figure 3.2 shows the number of respondents per sector. The sector with the highest number of respondents was ICT (286) followed by agriculture (125), which is congruent with the proportion of total activities for each area. The evaluation team regards this survey as an adequate representation of the activity participants.

**FIGURE 3.2 NUMBER OF REG BUSINESS SURVEY RESPONDENTS PER SECTOR<sup>6</sup>**



**Business Support Organizations Survey**

For the survey of BSOs, the evaluation team relied on two sources of information to develop the online survey mailing lists: 1) a list of key stakeholders provided by REG; and 2) an examination of REG participant lists for the names of all business organizations and clusters. The evaluation team sent the survey to 177 BSOs and a total of 28 responses were received (a 15.82 percent response rate). Figure 3.3 provides a breakdown of response rates by country.

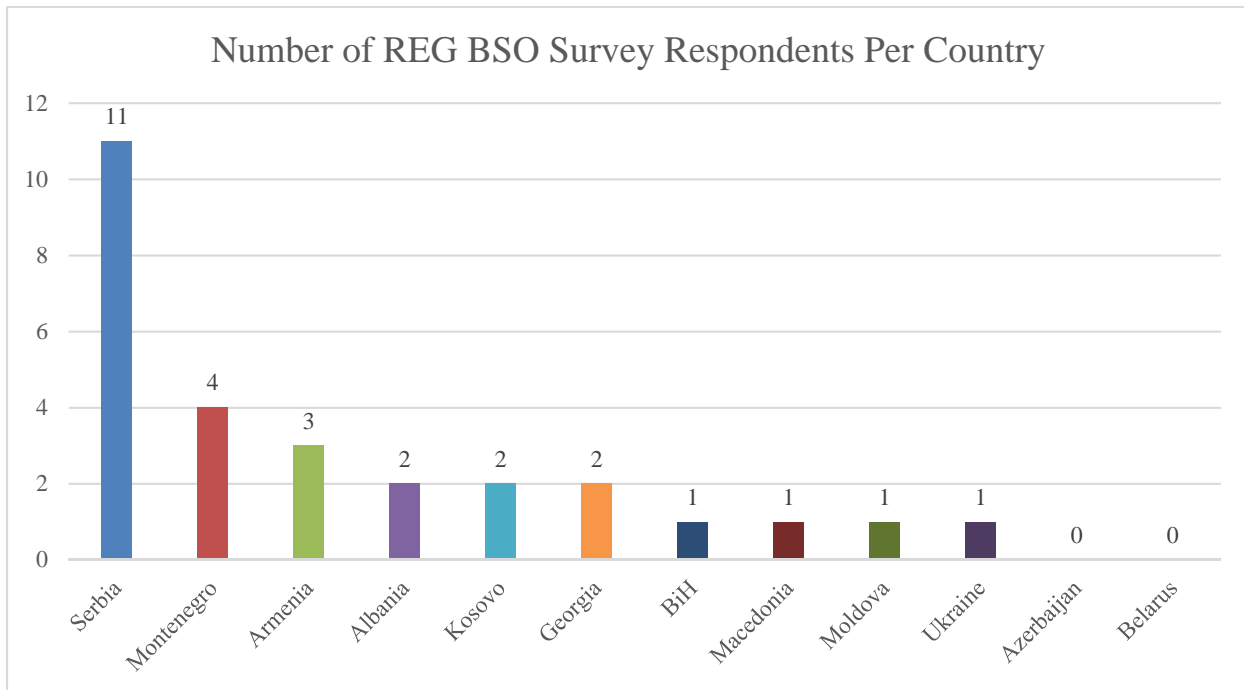
**FIGURE 3.3 BSO SURVEY RESPONSE RATES**

BSO Survey Response Rates				
Country	Survey Language	Sent	Responded	%
Albania	Albanian	21	2	9.52%
Armenia	Russian	10	3	30.00%
Azerbaijan	Russian	0	0	n/a
Belarus	Russian	1	0	0.00%
Bosnia	Serbian	19	1	5.26%
Georgia	English	18	2	11.11%
Kosovo	Albanian	7	2	28.57%
Macedonia	Macedonian	24	1	4.17%
Moldova	Russian	5	1	20.00%
Montenegro	Serbian	14	4	28.57%
Serbia	Serbian	56	11	19.64%
Ukraine	Ukrainian	2	1	50.00%
		<b>177</b>	<b>28</b>	<b>15.82%</b>

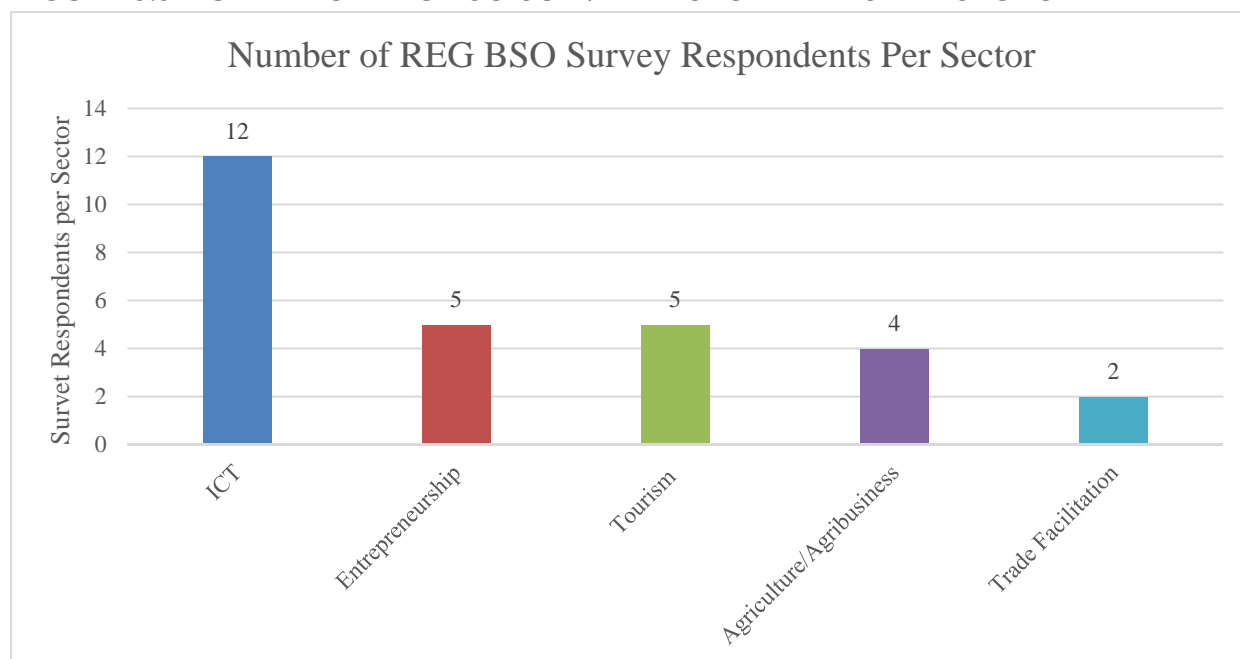
<sup>6</sup> Adds to 634, rather than 625, because several respondents listed countries outside the 12 E&E region.

The following two graphs show summary statistics concerning the business survey. In Figures 3.4 and 3.5 the number of respondents per country and per sector are presented. The country with the highest number of respondents was Serbia, followed by Montenegro. The countries with the least number of respondents were Belarus and Azerbaijan with zero respondents. The number of responses from these two countries was low because the evaluation team was not able to identify BSOs involved in REG activities in these two countries (the survey was sent to one BSO in Belarus and zero in Azerbaijan). The subject area with the highest number of respondents was ICT followed by entrepreneurship and tourism. BSO surveys are relied upon less-heavily in this evaluation report due to the small-scale nature of the BSO program as compared to the business program and the overall smaller number of survey respondents and activity participants.

**FIGURE 3.4 NUMBER OF REG BSO SURVEY RESPONDENTS PER COUNTRY**



**FIGURE 3.5 NUMBER OF REG BSO SURVEY RESPONDENTS PER SECTOR**



**USAID Mission Survey**

The names of participants for the USAID Mission survey were provided by the USAID Evaluation Activity Manager. Figure 3.6 presents the number of responses by Mission. A total of 27 survey questionnaires were sent and 17 responses were received (one of the respondents chose not to identify his/her location).

**FIGURE 3.6 USAID SURVEY RESPONSE RATES**

USAID Survey Response Rate			
Country	Sent	Responded	%
Albania	2	2	100.0%
Armenia	3	2	66.7%
Azerbaijan	2	1	50.0%
Belarus	1	0	0.0%
Bosnia	3	2	66.7%
Georgia	1	0	0.0%
Kosovo	4	2	50.0%
Macedonia	5	3	60.0%
Moldova	2	0	0.0%
Montenegro	0	0	N.A.
Serbia	3	3	100.0%
Ukraine	1	1	100.0%
<b>Total</b>	<b>27</b>	<b>17*</b>	<b>62.96%</b>

\*The total includes the respondent (1) who chose not to identify the country.

## **LIMITATIONS**

### **Design Limitations**

Although the evaluation covers all 12 countries in the region, funding was only available for visits to six countries. Therefore, the findings for countries not visited are restricted to secondary data from the REG Project, the results of the three surveys mentioned above, and a KII conducted by phone with the Ukraine Mission to discuss their buy-in to REG.

### **Implementation Limitations**

While there were no major limitations encountered in the implementation of the evaluation, certain challenges presented themselves. The time constraints on the evaluation combined with the breadth of countries and thematic areas to evaluate presented a challenge. It was particularly challenging to complete the KIIs and FGDs with companies and individuals due to their limited time availability. Additionally, the limitation on the number of field days presented difficulty in travelling to business locations, especially those in remote areas outside of capital cities. The evaluation findings relating to agriculture and tourism could be better informed had additional time for travel been available.



## 4. FINDINGS AND CONCLUSIONS

Findings are presented by the four evaluation questions: 1) results (Evaluation Question 1); 2) sustainability of interventions and businesses (Evaluation Question 2); 3) investment and co-funding (Evaluation Question 3); and 4) REG management (Evaluation Question 4).

### **Evaluation Question 1: To What Extent Has The Project Proved Successful In Assisting Companies: Become Exporters, Develop New Products, Access Finance, And Improve Workforce Skills? For The Ukrainian Financial Sector Stability Program: To What Extent Has The Project Proved Successful In Improving Financial Sector Stability, Growth And Inclusion?<sup>7,8</sup>**

#### **REG Data**

REG performance reporting data includes two outcome-level indicators: 1) Increased exports and investments as a result of project interventions; and 2) Number of firms and individuals receiving USG assistance that obtained an internationally recognized certification (see Annex IX for summary). In its Annual Report for the year ending 12/31/2016, REG reported \$8,856,582 for the first indicator, and 807 for the second indicator. In a special report, entitled 'REG Tracker- Sales and Investment (2014-2016), REG provided a detailed breakdown of the results for the first indicator; the majority of the reported figure represents increased exports (see Annex X).

#### **Survey Findings**

Figure 4.1 below provide summary ratings of all REG activities by survey respondents (based on the list of 139 activities provided to the evaluation team on April 7, 2017). Figure 4.1 shows weighted average beneficiary ratings of REG activities by activity type (workforce development, product development, business operations or technology, business development/trade promotion, standards and certification, entrepreneurship, finance, and trade facilitation) and sector (agribusiness, ICT, tourism, entrepreneurship,

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<sup>7</sup> For the sake of clarity, the question has been slightly modified from the original SOW question which read: "For the Ukrainian financial sector stability program: To improve the financial sector stability, growth and inclusion?"

<sup>8</sup> SEGURA provided the following comments on this question: "REG has not had the task to assist firms to BECOME exporters, but to work with export ready firms to INCREASE their exports. The only activity we have that works with firms to BECOME exporters is the current pilot export promotion BREDI activities in Albania (for AG and IT) and Macedonia (for AG) for second tier smaller firms"... "REG has not had the concrete task to develop new products. It was decided to pilot new products in tourism, as part of diversification of adventure/nature products in the VVB and of course, new products are the basis of the startup ecosystems." With respect to Finance, SEGURA commented: "Also, not a main target, except for knowledge sharing in the 3 sectors, and as part of working with the startup ecosystem".

In the contract between USAID and SEGURA for the implementation of REG, dated September 25, 2013, Section C, Statement of Work, includes the following language on page 13 under Component 1, Increased Private Sector Competitiveness and Enterprise Development: "Interventions that identify and strengthen agriculture and non-agriculture value chains on a regional basis, promote sectors regionally and internationally, improve workforce skills through standards and certification programs, and further entrepreneurship training and services." While there is no specific mention of helping businesses to 'become exporters', 'develop new products', or 'access finance' under Component 1, the contract indicators on page 36 do include: "1) Increased exports and investment in value chains/sectors targeted for regional support; 2) Increased intra-regional trade flows in targeted sectors due to reduction in non-tariff trade barriers", among others. 'Access to finance' is listed on page 29 under cross-cutting issues and is discussed in terms of women's difficulty in accessing credit.

and trade facilitation). Survey recipients were asked to “rate the usefulness of the event for your business. (Very low, Low, Medium, High, Very High)”. Three workforce development activities received the highest scores while trade facilitation, which was based on a much smaller number of respondents, scored the lowest. None of the activity types in Figure 4.1 received a score below 3 (medium level). Annex VIII provides a detailed overview of the ratings for all activities that were covered by the business survey.

**FIGURE 4.1: BENEFICIARY RATINGS OF REG ACTIVITIES BY ACTIVITY TYPE AND SECTOR<sup>9</sup>**

Beneficiary Ratings of REG Activities (1) (2)						
Activity Type	Sector					
	Agribusiness	ICT	Tourism	Entrepreneurship	Trade Facilitation	All Sectors
Business Development/ Trade Promotion	4.2 (17)	3.8 (20)	4.1(14)	-	-	3.9 (51)
Standards and Certification	4.1 (26)	3.9 (9)	-	-	-	4.0 (35)
Entrepreneurship	-	-	-	4.0 (20)	-	3.8 (20)
Business Operations or Technology	4.0 (10)	3.9 (4)	-	-	-	4.0 (14)
Product Development	-	-	3.9 (6)	-	-	3.9 (6)
Trade Facilitation	-	-	-	-	3.3 (6)	3.3 (6)
Workforce Development	-	-	4.3 (3)	-	-	4.3 (3)
Finance	3.3 (1)	-	-	-	-	3.3 (1)
All Activities	4.1 (54)	3.8 (33)	4.1 (23)	4.0 (20)	3.3 (6)	3.9 (136)

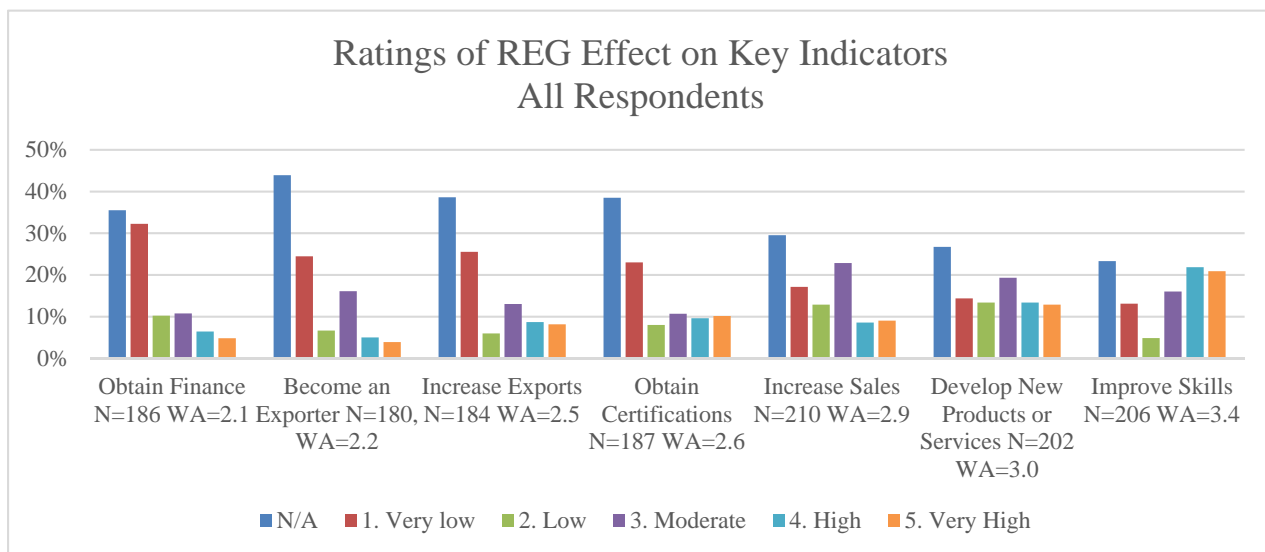
1. Weighted average ratings on a scale of 1-5, where 1=very low, 2=low, 3=medium, 4=high, and 5=very high.

2. Number of activities rated in parenthesis.

Figure 4.2 below shows the overall beneficiary ratings of the effect of REG on the businesses of the beneficiaries. Survey recipients were asked: “To what extent has REG helped your business to...Become an exporter, Develop new products, Access finance, Improve workforce skills, Increase sales.” Respondents gave the highest rating for the effect of REG in improving skills, and the lowest rating for obtaining finance. However, unlike the ratings of the usefulness of specific activities presented above, only two of the weighted average ratings of REG effects met or exceeded the moderate level of 3 out of 5.

<sup>9</sup> The number of activities for which ratings were requested is 136, and is based on the list of 139 activities provided by SEGURA on April 7, 2017. The three activities listed under the Financial Sector Stability buy-in in Ukraine were not part of the survey.

**FIGURE 4.2: REG EFFECT: ALL SECTORS**



Detailed findings are presented below by the six sectors of REG intervention: agribusiness, ICT, tourism, entrepreneurship, trade facilitation, and financial sector stability. Three sets of data are presented: 1) data from REG; 2) on-line survey data; and 3) information collected from KIIs and FGDs.

## Findings

### Agribusiness

#### REG data:

According to REG, the project conducted 61<sup>10</sup> agribusiness activities<sup>11</sup> in which 1,609 persons from the 12 E&E countries participated. Subject areas included: business development/trade promotion, business operations or technology, finance, and standards and certifications. The focus was on increasing the ability of E&E agribusinesses to penetrate export markets.

According to REG, one of the most important accomplishments was the increase of export sales by assisted firms in Azerbaijan; the total increase was \$4,582,300.

**FIGURE 4.3: AGRIBUSINESS ACTIVITIES**

Month/Year	Subject Area/Activity	Country
<b>Business Development/Trade Promotion</b>		
Feb-15	Matchmaking Support at Fruit Logistica	Germany

<sup>10</sup> In the list of activities provided by REG to the evaluation team on April 7, 2017, there were 54 agribusiness activities and 1,077 participants for the period 2014 through 2016. On July 27, 2017, REG provided an updated list that showed 61 activities during the same period; the additions represented sub-activities of items that were included on the first list. The findings from the on-line survey and KIIs/FGDs presented below are based on the list of activities provided in April 2017 (54 agribusiness activities).

<sup>11</sup> To help answer the evaluation questions, the evaluation team classified REG activities into eight areas: 1) business development/trade promotion; 2) product development; 3) business operations or technology; 4) finance; 5) standards and certification; 6) workforce skills; 7) entrepreneurship; and 8) trade facilitation.

Month/ Year	Subject Area/Activity	Country
Feb-15	Trade and Market Mission at Gulfood	UAE
May-15	B2B with TESCO and Spar	Macedonia
Oct-15	Anuga Trade Fair	France
Oct-15	Anuga Trade Fair	Germany
Nov-15	CEI Biz Forum on Regional Cooperation	Macedonia
Nov-15	ICT in Agribusiness Conference	Macedonia
Feb-16	Matchmaking Support at Fruit Logistica	Germany
Feb-16	Gulfood 2016	UAE
Feb-16	Trade and Market Mission at Gulfood	UAE
Apr-16	Regional Meeting and B2B with Delhaize	Serbia
Apr-16	Inbound Trade Mission with German, Dutch Buyers	Serbia, Macedonia
Jul-16	Inbound Trade Mission with UNIVEG	Albania, Macedonia
Oct-16	SIAL Paris (food processing)	France
Oct-16	Trade Mission, B2B with UNIVEG	Poland, Czech Republic, Austria
Nov-16	Inbound Trade Mission for German Buyers	BiH, Serbia, Macedonia
Nov-16	Fruit net Forum – SEE	Serbia
Dec-16	B2B with Supermarket Chains	Albania
<b>Business Operations or Technology</b>		
Jun-14	Study Tour to Italy for F&V	Italy
May-15	Technology upgrade for cultivation of berries	Azerbaijan
May-15	Hazelnut Study Tour	Turkey, Georgia
Sep-15	Training in Postharvest and Cold Storage	Azerbaijan
Sep-15	Study tour for AZ Pomegranate stakeholders	Israel
Sep-15	Greenhouse study tour to Turkey	Turkey
Apr-16	Upgrading Technology for Cultivation of Berries	Azerbaijan
Jun-16	Study tour to Italy for AZ stakeholders	Italy
Oct-16	ICT in Agribusiness	Serbia
Nov-16	ICT in Agribusiness	Montenegro
Nov-16	Greenhouse study tour to Turkey	Turkey
<b>Finance</b>		
Dec-15	Agribusiness Access to Finance - Regional Sharing	Macedonia
<b>Standards and Certification</b>		
May-14	ISO22000 Training for Auditors	Macedonia
May-14	METRO Cash and Carry	Serbia

Month/ Year	Subject Area/Activity	Country
Oct-14	ISO22000 Training for Auditors	Serbia
Dec-14	Global G.A.P Training – Albania	Albania
Apr-15	Global G.A.P. Training in Priority Standards	Ukraine
Apr-15	Training on EU Market Developments, F&V Export	Ukraine
Jun-15	Global G.A.P. Kosovo	Kosovo
Jun-15	Implementation and Certification of Organic Standard	Serbia
Sep-15	Global G.A.P. Training – Albania	Albania
Oct-15	ISO22000 Training - Food Safety Management System	Albania
Oct-15	Global G.A.P. Training – Macedonia	Macedonia
Dec-15	HACCP Training	Albania
Dec-15	Global G.A.P Training – Serbia	Serbia
Jan-16	Global G.A.P. Certification -	Serbia
Jan-16	Implementation and Certification of IFS BRC	Serbia
Apr-16	Training for Internal Auditors - IFS BRC FSSC	Macedonia
Apr-16	Training for Internal Auditors - IFS BRC	Serbia
Oct-16	ICT in Agribusiness	Macedonia
Oct-16	IPARD Roundtable	Montenegro
2015 – 2016	Global G.A.P. Implementation and Certification	Albania
2015 – 2016	HACCP Implementation and Certification	Albania
2015 – 2016	ISO22000 Implementation and Certification	Albania
2015 – 2016	HACCP - ISO22000 Implementation and Certification	Macedonia
2015 – 2016	IFS/FSSC/BRC Implementation and Certification	Macedonia
2015 – 2016	Implementation and Certification of Global G.A.P.	Macedonia
2015 – 2016	Implementation and Certification of Organic Standard	Macedonia

### Surveys:

Figure 4.4 shows a summary of the ratings of the usefulness REG interventions by activity type, whereas Figure 4.5 presents the estimated effect of REG on the four areas specifically mentioned in the SOW, i.e. becoming an exporter, developing new products, accessing finance, and improving workforce skills, plus three others obtaining certifications, increasing sales, and increasing exports.

As shown below in Figure 4.4, the composite weighted average ratings of agribusiness activity types ranged from 3.3 to 4.1 out of 5. Finance included only one activity.

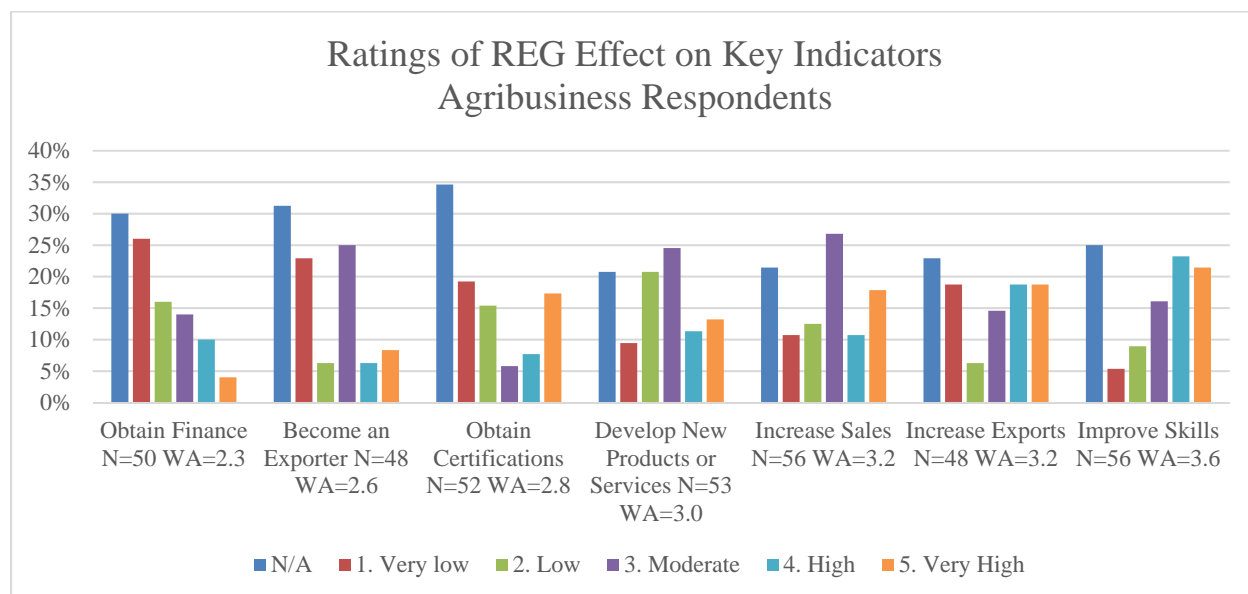
**FIGURE 4.4: REG ACTIVITY RATINGS: AGRICULTURE/AGRIBUSINESS**

Activity Type	Ratings
Business Development/Trade Promotion	4.1
Business Operations or Technology	4.0
Standards and Certification	4.1
Finance	3.3
<b>All Activity Types</b>	<b>4.1</b>

In terms of the estimated effect of REG on key indicators of capacity and performance, survey respondents provided lower ratings than the ones for activities. As shown in Figure 4.5 below, the highest rating was given for the effect of REG in improving skills, and the lowest rating for the effect on obtaining finance. Four of the seven of the weighted average ratings met or exceeded the moderate level of 3 out of 5.

Of the four indicators specifically listed in the evaluation SOW ('become an exporter', 'develop new products', 'obtain finance', and 'improve skills'), two of them ('develop new products', and 'improve workforce skills') rated more than 3. 'Become an exporter' was rated less than moderate, but 'increase exports' was on average more than moderate. The latter finding is consistent with information obtained in FGDs and KIIs, in which most participants indicated that they are already exporting.

**FIGURE 4.5: REG EFFECT AGRIBUSINESS**



**KIIs and FGDs:**

Findings are provided for the six countries visited by the evaluation team.

**Albania:** REG has helped six companies achieve Global G.A.P. so that they can do business with foreign buyers and three have done so to date. The other three companies received the certification after the harvesting period was over. REG covered the initial certification cost, while companies pay for the cost of annual renewals that confirm the maintenance of global gap standards. One company, Agro Co Albania, achieved Global G.A.P. certifications for five products, only the first of which was aided by REG support.

**Azerbaijan:** REG works very closely with the bilateral USAID Project Agricultural Support to Agriculture Project (ASAP), which provides additional technical and managerial support to REG participants. The latter were already in the export business before REG program assistance, but primarily worked with the Russian markets. None of them had attended foreign trade shows before 2014 (before they received REG support). REG introduced these participants to new buyers at several trade fairs—one of the most important aspects of the program, according to Azerbaijani FGD participants, as well as participants interviewed in five other countries assisted by REG. It is less clear whether sales increased as a direct result from the REG Project.

**Bosnia and Herzegovina (BiH):** REG supported trade fairs that helped BiH agribusinesses with business linkages and networking. REG prearranged visits of several companies and provided training in market entrance. According to the USAID/BiH bilateral FARMA Project, the latter actively assisted REG participants in preparing for participation in trade fairs. Specific results included: acquisition of business contacts of several Scandinavian companies, ongoing discussions from business to business (B2B) meetings with Swedish companies, and site visits by a foreign representative to a local food processing company in BiH. Additionally, participants in the Dubai Fair gained useful insights into market procurement opportunities in the Middle East.

**Kosovo:** Kosovo agribusinesses participated at the selling missions in Skopje (Macedonia) with German and Dutch buyers. In the beginning, the EU partners did not grant credibility to agricultural producers from Kosovo; however, the USAID Agricultural Growth and Rural Opportunities (AGRO) Project and REG worked to this end and enabled access to new markets according to the participants. Many FGD participants have established good contacts at the buyer missions and have sent offers. According to FGD participants, the most important factor for successful participation at these foreign fairs is to have a reputable host/consultant to help with establishing business contacts. As a result, they established very good cooperation with foreign producers and processors—particularly from Macedonia. B2B meetings were particularly effective, according to the interviewees.

**Macedonia:** Two companies participated in a focus group discussion. Both were introduced to REG through professional associations. The first is a fresh products producer with 50 full-time employees in the collection center. They export fresh vegetables (tomatoes, cabbage, peppers, etc.) mainly to Russia. The second is a company with 250 employees, which includes a well-known local winery (45 employees with production capacity of 4.5 million bottles). Both participated at B2B meetings organized by REG: Global Supermarket Chains (TESCO and SPAR International), and the Western Balkans and Matchmaking support at Trade Fair Fruit Logistica 2015 in Berlin. According to these two companies, the most important benefits from REG activities were: increasing networks and establishing new business contacts, better understanding of markets, access to larger retailers, and concrete business deals. For example, one company signed a new contract with a trading company from Czech Republic for the export of plums.

**Serbia:** All eight companies interviewed have increased the number of their business contacts, and some have signed business contracts<sup>12</sup>. This is an important achievement, according to the FGD participants, because the process from establishing first contacts until signing a business agreement is tedious and slow.

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<sup>12</sup> Companies were generally reluctant to provide details of business deals in FGDs, where competitors were present.

According to the FGD participants, buyers are very reluctant to switch to new suppliers unless they are convinced of their ability to consistently supply quality produce at competitive prices. Through participating at various events, Serbian companies have been able to shorten the time between initial contact with a buyer and an actual sale. Additionally, they report that they have improved their sales and marketing skills because of REG training, and their knowledge about both existing and potential markets has increased.

Although REG activities did not directly focus on capacity building of BSOs, the Chamber for Commerce and Industry of Serbia has benefited significantly due to a better understanding of potential markets, which enables them better to match agribusiness companies with the fairs, B2B meetings, and other events aiming at increasing exports.

## ICT

### REG Data:

According to REG, the project conducted 50<sup>13</sup> activities in the ICT sector with a total of 1,681 participants.

**FIGURE 4.6: ICT ACTIVITIES**

Month/ Year	Subject Area/Activity	Country
<b>Business Development/Trade Promotion</b>		
May-14	Workshop on European Union Tenders	Serbia
Oct-14	Deutschland Austria and Switzerland (DACH) Mission	Germany, Austria, Switz.
May-15	South Eastern Europe Regional IT Conference	Bosnia and Herzegovina
Jun-15	B2B Forum in Morocco	Morocco
Oct-15	B2B and Lindholmen Conference	Sweden
Nov-15	Balkans and Black Sea Cluster Meeting	Macedonia
Feb-16	Balkan and Black Sea ICT Cluster Network Meeting	Serbia
Feb-16	Mobile World Congress B2B	Spain
Feb-16	Horizon 2020 Training – Tirana	Albania
Feb-16	Horizon 2020 Training	Bosnia and Herzegovina
Feb-16	Horizon 2020 Training – Skopje	Macedonia
May-16	Agro B2B Event	Serbia
Jun-16	Digitec Forum	Armenia
Jun-16	Strategic Thinking	Armenia
Sep-16	Sarajevo Tech Summit	Bosnia and Herzegovina

<sup>13</sup> In the list of activities provided by REG to the evaluation team on April 7, 2017, there were 33 ICT activities for the period 2014 through 2016. On July 27, 2017, REG provided an updated list that showed 50 activities during the same time period; these are all listed in Figure 4.6. The findings from the on-line survey and KIIs/FDGs presented below are based on the list of activities provided in April 2017 (33 ICT activities).



Month/ Year	Subject Area/Activity	Country
Sep-16	Balkans and Black Sea Cluster Meeting/INFOFest	Montenegro
Sep-16	Cluster Matchmaking Conference	Poland
Oct-16	Dublin B2B Event (with Dublin Chamber of Commerce)	Ireland
Oct-16	KOS (Kosovo) ICT Event	Kosovo
Oct-16	ASKA Building Bridges Conference	Serbia
Oct-16	B2B, Lindholmen Conference	Sweden
Nov-16	Strategic Thinking: Define Business Strategy	Bosnia and Herzegovina
Nov-16	Georgian IT Innovation Event	Georgia
Nov-16	SEETA ICT in Agribusiness	Macedonia
Nov-16	Advanced Technologies Forum	Serbia
Feb-17	Nordic ICT ID Conference	Sweden
<b>Business Operations or Technology</b>		
Jun-16	MS 461 Querying MS SQL Server 2012/2014	Bosnia and Herzegovina
Jun-16	MS 480 Programming in HTML5 with JavaScript and	Bosnia and Herzegovina
Jun-16	MCSA: SQL Server 2012 Training	Bosnia and Herzegovina
Jun-16	MCSD: Web applications and other MCSD Training	Bosnia and Herzegovina
Sep-16	MS 462 Administering MS SQL Server	Bosnia and Herzegovina
Sep-16	MS 486 Developing ASP.NET MVC Web Applications	Bosnia and Herzegovina
Nov-16	Business Innovation Forum	Armenia
Nov-16	MS 463 Implementing a Data Warehouse	Bosnia and Herzegovina
Nov-16	MS 487 Developing MS Azure and Web Services	Bosnia and Herzegovina
Dec-16	HTML5 / CSS3 Beginner Level Course for Web Development	Serbia
<b>Standards and Certification</b>		
Dec-15	Software Developer Examination – Java (SDEJava)	Kosovo
Dec-15	Proxor Software Developer Exam- Java	Kosovo
Dec-15	Proxor Software Developer Exam Preparation Training - Java	Kosovo
Apr-16	Lean-Kanban Project Mgt. Executive Session/Workshop	Georgia
Jun-16	How to Improve and Sustain Project and Process Mgt.	Albania
Oct-16	How to Improve and Sustain Project and Process Mgt.	Moldova
Oct-16	ISO 9001:2015 Quality Management System	Armenia
Oct-16	SCRUM Master Training and Certification	Albania
Nov-16	Using SCRUM Framework in Software Development Projects	Georgia
Nov-16	ITMark, Breza Software Engineering	Serbia
Nov-16	ISO 9001:2015 Certification, Logik Poslovna Resenia	Armenia

Month/Year	Subject Area/Activity	Country
Nov-16	ISO 27001:2013 Certification, Logik Poslovna Resenia	Serbia
Dec-16	Introduction to CMMI for Development course	Moldova
Dec-16	Introduction to CMMI for Development certification w/CMU	Moldova

**Surveys:**

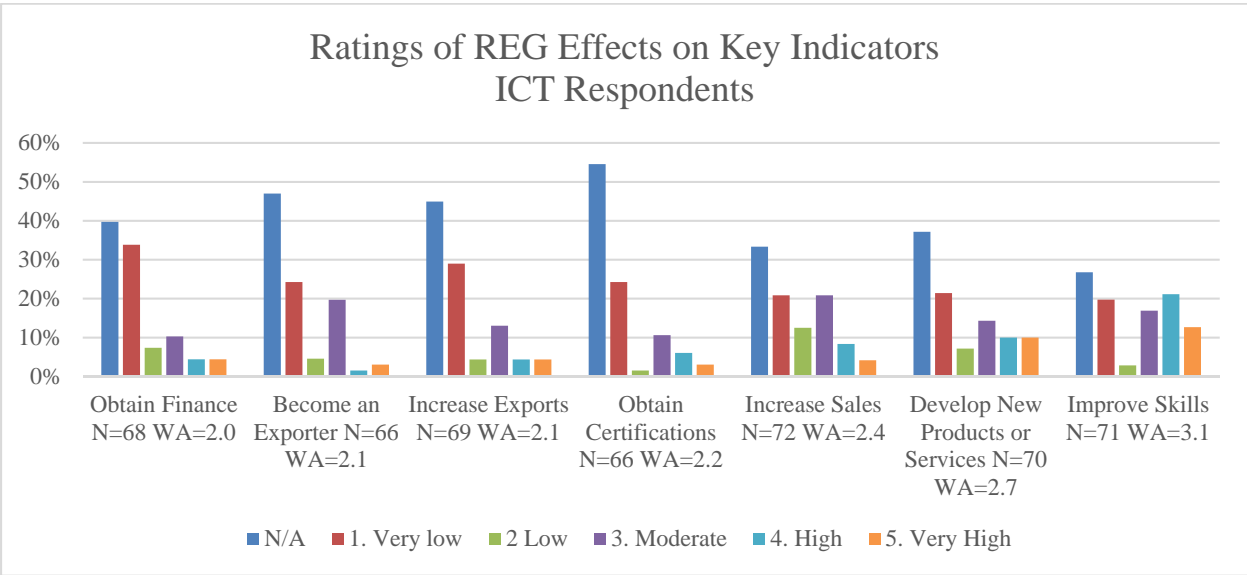
As shown below in Figure 4.7, the composite weighted average ratings of the usefulness of ICT activities ranged from 3.8 to 3.9 out of 5.

**FIGURE 4.7: REG ACTIVITY RATINGS: ICT**

Activity Type	ICT
Business Development/Trade Promotion	3.8
Business Operations or Technology	3.9
Standards and Certification	3.9
<b>All ICT Activity Types</b>	<b>3.8</b>

In terms of the estimated effect of REG on key indicators of capacity and performance, ICT survey respondents provided lower ratings than the ones they provided for activities. As shown in Figure 4.8 below, the highest rating was again given for the effect of REG on improving skills, which was the only one of seven indicators to be rated above moderate.

**FIGURE 4.8 REG EFFECT: ICT**



**KIIs and FGDs:**

Findings are provided for the five countries visited by the evaluation team. There were no ICT activities in Azerbaijan.

The ICT sector is one of the emerging sectors in transition economies and is characterized by the presence of many small businesses started since the transition process began. Although it is difficult to find up-to-date statistics on growth, mainly due to poor collection and monitoring of micro-economic data at the national level, ICT can be said to be a relatively fast-growing sector (typically over 10 percent per annum) though beset with considerable challenges as owners seek to develop their workforce, develop solutions meeting international standards, and access high-value markets. Much of the growth has been from outsourced service, Serbia is the only REG country listed on Tholon's Top 100 Outsourcing Index for IT (with Belgrade ranked 95th). The REG Project aimed to tackle many important aspects of MSME development in the ICT sector, namely through the transfer of know-how on software programming, best practices in software development, technology development, and certification of programming skills. Additional focus was on IT industry processes at both the individual and company level, and access to new geographical markets. The international conferences and B2B networking, training, and certification were provided to beneficiaries free of charge whereas participation in international B2B and trade missions involved cost sharing between REG and the beneficiaries. However, the IT business support organizations, which were REG's channel for reaching out to the MSMEs in the ICT sector, were assisted by enabling their management staff to participate in the aforementioned networking and B2B events with all related costs covered.

The evaluation team's meetings with the ICT BSOs, usually established as associations or chambers, as well as individual enterprises participating in group-meetings, enabled the team to probe into the benefits to participating enterprises. The KIs and FGDs pointed to international networking and B2B as being the most valued benefit of REG support for the ICT sector in the Western Balkans because it provided beneficiaries with access to serious potential clients, although training leading to certification were also highly valued since it is a necessity for successful competition in markets. Companies valued the flexible and adaptable nature of the training and certification support to accommodate for nuances in the ICT sector. When asked about the specifics of deals resulting from international B2B, BSO managers did not know/were unable to share such information, claiming that they did not collect this since it was confidential in nature, that firms might have needed to enter into non-disclosure agreements, and companies tended to speak about good prospects rather than about specific deals, although a few examples were referred to during discussions. BSO's lack of information about members' successes is among other things symptomatic of what is a generally lower level of trust among companies in transition economies compared with Western ones, as well as insufficient effort into developing and implementing an effective system for monitoring results.

All interviewed companies and BSO management spoke highly of the benefits of working within the Balkan and Black Sea ICT Clusters Network, which holds events that REG beneficiaries participate in with the project's assistance. This regional cluster network has provided the West Balkans with high visibility as a place for doing business in the ICT sector and networking between regional companies. However, as expressed by a staff-member of the USAID Mission in Macedonia, it had been expected that inter-company networking in the region would lead to greater intra-regional collaboration on the provision of services to markets within and outside the region. When asked about regional-networking, interviewees were unable to provide many examples; although, some cited Kosovar and Macedonian companies' business engagement, resulting from the development of specific expertise software for use in the insurance industry. Informants mentioned a lack of widespread intra-regional collaboration attributed to lack of know-how on establishing ventures, insufficient time and resources to explore opportunities due to focus on existing contracts, and a reluctance to expose workforce to competing companies due to perceived risks of poaching.

Workforce development was the key challenge for all companies in beneficiary countries. However, each country has its own challenges in terms of the availability and state of development of academic and

vocational training. For example, Serbia is considerably more advanced in having established IT academies resulting from a combination of donor support, including USAID from past bilateral activities and government initiatives. Albania is much less advanced. The REG Project was not designed to tackle workforce shortages on a large scale but business organizations and companies valued the training provided and felt there were benefits in developing regional training initiatives of the type undertaken by REG.

REG has provided companies with assistance in applying for EU grants under various programs such as Horizon 2020, and cross-border and regional collaboration projects. Although business support organizations and IT clusters have participated in such bids, there is no evidence of much success in winning projects. Two that attracted funding were a cross-border proposal for ICT in tourism implemented by the Montenegro IT cluster and STIKK, and the other was financed under the Interreg Danube Transnational Program, and included the Vojvodina IT cluster, Cluj IT cluster, Bulgarian ICT cluster, and the Montenegro IT cluster. REG's initiatives have supported project applications to facilitate collaboration between the IT and other sectors, notably agribusiness. REG has facilitated inter-sector conferences and this has resulted in the development of IT solutions for agribusiness in some cases.

The following is a summary of findings from meetings in the visited countries including IT businesses and IT business support organizations:

**Albania:** The Albanian ICT sector has had a long-lasting relationship with USAID activities through collaboration with REG's predecessor project, Regional Competitiveness Initiative (RCI). Albanian IT businesses have participated in most activities facilitated by REG and interviewees all said they highly valued its assistance. The Albanian IT Association (AITA) Executive Director, said that before joining the regional initiatives IT companies were isolated, small, weak, had limited knowledge, and could not compare their progress with the region's. REG is said to have had strengthened the importance of ICT in the country's economy, and their participation in events in Stuttgart and Vienna (2014) encouraged them to access foreign markets. One company has since conducted business internationally and has clients in Austria, Romania, and the United Kingdom. This happened because REG introduced and trained them to do business abroad. Another participant noted that awareness building about markets, capacity building from training, and B2B networking had been the most beneficial results from REG.

**Bosnia and Herzegovina:** The BiH ICT sector has developed well over the years, though as in other West Balkans countries it faces major challenges, particularly in workforce development and shortages of qualified personnel. The challenge of tackling this by reforms to the educational system are made more complicated by BiH's political system. The BIT Alliance represents the interests of relatively large IT companies in the domestic ICT sector and is currently mainly focused on advocacy rather than on training and market linkages. The evaluation team met the former manager of BIT Alliance to discuss the sector as well as her own organization, DoIT, a small business which had collaborated with REG by successfully organizing the successful Sarajevo Tech Summit 2016 focused on the Internet of Things. DoIT's founders have been cooperating with REG for over two years and they are still in the process of determining the best service model for supporting their IT clients. They spoke highly of the assistance provided to the ICT sector, as did two software engineering companies. Everyone valued the opportunities REG created for both domestic and international B2B networking, and spoke of it as a change agent through creating a platform for brainstorming ideas and increasing the self-confidence of companies.

**Kosovo:** The IT software industry in Kosovo is represented by STIKK, which first collaborated with USAID under RCI. STIKK has gained recognition in the region and organizes the Kosovo ICT conference, which will hold its 5<sup>th</sup> edition in 2017. This international conference, which obtained some support from REG, attracts high-profile keynote speakers from leading IT companies and technology leaders in the World and is a major networking opportunity for participants. Two software engineering companies (one

of which is the largest in Kosovo and both of which had benefited from REG through participation in training, certification, and international B2B events), spoke of REG's importance in connecting them with prospective customers. B2B events have provided STIKK members with concrete results in the shape of contracts with foreign partners. The greatest constraint on IT company development is lack of access to skilled workforce, although steps were undertaken by STIKK as well as individual companies in setting up and delivering tailor-made informal workforce training programs with support from other donors. Interviewees noted that they benefitted from the bilateral USAID activity, EMPOWER, which provides grants for workforce development (outside the scope of REG).

**Macedonia:** MASIT is Macedonia's leading business support organization for the ICT sector, currently registered as an IT chamber of commerce and supported by USAID activities since its involvement with RCI. Its management spoke of highly valued and popular certification support and praised REG's readiness to approve certifications of all types relevant to targeted markets. There was no other source for this type of assistance within the country. MASIT's ability to facilitate this type of service has bolstered its position as a BSO for the sector. The most valuable benefit was the international B2B events. In comparison with Macedonian state initiatives, REG events are paving the way towards business relationships; participants are learning lessons of how to target and engage with prospective partners as they progress from one B2B event to another. For example, the first Swedish mission was perceived as less successful than its follow-up due to lessons learned. Macedonian participants are optimistic about these leading to business relationships.

**Serbia:** Serbia, as the largest country in the West Balkans region, has the most developed ICT sector in terms of size and geographic extent. The main ICT clusters are Vojvodina IT cluster (North), IT Net Cluster (Belgrade), Central Serbia IT cluster, and the advanced technologies cluster NiCAT (Nis, includes IT companies). The evaluation team met with all cluster managers as well as with two IT members of the Nis-based cluster.

All cluster managers and interviewed companies cited workforce development as being the key challenge to the sector and acknowledged the value of training and certifications. They particularly emphasized the immense benefits of participation in international B2B events. The Dublin matchmaking event was said to have been most productive in establishing links with Irish partners that could lead to the formation of several business relationships. For instance, due to B2B events one participant spoke of an agreement to provide services to a Swiss customer as a result of links established at an event enabled by REG. The other was unable to provide specific examples of deals struck as a direct result of B2B events but is confident that new business would materialize, particularly as a result of the Dublin event. Notwithstanding progress in the development of international B2B contacts, it is interesting to note that there is still a need to improve intra-regional and intra-country cooperation. The Serbian ICT cluster managers spoke of the potential for improving collaboration between members of the four clusters centered around IT hub cities.

All cluster managers spoke of the value of REG support to members in enhancing the visibility and credibility of the clusters as BSOs, and all agreed that membership growth is partly attributed to REG. Serbian interviewees spoke of the vital role of USAID's role in catalyzing a change of thinking within the sector, and the NiCAT cluster manager related the experiences from a visit to Silicon Valley as life changing.

## Tourism

**REG Data:** According to REG data, there were 37<sup>14</sup> activities in the tourism sector with a total of 610 participants.

**FIGURE 4.9: TOURISM ACTIVITIES**

Month / Year	Subject Area/Activity	Country
<b>Business Development/Trade Promotion</b>		
Jan-15	London Adventure Travel Show	UK
Mar-15	International Tourism Fair - Berlin	Germany
Mar-15	Adventure EDU II - Macedonia Workshop	Macedonia
Jun-15	REG Adventure Week Western Balkans	Kosovo
Jun-15	Adventure EDU - Kosovo Workshop	Kosovo
Feb-16	Adventure Travel Show	UK
Feb-16	ATTA Conference	UK
Mar-16	Destinations Nature - Trade Show	France
Mar-16	International Tourism Fair - Berlin	Germany
May-16	Adventure Next Trade Show	Macedonia
Sep-16	Adventure Travel World Next	USA
Oct-16	International Tourism Fair - Asia	Malaysia
Dec-16	Adventure Travel Business Workshop - Western Balkans	Serbia
<b>Product Development</b>		
Apr-14	REG New Product Development	Albania, etc.
Jul-15	REG New Product Development	Albania, etc.
Oct-15	Adventure EDU	Kosovo
Nov-15	Learning by Doing: Wildlife Retreat	Macedonia, Montenegro
Dec-15	Learning by Doing: Culinary / Gastronomy and Cultural Heritage	Bosnia and Herzegovina
Feb-16	Learning by Doing: Gastro Retreat	Bosnia and Herzegovina
Mar-16	Learning by Doing - Birdwatching	Albania
Oct-16	Learning by Doing: Birdwatching Training	Albania

<sup>14</sup> In the list of activities provided by REG to the Evaluation Team on April 7, 2017, there were 23 tourism activities and 233 participants for the period 2014 through 2016. On July 27, 2017, REG provided an updated list that listed 34 activities during the same period. Figure 4.9 includes the original list of 23 activities plus four that were omitted from the first list; the remaining difference represents sub-activities of the activities listed in Figure 4.9. The findings from the on-line survey and KIIs/FDGs presented below are based on the list of activities provided in April 2017 (23 tourism activities).

Month / Year	Subject Area/Activity	Country
Oct-16	Learning by Doing: Culinary / Gastronomy FAM Trip	Bosnia and Herzegovina
Nov-16	Learning by Doing: Guca Music	Serbia
<b>Workforce Development</b>		
May-14	American Hotel and Lodging Educational Institute (AHLEI) Training	Serbia
Jun-14	REG Leave No Trace (LNT) Program	Macedonia
Oct-16	Adventure Guide Training Workshop - Western Balkans	Bosnia and Herzegovina
Nov-16	Adventure Guide Training Workshop - Caucasus	Georgia, Armenia

**Surveys:**

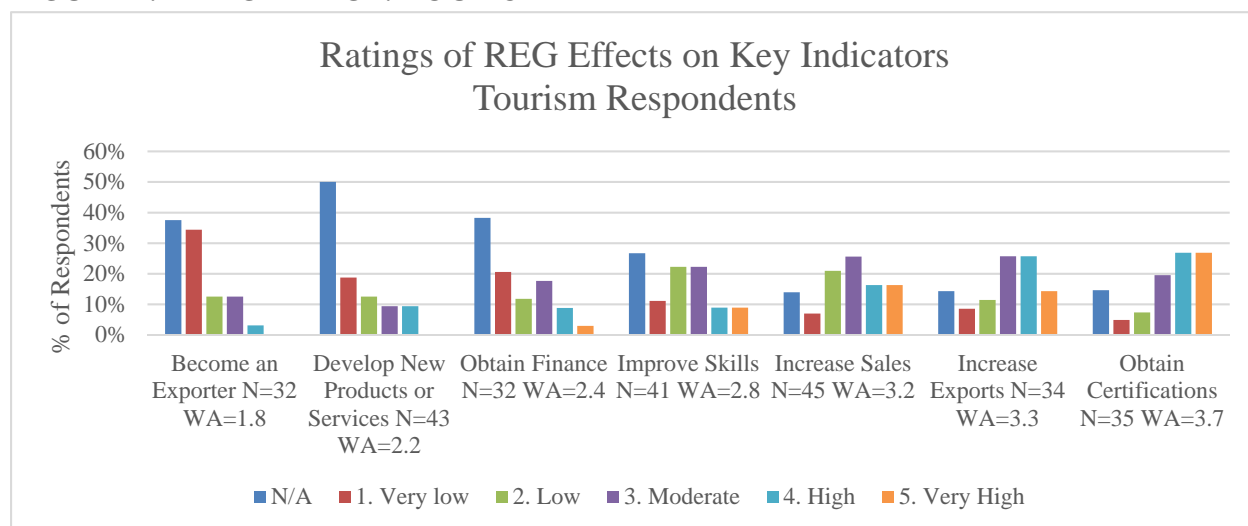
As shown below in Figure 4.10, the composite weighted average ratings of the usefulness of tourism activities ranged from 3.9 to 4.3 out of 5.

**FIGURE 4.10 REG ACTIVITY RATINGS: TOURISM**

Activity Type	Tourism
Business Development/ Trade Promotion	4.1
Product Development	3.9
Workforce Development	4.3
<b>All Tourism Activity Types</b>	<b>4.1</b>

In terms of the estimated effect of REG on key indicators of capacity and performance in the tourism sector, survey respondents provided lower ratings than they did for the usefulness of REG activities in which they participated. As shown in Figure 4.11 below, the highest rating was given for the effect of REG on obtaining certifications, and the lowest rating for the effect of REG on becoming an exporter. Three out of seven weighted average ratings (sales, exports, and certifications), met or exceeded the moderate level of three out of five. However, the effects of REG on all four indicators listed in the evaluation SOW ('become an exporter', 'develop new products', 'obtain finance', and 'improve skills') were rated less than moderate.

**FIGURE 4.1 | REG EFFECT: TOURISM**



**KIIs and FGDs:**

In recent years, the tourism sector has expanded in all REG supported countries in the Western Balkans due to the increased number of international tourists. The Balkan countries also exchange significant tourist flows which support the development of their tourism industries. Given the political stabilization and improvement of the image of the overall Balkan region, it can be expected that the tourism industry of these countries will develop dynamically in the coming years.

REG’s effect on companies was wider than the scope of the evaluation question, because in addition to developing new products, and improving access to finance and workforce skills, there are examples of other improvements to business performance. Therefore, the question can be examined from a broader view: What is the effect on the companies? What benefits did they receive?

In some cases, it is difficult to attribute concrete performance results to REG directly, but according to the interviewed companies from tourism sector, most of the increase in sales occurred as a result of REG’s assistance for participation at international trade fairs. In addition, they agree that they have received benefits in increasing their number of visitors, developing new products after attending Learning by Doing (LbD) workshops, improved working skills, and improved promotion as a tourist destination.

Businesses felt that they increased the number of visitors and provided anecdotal evidence, although no concrete numbers have been found to show the direct effect of REG. The tour operator in Kosovo, the agro tourism inn in Bosnia and Herzegovina, and National Park in Macedonia found an increase in visitors. Businesses who developed new products after attending LbD workshops stated an enrichment in tourism by organizing visits of farm of wild boar, visiting local attractions, organizing picnics and wine consumption in the nature or cooking classes held at agro tourism inns, participate in preparation of local meals, wine tasting, etc. Businesses who saw their working skills improve through REG training events stated that REG training directly contributed to developing new products and improving customer service, and in some cases also influenced a change of perception about the tourism industry (e.g. rangers in National Park in Macedonia). Finally, those who saw an improvement in promotion stated that REG helped put the Balkans “on the map” as an undiscovered destination, thanks to publicity generated through National Geographic Traveler, Vogue, NY Times, and The Lonely Planet. These companies have branded Balkan tourism as a combination of outdoor, historical, and cultural activities.



**Albania:** With a coastline of 470 km and numerous mountains over 1000 m, Albania has great potential for tourism; however, the resources have not been marketed sufficiently. According to tourism representatives at a FGD, from a regional perspective compared to other countries, Albania has not been given as much support from REG. However, they highly value REG activities, especially the Adventure Travel World Summit (ATWS) in Alaska, which brought significant attention to the Balkan region. They all agree that for growing companies in the field of tourism, such events are great learning opportunities. Although a regional approach is important to coordination among the Balkan countries, different levels of development and readiness need to be taken into consideration. For example, according to interviewees, regarding readiness for participating at international fairs, Kosovar companies are not at the same level as Bosnia, Serbia, and Albania, and due to significant government support and intensive tourism support interventions in the past several years, Macedonia and Montenegro are most ready to reap the benefits of fair participation.

**Bosnia and Herzegovina:** There is a big potential for tourism development in BiH, due to abundance of natural resources and rich cultural heritage. The number of tourists has increased steadily in the last several years. The most developed is religious tourism around Megjorje. Although there are no official data, estimates indicate that around two million pilgrims visit Herzegovina every year. Most other tourists come from Croatia, usually combining one week at the Adriatic coast and another week in Herzegovina. According to interviewed beneficiaries, BiH should not rely on religious tourism, because does not generate significant revenue outside of lodging. However, a high number of pilgrims contributes to development of other sectors, such as construction and food production. Regional activities in the field of tourism would be beneficial, as each Balkan country is too small to offer a complete tourist experience.

The stakeholders highly appreciated REG support, which produced benefits by introducing new products, more effectively calculating costs and establishing prices, increasing awareness of the necessity for cooperation among local/regional entities, increasing the network of regional partners, and improving the marketing of tourism in BiH.

**Kosovo:** There is a lot to be done to promote Kosovo as single tourism destination, but in general tourism in Kosovo should be seen in a regional perspective because foreign visitors are mostly interested in the region as a whole. Therefore, projects such as Via Dinarica or Peaks of Balkans are very important. Bad image due to political problems in the recent past is one of the biggest challenges. Regional cooperation with BiH and Serbia is difficult due to political reasons. With Albania and Montenegro there is a special agreement that allows free movement of visitors in the cross-border region. There is no such agreement with Macedonia. REG is not sufficiently present in Kosovo, and most of the activities were supported by the USAID bilateral project EMPOWER. The tourism companies that participated in REG activities (market place, training for product development, marketing and promotion) stressed that the training was of a high quality, practical, and case-study based delivered by people with profound expert knowledge. They contributed to raising awareness, networking with other tour operators in the region and generating new ideas. Concrete benefits from established contacts and acquired knowledge, are yet to come. There are examples of increased visitors (a tour operator in North Kosovo claims that after having 200 guests in 2016, by May 2017, there had already been 300 bookings); however, the increase cannot be attributed to solely REG activities. Another benefit is changing of perception of both, tourism stakeholders and potential customers. For example, in the past people were not interested to pay for organized tours. Now they see value in adventure travel, which appeals to typically, young professionals.

**Macedonia:** In Macedonia, in addition to KIIIs with three tourism stakeholders, one FGD was organized with six members of the EDEN tourism cluster, who participated in AdventureWeek Western Balkans (AWWB). AWWB, an intensive familiarization (FAM) tour, took place over 10 days in September 2014 (three days in Kosovo, three to four days in Albania, and four days in Macedonia). The six EDEN tourism

cluster members also participate in Adventure Next Balkans in May 2016, organized by ATTA. EDEN cluster members were service providers for Adventure Next Balkans (restaurants, hotels, etc.), resulting in increased income which can be attributed to the REG Project. However, according to the members the biggest benefit from taking part in the REG Project was increased awareness about safety standards. Safety issues were not taken seriously before Adventure Next Balkans (for example, there was no mountain rescue service in Macedonia).

There are other benefits supported by anecdotal evidence such as promotion of Ohrid as a tourism destination and increased awareness about the tourism cluster. Regional activities are more effective and can produce more sustainable benefits because they establish contacts and contribute to the generation of new ideas for future enrichment of the tourism industry. Via Dinarica<sup>15</sup> was mentioned as a good example of regional project, but Macedonia has not been promoted sufficiently. There are no tours organized in the country as part of Via Dinarica. Additional benefits that were mentioned by the KIIs included expanding the market through participation in ITB Berlin, attracting foreign partners at FAM tours, developing new products such as new tour routes in the National Park Mavrovo.

**Serbia:** Despite the challenges, such as a lack of recognition of Serbia as a tourist destination and insufficiently developed tourism infrastructure, around 1.2 million tourists visit Serbia annually. Most are from the former Yugoslav countries, but there are also visitors from Turkey, Russia, Italy, Germany, Israel, etc. Representatives of tourism companies that participated in a FGD in Serbia expressed their deep appreciation for the innovativeness and support of REG. They also indicated that participation at international events, like the Adventure Travel World Summit in Alaska, was particularly helpful.

### Entrepreneurship/Start-Ups

#### REG Data:

According to REG, there were 25<sup>16</sup> activities in the Entrepreneurship/Start-Ups sector with a total of 1,122 participants. According to SEGURA, the start-ups supported by REG have received \$650,000 in investments as a result of REG support.

**FIGURE 4.12: ENTREPRENEURSHIP ACTIVITIES**

Month/ Year	Subject Area/Activity	Country
<b>Entrepreneurship</b>		
Feb-14	Introduction to Angel Investing	Serbia
Apr-14	Tbilisi for the Win Camp	Georgia

<sup>15</sup> Via Dinarica is a regional initiative lead by private sector. In some countries – primarily BiH and Kosovo it has received donor assistance: in BiH USAID and UNDP jointly support development of the trail, while in Kosovo the trail development has received some support from USAID EMPOWER Project. In rest of the countries, development effort is mainly supported by the members of the Via Dinarica Alliance – private sector alliance of tour operators who offer regional hiking programs. The alliance is also leading the promotional efforts for the Via Dinarica, where they have received REG support.

<sup>16</sup> In the list of activities provided by REG to the Evaluation Team on April 7, 2017, there were 20 activities for the period 2014 through 2016 that the evaluation team classified as entrepreneurship events. On July 27, 2017, REG provided an updated list that showed 25 activities during the same period. The difference represents six sub-activities of a previously listed activity plus one activity that was already planned by a REG subcontractor; two entrepreneurship activities were listed in the survey under other sectors. The findings from the on-line survey and KIIs/FDGs presented below are based on the list of activities provided in April 2017 (20 entrepreneurship activities).

Month/ Year	Subject Area/Activity	Country
May-14	Sarajevo For the Win Camp	Bosnia and Herzegovina
Jun-14	Empowering Women in Business	Albania
Oct-14	Pristina For the Win Camp	Kosovo
Nov-14	Armenia For the Win - Open Event	Armenia
Dec-14	Kyiv For the Win - Open Event	Ukraine
Jun-15	B2B Matchmaking Events for Women in Business	Albania
Jun-15	Traction Camp Mavrovo	Macedonia
Sep-15	Women in Business B2B	Serbia
Oct-15	Traction Camp Odessa	Ukraine
Nov-15	Traction Camp Tbilisi	Georgia
Mar-16	Regional Women Entrepreneurs B2B Event	Bosnia and Herzegovina
Apr-16	Traction Camp AgTech	USA
Jun-16	Regional Access to Finance Event for Women Entrepreneurs	Macedonia
Sep-16	Traction Camp Tech Crunch	USA
Oct-16	Startup Study Tours to Startup Hubs of Berlin London	England
Oct-16	Startup Study Tours to Startup Hubs of Berlin	Germany

#### Surveys:

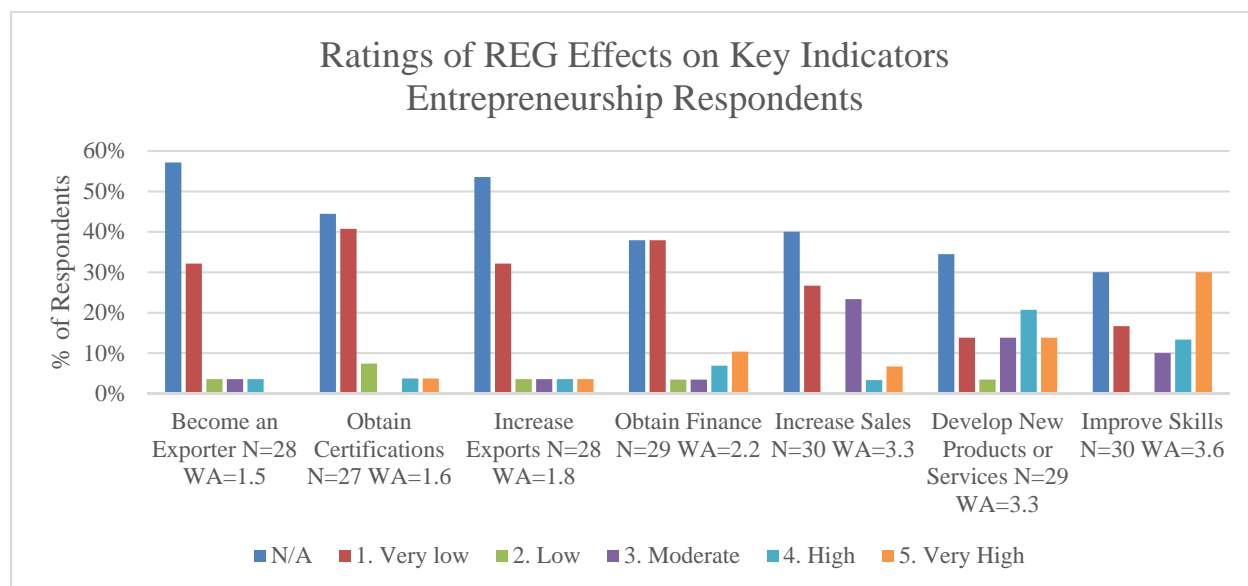
As shown below in Figure 4.13, the composite weighted average of the usefulness of the 20 activities included in the survey was 4.0 out of 5.

**FIGURE 4.13 REG ACTIVITY RATINGS: ENTREPRENEURSHIP**

Activity Type	Entrepreneurship
Entrepreneurship	4.0

In terms of the estimated effect of REG on key indicators of capacity and performance in entrepreneurship, survey respondents provided somewhat lower ratings than their ratings of REG activities. As shown in Figure 4.14 below, the highest rating was given for the effect of REG on improving skills, while the lowest rating was for the effect of REG on becoming an exporter. Three out of seven weighted average ratings (sales, developing new products, and improving skills), met or exceeded the moderate level, i.e. a rating of three out of five. However, the effects of REG on two of the four indicators listed in the evaluation SOW ('become an exporter', and 'obtain finance') were rated less than moderate.

**FIGURE 4.14: REG EFFECT: ENTREPRENEURSHIP**



**KIIs and FGDs:**

The findings are provided based on the evaluation team’s meetings in six countries. Although there are marked differences between the former Yugoslav economies, former USSR republic Azerbaijan, and former Communist ruled Albania, all have significant historical barriers to entrepreneurship. In the past, all private initiatives were forbidden and business linkages with the West were strictly controlled by the state. All countries in the region are at various stages in the development of their own entrepreneurship and innovation support ecosystem. REG’s role in supporting start-up entrepreneurship was to identify and promote the development of entrepreneurs through special training camps targeting both novices as well as started early stage businesses. The training additionally took them to international events to see and savor the start-up climate, pitch their business ideas, develop investor-readiness, and establish connections with other entrepreneurs and prospective investors. The support was managed by a roving entrepreneurship leader who, although based in Sofia, travelled throughout the REG countries to identify and target prospective participants. They were invited to apply for participation in training camps and compete for inclusion in international networking and pitching events. The following is an overview of feedback obtained from meetings with individuals or groups of entrepreneurs that benefited from REG entrepreneurship support:

**Albania:** The three Albanian entrepreneurs interviewed by the evaluation team included the Executive Director of the Albanian IT association and the owner of a successful IT start-up. The latter participated in an open call for funding from the EU FRACTALS innovation project managed by the Vojvodina cluster in Serbia. Although he failed to win funding for his “market to-go” project, he was introduced to REG and subsequently participated in the Silicon Valley event. The event opened his mind on how to grow his business without investor funding. Subsequently he started a successful job search portal, which has recently attracted investor interest, which he declined after deciding to continue growing the firm.

Of the three IT entrepreneurs, two took part in start-up camps. One founded a website promoting a wide range of Albanian business and travel services but he has still not developed a way of generating income from it and turned his attention to the development of another unrelated business. When discussion turned to the shortcomings of the start-up support ecosystem in Albania, two of the participants blamed lack of growth opportunities for IT start-ups on the unfair government procurement practices that

included only a tight circle of companies that were leading members of the IT association. Donors were criticized for lack of coordination in supporting entrepreneurship. Both thought that the establishment of a start-up fund might be more beneficial than sending entrepreneurs to training camps and pitching events, which provided little chance of obtaining funding. Furthermore, both thought there was potential for the formation of an association that could advocate on behalf of start-ups rather than the Albanian ICT Association, which represented relatively well-developed enterprises.

**Azerbaijan:** The evaluation team met with the founders of two start-ups, which are said to have little support in the country. There is only one privately owned start-up fund in Azerbaijan, which had invested \$150,000 dollars on start-ups over the past year. The government provides small amounts of funding for agribusiness start-ups and start-up funding for ICT companies, though this funding is said to be reserved for enterprises with government connections. One company was established to provide business travel services to citizens of Azerbaijan. Another is an IT-based car sharing business, which started out as a website for sharing a wide range of assets. Both entrepreneurs have other jobs as well as developing their businesses. The founders of both companies attended Techcrunch events in Tbilisi (Georgia). One said that the event helped him narrow down focus of the business to cars only, whereas the other said that while he set out to find investors, the event helped him decide that his business was not ready for investment. While the founders valued opportunities to participate in international events, they felt that the focus should be on bringing the investors to them.

**Bosnia and Herzegovina:** One of three REG beneficiaries interviewed has developed a FinTech-based business that provides an IT-based solution for money transfer targeting diaspora communities. The co-founders perceive a gap in the market for remittance transfer services that would challenge the larger players, and tap into what are currently unofficial flows. These entrepreneurs have faced a wide range of challenges, ranging from regulatory to technological, and have yet to finalize their business model and technology. They say they have benefited from USAID support from a combination of bilateral project support (USAID Partnerships for Innovation) and REG. After winning the 2nd prize at the first REG For the Win (FTW) event, they progressed to the TechCrunch event in 2014. When asked about how they had benefited from REG, they rated FTW very highly (“very well organized and provided lots of useful information from successful world-class entrepreneurs”) and claimed it was a turning point in their endeavor of success. They are in touch with a potential Swedish investor and have utilized their expertise to advise a UK firm developed an online application linked to pre-paid debit cards, which needs to be completed before they return to developing the FinTech start-up.

The second REG beneficiary is a start-up for online food ordering, which has been in existence since 2011. After working as a consultant for a USAID bilateral project, the founder took part in a Traction camp herself. She found the experience: “shocking event though I had designed an accelerator program in Bosnia” and it taught her how interaction with investors was at the core of maintaining a viable business. The benefits of participation helped her to double the company’s revenues and the business maintains a position in its market despite the presence of a major international competitor. However, she is thinking of selling the company because she feels it could do with someone with more energy. She currently works as an IT specialist in mobile applications.

A third example of a start-up is a company that provides services to IT companies adopting FinTech solutions but also works with a range of other businesses adopting IT solutions e.g. airline ticketing. It said its clients include companies from top 50 start-ups in Europe, and it collaborates closely with international companies such as Spotify and Uber. The company currently employs close to 50 staff, and is considered to be a large, IT domestic enterprise in BiH. It is a member of the BIT Alliance, an association of software industry firms, and one its two founders is on its Board of Directors. Its turnover is said to run into millions of dollars, and it generates revenue from fees as well as equity stakes in client enterprises.

**Kosovo:** Three of the four start-up beneficiaries interviewed by the evaluation team attended Traction camp at Mavrovo in Macedonia, and the fourth attended the camp in Silicon Valley. One founded a company designing and marketing a 3-D printer assembled in Kosovo, and has orders from numerous Western geographical markets. It sells through Amazon. The second is an IT-based extension service, which measures nutrients in the soil and advises farmers on what to plant. The third created an IT-based citizen self-reporting service for real-time news and information, and the fourth founded a company providing motion graphics and animation. These entrepreneurs have been successful in making money from their businesses, though not all have been successful with their initial ideas. These founders recounted how the Traction camps helped: to change the mindset to doing business; to look at markets and to design products; to value contacts and mentors who themselves were successful US entrepreneurs, which in turn led them to new contacts such as creative directors worldwide, playing a key role in encouraging one in the development of a spin-off start up; and to learn directly from world renowned names like Google and Skype.

**Macedonia:** The evaluation team met with a start-up founder that provides creative artists with an internet- marketplace for marketing and selling their products. A creative artist herself, she gave up a secure and well-paid position with a telecommunication company to establish a start-up after learning about entrepreneurship after attending another donor's event. Subsequently, she successfully applied for a government grant to establish a business for producing 3-D laser printed objects created by artists. She attended a REG start-up camp that played a crucial role in re-pivoting and re-modeling her business idea to the provision of an internet based marketplace that is intended to generate revenues from commissions on sales and fills the gap for such services due to the inability and lack of knowledge among creative artists to market their creations. To date she has sold only three objects. Her sole source of funding has been the grant and her own savings. She feels she is reaching capacity due to lack of funding and does not have access to long-term mentoring that would help her make further progress.

This contrasts significantly with those of the founder of a well know start-up that is establishing itself as a leader in delivery of training, filling a gap said to exist between formal and informal education. His company delivers training designed to the needs of the domestic marketplace and works closely with employers. It provides training in a variety of areas including business management, industrial design and software programming, and claims to have a 100% success rate in helping its trainees find employment, which is attributed to careful selection of trainees as well as close cooperation with potential employers who even track the progress of individual trainees. This start-up offers short and long courses at prices that are ten-fold those offered by competing donor supported competitors but continues to attract many applicants. The founder is unable to say exactly how his participation in the traction camp helped him since he claims that dozens of advisors influenced him in his business endeavors. However, he acknowledges the high standard of practical training delivered by real experts at the camp and found the pitch training of immense value, claiming that he is "constantly pitching". The camp contributed to a change of his mind-set in crossing the line from business planning to implementation. He found traction camp much "deeper" and more focused than start-up events supported by other donors. This start-up is already looking at opportunities for expanding its business within the region and abroad, specifically to the Scandinavian market.

**Serbia:** Serbia has been a significant participant in REG events. One of the interviewed founders developed software for automated field service management. For example, it is used for restocking of vending machines. His main client base is in Serbia but he hopes to sell to the US. He describes his experience in a REG Techcrunch event in the US as a "life-changing" experience. He maintains contact with contacts made at that event. Another founder who attended a REG Techcrunch camp in the US, described the US experience as being very different from a pitch event in Serbia. He was particularly

impressed by the quality of the people he met and the direct questions they asked him about his business idea, which is an IT-based service linking farmers with beekeepers for pollination of crops. He is hoping to expand his business outside of Serbia and is considering the US market. He highly values the experience of going to the US. A third founder developed a gaming software that allows users to compete against one another in playing the role of coach in an actual basketball game. Additionally, he runs an IT consulting firm working for financial institutions, manufacturers, and public administration. A fourth is the founder of an IT-based platform for sharing agricultural equipment, i.e. a kind of Uber in the field of agriculture. Before joining the REG activities, he was benefiting from the EU FRACTALS program, where he learned about REG and applied. He was selected for the Techcrunch camp in San Francisco in 2016 and is very pleased with the outcomes. He now understands how the start-up ecosystem functions; values establishing contacts; has increased his knowledge having received valuable advice; and the event contributed to his perception about developing business ideas. Many of the IT entrepreneurs are also members of an IT cluster.

## Trade Facilitation

### REG Data:

According to REG, the project implemented 10<sup>17</sup> formal activities in the Trade Facilitation sector with a total of 195 participants.

**FIGURE 4.15: TRADE FACILITATION ACTIVITIES**

Month/ Year	Subject Area/Activity	Country
<b>Trade Facilitation</b>		
Oct-15	WTO TFA Self-Assessment Workshop for BiH	Bosnia and Herzegovina
Nov-15	Regional Workshop on National Trade Facilitation Committee in CEFTA	Serbia
Mar-16	Training on the WTO Agreement on Trade Facilitation for CEFTA	Switzerland
Nov-16	TFA Workshop Organized by WTO for Central and East Europe and Central Asia	Austria
Nov-16	Increasing Efficiency and Transparency Workshop	Serbia

### Surveys:

As shown below in Figure 4.16, the composite weighted average rating for the trade facilitation activities was 3.3 out of 5.

<sup>17</sup> In the list of activities provided by REG to the Evaluation Team on April 7, 2017, there were six trade facilitation activities for the period 2014 through 2016 (including one labelled 'Ongoing TF Efforts & Event Co-Sponsors' that is not included in Figure 4.15 above). On July 27, 2017, REG provided an updated list that showed 10 activities during the same time. The evaluation team reviewed the list and noted that the additional activities seem to be meetings or REG participation at events organized by other entities and not full activities. The findings from the on-line survey and KIIs/FDGs presented below are based on the list of activities provided in April 2017 (6 trade facilitation activities).

**FIGURE 4.16: REG ACTIVITY RATINGS: TRADE FACILITATION**

Activity Type	Trade Facilitation
Trade Facilitation	3.3

The business survey did not measure the estimated effects of trade facilitation on the key performance indicators of businesses.

**KIIs and FGDs:**

The Trade Facilitation Agreement (TFA) is an initiative of the World Trade Organization (WTO) that began in 2013; the agreement entered into force in February 2017 with the approval of the requisite number of WTO members. TFA requires that member countries establish Trade Facilitation Committees (TFC) that include members of the public and private sectors.

The Central European Free Trade Association (CEFTA), originally formed by Poland, Czechoslovakia, and Hungary, now includes seven countries: Albania, Bosnia-Herzegovina, Kosovo, Macedonia, Moldova, Montenegro, and Serbia. While Serbia, Kosovo, and Bosnia-Herzegovina are not WTO members, CEFTA requires that all its members adopt WTO rules. Within CEFTA there are no customs duties, but non-tariff barriers have been increasing. According to the REG Trade Facilitation Lead, CEFTA is a ‘good mechanism’; it has a secretariat in Brussels and meetings of member countries take place on a regular basis. REG-assisted countries are more focused on EU accession than they are on increasing trade within CEFTA. Among CEFTA members, Montenegro is the most advanced in terms of EU accession. The political environment has an important influence on the trade relations between the countries. For example, some of the Serbian representatives would not participate in REG trade facilitation activities organized in Kosovo.

According to REG’s Trade Facilitation Lead, regional projects have a difficult time to get deeply involved in issues related to specific countries. Group events were useful during the negotiation of TFAs, and regional assistance should be continued (CEFTA is a good mechanism for facilitating regional work), but it should be taken into consideration that different governments have very different needs in trade facilitation. For example, the chairperson of the National Trade Facilitation Council (NTFC) in Kosovo stated that capacity building is probably done better on a bilateral basis rather than a regional basis.

Most of the problems in the field of trade facilitation can be grouped in two categories: burdensome non-tariff barriers to trade, and problems between the countries due to their country specific needs.

In addition to organizing trade facilitation workshops for increasing understanding and sharing experiences in various trade facilitation issues (increasing efficiency and transparency, creating a joint action plan, stakeholder’s involvement, etc.), REG has engaged independent experts to identify the biggest trade challenges, and works closely with the NTFCs. Trade facilitation interventions are supposed to create favorable conditions that would enable businesses in the region to increase their exports in long run. However, it would be difficult to make any direct links between REG trade facilitation support and changes in the capacity or performance of individual businesses.



## Financial Sector Stability (Ukraine)

### REG Data:

According to REG, the project conducted 35<sup>18</sup> activities related to financial sector stability, all but one for the Ukrainian financial sector.

**FIGURE 4.17: FINANCIAL SECTOR ACTIVITIES**

Month/ Year	Extended Activity Title	Country
<b>Financial Sector</b>		
<b>Component 1 - Strategic Communication</b>		
Feb-16	CI. Card Sorting Exercise for NBU for journalists	Ukraine
Feb-16	CI. Card Sorting Exercise for NBU for NBU staff	Ukraine
Apr-16	CI. Card Sorting Exercise for DGF – staff	Ukraine
May-16	CI. Writing for Web for NBU 1	Ukraine
Jun-16	CI. Writing for Web for NBU 2	Ukraine
Jul-16	CI. Card Sorting Exercise for DGF - real depositors	Ukraine
Sep-16	CI. Simple Writing for NBU	Ukraine
Sep-16	CI. Writing for Web for DGF	Ukraine
Oct-16	CI. Card Sorting Exercise for NSSMC for staff	Ukraine
Oct-16	CI. Card Sorting Exercise for NSSMC for interns	Ukraine
Oct-16	CI. Card Sorting Exercise for NSSMC for journalists	Ukraine
Dec-16	CI. Simple Writing for NSSMC and DGF	Ukraine
<b>Component 2 - Ukrainian Diaspora Financing</b>		
Sep-16	C2. CEDOS Policy Workshop on Migration	Ukraine
<b>Component 3 - Financial Sector Regulation &amp; Supervision</b>		
Apr-16	C3. WB Enforcement Institute	USA
Jul-16	C3. US SEC Training of Market Discipline and AML - industry outreach day	Ukraine
Jul-16	C3. US SEC Training of Market Discipline and AML for NSSMC	Ukraine
Sep-16	C3. CFTC Annual Conference	Czech Republic
Sep-16	C3. CFTC International Conference	Ukraine
Sep-16	C3. IOSCO Regional Conference	Czech Republic
Sep-16	C3. US SEC Training of Enforcement - industry outreach day	Ukraine
Sep-16	C3. US SEC Training on Enforcement for NSSMC	Ukraine
Oct-16	C3. School of Bank Examiner	Ukraine

<sup>18</sup> In the list of activities provided by REG to the Evaluation Team on April 7, 2017, there were 3 major categories of activities for financial sector stability for the period 2014 through 2016. On July 27, 2017, REG provided an updated list that detailed the 35 activities in the table.

Month/ Year	Extended Activity Title	Country
Dec-16	C3. IOSCO Conference on IOSCO Principles and MMoU - market participants	Ukraine
Dec-16	C3. IOSCO Conference on IOSCO Principles and MMoU – regulators	Ukraine
<b>Component 4 - Digital Financial Services (DFS)</b>		
Jun-16	C4. DFS Knowledge Sharing Workshop - Banking University	Ukraine
Jun-16	C4. DFS Knowledge Sharing Workshop - Banking University	Ukraine
Jun-16	C4. DFS Knowledge Sharing Workshop - Odesa Telecom Academy	Ukraine
Jul-16	C4. ITC Conference "Payment Systems: Technology, Security and Innovations"	Ukraine
Sep-16	C4. DFS Knowledge Sharing Workshop - Kyiv National University of Economics	Ukraine
Nov-16	C4. DFS Knowledge Sharing Workshop - Kyiv National University of Trade and Economics	Ukraine
Nov-16	C4. DFS Knowledge Sharing Workshop - Lviv National Ivan Franko University	Ukraine
Nov-16	C4. DFS Knowledge Sharing Workshop - Ukrainian Catholic University	Ukraine
Nov-16	C4. Ukrainian Cashless Summit	Ukraine
Nov-16	C4. DFS Knowledge Sharing Workshop Kyiv National Trade & Economics University	Ukraine
Nov-16	C4. DFS Knowledge Sharing Workshop Ukrainian Catholic University	Ukraine
Nov-16	C4. DFS Knowledge Sharing Workshop Ivan Franko National University	Ukraine
Sep-14	FULM Conference on EU Capital Requirements Directive for Deposit Taking Institutions	Macedonia

#### **KIIs and FGDs:**

One KII was conducted by phone with the USAID Activity Manager for the Ukraine Financial Sector Stability Program (IP-FSS) in Ukraine. FSS activities began in early 2016 and will likely be completed by October 2017. During 2016, the buy-in was managed by a full-time, resident Chief of Party. Activities are grouped into four components: 1) communication; 2) diaspora financing and investment; 3) financial markets regulation; and 4) digital finance.

The REG IP-FSS buy-in was initiated in February 2015 following the termination for convenience of a bilateral financial sector support program. The REG team was on the ground in Ukraine by December 2015. It has played an important role in dealing with the economic and financial crises that followed the ouster of the former Ukrainian president in 2014 by helping Ukraine to meet the conditions set by the International Monetary Fund for financial support. One of its most important achievements has been to improve the public communications capacity of the National Bank of Ukraine (NBU) during a time of severe turmoil in financial markets.

The IP-FSS is linked closely with the IMF-supported plan to restructure the banking sector. The first and most important component of the buy-in, public communication, has been a high priority for all financial

sector operators. The REG Project has helped NBU establish a new website that will soon go public, increase public dialogue, and help depositors to better understand how financial markets work, the risks of institutions failing, and what actions should be taken in case of bank failure. It accounts for 50 percent of all IP-FSS funding. IP-FSS has also helped to improve communications within the NBU itself. IP-FSS advisors have worked for up to six months inside NBU, something that has helped to bridge the communications gaps that had existed among and within NBU departments and other Ukrainian financial sector institutions.

The second IP-FSS component involved the production of a comprehensive report on the Ukrainian diaspora and the potential for increasing its investment in Ukraine, while the third IP-FSS component has worked primarily with securities regulators and has provided important links to the International Organization for Securities Commissions, which “develops, implements and promotes adherence to internationally recognized standards for securities regulation”<sup>19</sup>, as well as the U.S. Securities and Exchange Commission (SEC) and the U.S. Commodities Futures Trading Commission (CFTC).

Finally, IP-FSS, under its support for digital finance, has been attempting to bridge the gap between the high rate of mobile penetration in Ukraine (130%) and the very low level of banking penetration; only 50% of adults have bank accounts. REG has helped to bridge the gap between two NBU departments that did not previously coordinate. The NBU is currently discussing a possible new digital financial service with a well-known mobile operator, and a trial involving student payments. IP-FSS has also launched several educational events about digital finance.

## Conclusions

### Agribusiness

The REG Project devoted a significant amount of time and effort to the agribusiness sector; in fact, almost 40 percent of REG activities targeted this sector. The assistance, which focused on market development and certifications needed to enter Western European markets, was highly appreciated by participants. According to the participants who were either surveyed or interviewed, the project helped them to improve their human resource capacity in both marketing and operations. While there was anecdotal evidence of effects on performance, e.g. sales and exports, overall there was relatively little quantitative data showing that the project had major effects on performance, at least within the timeframe of the project.

### ICT

The second largest beneficiary of REG’s activities was the ICT sector. REG was particularly useful in providing opportunities for business networking and market linkages with prospective business partners, although there is no evidence of it strongly effecting sales and exports, even though there was some anecdotal evidence from focus groups of companies establishing linkages with Western customers, which could be attributed to some degree to REG. The inability to link relationships with deals can be explained since there can be a significant time lag between the establishment of business relationships and conversion to contracts. All beneficiaries believed that they had learned a lot and this is consistent with good overall satisfaction with acquisition of skills, as indicated in the survey results.

### Tourism

Most of the interviewed beneficiaries expressed clear satisfaction with REG support for new product development, expanding of business network and customer base, and especially skills improvement. This was confirmed by the survey, where the estimated effect of REG interventions is highest in skills

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<sup>19</sup> IOSCO website.

improvement. In addition, according to KIs and FGDs, REG's contribution to building the regional network is highly valuable, as an instrument for expanding markets and increasing of sales. At present, however, it is difficult to attribute concrete performance results regarding increased sales to REG directly. Therefore, more intensive monitoring is needed, which would require the REG beneficiaries closely to monitor and disclose the achieved results whenever possible, not only after the events have been organized (e.g. fair participation), but over the mid-term (6 months to 1 year). A regional approach to tourism is necessary for optimizing the benefits of individual tourism potential of each of the countries. None of the countries in the Western Balkan region are large enough to offer a diversified tourism experience, so cooperation among them in joint tourist routes, is important for attracting tourists, especially those from more distant regions. In some cases, some of the companies were not ready for participation at high level events, such as Adventure Travel World Summit in Alaska. When organizing regional events, the political context and administrative barriers need to be taken into consideration.

### **Entrepreneurship**

The survey found a high level of satisfaction with the activities among two-thirds of participants. REG made a significant effect on the mindset of the participants by inspiring them, many of whom referred to life changing experiences, and enhancing their skills as shown in the survey results. None of the interviewed beneficiaries spoke of deals and this is consistent with the survey results, which do not show obtaining finance and sales as having been influenced by REG. It should be noted that this is not surprising since globally only a small percentage of start-ups are successful in obtaining equity funding. All the start-ups are technology based and most deliver their services through an internet-based platform.

### **Trade Facilitation**

Given that trade facilitation addresses the movement of goods across national borders and following that CEFTA is a mechanism for facilitating regional cooperation, a regional approach in trade facilitation is necessary. Regional projects, however, have difficult time to get deeply involved in issues related to specific countries, so it should be taken into consideration that different governments have very different needs in trade facilitation and some activities needs to be customized (e.g. capacity building). As it was stressed by the chairperson of the National Trade Facilitation Council in Kosovo, bilateral capacity building measures are more effective. When organizing regional events political context and administrative barriers need to be taken into consideration. The political environment highly influences the trade relations between the countries.

### **Financial Sector Stability (Ukraine)**

REG's work on the IP-FSS has been highly appreciated by the USAID Mission to Ukraine. However, it is difficult to form concrete conclusions about its effectiveness in improving financial sector stability, growth, and inclusion in Ukraine based on the information available to the evaluation team.

### **Overall Conclusions**

REG's effect on companies was wider than the indicators in the question indicate, because in addition to becoming exporters, developing new products, improving access to finance, and workforce skills, there are examples of other improvements of business performance. The regional approach creates additional value, especially in the field of tourism and trade facilitation. Regional support does not aim at filling the gaps of bilateral projects, but complements them and builds on them providing additional values. In some cases, it is difficult to attribute concrete performance results to REG directly, because in addition to receiving support from other international organizations, the beneficiaries themselves also invest in improving their performance.

## **Evaluation Question 2: Which Of The Activities In The Targeted Sectors Will Remain Sustainable And Active After The Life Of Project (LOP)?**

This question consists of three sub-questions discussed below.

**Evaluation Question 2a.i. Were there typological commonalities in the intervention that will remain sustainable?**

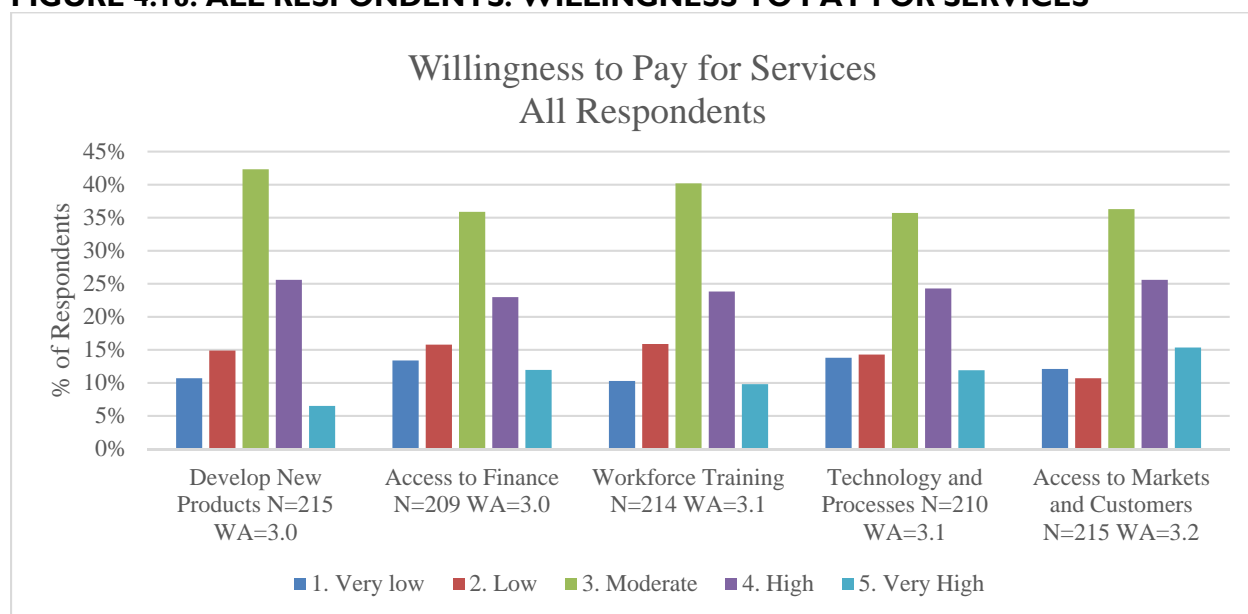
**Overall Findings**

In general, the sustainability of REG interventions, i.e. the services provided by REG, without further donor support depends on both: 1) the continued availability of such services in the market; and 2) the willingness of companies to pay for them. These questions were explored in the survey, KIIs, and FGDs.

**Survey:**

Survey data show that REG-assisted businesses of all types are only moderately willing to pay for the five types of business support interventions (access to markets and customers, development of new products, access to finance, workforce training, and technology/processes) that have been supported by the REG Project (Figure 4.18). The willingness to pay for access to markets and customers was the highest, while assistance for developing new products was the lowest. However, the difference was only 0.2 on a scale of 5.

**FIGURE 4.18: ALL RESPONDENTS: WILLINGNESS TO PAY FOR SERVICES**



**KIIs and FGDs:**

With respect to the continued availability of services, many of the ones that have been supported by REG, such as trade fairs and professional meetings and events, are well-established and supported by professional organizations, including associations of buyers in the markets targeted by REG beneficiaries. The sustainability of such services directly contributes to the sustainability of the businesses that REG assisted, which is addressed under the response to the Question 2a.ii. For example, in the agribusiness sector, continued sales into the EU market for agriculture products from the E&E region were found to be dependent on the ability of producers and processes to obtain the certifications required in EU markets. According to businesses interviewed, the availability of and access to training and certification services is critical for the access of E&E producers and processors to EU markets and Gulf of Arabia markets.

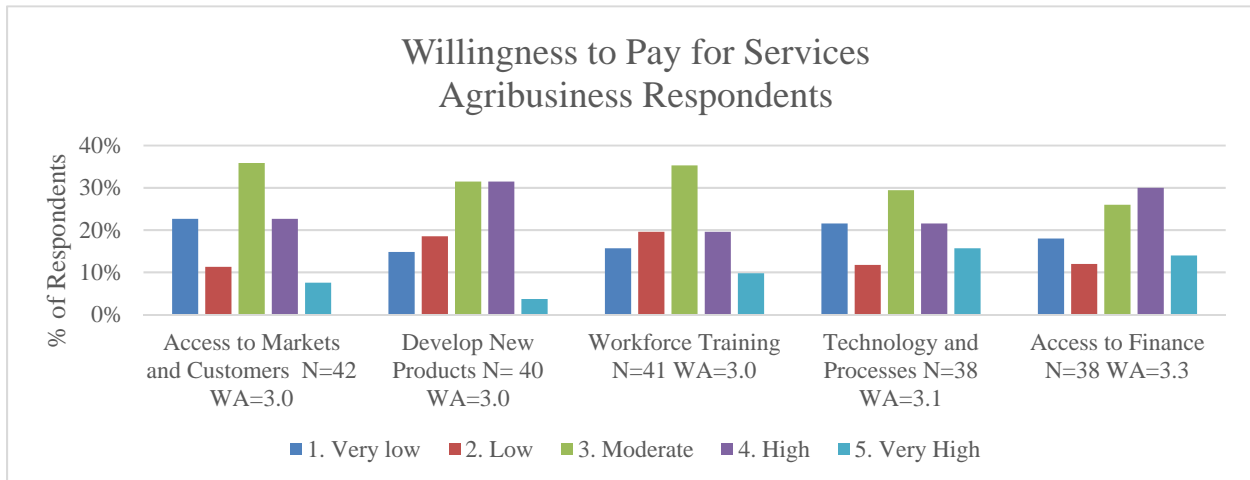
## Findings

### Agribusiness

#### Survey:

Business survey data indicate that agribusinesses are on average moderately willing to pay for all five types of services, as shown in the graph below (Figure 4.19). The willingness to pay for access to finance was the highest, while access to markets was the lowest. However, the differences were only 0.3 on a scale of 5.

**FIGURE 4.19: AGRIBUSINESS: WILLINGNESS TO PAY FOR SERVICES**



#### KIIs and FGDs:

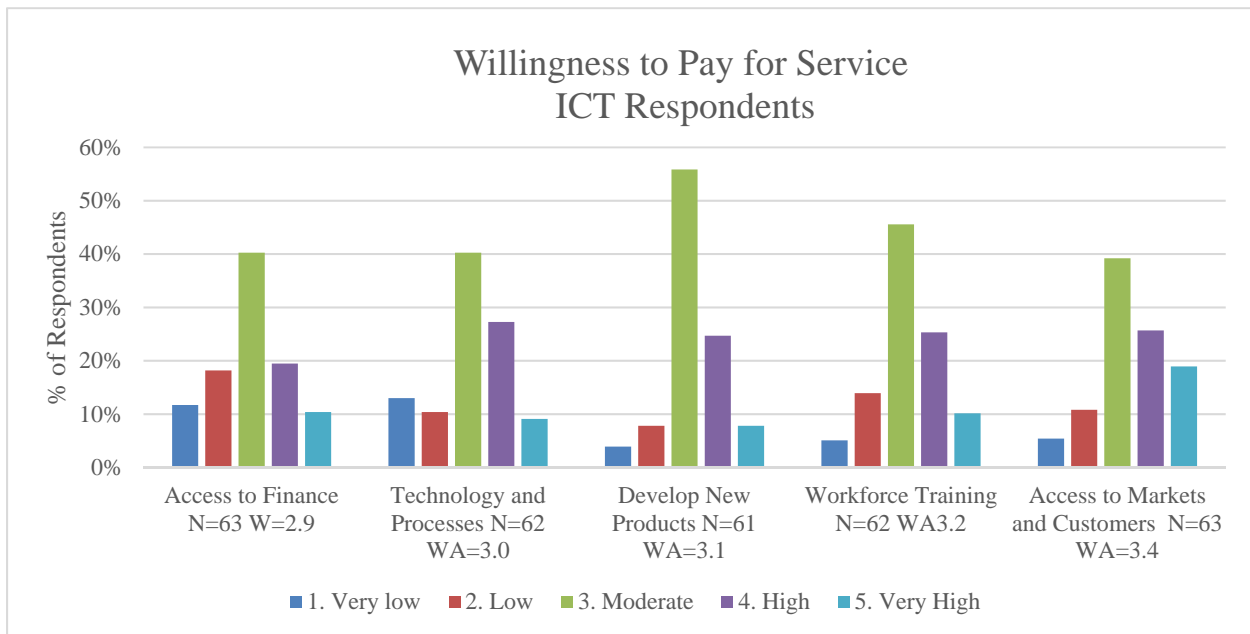
In KIIs and FGDs, agribusinesses generally confirmed their willingness to pay for services. They expressed an interest in access to markets and certification training. However, even some of the larger companies indicated that it might be difficult for them to afford the specialized market consultants that REG had arranged at international trade shows.

### ICT

#### Survey:

ICT businesses are also on average moderately willing to pay for all five types of services, as shown in the Figure 4.20 below. Within this group, the willingness to pay for access to markets was the highest, while access to finance was lowest. However, the differences were only 0.5 on a scale of 5.

**FIGURE 4.20: ICT COMPANIES: WILLINGNESS TO PAY FOR SERVICES**



### KIIs and FGDs:

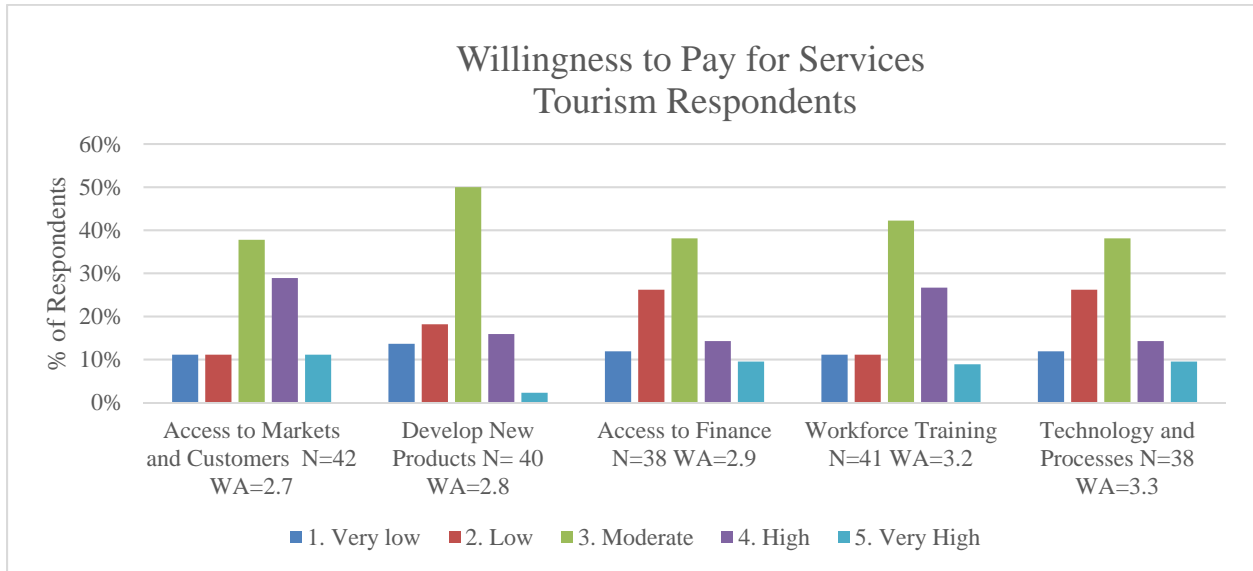
From the standpoint of the sustainability of the interventions, the business survey data show that generally ICT companies are willing to pay for a wide range of services of the types received from REG, particularly in access markets and customers, followed by developing new products, accessing new technologies, and work-force training. As explained by informants during the KIIs and FGDs, companies understand that they are unlikely to be able to identify and engage with potential clients without expert assistance. During these meetings, beneficiaries of this type of assistance noted the usefulness of the international B2B events and the quality of partners they encountered. It not surprising that companies that highly value access to markets would also value support in developing skills, technologies, and products that would enable them to access the export markets.

### Tourism

#### Survey:

Tourism enterprises are also moderately willing on average to pay for all five types of services, as shown in the Figure 4.21 below. Within this group, the willingness to pay for help in technology and processes, such as information systems, was the highest, while access to markets and customers was lowest. However, the difference between the two ratings was only 0.6 on a scale of 5.

**FIGURE 4.21: TOURISM COMPANIES: WILLINGNESS TO PAY FOR SERVICES**



Business survey data indicate that businesses in the tourism subject area view access to markets and customers, and workforce training as extremely important for their future success. They are on average willing to pay for services to aid them in that regard, as shown in the graphs above.

**KIIs and FGDs:**

The interviewed beneficiaries from tourism sector highly value market expansion, the networking opportunities, knowledge acquired, and skills improved. Some of them stated that as a result of REG activities, their business perspectives have been completely changed in a positive way. However, the KIIs and FGDs, suggest that still there is still a high level of reliance on donor support and low readiness for continuation with payment after the project is over.

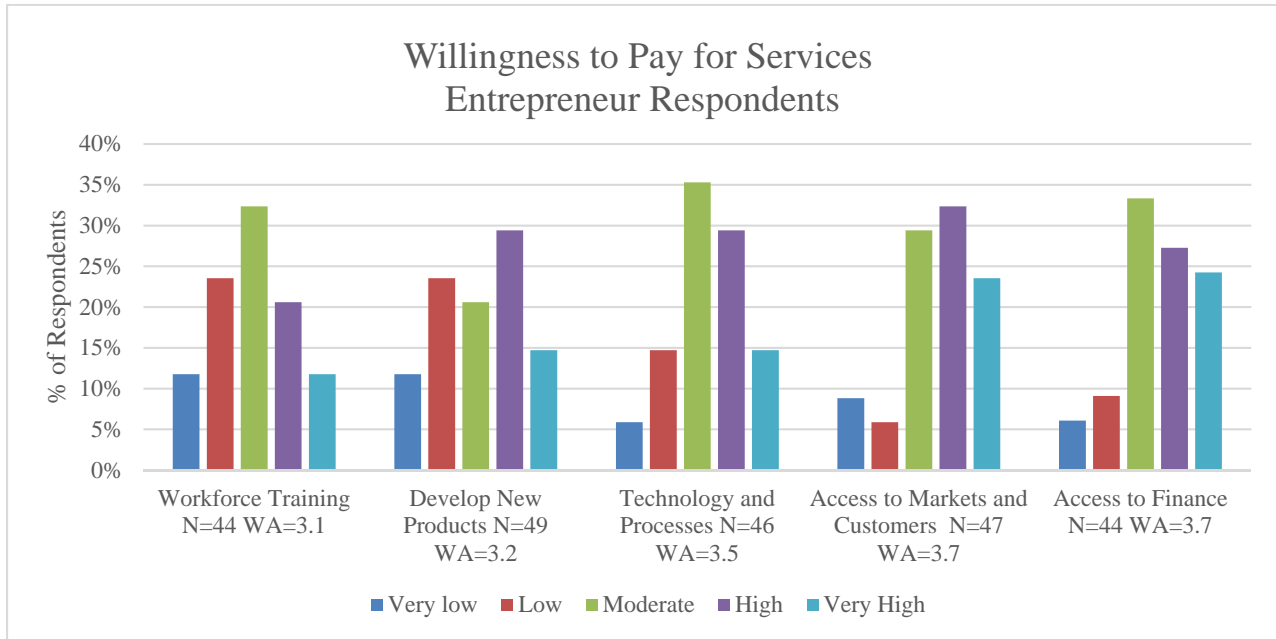
**Entrepreneurship**

**Survey:**

Entrepreneurs are somewhat more willing to pay for services than their colleagues in agribusiness, ICT, and tourism. As shown in Figure 4.22 below, entrepreneurs are most willing to pay for access to finance and markets, while least willing to pay for workforce training. Their willingness to pay for access to finance and markets, each rated at 3.7 out of a possible 5, ranked highest among all respondents in any sector for any type of service.



**FIGURE 4.22: ENTREPRENEURS: WILLINGNESS TO PAY FOR SERVICES**



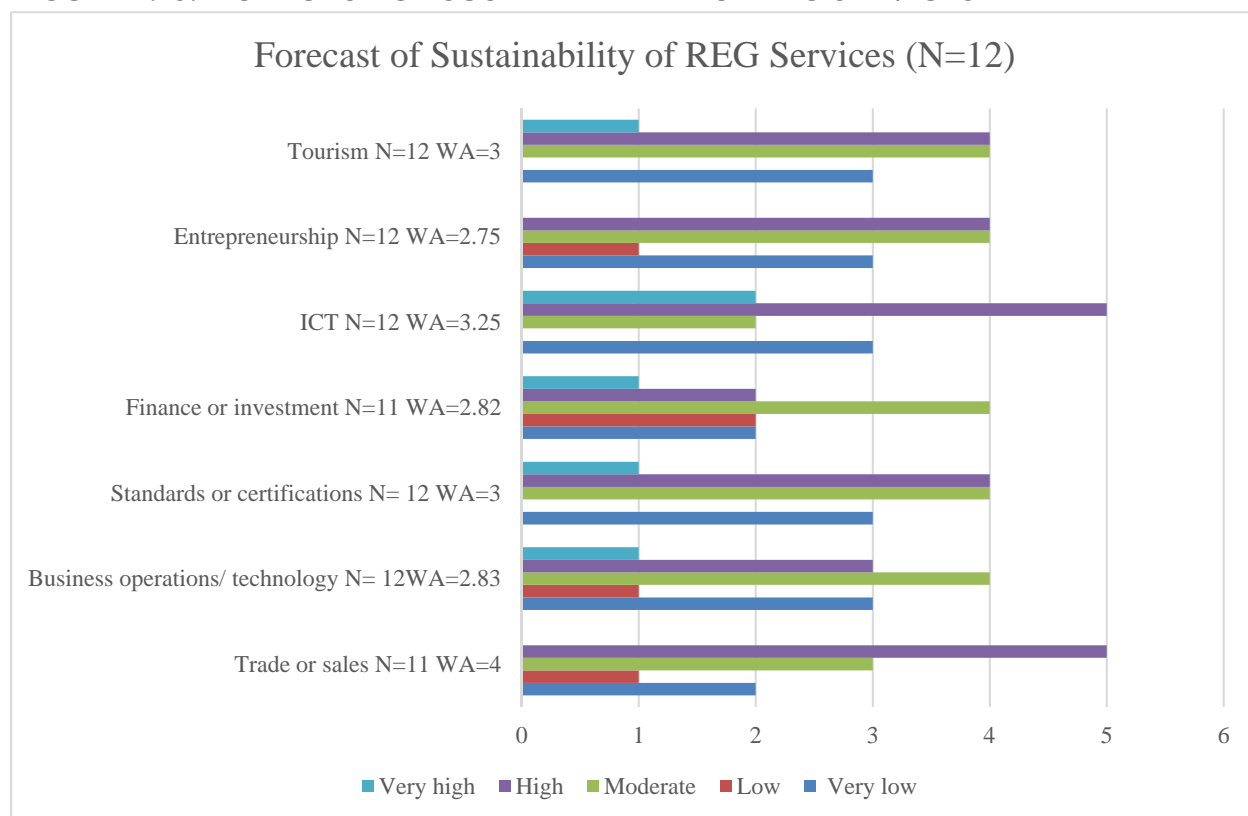
**KIIs and FGDs:**

Most of the entrepreneurs interviewed are determined to make their businesses successful, although in some cases, the businesses had not generated sufficient revenues to pay their employees and founders livable wages. These founders and employees were often working second jobs to make sufficient income to live. Without doubt, on the question of effect on mindset, the start-up training has changed the outlook of entrepreneurs and appears to have significantly affected their mindset and actions.

**USAID Staff Survey**

Figure 4.23 shows how USAID staff viewed the sustainability of REG services. While “Trade or Sales” and ICT did have a ‘high’ average response regarding the forecast of sustainability, the average responses for the rest of the categories were between low and moderate level. Even though the number of respondents is low and the distributions vary across categories, the graphic does provide some insights on how sustainability in REG activities is viewed by USAID staff in REG countries.

**FIGURE 4.23: FORECAST OF SUSTAINABILITY OF REG SERVICES**



The comments below show some examples given by USAID staff who did not believe REG will be sustainable in the future are included in the table below.

USAID Mission Survey Comments
<i>“Apart from few exemptions, REG provide direct assistance to the beneficiaries, not really working through the institutions (and building their capacities) or creating a systematic change. A sustainable change is hard to build and requires a bilateral continuing presence and partnership on the ground, as well as investment, commitment and co-ownership from the local entities. The way REG and its activities are structured, they cannot bring to a systematic and sustainable change. Rather, their activities are more designed to complement existing projects.”</i>
<i>“REG’s activities are thinly dispersed throughout the region, thus the attribution levels are questionable when sustainability of the interventions is in question.”</i>

**Conclusions on Sustainability of REG Interventions<sup>20</sup>**

In general, beneficiaries are only moderately willing to continue to pay for participation for activities that are currently supported by REG. REG-supported businesses generally expressed higher willingness to pay for the cost of services in face to face meetings with the evaluation team and less willingness in their survey

<sup>20</sup> Note: Conclusions are based on categories from the survey, which were based on the four specific areas listed in the SOW Question 1. The survey did not specifically ask about the willingness to pay for certifications, since they are essential requirements for accessing markets and customers, not ends in themselves. They are essential in establishing best practice processes, sometimes at both individual or product level e.g. software programming, and company level e.g. security, and are achieved through workforce training. Furthermore, companies would not be able to win contracts, especially in Western markets, without the required certifications.

response. Of special interest to the businesses, are trade missions (in-bound and out-bound) that facilitate business contacts and certifications training that increase market access. However, for larger more developed companies this appears to be more realistic than for recently established and smaller ones.

In its comments on the sustainability of REG interventions, SEGURA noted that REG works with local associations or groups, wherever they are viable partners. Examples are the IT associations/clusters in each country and the two regional tourism initiatives.

**Access to markets and customers:** This has been the ‘bread and butter’ of REG. Participants have generally been very positive about their experiences in these events. They have made new contacts and gained a much better idea of market requirements. However, participation in foreign trade fairs is also relatively expensive. Larger, more sophisticated companies should be able to do this on their own, but smaller businesses may not be able to afford the costs.

**Develop new products:** This work was mainly done in the tourism sector. While participants see the value, they may not be able to afford the cost of foreign consultants like the ones who came to do LbD events.

**Access to finance:** REG has done very little in this area; only one activity of 139 was specifically related to access to finance issues. However, business persons rate this among their biggest obstacles.

**Workforce training:** Workforce is also identified as a priority for the businesses interviewed. However, there is not a clear commitment to workforce development due to the fear of losing trained staff to other companies. And in fact, REG did not do a lot of workforce training, other than certifications. This will continue to be a hard sell.

**Technology and processes:** Businesses are very interested in accessing the latest new technology; the willingness to pay for such access appears high.

## **EVALUATION QUESTION 2A.II: WERE THERE TYPOLOGICAL COMMONALITIES IN THE COMPANIES/ORGANIZATIONS WHERE SUSTAINABILITY WAS ACHIEVED?**

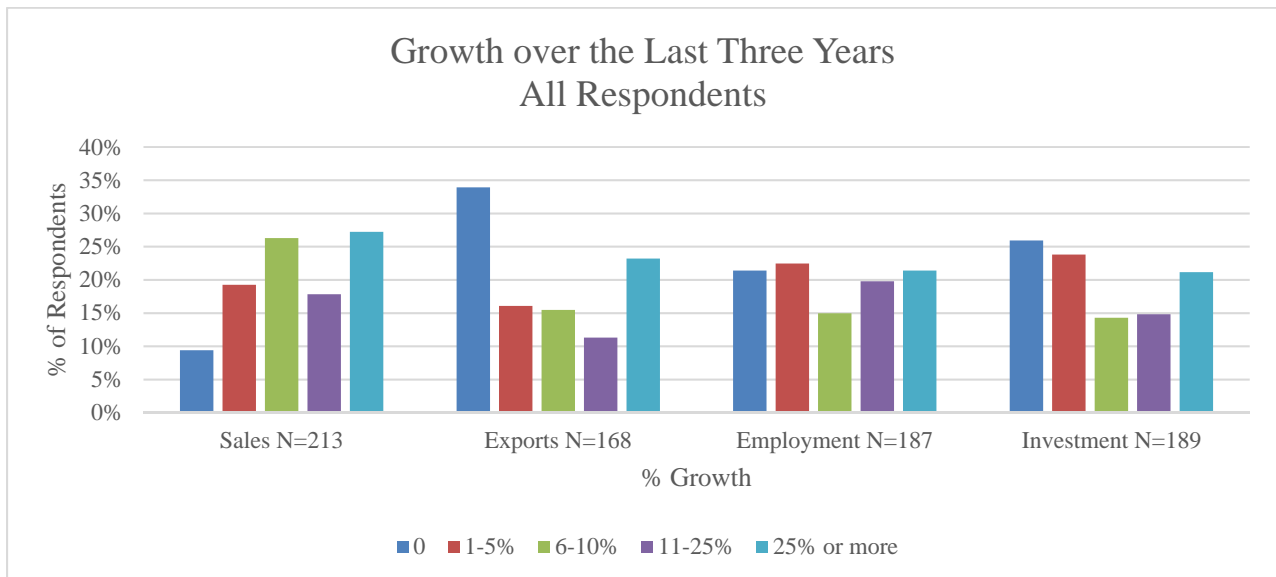
This question is examined from the point of view of the likelihood of future viability of the companies and business organizations assisted by REG. Survey results show the growth that responding REG participants have achieved over the last three years in key performance indicators: sales, exports, investment, and employment. KIIs and FGDs highlight challenges to sustainability as well as opportunities that will contribute to sustainability.

### **Overall Findings**

There were three main commonalities found in the REG-assisted businesses companies that have good prospects for growth and profitability and where sustainably is being achieved. These include: good business opportunities, motivated management and staff, and sufficient capacity. The latter includes qualified personnel, management systems, plant and equipment, and financing.

Recent past performance provides one indication of the sectors that are most likely to be sustainable. Figure 4.24 below provides a summary of responses to the question about growth achieved over the last three years. Almost 66 percent of respondents experienced at least some growth in exports over the last three years. More than two thirds of respondents (74 percent) reported growth in investment. These figures are broken down by sector in the following pages.

**FIGURE 4.24: GROWTH IN ALL REG-SUPPORTED BUSINESSES**



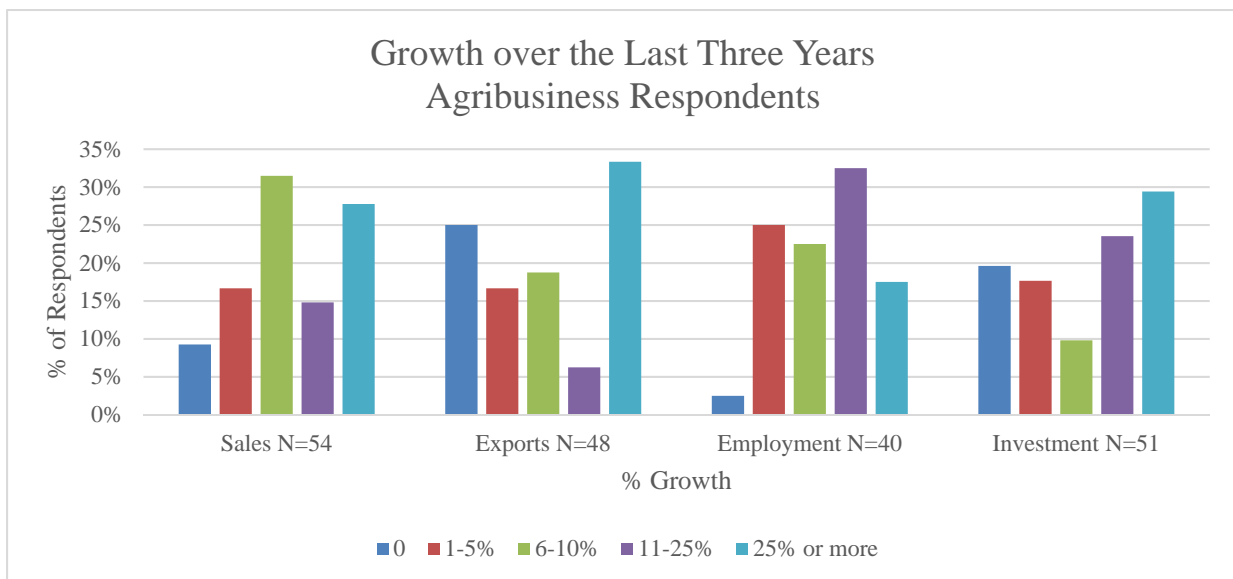
**Findings**

**Agribusiness**

**Survey**

Almost 91 percent of REG-supported agribusinesses who responded to the survey have seen some growth in sales over the past three years (Figure 4.25). Over 95 percent have had some growth in employment. In terms of exports, 75 percent reported some growth; 33 percent of respondents reported export growth of 25 percent or more, while 25 percent of respondents reported no growth.

**FIGURE 4.25: GROWTH IN REG-SUPPORTED AGRIBUSINESSES**



### KIIs and FGDs:

The following represent the views of participants in KIIs and FGDs held in the six countries visited by the evaluation team.

A current constraint to sustainability is the lack of resources for farmers to obtain and maintain certification, particularly in Albania. Once (if) certification is received—on a product by product basis—the companies must still maintain the certification on an annual basis through an audit of practices. Larger companies, or as companies grow and create more revenue, can afford this, but smaller and new starts may not be able to.

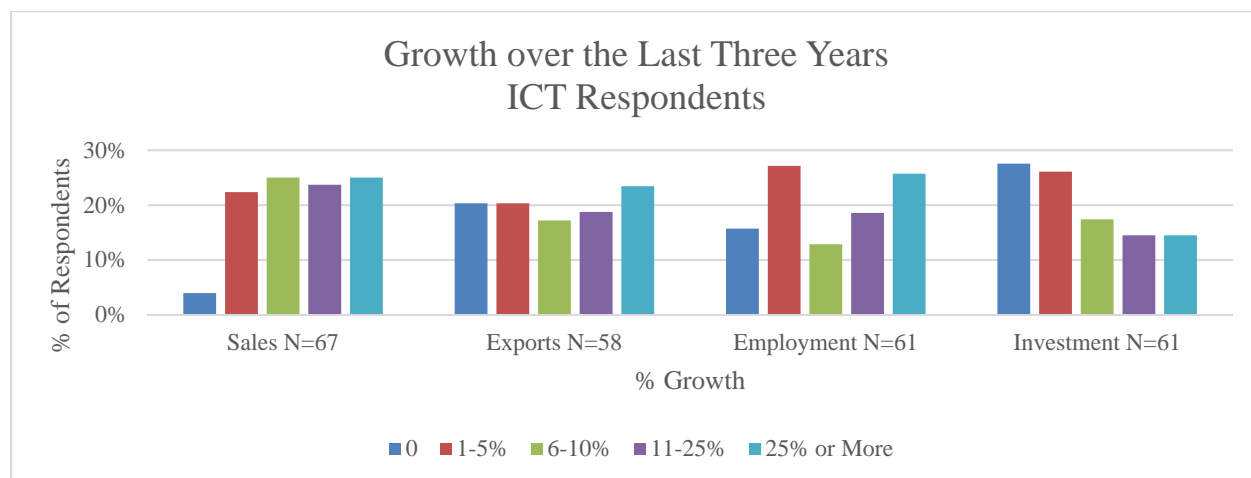
Many interviewed REG participants expressed desire to diversify exports and procure new markets. This is particularly necessary in gaining access to European markets and responding to their needs. Most companies have introduced HACCP or Global GAP, but implementation remains a challenge. There is a need for building capacities of local consultants for certification. The evaluation team identified several factors that threaten the viability of export-oriented agriculture. They include: a lack of support for start-ups and young companies, high levels of emigration, inadequate workforce on both managerial and working levels, old varieties of fruits, lack of financial resources, and the high cost of new varieties.

### ICT

#### Survey:

Almost 96 percent of REG-supported ICT respondents report at least some growth in sales over the past three years (Figure 4.26). Smaller percentages reported growth in exports, employment, and investment over the same period.

**FIGURE 4.26: GROWTH IN REG-SUPPORTED ICT BUSINESSES**



### KIIs and FGDs:

The sustainability of the ICT sector development in the REG beneficiary countries greatly depends on the supply of workforce in terms of numbers and quality needed. All IT managers spoke of workforce development as the biggest challenge and constraint to their ability to scale-up activities. Tackling workforce development through a combination of academic and vocational training, through both formal and informal approaches, is a long-term and relatively intensive activity, which has not been the focus of REG's activities given the project's resource limitations. Nevertheless, REG has addressed immediate workforce

development issues within the limitations of its scope and resources. Training leading to certifications were highly valued area since these amongst other things increased the qualifications of individual members of the workforce.

Sustainable ICT businesses have better access to training and there is considerable variety between the availability of this within the sectors of the REG beneficiary countries. There is better training in countries in which the ICT sectors are relatively stronger and/or better supported, and where there has been donor assistance related to this area, for example in Serbia. Not surprisingly, the Serbian ICT sector is by far the strongest of the West Balkan countries.

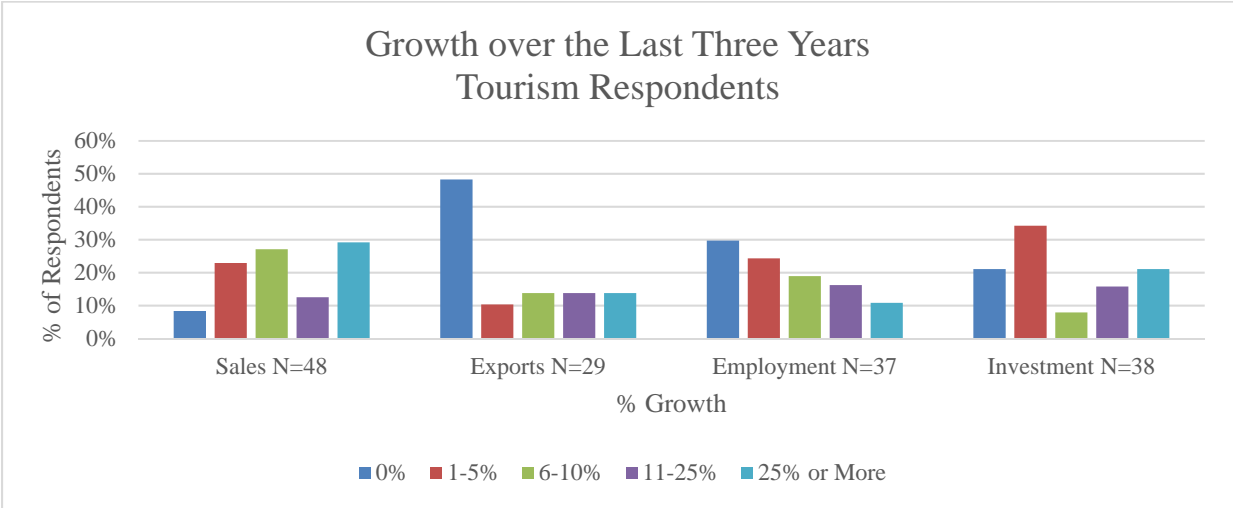
Furthermore, a commonality between successful companies is that they are willing to invest their time and resources into B2B networking events after seeing the benefits of learning about new markets and establishing contacts. However, some doubts were raised about whether they had achieved the necessary competences to target customers and strike deals without recourse to expert advice. Moreover, many BSOs doubted they were fully ready to identify partners for co-organizing international events unassisted other than those with which they had already established contact through REG activities. Many BSOs also were unsure of their ability to finance these projects and proposed to seek support from international multilateral and bilateral donors and donor-funded projects.

**Tourism**

**Survey:**

Almost 92 percent of REG-supported tourism respondents report at least some growth in sales over the past three years (Figure 4.27). However, close to 50 percent reported no growth in exports, i.e. sales to foreigners. More than 50 percent saw modest increases in employment.

**FIGURE 4.27: GROWTH IN REG-SUPPORTED TOURISM BUSINESSES**



**KIIs and FGDs:**

Tourism is a growing sector in all the countries in the Western Balkan region, and according to official statistics, trends have been increasing in the recent years, with or without REG assistance. In addition to the evident spill-over traffic from the Adriatic coast, especially for Bosnia and Herzegovina, the number of visitors in the visited countries is increasing steadily. For example, according to the representative from the National Tourism Organization in Serbia, there was a ‘two-digit’ growth of the tourism sector in Serbia in the last year. In all Western Balkan countries, there are opportunities for tourism development due to

natural resources, rich cultural heritage, etc.

Although the tourism in each of the visited Western Balkan countries is growing, the added value from REG is support and development of a regional cooperation platform. The regional platform not only serves as communication and knowledge exchange between the countries, but it also assists communication with international markets and increasing of awareness about the improved regional political stability, which is one of the main preconditions for fully utilization of the tourism potentials of the region.

There are differences in external factors that influence sustainability of companies and organizations from this sector, but there are clear trends towards increased capacities of businesses specializing in tourism, as a result of participation in REG supported activities.

Appropriate government support is one of the most important aspects of achieving sustainability. For example, Kosovar companies feel less sustainable than Bosnian, Serbian, or Albanian companies due to lack of governmental support. Due to significant government support and intensive tourism support interventions in the past several years, Macedonia and Montenegro are most ready to reap the benefits of fair participation. Many organizations indicated the importance of collaboration with outside associations, chambers or clusters to provide needs-oriented services and represent their interests to relevant stakeholders to advocate for governmental support.

The interviewed beneficiaries mostly valued their participation at Adventure Travel World Summit in Alaska as an event for improving access to markets and customers. However, due to the considerable costs required, most companies in Kosovo and Albania cannot finance their participation. According to REG participants, activities related to work skills development are inexpensive and need to be prioritized despite their perceived ineffectiveness in the short-run.

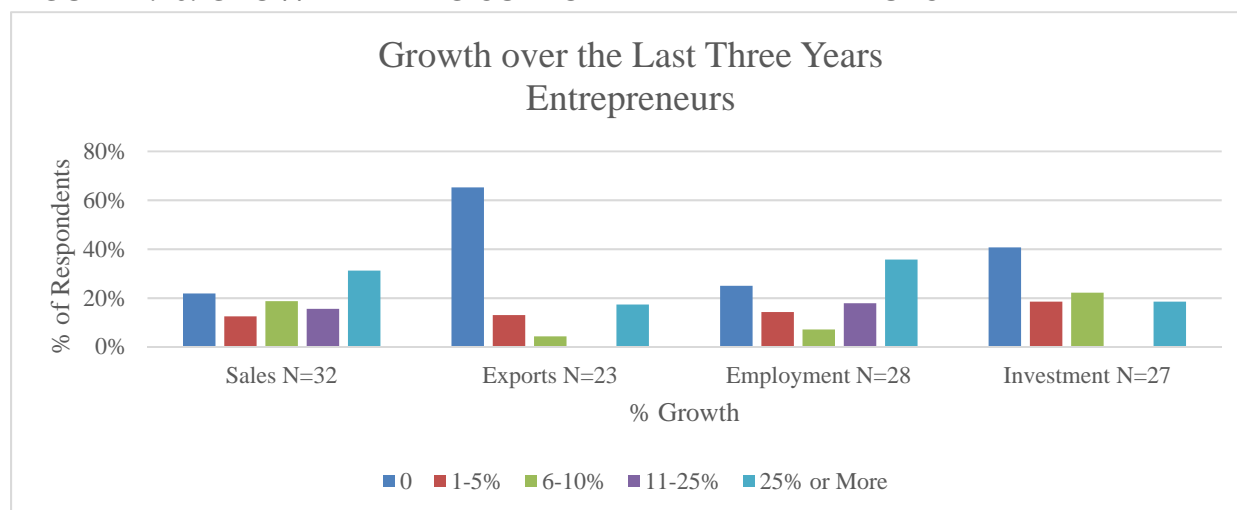
There were several internal factors identified as beneficial to long-term sustainability of tourism companies that took part in REG activities. Based on the KIIs and FGDs, a high level of motivation, willingness to strength capacities, readiness to co-finance participation, as well as awareness about the necessity for cooperation could be identified as extremely helpful in this regard. Throughout discussions with the evaluation team, it was evident that those who showed higher levels of motivation and proactivity and who understand the concept of cooperation among the competitors in the tourism sector, benefitted most from REG activities.

## **Entrepreneurship**

### **Survey:**

REG-supported entrepreneurs reported lower growth than either agribusiness, ICT, or tourism (Figure 4.28). More than 20 percent reported no growth in sales or employment over the last three years.

**FIGURE 4.28: GROWTH IN REG-SUPPORTED ENTREPRENEURS**



**KIIs and FGDs:**

It is difficult to be conclusive about the commonalities between apparently successful and less successful start-ups based on the interviews held. The evaluation team met with both growing start-ups as well as with the founders of less successful ones that had nevertheless not given up and appeared to be still determined to succeed. Common traits for the successful founders that were interviewed included a high degree of motivation, willingness to learn and try new ideas, optimism about the future, readiness and ability to leverage on connections, and willingness to travel to business partners. The question of sustainability from a start-up perspective can be viewed from different angles, namely: the viability of the beneficiary start-up businesses; the lasting effect of start-up training on the beneficiary entrepreneur, and the sustainability of the activities delivered by REG.

Most beneficiaries highly valued their participation in the start-up camps and pitching contests and stated their willingness to self-fund. This is an encouraging response given that such events are organized by investors networks. However, some beneficiaries spoke of the need to continue bringing Western entrepreneurs to the transition economies to provide ease of access of start-up founders and opportunities for longer term mentoring. The degree of support needed varied between countries. For example, Serbs spoke of going at own cost to such events, whereas Albanians were expecting more support. However, even with more mentoring from Western entrepreneurs, the lack of well-developed innovation and start-up support ecosystems in transition countries results in lost opportunities for building upon support provided by activities such as REG. Although REG events have played an important part in the lives of these people, it is inconclusive if they have all generated sufficient momentum to continue.

**Conclusions on Sustainability of REG-assisted Businesses**

There are three common characteristics found in the REG-assisted businesses that were found to have good prospects for growth and profitability: 1) the availability of good business opportunities; 2) the motivation to take advantage of those opportunities; and 3) capacity in terms of management and workers, plant and equipment, and access to finance. These are further supported by the value placed on training, networking and market-linkage, and the presence of business support organizations.

**Agribusiness**

According to interviews with REG staff, USAID agribusiness projects, and REG beneficiaries, there are excellent business opportunities for agribusinesses within the E&E region, especially in the Western



European and Gulf markets for high quality fresh and frozen products that are particularly well-suited to the agro-climatic conditions in the region. Berries in the West Balkans and hazelnuts in Azerbaijan are but two examples of high growth, high margin products that have excellent export potential. The companies assisted by REG were found to be highly motivated, and many possess a reasonable level of capacity that can be significantly improved with targeted assistance in marketing and certifications.

## **ICT**

The ICT sector is relatively fast-growing within the E&E region and especially within the West Balkans, providing opportunities for outsourced services as well as for provision of own solutions. Companies understand the importance of developing skills, obtaining the required certifications, and participation in regional and international B2B events to establish market linkages, which can take years to convert to sales. Furthermore, technical assistance to the sector can be effectively and efficiently delivered through cooperation with relatively strong sector dedicated business support organizations. Thus, it is concluded that the companies assisted by REG are both motivated and possess the capacity to improve with targeted assistance although their capability for growing is currently limited by shortages of qualified workforce and the need to develop workforce skills.

## **Tourism**

For fully taking advantage of REG supported events, such as for example Famtrips or International Trade Fairs, possessing a certain level of operational capacity is one of the main preconditions for taking advantage of the B2B meetings between tour operators and buyers of tour service. Furthermore, during the interviews, the lack of qualified human resources was mentioned as one of the biggest constraints for tourism development. Therefore, participation in training events organized by REG, for improving various business and management skills, marketing, etc., was of paramount importance and one of the commonalities for companies that achieved sustainable results.

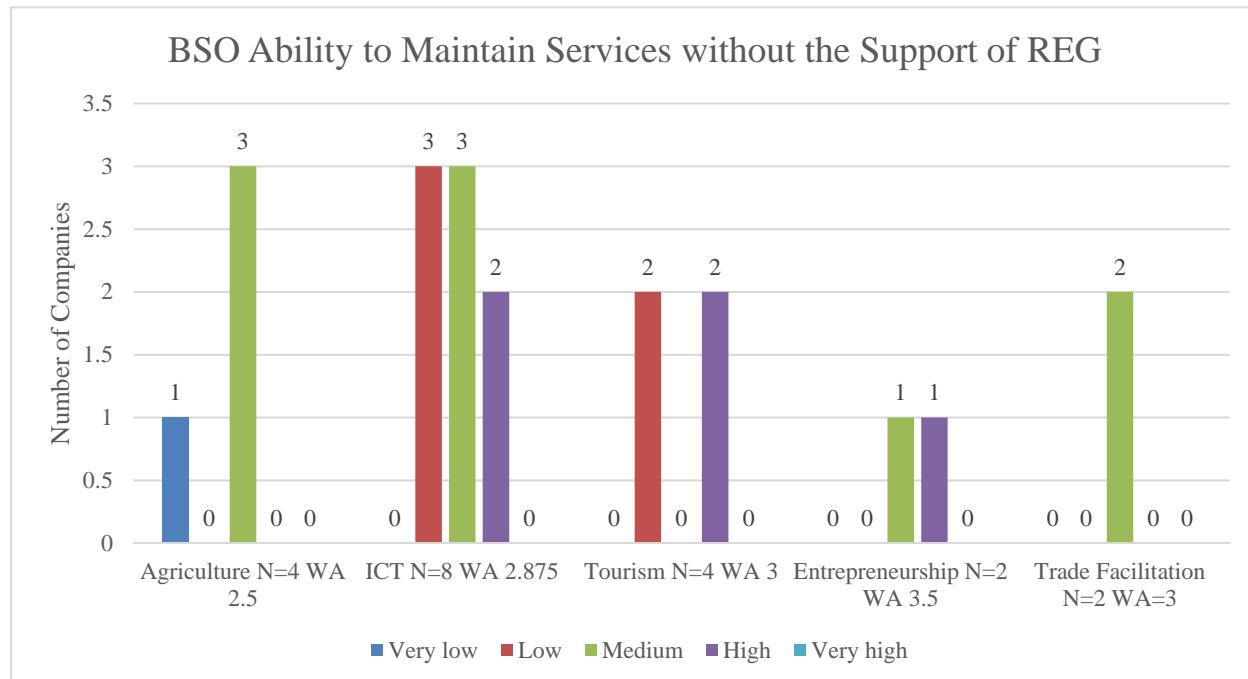
Given that all the interviewed beneficiaries understand the importance of co-financing for achieving sustainable results in a long-run, it should be further promoted whenever possible, even by increasing the own contribution. Mechanisms should be developed for wider distribution of REG support (avoiding supporting same companies, or decreasing the level of financial support).

## **Entrepreneurship**

Whereas some start-ups have the characteristics of growing businesses, not all have been successful. However, failure is normal for start-ups and should not be interpreted as indicative of non-sustainability of entrepreneurial endeavor. Importantly, in cases of interviewed founders, the common trait is that all are highly motivated and determined to carry on being entrepreneurs, even if it means establishing a new company. In some cases, entrepreneurs had decided to persevere while supplementing income from unrelated activities. REG support had resulted or at least contributed to a seemingly lasting effect on the mindsets of many. Having said this, it should be noted that the evaluation team interviewed those who were in business and willing to talk. It is not known how many of those supported by REG failed.

Figure 4.29 summarizes the views of 20 BSOs concerning their ability to maintain services without the support of REG. On average, this group is between low and moderately certain of their ability to maintain services without the support of REG. Due to the limited number of survey respondents and the distribution of the responses, the effect on sustainability for BSOs from survey responses is limited.

**FIGURE 4.29: BSO'S ABILITY TO MAINTAIN SERVICES WITHOUT THE SUPPORT OF REG**



**Evaluation Question 2.B.: What Are The Differences Observed Regarding Working With Business Associations And Chambers Versus Individual Firms?**

**Overall Findings**

REG coordinated as much as possible with existing business organizations and clusters to reach individual firms. It was not so much an either/or choice, but depended on the existence of intermediary organizations in each sector. In fact, REG worked with business associations and chambers to gain access to individual firms, not for strengthening associations and chambers. Using these groups broadened REG’s outreach efforts and helped increase collaboration among firms, especially in the IT and tourism sectors. IT is the best organized, followed by tourism and agriculture.

**Findings**

**Agribusiness**

The evaluation team encountered few associations that provide strong support to the agribusiness sector in the six countries visited. One exception was in Serbia, where the Chamber of Commerce and Industry has an agribusiness committee supported by strong professional staff who have played a critical role in organizing the participation of Serbian businesses in foreign trade fairs. In countries where a bilateral USAID agribusiness project exists (Azerbaijan, Bosnia, and Kosovo), REG has worked more closely with the projects than with any agribusiness association.

**ICT**

REG worked with the ICT sectors throughout the region through IT dedicated business support organizations, namely chamber/associations, all of which are members of the Balkan and Black Sea IT Cluster Network which is a key factor in enabling regional cooperation in the IT sector. At this stage, it

is unclear to what extent DoIT will act as a key facilitator and catalyst of IT sector development in BiH, although its recent conference was deemed very successful. REG's success in tackling the issues facing the ICT sector in the region may be attributed to the legacy of the preceding USAID Regional Competitiveness Initiative (RCI) project, which laid the foundations of USAID regional support to the ICT sector in the West Balkans, as well as to the work through the business support organizations with which RCI had established relationships. It is noteworthy, that the USAID's implementing partners for both the RCI and REG activities was SEGURA and the REG COP continued the relationship with the beneficiary BSOs and some of the companies from the RCI activity to REG.

## **Tourism**

Although according to the KILs and FGDs (e.g. FGD with tourism cluster in Macedonia) the projects completed in partnerships with associations, chambers, clusters or other types of institutionalized cooperation in general have higher chances of sustainability, most of the REG assistance in tourism sector has been done directly with businesses, because the BSO segment is either non-existent or extremely weak across the region. However, there is a need to remain alert and open for involving emerging business associations or clusters as they show interest and start to operate within the tourism industry.

There are also some disadvantages or limiting factors for involving business associations such as weak institutionalized cooperation, slower decision making, and crony activism. One of the limiting factors was that in some of the countries there were either no business associations in certain sectors, or the existing ones were not functional. For example, there is a National Tourism Organization in Serbia, organized as parastatal National Tourism Authority, but according to KILs and a FGD, it does not actively consider the needs of the small tour operators. In Macedonia, besides EDEN tourism cluster that is active in the Southwest region, there are four tourism related chambers in the country, but none of them represented the interest of the in-bound tour operators adequately. Thus, there is a recently established Association of Inbound Tourism. Some of the decisions require arranging a board meeting or at least two thirds majority, which is not easy to get, when there is a short notice. Additionally, these participations can also limit the availability of knowledge and input to non-members.

## **Entrepreneurship**

There is no single way in which REG and start-up beneficiaries established contact. The following three ways were the main avenues used: direct contact by the REG start-up team leader based on his research into participants in innovation support programs such as FRACTALS and locally organized start-up events; information obtained through other donor assisted projects; and through direct partner organizations – accelerators, innovation centers, and incubators.

Furthermore, in some countries, such as Albania, Macedonia, Serbia, the start-ups are members of IT focused BSOs (as well as being IT specialists) and it may be assumed that this too could have provided a channel of information to candidates on where to seek support. However, it is difficult to be conclusive in answering whether there are significant differences between REG start-up beneficiaries that are members of an association and individuals who are not (for example in Azerbaijan). The aforementioned IT BSOs are not directly involved in start-up support and success is sooner related to the state of development of the start-up support ecosystem, which is stronger, for example, in Serbia, and relatively stronger in Macedonia and Kosovo than it is in Albania. However, membership of IT associations appears to provide some sense of belonging and networking opportunities. The Executive Director of AITA in Albania even referred to this IT association as being *inter alia* a network for start-ups. This appears to be important since many of the start-ups referred to maintaining contact with co-participants in start-up events through Facebook pages.

## Trade Facilitation

REG trade facilitation measures were aimed at the policy level and involved host country governments and, to a limited extent, business associations, so no comparison between the business associations/chambers and individual companies could be made.

## Conclusions

It is difficult to draw definitive conclusions based on the data available to the evaluation team. *A priori*, working through associations can significantly broaden outreach. However, based on the available data on REG interventions, those involving intermediaries were more successful than those that did not.

## Evaluation Question 3: How Effective Was The Project In Attracting Investment Funding (From A Firm's Perspective) And Co-Funding (From The Project's Perspective) To Support Development Actions And How Well Was That Funding Tracked And Quantified?

### Overall Findings

#### REG Data:

REG collects data on investment and exports but does not disaggregate the data<sup>21</sup>. According to SEGURA, “investment was not originally a target indicator and was only added into the export/sales indicator because of REG’s work with startups. So, we did not focus any efforts on investment attraction in the three sectors, only within our startup work and only as one part of the development process for the startups”. However, this appears to contradict the original REG scope of work, which did include an indicator for investment, as noted previously.

Co-funding was actively sought from project participants, other USAID projects, and other donor programs. REG periodic reports do not provide data on the amounts of investment funds leveraged by the project nor the amounts of co-funding.

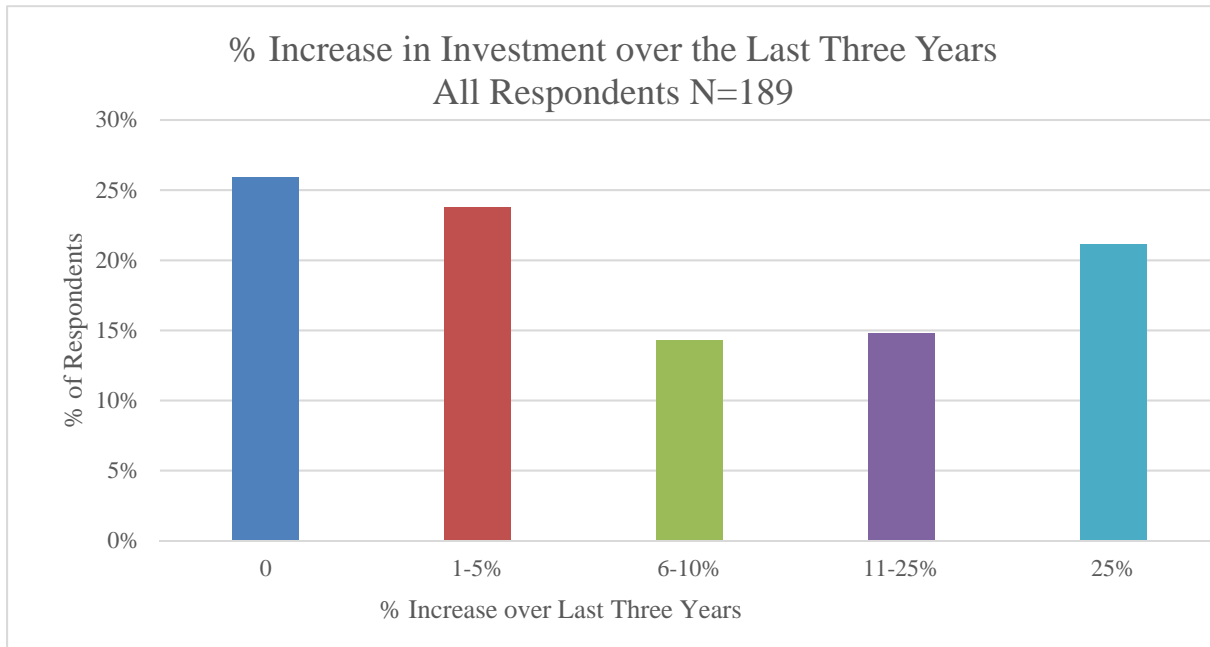
#### Survey:

Survey data provide two possible answers to the question of whether REG was effective in ‘attracting investment funding’. Figure 4.30 shows that 74 percent of respondents experienced at least some growth in investment over the past three years. Obviously, such increases may or may not be due to assistance from REG.

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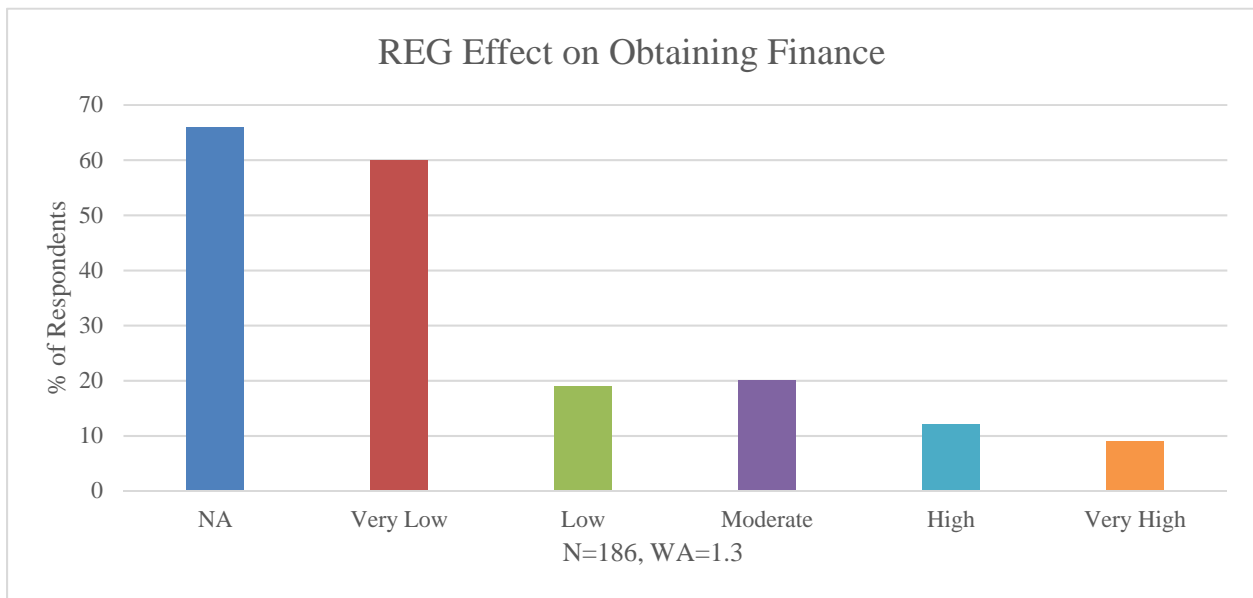
<sup>21</sup> The evaluation team requested disaggregated data on investment from SEGURA by e-mail on August 22, 2017. Additional details were provided by SEGURA on August 28, 2017 (see Annex X), although the data was not disaggregated by exports and investment.

**FIGURE 4.30: ESTIMATED GROWTH IN INVESTMENT**



Survey data also are available on the effect of REG on participants ability to obtain finance. Figure 4.31 below shows how survey respondents felt about REG’s effect on obtaining finance. In this case, the weighted average response was only 1.3, just above “Very low”, indicating that at least for these respondents, the effect on obtaining finance was minimal.

**FIGURE 4.31: REG’S ESTIMATED EFFECT ON OBTAINING FINANCE**



**KIIs and FGDs:**

There is little anecdotal evidence of increases in business investment as a direct result of REG activities. Most representatives of start-ups had previously established strong contacts with potential investors (at traction camps, etc.), although some networked with these existing contacts at REG events.

It is evident from the KIs and the FGDs that co-funding projects contributes towards greater sustainability of project results, and could certainly increase investment opportunities in the long-term due to the increased cooperation within sectors. Co-funding creates awareness that competitiveness cannot be donor-driven in the long-run, and provides companies the opportunity to begin partnerships amongst themselves. Co-funding has proven to be very effective precondition for participation in REG activities, also from an aspect of avoiding market distortion by providing pure grants for a privileged group of beneficiaries.

As a result of the experience from the REG Project, many firms will participate in relevant trade fairs, B2B meetings or sector important summits. In KIs and FGDs, many companies showed an appreciation for the benefits they receive from these projects, and expressed that these benefits outweigh the costs of attending (transportation, accommodation, etc.). This is also an important finding, because it indicates the relevance and value of such meetings. Most believed that, although co-funding was not necessarily an essential ingredient of future USAID activities, continued assistance in setting up B2B events and expert assistance in identifying target companies as well as expert advice on international marketing is needed.

## **Conclusions**

Co-funding by project participations is an important aspect of REG, although it is difficult to quantify exact amounts. It has not been possible to quantify the levels of investment attracted to businesses by the REG Project. Many businesses indicated that investment had increased over the past three years, but did not attribute that to assistance from REG.

## **Evaluation Question 4: What Are The Strengths And Weaknesses Of The REG Management Structure?**

To answer this question and its sub-questions, the evaluation team interviewed USAID Washington and field staff, SEGURA's home office and field staff, and other bilateral projects. In addition, the team conducted an on-line survey of USAID's mission personnel that covered all 12 E&E missions.

### **Evaluation Question 4.A.: What Do USAID Mission Staff Identify As The Strengths And Weaknesses Of The Consultation Process?**

## **Overall Findings**

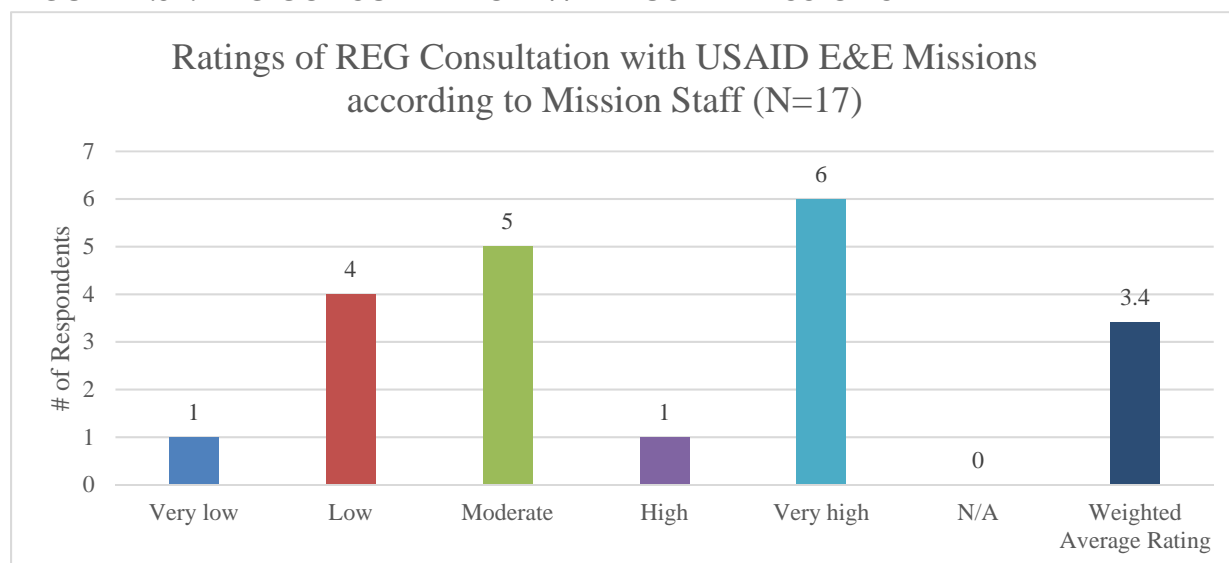
### **Survey:**

USAID Mission personnel<sup>22</sup> were asked: "To what extent did REG consult with your Mission about activities in your country?" As shown in Figure 4.32 below, 17 persons responded to this question. The weighted average rating is 3.4, just above moderate.

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<sup>22</sup> 27 USAID E&E Mission staff were contacted for the survey; persons were either identified by the USAID E&E COR or through the Evaluation Team's meetings with USAID Missions.

**FIGURE 4.32: REG CONSULTATION WITH USAID MISSIONS**



Survey comments regarding the consultation process included the following:

Comments
<i>“REG consults with Mission regularly (via email and in-country meetings).”</i>
<i>“The project coordinates on implementation of already selected activities. We do not effectively coordinate on planning of activities.”</i>
<i>“REG shares with the Mission regular updates on planned activities. If REG is implementing activities under the "Core" funding, then they do not consult with us (they only inform us). If REG is implementing activities from the "Buy-in" then they consult with the Mission.”</i>
<i>“The COP and/or team leaders always consult and brief USAID Economic Growth team on REG activities in Macedonia.”</i>

**KIIs and FGDs:**

At least one meeting was held with each USAID Mission in the six countries visited by the evaluation team. Most USAID staff interviewed in-person for this report complimented REG management for sharing information on the status of REG activities through a weekly e-mail and periodic country visits. They indicated that the constant communication and updates of relevant developments were helpful to them in staying engaged with the REG Project and for building a strong environment in which to operate REG.

However, there was a wide range of opinion about the extent of coordination in the planning, implementation, and follow-up phases of REG activities. Missions with buy-ins were generally much more satisfied with the coordination process, and with REG results in general, than Missions that did not have buy-ins.

**Conclusions**

In general, REG has done an excellent job of keeping Missions informed of its activities, according to feedback received from USAID field personnel in KIIs and the USAID survey. Missions noted that coordination is much stronger for the four buy-in activities than it is for the core regional activities.

## Evaluation Question 4.B.: How Well Did REG Coordinate with Bilateral Projects (E.G., Enhance Trade Facilitation) or Fill Gaps Where Bilateral Activities Did Not Exist (Buy-Ins)?

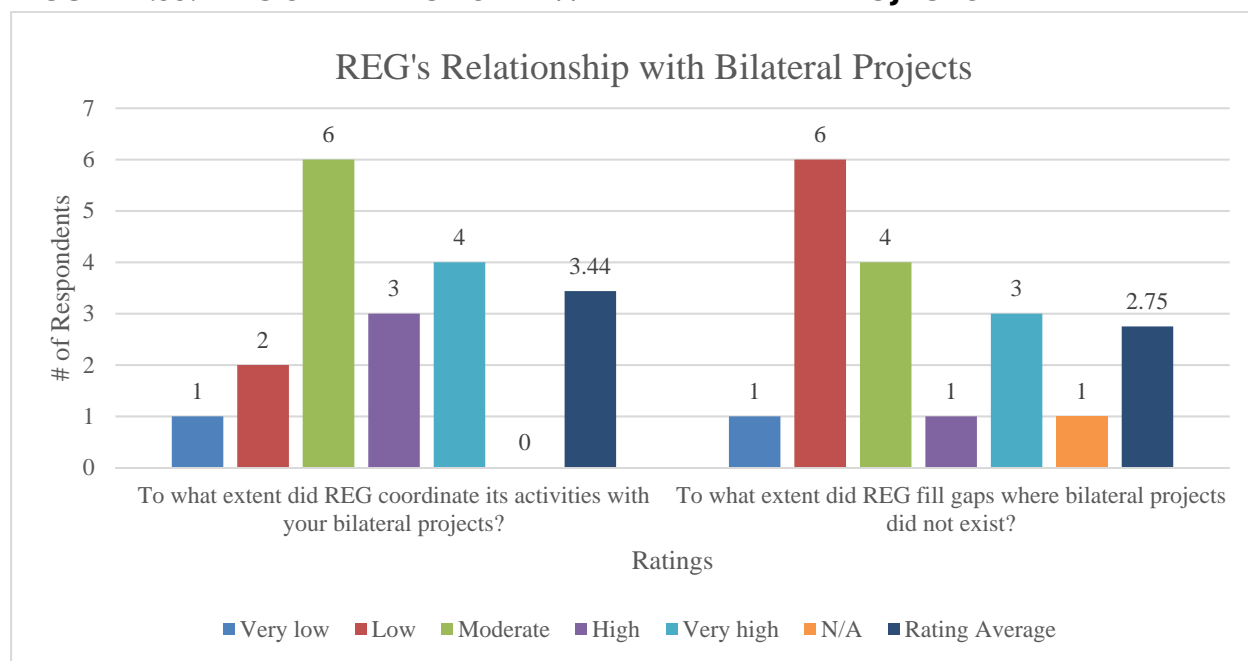
### Overall Findings

#### Survey:

USAID Mission personnel were asked: “To what extent did REG coordinate its activities with your bilateral projects?” and “To what extent did REG fill gaps where bilateral projects did not exist?”

As shown in Figure 4.33 below, 16 persons out of 27 responded. On average, USAID field personnel indicated that REG was somewhat better at coordinating its activities with bilateral projects (weighted average score of 3.4, or slightly above moderate) than it was in filling gaps where bilateral projects did not exist (weighted average score of 2.8, or slightly below moderate).

**FIGURE 4.33: REG'S RELATIONSHIP WITH BILATERAL PROJECTS**



Survey comments regarding REGs relationship with bilateral projects included:

Comments on Coordination with Bilateral Projects
“REG consults with management of relevant USAID-funded projects in country to obtain technical and programmatic input.”
“It depends on the specific activity.”
“To the extent possible and when feasible.”



### Comments on Filling Gaps in Bilateral Programs

*“REG support came in critical time for our Mission and country context. We just terminated one large financial sector assistance project and were in the midst of conceptualizing and designing a new project. The buy-in we procured through REG served a one-year bridge between the two projects and provided critical support to the new leadership of our partner agencies.”*

*“REG provides additional boost to already existing projects in country. Occasionally, REG fills a gap.”*

*“For example, REG’s activities related to Trade are activities where we have no bilateral coverage.”*

*“REG always coordinated with bilateral projects on the ground, and either joined forces or determined to support something that was not part of the bilateral project.”*

#### **KIIs and FGDs:**

Meetings with USAID bilateral projects and REG staff provided additional insights into the level of coordination between bilateral projects and REG.

#### **Findings**

##### **Agribusiness**

Meetings held with three USAID bilateral agriculture projects in the E&E region demonstrate a high degree of collaboration between REG and bilateral projects. The REG Agribusiness Lead indicated that coordination with USAID projects is done in a very systematic way. REG tries to influence bilateral activities, and the latter also provide guidance to REG. In Azerbaijan and Kosovo, REG coordinates very closely with bilateral agriculture projects.

**Azerbaijan ASAP Project:** According to ASAP project personnel, there is excellent collaboration between REG and the bilateral ASAP project, especially on international TA and foreign trips, that are mainly funded through a Mission buy-in to REG. Almost all the participants participated in foreign market development trips funded by REG and ASAP. The latter is much more focused on agricultural production (e.g. they are training agronomists), whereas REG is much more focused on market development. Because ASAP has very little funding for international TA, the REG buy-in has helped alleviate this shortcoming. REG also facilitates USAD administrative requirements for foreign trips. Most activities are initiated by ASAP, according to its management. The REG Agribusiness Lead has helped them a lot with ‘great contacts’. REG is a ‘great partner’. For example, for a study trip to Italy, REG found what ASAP described as ‘excellent business contacts’ using a person from the FAO.

**BiH Fostering Agricultural Markets Activity (FARMA) Project:** Although the cooperation with REG is very good, the FARMA representative feels that the REG Project is handicapped by the lack of a local representative. Local presence would positively affect the number of activities where BiH companies will be involved. According to the FARMA representative, REG is especially important when there is no bilateral project in the country. When FARMA is active, REG can provide complementary activities. Regional activities are beneficial, but due to the differences in the level of development in separate countries, specific interventions are required in each of the countries in the Balkan region

**Kosovo AGRO Project:** The Deputy Chief of Party for AGRO indicated that there is excellent collaboration with REG. Some of the AGRO clients who participated in a focus group discussion, however, did request that REG provide more advance notice for future activities and events. According to this group, some of them are organized with very short notice.

## ICT

**USAID Kosovo EMPOWER project in Kosovo:** The Chief of Party for the EMPOWER project indicated that there was very good collaboration with REG. The EMPOWER project provides support to SMEs in ICT and Tourism. It has collaborated with REG in directing EMPOWER beneficiaries to ICT market linkage events facilitated by REG as well as sending Tourism beneficiaries to trainings related to adventure tourism as well as to ATTA Summits. Also, EMPOWER co-founded the participation of women entrepreneurs in the REG organized B2B meetings in Tirana and Belgrade, and funded Kosovar participants in the REG group participating in Gulfood. According to some feedback, some of these were organized at short notice.

## Tourism

Most of the interviewed representatives from tourism sector in Kosovo that participated in REG activities stressed that they were supported by the USAID/EMPOWER Project. They were very familiar with REG. However, from discussions with the EMPOWER coordinator for tourism and tourism beneficiaries, although it was not explicitly said by any of them, there was impression that there is insufficient understanding about complementing regional and bilateral activities (there is a tendency of overemphasizing that results have been achieved by EMPOWER and not by REG).

## Entrepreneurship

**USAID Partnerships for Innovation in BiH.** Former employees of this activity spoke positively of REG cooperation particularly with a view to identifying prospective candidates for REG's entrepreneurship support activities.

## Trade Facilitation

**Kosovo USAID Partnerships for Development (PFD).** This USAID bilateral activity cooperated with REG by sending Kosovo PFD supported Government of Kosovo staff to participate in the WTO self-assessment in Albania facilitated by REG, followed by continuation of this exercise in Macedonia. A joint Kosovo-Albania agreement was signed in accordance with WTO guidelines. Both the PFD activity and one of the main beneficiaries from the Ministry of Trade and Industry were highly satisfied with REG cooperation and the outcomes.

## Conclusions

How well did REG coordinate with bilateral projects (e.g., enhance trade facilitation) or fill gaps where bilateral activities did not exist (buy-ins)? In general, REG has done a commendable job of coordinating with USAID bilateral projects, maintaining regular communication and effective cooperation. In some cases, like Azerbaijan, such coordination is an important element in the strategies of both REG and the bilateral project. In other cases, it appears that such collaboration is done on an ad hoc basis. REG does not do as well, according to the survey respondents, of filling gaps where bilateral projects do not exist.

## **Evaluation Question 4.C.: What Do Missions In The Region Identify As Constraints Or Issues To Access/Utilize The Project?**

### **Findings**

While most USAID staff indicated that REG staff are available '24/7', several persons did express a concern about the lack of in-country REG staff with whom they could communicate in person on a regular basis. The concentration of REG staff in two West Balkan countries (Macedonia and Bosnia-Herzegovina) was viewed as a constraint by USAID staff outside of those countries.

### **Conclusions**

While the placement of project staff in each country may not have been possible due to lack of funding, it did reduce the level of interaction between most USAID missions and REG staff. As a result, project activities tended to be undertaken more as 'targets of opportunity' rather than as part of a well-developed project strategy.

## **Evaluation Question 4.D.: What Do REG Staff Identify as Management Constraints And Issues?**

The evaluation team met in the field with the REG Chief of Party, the home office coordinator, and sector leaders for agribusiness, ICT, tourism, and trade facilitation. While the team did not meet in person with the Sofia-based sector leader for entrepreneurship, there was a frequent exchange of e-mails concerning start-ups assisted by REG. The Evaluation Team Leader also meet with the home office coordinator and President of SEGURA in the latter's home office in the US.

REG management and staff share many of the same concerns expressed by USAID staff about the challenges of serving clients in six different sector/thematic areas who are spread across 12 countries in three distinct regions. While they expressed an interest in having coordinators based in each of the sub-regions to improve coordination, they cited budget issues that preclude such an approach. They also noted that the collective expectations of 12 USAID Missions often exceed the relatively modest budget allocated to REG.

An aspect of REG support pertinent to the above question is how REG delivers support to its targeted sectors. The sector leaders for agribusiness and ICT are based in Macedonia, the sector leader for tourism is in Bosnia and Herzegovina, and the sector leader for entrepreneurship in Sofia, Bulgaria. Most of the organization and coordination has been carried out virtually from the base locations.

This is important to consider, because while some beneficiary support organizations had proximity and better access to the sector leader, other countries were at a disadvantage. Some of the beneficiaries commented that the location of sector leaders may have been a determinant of the scale of their involvement and benefits obtained from REG activities. REG staff share some of the same concerns as USAID staff, particularly with respect to the lack of presence in each of the 12 E&E countries, as well as low a relatively low level of funding to cover 12 countries.

REG management also noted the differences in working on core activities versus buy-ins. They contrasted the continuity of staff, especially local staff, in USAID field missions that facilitate project implementation, versus the more frequent changes in Washington-based staff that have posed more challenges in managing REG.

# 5. RECOMMENDATIONS

## 5.1 CLARIFY AND PRIORITIZE THE OBJECTIVES OF ANY NEW REGIONAL ECONOMIC GROWTH PROJECT

The E&E Bureau and E&E Missions should agree on clearly prioritized objectives for any new regional project that is managed by the E&E Bureau. Among such possible objectives are the ones that were explicitly or implicitly included in the REG Project:

- 1) Continuing a presence in countries, such as Serbia, Albania, and Macedonia, where bilateral budgets for economic growth activities have been reduced or eliminated
- 2) Taking advantage of economies of scale by addressing certain common needs on a regional rather than bilateral basis, such as the funding of international trade missions
- 3) Addressing issues that can be best addressed on a regional or sub-regional basis, such as WTO and EU accession, and tourism development and promotion
- 4) Providing a buy-in mechanism for technical expertise that might not be available from other sources (e.g. Ukraine FSS).
- 5) Providing a quick response to Mission's most urgent and specialized technical needs

## 5.2 PRIORITIZE GEOGRAPHIC SCOPE

The E&E Bureau should decide whether to include all sub-regions and countries in a new regional project. If all sub-regions and countries are included, then E&E should consider ways for prioritizing assistance. For example, depending on the program's objectives noted above, a country that is already receiving bilateral funding in economic growth does not need the same level of support as a country that is not receiving bilateral support.

## 5.3 ENSURE REGIONAL/COUNTRY PRESENCE OF IMPLEMENTERS

If the E&E Bureau decides that its new regional projects should address common issues faced within a sub-region, such as tourism within the West Balkans, then it should deploy a contractor representative within the assisted sub-region, as well as countries within the sub-region.

## 5.4 CLARIFY RELATIONSHIPS BETWEEN BILATERAL AND REGIONAL PROGRAMS AND IMPLEMENTERS

The E&E Bureau should establish clear roles and responsibilities for regional and bilateral implementers within the context of prioritizing objectives for regional programming. For example, if it is decided that attendance at international trade shows and conferences should be handled by a single regional contractor, for cost or other reasons, then this should be made explicit in all contracts funded within the Bureau.

If the E&E Bureau decides that a new regional project will focus on issues that can best be addressed on a regional basis or sub-regional basis, then the Bureau should strongly consider a project that focuses on tourism and trade facilitation. While the best approach in all sectors is to create a balance of regional (or sub-regional) and bilateral activities, these two sectors stand out as areas where a sub-regional focus is clearly warranted.

## 5.5 IMPROVE PERFORMANCE MANAGEMENT SYSTEMS

The E&E should improve performance management and reporting systems during the remainder of the REG Project and for any follow-on regional projects. Progress against agreed-upon performance indicators should be reported on a regular basis and measured against life of project targets. Each indicator should measure only one type of result. Measures, such as exports and investment, should not be combined into a single indicator.

REG, and the successor project, should also request beneficiaries to answer short and simple evaluation questionnaires after the completion of each project activity. This should be followed up within a year with another questionnaire that asks each beneficiary to report on the effect of the activity on his or her business.

# ANNEXES

ANNEX I: STATEMENT OF WORK .....	2
ANNEX II: LIST OF MEETINGS .....	8
ANNEX III: KEY INFORMANT INTERVIEW (KII) GUIDE.....	19
ANNEX IV: FOCUS GROUP DISCUSSION (FGD) PROTOCOL.....	23
ANNEX V: BUSINESS SURVEY QUESTIONNAIRE .....	26
ANNEX VI: BSO SURVEY QUESTIONNAIRE.....	45
ANNEX VII: USAID SURVEY QUESTIONNAIRE .....	55
ANNEX VIII: REG ACTIVITIES AND RATINGS .....	64
ANNEX IX: SUMMARY OF REG PERFORMANCE INDICATORS AND RESULTS .....	85
ANNEX X: SALES INVESTMENTS (2014-2016).....	87
ANNEX XI: DISCLOSURE OF ANY CONFLICTS OF INTEREST .....	92

# ANNEX I: STATEMENT OF WORK

*Award: OAA-EE-TO-17-00008*

*Performance Evaluation of the Regional Economic Growth (REG) Project*

## SECTION C – DESCRIPTION/SPECIFICATIONS/STATEMENT OF WORK

### Analytical Services for Performance Monitoring

#### C.1. SUMMARY

The Contractor shall conduct a performance evaluation of the USAID-funded Regional Economic Growth (REG) Project.

#### C.2. BACKGROUND

The purpose of the REG Project is to promote broad based, inclusive and sustainable economic growth in the E&E region through greater intraregional economic integration and harmonization in the E&E region and with other markets. Project activities focus on improving competitiveness and increasing financial sector stability by promoting economic integration within the region and building economic linkages to the EU and other markets. The REG Project seeks to provide a cost effective platform for demand driven high quality trainings and to introduce international best practices in private sector skills and financial sector management and regulation. The REG Project also includes a buy-in mechanism to allow Missions/Operating Units to provide targeted support in areas aligned to the Core Components of improved competitiveness and increased financial sector stability.

The Scope of Work has the following two Core Component areas: (1) Increased Private Sector Competitiveness and Enterprise Development, and (2) Increased Financial Sector Stability, Growth & Inclusion. Activities in the third area related to the buy-in mechanism for Missions/Operating Units must align to the two Core Components but also can include activities not mentioned above.

The timeframe to be covered by the evaluation is from the start of the activity in September 2013 through the initiation of this evaluation.

Regional Economic Growth (REG)

Contract No. AID-OAA-C-13-00139

Activity Dates: 09/2013 – 9/2018

Activity Funding: \$13,949,135

Implementing organization: SEGURA Consulting LLC

Contract Officer's Representative (COR): Stephen Little

#### C.3. PURPOSE OF THE EVALUATION

The purpose of the evaluation is to provide USAID with an external assessment of the Regional Economic Growth (REG) project to inform the future design of USAID E&E Bureau's regional economic growth activity. The intended audience is primarily the E&E Regional Technical Support Office (TSO) and the mission economic growth teams.

1. Analyze the progress and effectiveness of the interventions to date and assess the current state of the selected sectors.
2. Analyze the effectiveness of the existing management structure including coordination with missions.

#### C.4. TECHNICAL REQUIREMENTS

Key questions to address in the evaluation are listed below. An illustrative allocation of how time and resources should be spent is indicated by a percentage after each question.

1. **To what extent has the project proved successful in assisting companies: become exporters, develop new products, access finance, and improve workforce skills? (20%)**

For the Ukrainian financial sector stability program:

**To improve the financial sector stability, growth and inclusion?**

2. **Which of the activities in the targeted sectors will remain sustainable and active after the life of project (LOP)? (50%)**

Were there typological commonalities in the intervention that will remain sustainable? Were there commonalities in the companies/organizations where sustainability was achieved? What are the differences observed regarding working with business associations and chambers versus individual firms?

Sustainability refers to processes and/or activities that the business associations/chamber and companies will be able to perform after the life of the project without external support, including to prepare bankable projects, develop new products, market existing products on the and be able to penetrate new markets, and to maintain and/or introduce new standards.

3. **How effective was the project in attracting investment funding (from a firm's perspective) and co-funding (from the project's perspective) to support development actions and how well was that funding tracked and quantified? (10%)**

Firm's perspective includes investments from the Business Angels network, investment funds, venture capital funds, EU Pre-accession funds, and similar funding opportunities. Project's perspective includes other donor funding, and private sector investments.

4. **What are the strengths and weaknesses of REGs management structure? (20%)**

What do USAID Mission Staff identify as the strengths and weaknesses of the consultation process? How well did REG coordinate with bilateral projects (e.g., enhance trade facilitation) or fill gaps where bilateral activities did not exist (buy-ins)?



What do missions in the region identify as constraints or issues to access/utilize the project? What do REG staff identify as management constraints and issues?

#### **C.5. EVALUATION TEAM / KEY PERSONNEL**

The team for this assignment will be comprised of the following key personnel:

- Richard Rousseau - Team Leader/M&E Specialist/Economist;
- Andrzej Schafernaker - Senior Enterprise Development Specialist;
- Aleksandar Karaev - Mid-Level Enterprise Development Specialist.

USAID/EE may delegate one or more staff members (or involve staff of other USAID missions) to work full-time with the Evaluation Team (ET) or to participate in the field data collection activities in-country. The Evaluation TOCOR will inform the Contractor about any full-time/part-time USAID delegates no later than three working days after the submission of a draft/updated Evaluation and Work Plan (EWP). All costs associated with the participation of full-time/part-time USAID delegates in the evaluation will be covered by USAID/EE.

#### **C.6. SCHEDULE AND LOGISTICS**

The assignment shall commence no later than March 2017 and field work must be completed by June 1, 2017. Two trips are envisioned: a contiguous trip through the Balkan countries of Bosnia, Serbia, Macedonia, Kosovo and Albania comprising the entire evaluation team, and a second trip utilizing only the team lead and senior SME expert to Azerbaijan. E&E/TSO, in coordination with relevant USAID Missions, will provide the team with input and guidance in setting a schedule of interviews and site visits, but the responsibility for the schedule resides with the Contractor. The schedule should be defined, and finalized as much as possible before the Expatriate Team arrives in the field.

Prior to beginning of the field work, all team members will review background program documents to gain a firm understanding of the situation in the region and the REG Project. The team will interview relevant USAID missions' staff, relevant bilateral projects, beneficiaries of USAID's assistance, representatives of governments, experts, appropriate donor organizations providing assistance in this area, and others as appropriate.

**END OF SECTION C**

## SECTION F – DELIVERIES OR PERFORMANCE

### F.1. 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

This Order incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es): <http://www.arnet.gov/far>

NOTE: an "X" indicates Clauses incorporated by reference

**X 52.242-15 Stop-Work Order (AUG 1989)**

### F.2. PLACE OF PERFORMANCE

The place of performance under this Task Order is the United States of America, Bosnia, Serbia, Macedonia, Kosovo, Albania, and Azerbaijan.

### F.3. AUTHORIZED WORK DAY/WEEK

A six-day workweek is authorized. No overtime or premium pay is authorized under this Task Order.

### F.4. REPORTS AND DELIVERABLES OR OUTPUTS

In accordance with AIDAR clause 752.242-70, Periodic Progress Reports, the Contractor shall submit reports, deliverables or outputs as further described below to the TOCOR. All reports and other deliverables shall be in the English language, unless otherwise specified by the TOCOR.

#### (a) Final Evaluation Design and Work Plan:

The Final Evaluation Design and Work Plan must be submitted to the Task Order Contracting Officer's Representative (TOCOR) two weeks prior to the team's arrival in country. It must outline in detail what methods the contractor will use to prepare answers for each evaluation question in Section C.4. The Final Evaluation Design must include a detailed evaluation matrix (including the key questions, methods and data sources used to address each question and the data analysis plan for each question), draft questionnaires and other data collection instruments or their main features, known limitations to the evaluation design, and a dissemination plan. USAID/E&E/TSO expects that, at a minimum, the design will include the following:

- Review and analyze the existing performance information;
- Conduct site visits;
- Meet and interview USAID project beneficiaries, partners, host government counterparts at appropriate levels;
- Interview USAID staff and a representative number of experts working in the sector.

The methodology section in the Final Evaluation Design should address strengths and weaknesses of the proposed methodology, and how the latter will be mitigated. Unless exempted from doing so by the TOCOR, the design will be shared with country-level stakeholders as well as with the implementing partners for comment before being finalized. The Work Plan must include the anticipated schedule and logistical arrangements and delineate the roles and responsibilities of members of the evaluation team.

The evaluation team, in collaboration with USAID/Europe and Eurasia (E&E)/ Technical Support Office (TSO) will finalize the Final Evaluation Design and Work Plan before the start of the field assignment. The evaluation team will spend approximately three weeks in the region carrying out this Evaluation.

Before arrival, the team members shall familiarize themselves with documentation about the REG project and USAID's current assistance in the Economic Growth Area in the region. USAID/E&E/TSO will ensure that this documentation is available to the team prior to their arrival in the region. The literature includes at a minimum:

- The USAID – Regional Economic Growth (REG) project Statement of Work
- The REG Reports and Materials: Annual and Quarterly Reports, Annual Work Plan, Sector Assessments, trip reports, performance report and miscellaneous thematic reports from other sources
- World Economic Forum, Global Competitiveness Index, and other relevant competitiveness reports
- Other relevant (bilateral projects' reports, BEP, Small Business Expansion Project...)

(b) **Summary discussions with respective mission EG leads prior to departure.**

(c) **Dissemination of Results:** The contractor shall conduct an out brief for USAID/EE bureau staff in Washington to discuss the evaluation's findings, conclusions and recommendations. Staff from relevant missions will be invited to participate via teleconference. Charts, tables, and findings should be created to facilitate the design of future regional economic growth projects.

(d) **Datasets:** Prepare datasets and supporting documentation such as code books, data dictionaries, scope, and methodology used to collect and analyze the data—to be submitted to the USAID Development Data Library

(e) **Evaluation Report (draft, and final):** The contractor must incorporate USAID's comments and submit the final report to USAID/E&E within ten (10) working days following receipt of comments on the draft report. The contractor will make the final evaluation reports publicly available through the Development Experience Clearinghouse (DEC) at <http://dec.usaid.gov> within 30 calendar days of final approval of the formatted report with USAID consent. In case it is determined that the full report includes sensitive information, a revised/sanitized version will be produced and submitted to the DEC.

The evaluation final report should adhere to the USAID Evaluation Report Requirements<sup>1</sup> include data disaggregated by sex, an executive summary, introduction, background of the local context and the activities being evaluated, the main evaluation questions, the methodology or methodologies, the limitations to the evaluation, findings, conclusions, and recommendations and lessons learned (if applicable). The report will be peer reviewed utilizing the agencies Criteria to Ensure the Quality of the Evaluation Report<sup>2</sup>

**END OF SECTION F**

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<sup>1</sup> <https://www.usaid.gov/sites/default/files/documents/1868/201mah.pdf>

<sup>2</sup> <https://www.usaid.gov/sites/default/files/documents/1870/201maa.pdf>

## ANNEX II: LIST OF MEETINGS

Subject	Organization/s	Sector	Name	Title	Country
Tourism	NA	Tourism	Dragisha	CEO	Serbia
REG	USAID/Serbia, Office of Democratic and Economic Growth	Economic Development	Laura Pavlovic	Director	Serbia
Tourism	Individual Travels	Tourism	Miljan Miljević	Owner	Serbia
	Wild Serbia	Tourism	Ivan Nastic	Owner	Serbia
	PanaComp	Tourism	Ivanka Tasic	Director	Serbia
ICT	ICT Cluster	ICT	Marina Blagojevic	ICT Cluster Manager	Serbia
		ICT	Branimir Dzenopoljac	ICT Cluster Manager	Serbia
		ICT	Milan Solaja	ICT Cluster Manager	Serbia
Tourism	National Tourism Organization	Tourism	Zorica Jovanov	Head of International Marketing	Serbia
			Ivan Vuckovic	Sport and Active Holiday	Serbia
			NA	NA	Serbia
Trade Facilitation	American Chamber of Commerce	Business Association	Slobodanka Kucic	Chair, Trade Facilitation Committee	Serbia
Start-ups	Agri Shares		Boris Petrenj		Serbia

Subject	Organization/s	Sector	Name	Title	Country
Agribusiness	Chamber of Commerce and Industry of Serbia	Business Association	Zorana Delic	Senior Advisor	Serbia
	Lucic Group	Agribusiness	Aleksandar Stojanovic	Sales Manager	Serbia
	Master Frigo	Agribusiness	Bosko Bondzulic	NA	Serbia
	Groser	Agribusiness	Dusan Janicijevic	Sales Manager	Serbia
	Pik-Becej	Agribusiness	Milos Mijovic	Assistant Director	Serbia
	ITN Group	Agribusiness	Jelena Jovancic	Senior Sales Manager	Serbia
	Allberries	Agribusiness	Goran Bodanovic	Marketing Manager	Serbia
	Laki	Agribusiness	Milos Jremic	Sales Department	Serbia
	Planter	Agribusiness	Nikola Kuzmanovic	Sales Manager	Serbia
ICT	NiCAT cluster	ICT	Goran Mladenovic		Serbia
Start-ups	Beeweb	ICT	Djordje Djokic	Head of Marketing	Serbia
	Couch Coach	ICT	Nenad Nikolin	Owner	Serbia
	TBC	ICT	Bashko	Owner	Serbia
ICT	www.Bep.rs	ICT	Dragana Stanojevic		Serbia
Trade Facilitation	Ministry of Finance, Customs System and Policy Department	Trade		Assistant Minister	Serbia
		Trade	Ms. Dartos	Head of Department for Negotiations with EU	Serbia

Subject	Organization/s	Sector	Name	Title	Country
		Trade	Ms. Milka	Advisor Technical Customs Law	Serbia
REG	USAID / BIH	Economic Development	Vlado Milin	Project Management Specialist	BiH
		Trade	Dobri Vukmanovic	Evaluation Specialist	BiH
ICT	Ministry of Programming	ICT	Faris Zacina	CEO	BiH
Start-ups	Tanyir	Hospitality	Tanja Madzaric	Owner	BiH
REG	REG Project, Segura	Economic Development	Filip Stojanovic	Chief of Party	BiH
		Economic Development	Snjezana Derviskadic	Tourism Sector Lead	BiH
Start-ups	Yu-Transfer	IT	Rade Strizak	Owner	BiH
		IT	Djordje	Owner	BiH
ICT	doIT	IT	Zana Karkin	Owner	BiH
	doIT	IT	TBC	Owner	BiH
	App Impact	IT	Admir Tuzovic	Chief Technology Officer	BiH
	Rubicon	IT	Adin Poprzanovic	Chief Executive Officer	BiH
Tourism	Andrija	Agribusiness/ Tourism	Miro Coric	Manager	BiH
	Colors	Tourism	Alen Bilal	Sales Manager	BiH

Subject	Organization/s	Sector	Name	Title	Country
Tourism	Marica Gaj (agrotourism hotel and restaurant)	Hospitality	Marco	Owner	BiH
Tourism	Colors	Hospitality	Alan Bilal	Owner	BiH
REG	Harnessing BiH Diaspora for Economic Development Activity	Economic Development	Jusuf Tanovic	Deputy Chief of Party	BiH
Trade Facilitation	Ministry of Foreign Trade and Economic Relations	Trade	Elma Demir	Expert Advisor for monitoring implementa tion of customs policy	BiH
			M.A. Hajrudin Podbicanin	Assistant Minister	BiH
			MSc Suda Hadzic	Head of Dept. for Int'l Rel. and Project Coord.	BiH
			Dario Peric	Head of Dept. for IT	BiH
			Juliya Petrovic		BiH
			Brankica Panduragic	Head of Dept. of Tourism	BiH
Agribusiness	USAID/Sweden FARMA II Project	Economic Development	Velibor Trifkovic	Fruit and Vegetable Expert	BiH
REG	USAID/ Washington	Economic Development	Kraemer Lovelace	Monitoring Country Progress Analyst	Macedonia
Agribusiness	REG	Economic Development	Goran Damovski	Agriculture Lead	Macedonia



Subject	Organization/s	Sector	Name	Title	Country
REG	USAID/Macedonia	Economic Development	Tanja Markovska	Project Management Specialist	Macedonia
			Margareta Lipkovska Atanasov	Regional Energy Project Manager	Macedonia
Start-ups	Brainster	ICT	Peter Ninovski	CEO	Macedonia
Agribusiness	Evromak	Agribusiness	Mile Cekov	Sales Manager	Macedonia
	Agro	Agribusiness	Tome Minchev	Commercial Director	Macedonia
Trade Facilitation	IDEAS for Development Policies	Economic Development	Gordana Tosheva	Trade Facilitation Coordinator for REG Project	Macedonia
ICT	REG	Economic Development	Anita Nikova	ICT Team Coordinator	Macedonia
Tourism	Macedonia Travel	Tourism	Emilija Fildisevska	Director	Macedonia
Start-ups	Modular	ICT	Nina Nineska	Founder	Macedonia
REG	USAID/Macedonia	Economic Development	James Stein	Director	Macedonia
			Edward Gonzalez	Director, GDO	Macedonia
			Meri Cuculovska	Deputy Project Manager, BREDI	Macedonia
			Tanja Markovska	Project Management Specialist	Macedonia
ICT	MASIT	IT	Elena Petrushevska	Project Manager	Macedonia
	MASIT	IT	Biljana Prlichkova	Operations Director	Macedonia

Subject	Organization/s	Sector	Name	Title	Country
	Alternative System Integration	IT	Ivana Mircheska	Technical Support Engineer	Macedonia
	SIMt	IT	Predag Radojicic	Chief Technology Officer	Macedonia
REG	USAID/Macedonia	Economic Development	Meri Cuculovska		Macedonia
Tourism	National Park Mavrovo	Tourism	Velko Lazarevski	Park Ranger	Macedonia
Tourism	Eden Tourism Cluster of Southwest Macedonia	Tourism	Aleksandar	Member, Biking Club	Macedonia
	Hotel Association of Macedonia	Hospitality	Rade Simevski	Board Member	Macedonia
	Mal Odmor	Hospitality	Daniel Simevski	Manager	Macedonia
	Eden Tourism Cluster of Southwest Macedonia	Tourism	Goran Milanoski	Mountain Guide	Macedonia
	Royal View Hotel	Hospitality	Aleksandar	Owner	Macedonia
REG	USAID Kosovo, Economic Growth Office	Economic Development	Brian Martalus	Office Director	Kosovo
			Dardane Peja	Project Management Specialist	Kosovo
			Besa Ilazi	Project Management Specialist	Kosovo
			Flora Arifi	Project Management Specialist	Kosovo

Subject	Organization/s	Sector	Name	Title	Country
Trade Facilitation	NA	Economic Development	Terry	Ex-COP USAID Partnership for Development Activity re. Trade Facilitation collaboration with REG	Kosovo
Agribusiness	AGRO Project, Tetra Tech	Economic Development	Fatmir Selimi	Deputy COP	Kosovo
			Musli Berishi	Supply Contracts Specialist	Kosovo
	Ananas Impex		Adiat Hajdari	Manager	Kosovo
	Jege Foods		Gezim Berisha	Director of Production	Kosovo
Agribusiness	Besiana G		Visar Aliu	NA	Kosovo
ICT	STIKK	ICT			Kosovo
Tourism	Catun		Sali Soshi	Founder	Kosovo
	Air Tour		Petrit Riza	CEO`	Kosovo
	Visit Gjakova		Mr. Kujtim	NA	Kosovo
REG	Empower Project, Cardno		Skender Rama	COP	Kosovo
Start-ups	Frakton		Celik Nimani	CEO	Kosovo
	3-D Printing		Rron	Owner	Kosovo
	ICT Outsourcing		Liart	Owner	Kosovo
	Agriculture IT Application		Shkelqim	Owner	Kosovo

Subject	Organization/s	Sector	Name	Title	Country
Tourism	The Blonde Gypsy		Larissa Olenicoff	Travel Blogger	Kosovo
Trade Facilitation	Ministry of Trade & Industry		Sytrime Dervisholli	Head of Trade Department	Kosovo
			Anita Sutaj	Senior Officer for Trade	Kosovo
				TRAVEL	
REG	USAID/Albania	Economic Development	Dennis Wesner	Office Director	Albania
			Dr. Zhaneta Shatri	Deputy GDO	Albania
Agribusiness	Certification Body	Agribusiness	Stefan Dani	Certifier	Albania
		Agribusiness	Edona Bilali	Certification Trainer	Albania
	CBS	Consulting	Ilir Pilku	Agribusiness Development Director	Albania
Agribusiness	Al.co Consulting	Consulting	Alfred Dumi	IRCA Certified Lead Auditor	Albania
		Consulting	Tokli Thoma	Food Standards Consultant	Albania
		Consulting	Drita Decolli	Food Standards Consultant	Albania
Agribusiness	Ministry of Agriculture	Agriculture	Fatmira Allmuca		Albania
Agribusiness	Agrocon Albania	Agribusiness	Adrian Doko	Director of Technical and Agricultural Development	Albania

Subject	Organization/s	Sector	Name	Title	Country
	SE-BI shpk	Agribusiness	Genc Seferi		Albania
	Olive Oil Processor	Agribusiness	Ilirjin Subashi		Albania
Agribusiness	CBS	Consulting	Enio Jaco	Executive Director	Albania
ICT	Albanian Information and Communication Technology Association (AITA)	ICT	Dritan Mezini	Board Chairman	Albania
			Julia Canga	Project Coordinator	Albania
ICT	Facilization	ICT	Gjergji Guri	General Manager	Albania
	lkubINFO	ICT	Romeo Sherko	General Manager	Albania
			Artan Malka	Key Account Manager	Albania
	Infosoft Software Developer (ISD)	ICT	Greta Iljazi	Digital Engagement Manager	Albania
	Generation Y	ICT	Erjon Curraj	Country Manager	Albania
	Microsoft	ICT	Sokol Vladi	Country Manager	Albania
Start-ups	Findit	ICT	Bledar Bregu	Owner	Albania
	Green Leaf	ICT	Gentjan Zotaj	Owner	
Tourism	Our Own Expeditions	Tourism	Nancy Tare	Business and Program Manager	Albania
	Albania Adventure	Tourism	Blerina Ago	CEO	Albania

Subject	Organization/s	Sector	Name	Title	Country
	Outdoor Albania	Tourism	Laura Payne	Marketing Manager	Albania
	?	Tourism	Ricardo		Albania
Trade Facilitation	The Institute of Public and Private Policies	Consulting	Dr. Albana Dhimitri	Executive Director	Albania
Trade Facilitation	Chamber of Commerce and Industry	Business Association	Albana Laknori	Secretary General	Albania
Start-ups	Vizam.az		Baba Aghayev	Chief Traveling Officer	Azerbaijan
	Lendock		Agahuseyn		Azerbaijan
REG	USAID Office of Governance and Economic Resilience		Randall Olson	Director	Azerbaijan
	Economic Growth Office		Samir Hamidov	Project Management Specialist	Azerbaijan
Trade Facilitation	Coordinating Council of the Republic of Azerbaijan on Transit Freight		Elchin Ahmadov	Head of Office	Azerbaijan
			Nijat	Assistant	Azerbaijan
REG	Azerbaijan Export and Investment Promotion Foundation (Azpromo), Investment Promotion Department	Investment Promotion	Raul Kharbanda	Project Manger	Azerbaijan

Subject	Organization/s	Sector	Name	Title	Country
Agribusiness	Agricultural Support to Azerbaijan (ASAP) Project, Cultivating New Froniers	Economic Development	David Blood	Chief of Party	Azerbaijan
	Agriculture (CNFA)				
			George Melton	Agribusiness Advisor	Azerbaijan
Agribusiness	Bine Agro (greenhouse tomato grower)	Agribusiness	Zaur Salmanov	Sales Director	Azerbaijan
	Cold Storage Operator and Fruit Grower	Agribusiness	Azer Haktari		Azerbaijan
	Karaca Findik (hazelnut processor)	Agribusiness	Hamid Karajayev		Azerbaijan
	NA	Agribusiness	Zaur Salmanov	Agronomist	Azerbaijan
	Aznar (pomegranate grower and processor)	Agribusiness	Ali Abdulov		Azerbaijan
	AgrarCo LLC (orchard fruit and hazelnut grower)	Agribusiness	Jalil Agamirzoyev		Azerbaijan
	Az-Granata (pomegranate grower and processor)	Agribusiness	Boyukagha Mustafayev		Azerbaijan
	CNFA	Economic Development	Eldaniz Osmanov	Agricultural Practices Trainer	Azerbaijan

# ANNEX III: KEY INFORMANT INTERVIEW (KII) GUIDE

## Guidelines for Key Informant Interviews with Business Support Organizations (BSOs)

Note on BSOs: BSOs include Chambers of Commerce, Business Associations, SME clusters, NGOs and Foundations in the field of economic development, Universities, Training institutions, Business Incubators, Start-up accelerators, Enterprise Support Agencies, Market information services, Consultancy service providers (management consultants, quality consultants, etc.), as well as embedded BDS as special advisory services set up to tackle industry specific problems by the companies themselves.

BSOs could be categorized in several main groups - 1) Chamber of commerce, 2) Business Associations or Clusters, 3) NGOs or Foundations (involved in economic development), 4) Educational or Training institutions, 5) Start-up accelerators or Incubators; and 6) Others.

### I. Background

- Organizational and management (structure, gender). Legal status, main services, numbers of employees, number of members, years in operation, main beneficiaries).
- Size and capacity (scope of activities, annual budget, sources of funding).

### 2. Involvement in REG and type of support received

- Does your BSO know it was part of a REG activity?
- How was it attracted to the activity/activities?
- How was it selected to participate in project activities?
- Who was the organizer of the activity/activities in which it participated?
- How did it participate in the activity/activities and what type of support did it receive?
- How would you rate the services received or the events you participated under the project activities?
- Did it contribute any funds or in-kind contribution to activities in which it participated? Estimate of amount.

**3. Questions related to Key question I** (To what extent has the project proved successful in assisting companies become: exporters, develop new products, access finance, and improve workforce skills?)

- **To what extent has the project proved successful in assisting you to provide business oriented services**
  - How do you monitor your performance? Do you conduct regular assessment and evaluations of your services? Do you involve your beneficiaries in evaluating your services?
  - What were the immediate activity outputs, and later outcomes as a result of your participation?
  - How do you assess the impact of the project activities on your own institutional development in the areas of planning, human resources, and results eg. Planning (strategy



- and operations management); Human resources (know-how, skilled workforce); results (development of new services, improved quality, increased efficiency etc.). Please describe and provide examples of successful interventions made by the project that have improved the BSO.
- How many services were you providing before participating in project's activities?
  - How many new members or beneficiaries of services did you get as a direct result of your participation in the activities?
  - Which aspect of the support you received contributed most to your performance?
  - Has your reputation and visibility among your members/beneficiaries increased as a result of participating in project activities?
  - (If applicable) how valuable was your participation in **conferences, networking events, trade fairs and exhibitions** in improving your performance? Did you develop a business relationship with any of the businesses that you connected with and, if so, what type and how has it contributed to your performance (membership base, sales or sales growth of your members/beneficiaries, other forms). If it has not yet led to business, what is your expectation that it will and when?
  - (If applicable) how valuable were the **trainings, and learning experiences** you participated in to improving your performance (whether in relation to management and employees know-how and skills, service development etc.)?
  - (If applicable) how valuable were the **expert consulting services** provided to you? Were they delivered by a consulting firm/organization? Would your BSO use these services again?
  - If you have taken part in similar activities organized by other projects/donors, how have the REG ones been different?
  - Were all the important problems facing your organization tackled? Were there any gaps that were not addressed by the activities?
  - Did the organizers of the activities collect information on the outcomes of activities and their impact on the development of your BSO?
  - Did you invest your own organization's resources (financial or in-kind) in the activities?

**4. Questions related to Key question 2 (Which of the activities in the targeted sectors will remain sustainable and active after the life of the project (LOP))?**

- To what extent are your members/beneficiaries satisfied with your services? Is there any difference in their satisfaction before and after you have participated in project' activities? Are your services relevant to their needs? Are you effective in tackling the challenges faced?
- Are you able better able to contribute to improvement of performances of your beneficiaries as a result of participating in project activities?
- Have your beneficiaries improved their business performance as a result of receiving your services during the project implementation?
- Will they continue to use your services after the end of the project?
- Would you be able to provide same services without involvement donor supported projects?
- Will there be still needs for similar types of services, after finalization of project activities?
- Will your beneficiaries continue to provide co-financing when participating in your activities after receiving support from the project?
- Would they be able to provide higher co-financing when participating in your activities after receiving support from the project?

- Was your BSO involved in any activities related to improving the business environment, such as lobbying for regulatory change? What were the outputs and outcomes of these activities?
- What aspects of the project's activities are now sustainable? Which expertise is now available and affordable within the region? Which changes and improvements made your BSO and your beneficiaries are now a permanent feature and will be maintained?
- Is there any improvement of the performance of BDSs that have been engaged by your BSO, under the project activities?
- Will they be able to continue to provide sector based enterprise support without donor support?
- Would your BSO be able to continue the types of improvements described earlier during the coming months and years without support from the REG project or other projects of this type?
- If further support is useful, in which areas specifically? Which type of assistance can be eliminated, which reduced, which increased, and what type of new support is needed?
- Would your BSO be willing to invest in future support?

**5. Questions related to Key question 3** (How effective was the project in attracting investment funding (from a firm's perspective) and co-funding (from the project's perspective) to support development actions and how well was that funding tracked and quantified?)

- **Did you develop new services for assisting your members/beneficiaries in attracting investment funding, as a result of participating in projects' activities?**
  - Did you get any new idea for assisting your members/beneficiaries in attracting investment funding, as a result of participating in projects' activities?
  - Have you established new contacts which contributed to better assisting your members/beneficiaries in attracting investment funding, as a result of participating in projects' activities?
- **How effective was the project in attracting investment funding from the perspective of your members/beneficiaries?**
  - How did the project help to strengthen BSO's capacities for assisting the enterprises (members/beneficiaries) to attract investments from external sources?
  - (If applicable) How useful was the matchmaking with investors and lenders? If no funding attracted yet, what is the nature of the relationship with the fund providers and what stage has been reached?
  - How did the project help attract investment from external sources into the joint activities of the group of enterprises participating in the exercise?
  - Would your members/beneficiaries be able to attract the same level of investment into their enterprise without the project activities?
  - Would your members/beneficiaries been able to attract the same level of investment into their enterprise without the involvement of your BSO?
  - Do you keep track of achieved results of your members/beneficiaries (new contacts, increased sales, joint initiatives, etc.) as a result of your involvement in project activities for attracting investment funds?

## **6. Cross-sectoral issues (gender, minorities)**

- To what extent are women and minorities involved in your activities? Is their involvement higher as a result of support received from the project?

- Have you implemented any activities specially targeting women and/or minorities? Have they produced any changes in their performance? (please provide quantifiable data if possible)

# ANNEX IV: FOCUS GROUP DISCUSSION (FGD) PROTOCOL

## Draft Guidelines for Focus Group Discussions with Businesses

Note to FGD Facilitator: the FGDs seek to elicit qualitative nuance and context that will help us better understand, interpret and situate the data from survey instruments and other sources. Illustrative quotes and differing viewpoints may be particularly valuable. Time may not permit addressing all prompts at each FGD.

### PROOCOL:

**Introduction:** *Since 2014, the USAID Regional Economic Growth project has been working with SMEs throughout the Balkans and Eurasia with specific focus on the IT, agribusiness & foods, and tourism sectors. It has set up activities, frequently in collaboration with BSOs, to support enterprises in attaining regional standards and certification, increase linkages between firms in the region with potential customers in the EU, Middle East, Turkey and other key markets, supporting companies in participating in EU funded programs, and increasing awareness of firms in the targeted sectors on the potential benefits of IT tools and services for enhancing competitiveness. It also strived to improve access to finance for entrepreneurs through non-banking sources including VC and Angel Finance, and to address of specific needs of women in business and youth entrepreneurship. Each of you here today participated in one or more activities or events sponsored and facilitated by REG. The aim of this focus group discussion is to enable us to learn as much as we can about your experiences and your views of the project.*

**Ground Rules:** *First, here are a few “ground rules” to help us enjoy a productive discussion:*

- 1. Only one person should speak at a time;*
- 2. Please no side conversations with those sitting near you;*
- 3. Let’s avoid having one or two people dominate the conversation; and*
- 4. Be sure to hear from everyone; we want to hear as many different voices, stories and perspectives as possible.*

**Opening Prompt** (optional, as a way of encouraging discussion): *To get started, we will go around the room asking everyone to **briefly** respond to the following questions:*

*-The industry they work in and the role they play in its value-chain*

*- What key facts should we know about **the challenges facing** your sector that is important in understanding the challenges facing businesses?*

Facilitator note: Seek to identify both obstacles and challenges to enterprise development that are internal to enterprise and characteristic of the business environment in which the industry operates.

## Follow-On Prompts:

1. *How did you first learn of REG, and why did you want to participate in the project?*
2. *How has REG support helped to tackle the challenges facing your businesses?*
3. *If this support was provided by one or more Business Support Organizations (BSOs), how would you rate and compare their inputs? Do you plan on continuing to use their support services?*

Facilitator note: Identify the types of BSOs referred to, whether membership based such as business associations, clusters; business development services such as consultants, trainers etc.; others?

4. *Which aspect of the project's support has been the most valuable to you?*
5. *Which other projects apart from REG have you participated in that have been tackling challenges in these categories? How would you distinguish and compare REG with them?*

Facilitator note: It is important to consider that in countries received bilateral assistance from local projects, technical assistance has been provided to sectors including IT, Tourism, and Agribusiness, as in Kosovo for example. This question is to help the evaluators try separate the outcomes and impact of REG from those of these other projects.

6. *In what ways has your business improved or changed as a direct result of participating in REG? In particular, how has it helped you to access markets, make business connections and expand your sales? In what ways has REG affected your industry's value chain and the business environment?*

Facilitator note: In addition to improvements in financial performance, elicit information on improvement to planning, accessibility to resources (materials, workforce, business finance), knowledge and skills, production technology upgrading, product development, increased capacity and productivity, operations systems including adoption of IT techniques etc. The aforementioned query about IT would help address interest in cross-sectoral activities. Also, time permitting, use this opportunity to see views on whether the enterprise is aware of any improvements to the business environment as a direct result of REG activities, and to the activities of other enterprises in the value-chain.

7. *How large an investment did you make or attract to your enterprise for the development of your business, as a direct result of the support provided by REG? How did you report this investment to the project?*
8. *How sustainable are the changes achieved by the project, and are they dependent on continued technical assistance?*
9. *Are there any areas in which you could have benefited from additional support, which could have improved performance or sustainability?*

10. *What is your overall assessment of REG as it is?*

Facilitator note: Try to use this opportunity to obtain more descriptive statements from participants rather than simple assessments such as weak, average, strong, since this type of assessment can be obtained from the survey.

11. *How could this type of project be made more effective?*

**Concluding Statement:** *Thank you so much for participating in this focus group discussion. Your contributions have been quite helpful to our evaluation work. Should you find that you have other inputs to share or other comments or suggestions please contact us at: [rrousseau@internationaldevelopmentgroup.com](mailto:rrousseau@internationaldevelopmentgroup.com).*

# ANNEX V: BUSINESS SURVEY QUESTIONNAIRE

## USAID Regional Economic Growth (REG) Project: Business Survey

REG Activities or Events in which you participated.

1. Did you participate in any activities or events sponsored by REG?

Yes

No

Don't know

2. How many activities or events did you participate in?

1-2

3-4

5 or more

3. What was the main subject of the activities or events?

Agriculture/Agribusiness

Information and Communications Technology (ICT)

Tourism

Entrepreneurship

Trade Facilitation

## USAID Regional Economic Growth (REG) Project: Business Survey

### Agriculture and Agribusiness

4. Agriculture/Agribusiness: If you participated in any of the following Agriculture or Agribusiness related activities or events, please rate the usefulness for your business.

Very low

Low

Medium

High

Very high

Agribusiness Access to  
Finance - Regional  
Sharing, Macedonia,  
December 2015

	Very low	Low	Medium	High	Very high
Anuga Trade Fair, France, October 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Anuga Trade Fair Germany October 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B2B with Supermarket Chains Albania December 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B2B with TESCO and Spar Macedonia May 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
CEI Biz Forum on Regional Cooperation Macedonia November 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fruitnet Forum - SEE Serbia November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Global G.A.P. Certification - Serbia 1/1/2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Global G.A.P. Implementation and Certification Albania 2015 - 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Global G.A.P. Training - Albania Albania September 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Global G.A.P. Training - Macedonia Macedonia October 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Global G.A.P. Training in Priority Standards Ukraine April 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Global GAP Training - Albania Albania December 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Global GAP Training - Serbia Serbia December 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
GlobalG.A.P. Kosovo Kosovo June 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Greenhouse study tour to Turkey Turkey November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



	Very low	Low	Medium	High	Very high
Greenhouse study tour to Turkey Turkey September 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Gulfood 2016 UAE February 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HACCP - ISO22000 Implementation and Certification Macedonia 2015 - 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HACCP Implementation and Certification Albania 2015 - 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HACCP Training Albania December 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hazelnut Study Tour Turkey, Georgia May 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ICT in Agribusiness Serbia October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ICT in Agribusiness Macedonia October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ICT in Agribusiness Montenegro November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IFS/FSSC/BRC Implementation and Certification Macedonia 2015 - 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Implementation and Certification of Global G.A.P. Macedonia 2015 - 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Implementation and Certification of IFS BRC Serbia January 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Implementation and Certification of Organic Standard Macedonia 2015 - 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Implementation and Certification of Organic Standard Serbia June 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Very low	Low	Medium	High	Very high
Inbound Trade Mission for German Buyers BiH, Serbia, Macedonia November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inbound Trade Mission with German, Dutch Buyers Serbia, Macedonia April 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inbound Trade Mission with UNIVEG Albania, Macedonia July 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
IPARD Roundtable Montenegro October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ISO22000 Implementation and Certification Albania 2015 - 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ISO22000 Training - Food Safety Management System Albania October 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ISO22000 Training for Auditors Serbia October 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ISO22000 Training for Auditors Macedonia May 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Matchmaking Support at FruitLogistica Germany February 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Matchmaking Support at FruitLogistica Germany February 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
METRO Cash and Carry Serbia May 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regional Meeting and B2B with Delhaize Serbia April 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SIAL Paris (food processing) France October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
stakeholders Israel September 2015 Study tour for AZ	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Very low	Low	Medium	High	Very high
Pomegranate					
Study tour to Italy for AZ stakeholders Italy June 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Study Tour to Italy for F&V Italy June 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology upgrade for cultivation of berries Azerbaijan May 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trade and Market Mission at Gulfood UAE February 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trade and Market Mission at Gulfood UAE February 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trade Mission, B2B with UNIVEG Poland, Czech Republic, Austria October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training for Internal Auditors - IFS BRC Serbia April 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training for Internal Auditors - IFS BRC FSSC Macedonia April 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training in Postharvest and Cold Storage Azerbaijan September 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training on EU Market Developments, F&V Export Ukraine April 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## USAID Regional Economic Growth (REG) Project: Business Survey

### Information and Communications Technology (IT/ICT)

5. Information and Communications Technology (IT/ ICT): If you participated in any of the following activities or events, please rate the usefulness for your business.

	Very low	Low	Medium	High	Very high
Advanced Technologies Forum, Serbia, November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agro B2B Event Serbia May 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ASKA Building Bridges Conference Serbia October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B2B and Lindholmen Conference Sweden October 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B2B Forum in Morocco Morocco June 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B2B, Lindholmen Conference Sweden October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Balkans and Black Sea Cluster Meeting Macedonia November 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Balkans and Black Sea Cluster Meeting/INFOFest Montenegro September 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business Innovation Forum Armenia November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cluster Matchmaking Conference Poland September 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Deutschland Austria and Switzerland (DACH) Mission Germany, Austria, Switzerland October 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Digitec Forum Armenia June 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dublin B2B Event (with Dublin Chamber of Commerce) Ireland October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Georgian IT Innovation Event Georgia November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Very low	Low	Medium	High	Very high
Horizon 2020 Training - BiH February 2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Horizon 2020 Training - Skopje Macedonia February 2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Horizon 2020 Training - Tirana Albania February 2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
How to Improve and Sustain Project and Process Management - Moldova October 2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
IT Standards, models and frameworks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
How to Improve and Sustain Project and Process Management - IT standards, models and frameworks - target markets, benefits, cost and time for implementation Albania June 2016	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ICT in Agribusiness Macedonia November 2016	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ICT in Agribusiness Conference Macedonia November 2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
KOS (Kosovo) ICT Event Kosovo October 2016	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lean-Kanban Project Management Executive Session and Workshop Georgia April 2016	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile World Congress B2B Spain February 2016	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proxor Software Developer Exam- Java Kosovo December 2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proxor Software Developer Exam Preparation Training - Java Kosovo December 2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Very low	Low	Medium	High	Very high
Sarajevo Tech Summit BiH September 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SCRUM Master Training and Certification Albania October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
South Eastern Europe Regional IT Conference BiH May 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strategic Thinking:					
Define Business Strategy and Translate it and Herzegovina November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> into Operational Terms Bosnia
STRATEGIC THINKING: Formulate Your Business Strategy and Translate it into Operational Terms Armenia June 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Using SCRUM Framework in Software Development Projects Georgia November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workshop on European Union Tenders Serbia May 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## USAID Regional Economic Growth (REG) Project: Business Survey

### Tourism

6. Tourism: If you participated in any of the following Tourism events, please rate the usefulness of the event for your business.

	Very low	Low	Medium	High	Very high
Adventure EDU Kosovo October 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adventure EDU - Kosovo Workshop Kosovo June 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adventure EDU II - Macedonia Workshop Macedonia March 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Very low	Low	Medium	High	Very high
Adventure Guide Training Workshop - Caucasus Georgia, Armenia November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adventure Guide Training Workshop - Western Balkans BiH October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adventure Travel Business Workshop - Western Balkans Serbia December 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adventure Travel Show UK January 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adventure Travel World Next USA September 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
AdventureNext Trade Show Macedonia May 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Albania B2B Albania Various 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
American Hotel and Lodging Educational Institute (AHLEI) Training Serbia May 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ATTA Conference UK January 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Destinations Nature - Trade Show France March 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
International Tourism Fair - Asia Malaysia October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
International Tourism Fair - Berlin Germany March 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
International Tourism Fair - Berlin Germany March 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kosovo B2B Kosovo Various 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Very low	Low	Medium	High	
Learning by Doing - Birdwatching Albania March 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learning by Doing: Birdwatching Training Albania October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learning by Doing: Gastro Retreat BiH February 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learning by Doing: Guca Music Serbia November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learning by Doing: Wildlife Retreat Macedonia, Montenegro November 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Macedonia B2B Macedonia Various 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## USAID Regional Economic Growth (REG) Project: Business Survey

### Entrepreneurship

7. Entrepreneurship : If you participated in any of the following Entrepreneurship activities or events, please rate the usefulness for your organization .

	Very low	Low	Medium	High	Very High
Armenia For the Win - Open Event Armenia November 2014	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B2B Matchmaking Event with Food Producers Macedonia May 2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B2B Matchmaking Events for Women in Business Albania June 2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Empowering Women in Business Albania June 2014	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ICT B2B in Morocco Morocco June 2015	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



	Very low	Low	Medium	High	Very High
Introduction to Angel Investing Serbia February 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Kyiv For the Win - Open Event Ukraine December 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pristina For the Win Camp Kosovo October 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regional Access to Finance Event for Women Entrepreneurs from Macedonia, Kosovo and Albania Bosnia and Herzegovina June 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regional Women Entrepreneurs B2B Event Bosnia and Herzegovina March 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sarajevo For the Win Camp BiH May 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Startup Study Tours to Startup Hubs of Berlin Germany October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Startup Study Tours to Startup Hubs of Berlin London England October 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tbilisi For The Win Camp Georgia April 2014	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traction Camp AgTech USA April 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traction Camp Mavrovo Macedonia June 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traction Camp Odessa Ukraine October 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traction Camp Tbilisi Georgia November 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traction Camp Tech Crunch USA September 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Women in Business B2B Serbia September 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## USAID Regional Economic Growth (REG) Project: Business Survey

### Trade Facilitation

8. Trade Facilitation : If you participated in any of the following Trade Facilitation activities or events, please rate the usefulness for your organization .

	Very low	Low	Medium	High	Very high
Implementation Stakeholders in B-REDI Countries Albania, Macedonia, Serbia 2016 - 2017	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ongoing TF Efforts & Event Co-Sponsors, Various locations, 2016 - 2017	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trade Facilitation - Increasing Efficiency and Transparency Workshop Serbia November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training on the WTO Agreement on Trade Facilitation for CEFTA, Switzerland March 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Update Workshop on WB TF Joint Action Plan Serbia November 2016	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workshop on National Trade Facilitation Committee in CEFTA Serbia November 2015	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## USAID Regional Economic Growth (REG) Project: Business Survey

### Additional Comments on Activities or Events

9. Do you have any additional comments on the activity or event in which you participated?

## USAID Regional Economic Growth (REG) Project: Business Survey

### Your Business or Organization

10. Name of business or organization

11. Legal Status

- Sole proprietor
- Partnership
- Limited liability Company
- Corporation
- Non-profit organization
- Government

12. How many years has your business or organization been in operation?

- <1
- >=1, <3
- >=3, <5
- >=5, <7
- >=7, <10
- >10

13. Gender of principal owner

- Male
- Female

14. Location (country)

- Albania
- Armenia
- Azerbaijan
- Belarus
- Bosnia and Herzegovina
- Georgia

Kosovo

Macedonia

Moldova

Montenegro

Serbia

Ukraine

15. Location (City, Town, or Village)

16. Location Type

Urban

Rural

17. The primary business sector in which your business operates

Agriculture and agribusiness (including fishing and forestry)

Information and communications technology (ICT)

Tourism (including hotels and restaurants)

Other (please specify)

18. Sales (in Euro equivalent)

<100,000

>=100,000, <500,000

>=500,000, <1,000,000

>=1,000,000, <5,000,000

>=5,000,000, <10,000,000

>=10,000,000

19. How many persons does your business or organization employ?

1 to 10

11 to 50

51 to 250

251 and above

## USAID Regional Economic Growth (REG) Project: Business Survey

### Impact of REG on Your Business

**One of REG's objectives was to help companies become: exporters, develop new products, access finance, and improve workforce skills. The following questions ask how your company was affected by REG.**

20. Please estimate the growth that your company has achieved over the last three years.

	0	1-5%	6-10%	11-25%	>25%
Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21. To what extent did REG help your business or organization with each of the following? (if not applicable to you business or organization, please mark N/A)

	Very low	Low	Moderate	High	Very high	N/A
Increase sales	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Become an exporter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Increase exports	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Develop new products or services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Obtain finance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Improve skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Obtain certifications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					

22. How do you finance your business? (check all that apply)

- Personal savings
- Family
- Bank credit
- Venture capital
- Investment funds
- Donor funds
- Other
- Other (please specify)

## USAID Regional Economic Growth (REG) Project: Business Survey

### Future Needs and Willingness to Pay for Services

23. What is the importance of the following for the future success of your business?

	Very low	Low	Medium	High	Very high
Access to markets and customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developing new products	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Access to finance	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Workforce training	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Technology and processes	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

24. How willing are you to pay for the following services that will assist you in the following areas?

	Very low	Low	Moderate	High	Very high
Access to markets and customers	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Developing new products	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Access to finance	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Workforce training	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Technology and processes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## USAID Regional Economic Growth (REG) Project: Business Survey

### Assistance from Local Business Service Organizations (BSOs)

25. Does your business belong to any associations or other business groups?

Yes

No

26. Please name the three most important business groups to which your business belongs.

Group 1.

Group 2.

Group 3.

27. Please rate the services and/or support provided by the groups listed above.

	Very poor	Poor	Fair	Good	Very good
Group 1.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Group 2.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Group 3.	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

## USAID Regional Economic Growth (REG) Project: Business Survey

### Assistance from International Organizations

28. Has your business or organization received support from any of the following organizations? (check all that apply)



- GIZ
- CBI
- CEFTA Secretariat
- EBRD
- European Union
- Swiss Development Corporation (SDC)
- UNDP
- World Bank IFC
- Other (please specify)

## USAID Regional Economic Growth (REG) Project: Business Survey

### Background on person completing survey (optional)

29. Name of person completing survey

30. Position in organization

- Owner
- President/CEO/Managing Director
- Other (please specify)

31. May we contact you for additional information?

- Yes
- No

32. E-mail

# ANNEX VI: BSO SURVEY QUESTIONNAIRE

## USAID Regional Economic Growth (REG) Project BSO Survey

### Your Organization's Relationship with REG

1. What statement(s) best explains the nature of your relationship with REG? (check all that apply)

- Received support from REG to strengthen our capacity
- Attended an event sponsored by REG
- Organized an event in collaboration with REG
- REG promoted our event(s) through their regional network
- We promoted REG events and activities through our networks and to our members
- No relationship with REG

2. In what area did you primarily collaborate with REG? (check all that apply)

- Agriculture/Agribusiness
- Information and Communications Technology (ICT)
- Tourism
- Entrepreneurship
- Trade Facilitation

Please explain if you checked more than one box.

3. How would you rate the activities or events in which you collaborated with REG?

	Very poor	Poor	Fair	Good	Very good	N/A
Training/workshops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Conference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Study Tour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Trade Missions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Exhibition/Fairs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Business to Business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					

## USAID Regional Economic Growth (REG) Project BSO Survey

### Your Organization

4. Name of organization

5. Type of organization

- Chamber of commerce
- Business Association or Cluster
- NGO or Foundation (involved in economic development)
- Educational or Training institution

Start-up accelerator or Incubator

6. Years in operation

< 1

>=1, <5

>= 5, <10

>=10

7. Country in which located

Albania

Armenia

Azerbaijan

Belarus

Bosnia and Herzegovina

Georgia

Kosovo

Macedonia

Moldova

Montenegro

Serbia

Ukraine

8. City in which located

9. Please list the types of your funding sources and their relative importance.

	Very low	Low	Medium	High	Very high	N/A
Membership fees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government support (public sector grants or donations)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
International donor organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private donations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fees and charges for mission-related services (i.e. research, consulting, education and training)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fees from rentals or other assets (investments, copyrights)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Subsidiary businesses and/or product sales	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

10. Please list the types of service provided and their relative importance.

	Very low	Low	Moderate	High	Very high	N/A
Provision of information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advisory services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Formal education	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B2B meetings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advocacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business conferences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Awareness raising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fair participation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial support (grants)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Study tours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

11. Geographic scope of activities? (check all that apply)

- Local
- Regional (region within the country)
- National
- International

12. Annual Budget (in Euros)

- <100,000
- >=100,000, <500,000
- >=500,000, <1,000,000
- >=1,000,000, <5,000,000
- >=5,000,000

13. Number of employees

1-10

11-50

51-100   
>100

## USAID Regional Economic Growth (REG) Project BSO Survey

### Impact of REG on Your Organization

14. To what extent has the REG Project assisted your organization in providing business-oriented services?

Very low

Low

Medium

High

Very high

15. What was the impact of REG on your organization's capacity and performance?

	Very low	Low	Moderate	High	Very high	N/A
Increased number of clients	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Increased number of members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Introduced new services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Improved quality of existing services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Improved our human capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					
Improved our reputation in the business community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment	<input type="text"/>					

## USAID Regional Economic Growth (REG) Project BSO Survey

### Sustainability

16. How would you rate the following as possible challenges or obstacles to the functionality and growth of your organization?



	Very low	Low	Moderate	High	Very high
Management skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing skills	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accessing suitable funding	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Suitable premises	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inappropriate organizational structure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of institutional framework	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of awareness of business community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment

17. What is the potential for your organization to increase the number of activities while maintaining the same quality of service to participants?

- Very low
- Low
- Moderate
- High
- Very high

18. To what extent are you able to provide the same types of services without the support of REG or other donor supported projects?

- Very low
- Low
- Medium
- High
- Very High

19. Do you have any other comments on the sustainability of your activities or services?

## USAID Regional Economic Growth (REG) Project BSO Survey

### Attracting investment funding

20. To what extent did the REG Project increase your capacity to assist your members/beneficiaries in attracting investment funding?

Very low

Low

Moderate

High

Very high

Comments

21. To what extent have your members or clients been successful in attracting new investment funding?

Very low

Low

Moderate

High

Very high

Comments

## USAID Regional Economic Growth (REG) Project BSO Survey

### Background of Person Completing Survey (Optional)

22. Name of person completing survey

23. Position in organization

President/Chairman of the Board

Managing Director

Other (please specify)

24. May we contact you for additional information?

Yes

No

25. E-mail address

# ANNEX VII: USAID SURVEY QUESTIONNAIRE

## Your Mission's Relationship with REG

1. What statement best explains the nature of your Mission's relationship with REG?

- We are not aware of REG activities
- We are aware of REG activities and coordinate with the REG Project to the extent possible
- We are aware of REG activities but do not coordinate with the REG Project

Comments

2. Are you aware of citizens in your country benefiting from the services of REG?

- Yes
- No

3. To what extent did the REG Project...

Very low    Low    Moderate    High    Very high    N/A

...consult with your Mission about activities in your country?

- 

Comments

...coordinate its activities with your bilateral projects?

- 

Comments

...fill gaps where bilateral projects did not exist?

- 

Comments

## Quality of REG Activities and Events

### 4. How would you rate the quality of REG services in the following areas?

	Very poor	Poor	Fair	Good	Very good	N/A
Agriculture/Agribusiness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comments	<input type="text"/>					
Information and Communications Technology (ICT)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comments	<input type="text"/>					
Tourism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comments	<input type="text"/>					
Entrepreneurship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comments	<input type="text"/>					
Trade Facilitation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comments	<input type="text"/>					
Financial sector support	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comments	<input type="text"/>					

### 5. How would you rate the quality of REG activities or events?

	Very poor	Poor	Fair	Good	Very good	Not applicable
Training/workshops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Conference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Study Tour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trade Missions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Exhibition/Fairs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business to Business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

7. To what extent has REG helped businesses in your country to...?

Very low      Low      Moderate

High      Very high      Do not know

Become exporters

Comment

Develop new products

Comment

Access finance

Comment

Improve workforce skills

Comment

Increase sales

Comment

Increase exports

Comment

Improved productivity

Comment

8. What is the likelihood that the following types of REG activities will be sustainable without USAID support?

	Very low	Low	Moderate	High	Very high
Meeting or conference	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Study Tour	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trade Mission	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Trade Show or Exposition	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training or workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment

9. What is the likelihood that support services in the following areas will be sustainable without

	Very low	Low	Moderate	High	Very high
Business operations or technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Entrepreneurship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Finance or investment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
ICT	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Trade or sales	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Standards or certifications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Tourism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment

funding?

10. Do you have any other comments on the sustainability of REG activities?

## Business Environment

11. How would you rate the following as possible challenges or obstacles to the growth and profitability of businesses in your country?

	Very Low	Low	Moderate	High	Very high
Debt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Equity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Land	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Energy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telecommunications	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Water	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transportation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Skilled labor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Raw materials or other inputs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taxes and fees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Informal payments for government approvals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Security	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (specify)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)



## Future Needs

12. What is the importance of the following for the future success of businesses in your country?

	Very low	Low	Moderate	High	Very high
Access to markets and customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develop new products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to finance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workforce training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology and processes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policy, legal or regulatory reform	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving government entities that support businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving private business support organizations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

13. In your opinion how would you rank gaps in your (and other donor) future programming that a regional economic growth project should fill?

	Very Low	Low	Moderate	High	Very high
Access to markets and customers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developing new products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to finance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Workforce training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology and processes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policy, legal or regulatory reform	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving government entities that support businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improving private business support organizations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

15. Does your Mission collaborate with any of the following organizations? (check all that apply)

- GIZ
- CBI
- CEFTA Secretariat
- EBRD
- European Union
- IFC
- Regional Cooperation Council
- Swiss Development Corporation (SDC)
- UNDP
- World Bank

Comments

## Future Regional Programming

16. How important is regional programming for achieving results in the following areas?

Very low    Low    Moderate    High    Very high

Agriculture/Agribusiness

Comment

Information and Communications Technology (ICT)

Comment

Tourism

Comment

Entrepreneurship

Comment

Trade Facilitation

Comment

Financial Sector Support

Comment

17. Please comment on future regional programming in the Europe and Eurasia Region.

Strongly Disagree    Disagree    Neither agree nor disagree    Agree    Strongly agree

There is a continuing need for regional programming of funds.

Other (please specify)

There is a need for sub-regional programming (e.g. Western Balkans, Western NIS, Trans-Caucasus)

Other (please specify)

18. Where is the best location for contractors implementing regional programs.

- One regional location that serves the entire E&E region.
- Several sub-regional locations (e.g Western Balkans, Western NIS, Trans-Caucasus)
- United States

Comment

# ANNEX VIII: REG ACTIVITIES AND RATINGS

REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)														
	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
1	Advanced Technologies Forum	Business Development/Trade Promotion	B2B	IT	CORE	Serbia	November 2016	1	0	1	5	5	12	4.083
2	Adventure EDU	Product Development	Training or Workshop	Tourism		Kosovo	October 2015	1	1	3	5	1	11	3.364
3	Adventure EDU - Kosovo Workshop	Business Development/Trade Promotion	Trade Show or Fair	Tourism		Kosovo	June 2015	1	1	1	4	0	7	3.143
4	Adventure EDU II - Macedonia Workshop	Business Development/Trade Promotion	Trade Show or Fair	Tourism		Macedonia	March 2015	0	2	2	5	3	12	3.750
5	Adventure Guide Training Workshop - Caucasus	Workforce Development	Training or Workshop	Tourism		Georgia, Armenia	November 2016	0	0	0	1	4	5	4.800
6	Adventure Guide Training Workshop - Western Balkans	Workforce Development	Training or Workshop	Tourism		BiH	October 2016	1	0	0	2	7	10	4.400

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
7	Adventure Travel Business Workshop - Western Balkans	Business Development/Trade Promotion	Meeting or Conference	Tourism		Serbia	December 2016	1	0	1	8	5	15	4.067
8	Adventure Travel Show	Business Development/Trade Promotion	Trade Show or Fair	Tourism		UK	January 2016	0	0	0	1	2	3	4.667
9	Adventure Travel World Next	Business Development/Trade Promotion	Trade Show or Fair	Tourism		USA	September 2016	0	0	1	3	3	7	4.286
10	AdventureNext Trade Show	Business Development/Trade Promotion	Trade Show or Fair	Tourism		Macedonia	May 2016	0	0	1	3	9	13	4.615
11	Agribusiness Access to Finance - Regional Sharing	Finance	Meeting or Conference	Agriculture	CORE	Macedonia	December 2015	1	2	7	1	4	15	3.333
12	Agro B2B Event	Business Development/Trade Promotion	B2B	IT	CORE	Serbia	May 2016	4	0	1	3	1	9	2.667
13	Albania B2B	Business Development/Trade Promotion	B2B	Tourism		Albania	Various 2014	0	0	0	0	0	0	N/A

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
14	American Hotel and Lodging Educational Institute (AHLEI) Training	Workforce Development	Training or Workshop	Tourism		Serbia	May 2014	0	0	3	0	1	4	3.500
15	Anuga Trade Fair	Business Development/Trade Promotion	Trade Show or Fair	Agriculture	AzREG	France	October 2015	0	0	0	1	2	3	4.667
16	Anuga Trade Fair	Business Development/Trade Promotion	Trade Show or Fair	Agriculture	CORE	Germany	October 2015	0	1	0	1	4	6	4.333
17	Armenia For the Win - Open Event	Entrepreneurship	Training or Workshop	Entrepreneurship	CORE	Armenia	November 2014	0	0	0	0	1	1	5.000
18	ASKA Building Bridges Conference	Business Development/Trade Promotion	B2B	IT	CORE	Serbia	October 2016	1	1	1	3	4	10	3.800
19	ATTA Conference	Business Development/Trade Promotion	Trade Show or Fair	Tourism		UK	January 2016	0	0	0	1	2	3	4.667
20	B2B and Lindholmen Conference	Business Development/Trade Promotion	B2B	IT	CORE	Sweden	October 2015	1	4	3	2	3	13	3.154
21	B2B Forum in Morocco	Business Development/Trade Promotion	B2B	IT	CORE	Morocco	June 2015	1	0	3	1	0	5	2.800

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
22	B2B Matchmaking Event with Food Producers	Entrepreneurship	B2B	Entrepreneurship	CORE	Macedonia	May 2015	0	1	1	0	0	2	2.500
23	B2B Matchmaking Events for Women in Business	Entrepreneurship	B2B	Entrepreneurship	CORE	Albania	June 2015	0	0	0	0	0	0	N/A
24	B2B with Supermarket Chains	Business Development/Trade Promotion	B2B	Agriculture	B-REDI	Albania	December 2016	1	0	1	3	2	7	3.714
25	B2B with TESCO and Spar	Business Development/Trade Promotion	B2B	Agriculture	CORE	Macedonia	May 2015	0	0	2	1	3	6	4.167
26	B2B, Lindholmen Conference	Business Development/Trade Promotion	B2B	IT	CORE	Sweden	October 2016	3	5	1	2	3	14	2.786
27	Balkans and Black Sea Cluster Meeting	Business Development/Trade Promotion	B2B	IT	CORE	Macedonia	November 2015	2	0	0	2	5	9	3.889
28	Balkans and Black Sea Cluster Meeting/ INFOFest	Business Development/Trade Promotion	B2B	IT	CORE	Montenegro	September 2016	1	0	2	4	6	13	4.077
29	Business Innovation Forum	Business Operations or Technology	B2B	IT	CORE	Armenia	November 2016	0	1	1	0	1	3	3.333



**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
30	CEI Biz Forum on Regional Cooperation	Business Development/ Trade Promotion	Meeting or Conference	Agriculture	CORE	Macedonia	November 2015	0	1	0	5	1	7	3.857
31	Cluster Matchmaking Conference	Business Development/Trade Promotion	B2B	IT	CORE	Poland	September 2016	0	0	0	1	2	3	4.667
32	Component 1 - Strategic Communication	Finance	Training or Workshop	Financial Sector Supervision	IP-FSS	Ukraine	2016 - 2017	0	0	0	0	0	0	N/A
33	Component 3 - Financial Sector Regulation & Supervision	Finance	Training or Workshop	Financial Sector Supervision	IP-FSS	Ukraine	1/1/2016	0	0	0	0	0	0	N/A
34	Component 4 - Digital Financial Services	Finance	Training or Workshop	Financial Sector Supervision	IP-FSS	Ukraine	1/1/2016	0	0	0	0	0	0	N/A
35	Destinations Nature - Trade Show	Business Development/ Trade Promotion	Trade Show or Fair	Tourism		France	March 2016	0	1	1	0	1	3	3.333
36	Deutschland Austria and Switzerland (DACH) Mission	Business Development/Trade Promotion	B2B	IT	CORE	Germany, Austria, Switzerland	October 2014	0	0	1	2	3	6	4.333
37	Digitec Forum	Business Development/Trade Promotion	B2B	IT	CORE	Armenia	June 2016	0	0	0	2	3	5	4.600

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
38	Dublin B2B Event (with Dublin Chamber of Commerce)	Business Development/Trade Promotion	B2B	IT	CORE	Ireland	October 2016	1	1	5	7	7	21	3.857
39	Empowering Women in Business	Entrepreneurship	Meeting or Conference	Entrepreneurship	CORE	Albania	June 2014	0	0	0	0	0	0	N/A
40	Fruitnet Forum - SEE	Business Development/Trade Promotion	Meeting or Conference	Agriculture	B-REDI	Serbia	November 2016	0	0	1	1	0	2	3.500
41	Georgian IT Innovation Event	Business Development/Trade Promotion	B2B	IT	CORE	Georgia	November 2016	0	0	1	5	2	8	4.125
42	Global G.A.P. Certification -	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Serbia	1/1/2016	0	0	0	1	2	3	4.667
43	Global G.A.P. Implementation and Certification	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Albania	2015 - 2016	0	0	2	2	4	8	4.250
44	Global G.A.P. Training - Albania	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Albania	September 2015	0	1	1	2	4	8	4.125
45	Global G.A.P. Training - Macedonia	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Macedonia	October 2015	0	1	1	0	1	3	3.333

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
46	Global G.A.P. Training in Priority Standards	Standards and Certification	Training or Workshop	Agriculture	AzREG	Ukraine	April 2015	0	1	0	0	0	1	2.000
47	Global GAP Training - Albania	Standards and Certification	Training or Workshop	Agriculture	CORE	Albania	December 2014	0	2	1	3	3	9	3.778
48	Global GAP Training - Serbia	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Serbia	December 2015	0	0	0	0	0	0	N/A
49	GlobalG.A.P. Kosovo	Standards and Certification	Training or Workshop	Agriculture	CORE	Kosovo	June 2015	0	0	1	1	3	5	4.400
50	Greenhouse study tour to Turkey	Business Operations or Technology	Study Tour	Agriculture	AzREG	Turkey	November 2016	0	0	0	0	1	1	5.000
51	Greenhouse study tour to Turkey	Business Operations or Technology	Study Tour	Agriculture	AzREG	Turkey	September 2015	0	0	0	0	0	0	N/A
52	Gulfood 2016	Business Development/Trade Promotion	Trade Show or Fair	Agriculture	AzREG	UAE	February 2016	0	0	0	0	0	0	N/A
53	HACCP - ISO22000 Implementation and Certification	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Macedonia	2015 - 2016	0	0	2	1	0	3	3.333

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
54	HACCP Implementation and Certification	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Albania	2015 - 2016	0	0	0	1	3	4	4.750
55	HACCP Training	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Albania	December 2015	0	1	0	1	2	4	4.000
56	Hazelnut Study Tour	Business Operations or Technology	Study Tour	Agriculture	AzREG	Turkey, Georgia	May 2015	0	0	1	1	0	2	3.500
57	Horizon 2020 Training	Business Operations or Technology	B2B	IT	CORE	BiH	February 2016	0	1	1	3	1	6	3.667
58	Horizon 2020 Training - Skopje	Business Operations or Technology	Training or Workshop	IT	CORE	Macedonia	February 2016	0	0	2	0	3	5	4.200
59	Horizon 2020 Training - Tirana	Business Operations or Technology	B2B	IT	CORE	Albania	February 2016	0	0	0	1	1	2	4.500
60	How to Improve and Sustain Project and Process Management - IT Standards, models and frameworks	Standards and Certification	Training or Workshop	IT		Moldova	October 2016	1	0	0	1	0	2	2.500
61	How to Improve and Sustain Project and Process Management - IT standards,	Standards and Certification	Training or Workshop	IT	CORE	Albania	June 2016	0	0	0	1	2	3	4.667

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
	models and frameworks - target markets, benefits, cost and time for implementation													
62	ICT B2B in Morocco	Entrepreneurship	B2B	Entrepreneurship	CORE	Morocco	June 2015	0	0	0	0	0	0	N/A
63	ICT in Agribusiness	Business Development/Trade Promotion	B2B	IT	CORE	Macedonia	November 2016	1	1	3	4	5	14	3.786
64	ICT in Agribusiness	Business Operations or Technology	Training or Workshop	Agriculture	CORE	Serbia	October 2016	0	0	0	0	1	1	5.000
65	ICT in Agribusiness	Business Operations or Technology	Training or Workshop	Agriculture	CORE	Montenegro	November 2016	0	0	1	0	1	2	4.000
66	ICT in Agribusiness	Standards and Certification	Training or Workshop	Agriculture	CORE	Macedonia	October 2016	0	3	2	4	4	13	3.692
67	ICT in Agribusiness Conference	Business Development/Trade Promotion	B2B	IT	CORE	Macedonia	November 2015	1	1	4	5	8	19	3.947
68	IFS/FSSC/BRC Implementation	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Macedonia	2015 - 2016	0	0	0	0	1	1	5.000

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
	and Certification													
69	Implementation and Certification of Global G.A.P.	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Macedonia	2015 - 2016	0	0	0	0	1	1	5.000
70	Implementation and Certification of IFS BRC	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Serbia	January 2016	0	0	0	1	2	3	4.667
71	Implementation and Certification of Organic Standard	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Macedonia	2015 - 2016	0	0	0	1	1	2	4.500
72	Implementation and Certification of Organic Standard	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Serbia	June 2015	0	0	0	0	0	0	N/A
73	Implementation Stakeholders in B-REDI Countries	Trade Facilitation	Training or Workshop	Trade Facilitation	B-REDI	Albania, Macedonia, Serbia	2016 - 2017	1	0	2	2	0	5	3.000
74	Inbound Trade Mission for German Buyers	Business Development/Trade Promotion	Trade Mission	Agriculture	CORE	BiH, Serbia, Macedonia	November 2016	0	1	1	2	2	6	3.833

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
75	Inbound Trade Mission with German, Dutch Buyers	Business Development/Trade Promotion	Trade Mission	Agriculture	CORE	Serbia, Macedonia	April 2016	0	0	1	1	2	4	4.250
76	Inbound Trade Mission with UNIVEG	Business Development/Trade Promotion	Trade Mission	Agriculture	CORE	Albania, Macedonia	July 2016	0	0	1	1	3	5	4.400
77	International Tourism Fair - Asia	Business Development/Trade Promotion	Trade Show or Fair	Tourism		Malaysia	October 2016	0	0	0	1	0	1	4.000
78	International Tourism Fair - Berlin	Business Development/Trade Promotion	Trade Show or Fair	Tourism		Germany	March 2016	1	1	0	3	4	9	3.889
79	International Tourism Fair - Berlin	Business Development/Trade Promotion	Trade Show or Fair	Tourism		Germany	March 2015	0	0	0	2	6	8	4.750
80	Introduction to Angel Investing	Entrepreneurship	Meeting or Conference	Entrepreneurship	CORE	Serbia	February 2014	0	0	0	0	2	2	5.000
81	IPARD Roundtable	Standards and Certification	Training or Workshop	Agriculture	CORE	Montenegro	October 2016	0	0	0	0	0	0	N/A
82	ISO22000 Implementation	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Albania	2015 - 2016	0	0	0	2	2	4	4.500

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
	and Certification													
83	ISO22000 Training - Food Safety Management System	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Albania	October 2015	0	1	1	1	4	7	4.143
84	ISO22000 Training for Auditors	Standards and Certification	Training or Workshop	Agriculture	CORE	Serbia	October 2014	0	0	0	0	1	1	5.000
85	ISO22000 Training for Auditors	Standards and Certification	Training or Workshop	Agriculture	CORE	Macedonia	May 2014	0	1	0	0	0	1	2.000
86	KOS (Kosovo) ICT Event	Business Development/Trade Promotion	B2B	IT	CORE	Kosovo	October 2016	0	0	3	5	5	13	4.154
87	Kosovo B2B	Business Development/Trade Promotion	B2B	Tourism		Kosovo	Various 2014	0	1	0	1	0	2	3.000
88	Kyiv For the Win - Open Event	Entrepreneurship	Training or Workshop	Entrepreneurship	CORE	Ukraine	December 2014	0	0	0	0	0	0	N/A
89	Lean-Kanban Project	Standards and Certification	Training or Workshop	IT		Georgia	April 2016	0	0	0	0	0	0	N/A



**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
	Management Executive Session and Workshop													
90	Learning by Doing - Birdwatching	Product Development	Training or Workshop	Tourism		Albania	March 2016	0	0	1	2	0	3	3.667
91	Learning by Doing: Birdwatching Training	Product Development	Training or Workshop	Tourism		Albania	October 2016	0	0	1	2	1	4	4.000
92	Learning by Doing: Gastro Retreat	Product Development	Training or Workshop	Tourism		BiH	February 2016	0	0	0	0	3	3	5.000
93	Learning by Doing: Guca Music	Product Development	Training or Workshop	Tourism		Serbia	November 2016	1	0	0	1	5	7	4.286
94	Learning by Doing: Wildlife Retreat	Product Development	Training or Workshop	Tourism		Montenegro	November 2015	0	0	1	1	2	4	4.250
95	Macedonia B2B	Business Development/Trade Promotion	B2B	Tourism		Macedonia	Various 2014	0	0	0	1	1	2	4.500

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
96	Matchmaking Support at FruitLogistica	Business Development/Trade Promotion	Trade Show or Fair	Agriculture	CORE	Germany	February 2015	1	0	0	0	1	2	3.000
97	Matchmaking Support at FruitLogistica	Business Development/Trade Promotion	Trade Show or Fair	Agriculture	CORE	Germany	February 2016	1	0	0	0	2	3	3.667
98	METRO Cash and Carry	Standards and Certification	Training or Workshop	Agriculture	CORE	Serbia	May 2014	0	0	0	0	1	1	5.000
99	Mobile World Congress B2B	Business Development/Trade Promotion	B2B	IT	CORE	Spain	February 2016	0	1	0	3	2	6	4.000
100	Ongoing TF Efforts & Event Co-Sponsors	Trade Facilitation	Training or Workshop	Trade Facilitation	B-REDI	Various	2016 - 2017	1	1	1	1	1	5	3.000
101	Pristina For the Win Camp	Entrepreneurship	Training or Workshop	Entrepreneurship	CORE	Kosovo	October 2014	0	1	0	0	1	2	3.500
102	Proxor Software Developer Exam- Java	Standards and Certification	Training or Workshop	IT		Kosovo	December 2015	0	0	0	1	1	2	4.500

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
103	Proxor Software Developer Exam Preparation Training - Java	Standards and Certification	Training or Workshop	IT		Kosovo	December 2015	0	0	0	1	1	2	4.500
104	Regional Access to Finance Event for Women Entrepreneurs from Macedonia, Kosovo and Albania	Entrepreneurship	Training or Workshop	Entrepreneurship	CORE	Bosnia and Herzegovina	June 2016	1	0	1	2	1	5	3.400
105	Regional Meeting and B2B with Delhaize	Business Development/Trade Promotion	B2B	Agriculture	B-REDI	Serbia	April 2016	0	0	1	1	4	6	4.500
106	Regional Women Entrepreneurs B2B Event	Entrepreneurship	B2B	Entrepreneurship	CORE	Bosnia and Herzegovina	March 2016	1	0	0	0	0	1	1.000
107	Sarajevo For the Win Camp	Entrepreneurship	Training or Workshop	Entrepreneurship	CORE	BiH	May 2014	0	0	0	0	1	1	5.000

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
108	Sarajevo Tech Summit	Business Development/Trade Promotion	B2B	IT	CORE	BiH	September 2016	0	0	2	2	6	10	4.400
109	SCRUM Master Training and Certification	Standards and Certification	Training or Workshop	IT		Albania	October 2016	0	0	0	1	4	5	4.800
110	SIAL Paris (food procesing)	Business Development/Trade Promotion	Trade Show or Fair	Agriculture	AzREG	France	October 2016	0	1	0	3	6	10	4.400
111	South Eastern Europe Regional IT Conference	Business Development/Trade Promotion	Meeting or Conference	IT	CORE	BiH	May 2015	0	1	3	2	5	11	4.000
112	Startup Study Tours to Startup Hubs of Berlin	Entrepreneurship	Study Tour	Entrepreneurship	CORE	Germany	October 2016	0	0	0	0	1	1	5.000
113	Startup Study Tours to Startup Hubs of Berlin London	Entrepreneurship	Study Tour	Entrepreneurship	CORE	England	October 2016	0	0	0	1	2	3	4.667

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
114	Strategic Thinking: Define Business Strategy and Translate it into Operational Terms	Standards and Certification	Training or Workshop	IT		Bosnia and Herzegovina	November 2016	0	0	1	1	0	2	3.500
115	STRATEGIC THINKING: Formulate Your Business Strategy and Translate it into Operational Terms	Standards and Certification	Training or Workshop	IT		Armenia	June 2016	1	0	1	0	1	3	3.000
116	Study tour for AZ Pomegranate stakeholders	Business Operations or Technology	Study Tour	Agriculture	AzREG	Israel	September 2015	0	1	0	0	1	2	3.500
117	Study tour to Italy for AZ stakeholders	Business Operations or Technology	Study Tour	Agriculture	AzREG	Italy	June 2016	0	0	0	3	1	4	4.250
118	Study Tour to Italy for F&V	Business Operations or Technology	Study Tour	Agriculture	CORE	Italy	June 2014	0	0	0	0	0	0	N/A

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
119	Tbilisi For The Win Camp	Entrepreneurship	Training or Workshop	Entrepreneurship	CORE	Georgia	April 2014	0	0	0	0	0	0	N/A
120	Technology upgrade for cultivation of berries	Business Operations or Technology	Training or Workshop	Agriculture	AzREG	Azerbaijan	May 2015	0	0	1	0	0	1	3.000
121	Traction Camp AgTech	Entrepreneurship	Training or Workshop	Entrepreneurship	CORE	USA	April 2016	0	1	0	0	2	3	4.000
122	Traction Camp Mavrovo	Entrepreneurship	Training or Workshop	Entrepreneurship	CORE	Macedonia	June 2015	1	0	3	1	3	8	3.625
123	Traction Camp Odessa	Entrepreneurship	Training or Workshop	Entrepreneurship	CORE	Ukraine	October 2015	0	0	0	0	4	4	5.000
124	Traction Camp Tbilisi	Entrepreneurship	Training or Workshop	Entrepreneurship	CORE	Georgia	November 2015	0	0	1	0	1	2	4.000

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
125	Traction Camp Tech Crunch	Entrepreneurship	Training or Workshop	Entrepreneurship	CORE	USA	September 2016	0	0	0	1	3	4	4.750
126	Trade and Market Mission at Gulfood	Business Development/Trade Promotion	Trade Show or Fair	Agriculture	CORE	UAE	February 2016	0	0	0	2	1	3	4.333
127	Trade and Market Mission at Gulfood	Business Development/Trade Promotion	Trade Show or Fair	Agriculture	CORE	UAE	February 2015	0	0	1	5	2	8	4.125
128	Trade Facilitation - Increasing Efficiency and Transparency Workshop	Trade Facilitation	Training or Workshop	Trade Facilitation	B-REDI	Serbia	November 2016	1	0	1	5	1	8	3.625
129	Trade Mission, B2B with UNIVEG	Business Development/Trade Promotion	Trade Mission	Agriculture	CORE	Poland, Czech Republic, Austria	October 2016	0	0	0	0	5	5	5.000
130	Training for Internal Auditors - IFS BRC	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Serbia	April 2016	0	0	0	0	1	1	5.000

**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
131	Training for Internal Auditors - IFS BRC FSSC	Standards and Certification	Training or Workshop	Agriculture	B-REDI	Macedonia	April 2016	0	1	0	0	0	1	2.000
132	Training in Postharvest and Cold Storage	Business Operations or Technology	Training or Workshop	Agriculture	AzREG	Azerbaijan	September 2015	0	0	0	0	0	0	N/A
133	Training on EU Market Developments, F&V Export	Standards and Certification	Training or Workshop	Agriculture	CORE	Ukraine	April 2015	0	0	0	1	0	1	4.000
134	Training on the WTO Agreement on Trade Facilitation for CEFTA	Trade Facilitation	Training or Workshop	Trade Facilitation	B-REDI	Switzerland	March 2016	1	0	1	2	0	4	3.000
135	Update Workshop on WB TF Joint Action Plan	Trade Facilitation	Training or Workshop	Trade Facilitation	B-REDI	Serbia	November 2016	1	0	2	3	1	7	3.429
136	Using SCRUM Framework in Software Development Projects	Standards and Certification	Training or Workshop	IT		Georgia	November 2016	1	0	1	0	0	2	2.000



**REG Activities and Ratings (Very Low=1, Low=2, Medium=3, High=4, Very High=5)**

	Activity Title	Activity Subject	Activity Format	Sector	CORE/ Buy-In	Country	Month/ Year	Ratings (Counts)					N. Responses	Average Rating (Weighted)
								1	2	3	4	5		
137	Women in Business B2B	Entrepreneurship	B2B	Entrepreneurship	CORE	Serbia	September 2015	1	0	0	0	0	1	1.000
138	Workshop on European Union Tenders	Business Development/Trade Promotion	Training or Workshop	IT	CORE	Serbia	May 2014	0	0	1	0	0	1	3.000
139	Workshop on National Trade Facilitation Committee in CEFTA	Trade Facilitation	Training or Workshop	Trade Facilitation	B-REDI	Serbia	November 2015	1	0	2	3	1	7	3.429

# ANNEX IX: SUMMARY OF REG PERFORMANCE INDICATORS AND RESULTS

Summary of REG Performance Indicators and Results							
	Indicator	Type	Unit	2014	2015	2016	Total
1	Number of firms and individuals receiving USG assistance that obtained an internationally recognized certification	outcome	Cumulative number of firms and individuals	64	462	281	807
2	Ratio of partner to REG matching contributions/resources	outcome	Ratio of cumulative partner contributions to cumulative REG contributions	1.88	1.19	1.13	NA
3	Increased exports and investments as a result of project interventions	outcome	Value in US\$	17,400	1,246,182	7,593,000	8,856,582
4	Number of firms receiving USG capacity building assistance for export	output	Cumulative number of firms	149	508	1,194	1,851
5	Number of firms and individuals receiving USG assistance to obtain an internationally recognized certification	output	Cumulative number of firms and individuals	98	884	639	1,621
6	Number of days of USG supported technical assistance in trade and investment capacity provided to counterparts or stakeholders	output	Number of TA days funded by REG or REG cost-share partners	74	92	190	356
7	Number of days of USG supported technical assistance in trade and investment capacity provided to counterparts or stakeholders	output	Number of TA days funded by REG or REG cost-share partners	51	6	202	259
8	Number of participants in trade and investment trainings	output	Cumulative number of persons trained	1,260	1,461	3,336	6,057

Summary of REG Performance Indicators and Results							
	Indicator	Type	Unit	2014	2015	2016	Total
9	Reduction in non-tariff trade barriers or trade facilitation measures adopted due to project interventions	output	Number of measures/forms/processes adopted	3	-	-	3
10	Reduced time for goods to cross borders in the region as a result of project interventions	output	Improvement in time needed	-	-	-	-
11	Number of advocacy initiative supported by the project/capacity building activities	output	Cumulative number of advocacy initiatives	2	-	-	2

# ANNEX X: SALES INVESTMENTS (2014-2016)

	Activity	Date (exact or end of quarter)	Core/ Buy-in	Sector	Albania	Armenia	Azerbaijan	Belarus	Bosnia and Herzegovina	Georgia	Kosovo	Macedonia	Moldova	Montenegro	Serbia	Ukraine	Total
1	Danube IT (10000 EUR)	05/30/14		ICT											13,600		13,600
2	Opportunities for Joint Applications for EU Funds for Regional Players in ICT	12/31/14		ICT											3,800		3,800
3	Discover Macedonia tour (1010EUR x 14 people) - 1EUR=\$1.11808 on July 1	06/06/15		Tourism								15,810					15,810
4	Adventure Week Western Balkans	06/30/15		Tourism	57,730					57,730	57,730						173,190
5	Fruitlogistica (4-6 Feb 2015)	02/06/15		Agri-business							47,000						47,000
6	B2B with Global Supermarket chains – Tesco and SPAR	09/30/15		Agri-business							72,000						72,000
7	PR and Marketing Support for the Western Balkans Tourism Product - FAM TRIPS cost	May - October		Tourism	12,000			12,000	12,000	12,000	12,000			12,000			60,000

	Activity	Date (exact or end of quarter)	Core/ Buy-in	Sector	Albania	Armenia	Azerbaijan	Belarus	Bosnia and Herzegovina	Georgia	Kosovo	Macedonia	Moldova	Montenegro	Serbia	Ukraine	Total
8	AdventureWEEK Western Balkans - Bike tours	12/31/15										11,700					11,700
9	Bike Tour Italian... I. I.	12/31/15			28,241							28,241					56,483
10	REG Core Anuga 2015	12/31/15		Agri- business								650,000					650,000
11	AzREG Anuga 2015	12/31/15		Agri- business			160,000										160,000
12	Traction Camp Odessa	01/01/16	CORE	ENTR												\$50,000	50,000
13	IT certification support 2015	02/01/16	CORE	IT	930,000												930,000
14	Gulfood 2016 (Balkans)	04/01/16	CORE	AG								\$100,000					100,000
15	Azerbaijani companies exhibiting at Anuga 2015 (Cologne, Germany) (10-14 Oct 2016)	05/01/16	AzREG	AG			\$664,500										664,500
16	Trade Mission and visit to GulFood Trade Fair (Dubai) (20-25 Feb 2016)	05/01/16	AzREG	AG			\$975,450										975,450
17	InBound mission and B2Bs in MK and AL for UNIVEG (2 more trucks of black plumbs)	09/30/16	CORE	AG								\$15,700					15,700

	Activity	Date (exact or end of quarter)	Core/ Buy-in	Sector	Albania	Armenia	Azerbaijan	Belarus	Bosnia and Herzegovina	Georgia	Kosovo	Macedonia	Moldova	Montenegro	Serbia	Ukraine	Total
18	In-bound mission and B2B meetings for German buyers (sour cherries, plums and raspberries from Serbia)	09/30/16	CORE	AG											\$108,500		108,500
19	In-bound mission and B2B meetings for German buyers (wild garlic from BiH)	09/30/16	CORE	AG				\$20,000									20,000
20	In-bound mission and B2B meetings for German buyers (20 trucks of sour cherries)	09/30/16	CORE	AG							\$74,000			\$100,000			174,000
21	In-bound mission and B2B meetings for German buyers (15 trucks of plums)	09/30/16	CORE	AG							\$98,000						98,000
22	InBound mission and B2Bs in MK and AL for UNIVEG (export of black plumbs)	09/30/16	CORE	AG							\$95,000						95,000

	Activity	Date (exact or end of quarter)	Core/ Buy-in	Sector	Albania	Armenia	Azerbaijan	Belarus	Bosnia and Herzegovina	Georgia	Kosovo	Macedonia	Moldova	Montenegro	Serbia	Ukraine	Total
23	InBound mission and B2Bs in MK and AL for UNIVEG (2 more trucks of black plumbs)	09/30/16	CORE	AG								\$55,000					55,000
24	In-bound mission and B2B meetings for German buyers (plumbs from BiH)	11/21/16	CORE	AG				\$18,000									18,000
25	In-bound mission and B2B meetings for German buyers (plumbs from MK)	11/24/16- 11/25/16	CORE	AG								\$27,000					27,000
26	AZ companies at SIAL Trade Fair Paris	10/16/16- 10/20/16	AzREG	AG			\$2,782,350										2,782,350
27	Startup (MAX)	12/31/16	CORE	ENTR	\$15,000	\$15,000	\$20,000	\$50,000	\$15,000	\$10,000	\$5,000	\$20,000	\$50,000		\$100,000	\$300,000	600,000
28	IT Events, trainings and standartization activities	01/01/16 - 12/31/16	CORE	IT	\$126,000	\$0			\$104,500		\$0	\$430,000	\$12,500		\$206,500		879,500
<b>Total</b>																	<b>8,856,582</b>

**Total Sales and Investments by Year**


<b>Year</b>	<b>Amount</b>
2014	\$17,400
2015	\$1,246,182
2016	\$7,593,000
<b>Total</b>	<b>\$8,856,582</b>



# ANNEX XI: DISCLOSURE OF ANY CONFLICTS OF INTEREST

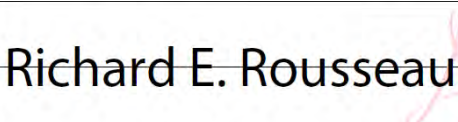
<b>Name</b>	Andrzej Schafernaker
<b>Title</b>	Enterprise Development Specialist
<b>Organization</b>	International Development Group
<b>Evaluation Position?</b>	<input type="checkbox"/> Team Leader <input checked="" type="checkbox"/> Team member
<b>Evaluation Award Number</b> <i>(contract or other instrument)</i>	Contract no. AID-OAA-C-13-00139
<b>USAID Project(s) Evaluated</b> <i>(Include project name(s), implementer name(s) and award number(s), if applicable)</i>	Performance Evaluation of the Regional Economic Growth (REG) Project
<b>I have real or potential conflicts of interest to disclose.</b>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<p><b>If yes answered above, I disclose the following facts:</b></p> <p><i>Real or potential conflicts of interest may include, but are not limited to:</i></p> <ol style="list-style-type: none"> <li><i>1. Close family member who is an employee of the USAID operating unit managing the project(s) being evaluated or the implementing organization(s) whose project(s) are being evaluated.</i></li> <li><i>2. Financial interest that is direct, or is significant though indirect, in the implementing organization(s) whose projects are being evaluated or in the outcome of the evaluation.</i></li> <li><i>3. Current or previous direct or significant though indirect experience with the project(s) being evaluated, including involvement in the project design or previous iterations of the project.</i></li> <li><i>4. Current or previous work experience or seeking employment with the USAID operating unit managing the evaluation or the implementing organization(s) whose project(s) are being evaluated.</i></li> <li><i>5. Current or previous work experience with an organization that may be seen as an industry competitor with the implementing organization(s) whose project(s) are being evaluated.</i></li> <li><i>6. Preconceived ideas toward individuals, groups, organizations, or objectives of the particular projects and organizations being evaluated that could bias the evaluation.</i></li> </ol>	

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

<b>Signature</b>	
<b>Date</b>	June 29, 2017

<b>Name</b>	Richard E. Rousseau
<b>Title</b>	Consultant
<b>Organization</b>	International Development Group
<b>Evaluation Position?</b>	<input checked="" type="checkbox"/> X Team Leader <input type="checkbox"/> Team member
<b>Evaluation Award Number</b> (contract or other instrument)	OAA-EE-T0-17-00008
<b>USAID Project(s) Evaluated</b> (Include project name(s), implementer name(s) and award number(s), if applicable)	Regional Economic Growth (REG) Project, Segura
<b>I have real or potential conflicts of interest to disclose.</b>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No X
<p><b>If yes answered above, I disclose the following facts:</b></p> <p><i>Real or potential conflicts of interest may include, but are not limited to:</i></p> <ol style="list-style-type: none"> <li>1. Close family member who is an employee of the USAID operating unit managing the project(s) being evaluated or the implementing organization(s) whose project(s) are being evaluated.</li> <li>2. Financial interest that is direct, or is significant though indirect, in the implementing organization(s) whose projects are being evaluated or in the outcome of the evaluation.</li> <li>3. Current or previous direct or significant though indirect experience with the project(s) being evaluated, including involvement in the project design or previous iterations of the project.</li> <li>4. Current or previous work experience or seeking employment with the USAID operating unit managing the evaluation or the implementing organization(s) whose project(s) are being evaluated.</li> <li>5. Current or previous work experience with an organization that may be seen as an industry competitor with the implementing organization(s) whose project(s) are being evaluated.</li> <li>6. Preconceived ideas toward individuals, groups, organizations, or objectives of the particular projects and organizations being evaluated that could bias the evaluation.</li> </ol>	

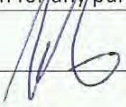
I certify (1) that I have completed this disclosure form fully and to the best of my ability and (2) that I will update this disclosure form promptly if relevant circumstances change. If I gain access to proprietary information of other companies, then I agree to protect their information from unauthorized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

<b>Signature</b>	 Digitally signed by Richard E. Rousseau DN: cn=Richard E. Rousseau, o, ou, email=richardrousseau@gmail.com, c=US Date: 2017.06.29 12:34:36 -04'00'
<b>Date</b>	

ANNEX VI: DISCLOSURE OF ANY CONFLICTS OF INTEREST

Name	Aleksandar Karaev
Title	Enterprise Development Specialist
Organization	International Development Group
Evaluation Position?	<input type="checkbox"/> Team Leader <input checked="" type="checkbox"/> Team member
Evaluation Award Number (contract or other instrument)	Contract no. AID-OAA-C-13-00139
USAID Project(s) Evaluated (Include project name(s), implementer name(s) and award number(s), if applicable)	Performance Evaluation of the Regional Economic Growth (REG) Project
I have real or potential conflicts of interest to disclose.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<p><b>If yes answered above, I disclose the following facts:</b></p> <p><i>Real or potential conflicts of interest may include, but are not limited to:</i></p> <ol style="list-style-type: none"> <li>1. Close family member who is an employee of the USAID operating unit managing the project(s) being evaluated or the implementing organization(s) whose project(s) are being evaluated.</li> <li>2. Financial interest that is direct, or is significant though indirect, in the implementing organization(s) whose projects are being evaluated or in the outcome of the evaluation.</li> <li>3. Current or previous direct or significant though indirect experience with the project(s) being evaluated, including involvement in the project design or previous iterations of the project.</li> <li>4. Current or previous work experience or seeking employment with the USAID operating unit managing the evaluation or the implementing organization(s) whose project(s) are being evaluated.</li> <li>5. Current or previous work experience with an organization that may be seen as an industry competitor with the implementing organization(s) whose project(s) are being evaluated.</li> <li>6. Preconceived ideas toward individuals, groups, organizations, or objectives of the particular projects and organizations being evaluated that could bias the evaluation.</li> </ol>	

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

Signature	
Date	June 30 2017