

Country Name	Project for Strengthening the Capacity for Tourism Promotion
Republic of Tunisia	

I. Project Outline

Background	<p>In Republic of Tunisia, the tourism sector is one of the main industries accounting for around 15% of GDP and it created more than 490,000 both direct and indirect employment in 2010. The country had a variety of tourism resources such as historical sites represented by the UNESCO World Cultural Heritages, traditional culture as well as natural tourism resources including the Mediterranean Sea and the Sahara Desert. Nevertheless, the country had relatively lower profitability from the tourism industry compared with neighbor tourism-oriented countries such as Morocco and Turkey.</p> <p>JICA implemented “the Study on Tourism Development Master Plan in Republic of Tunisia” (2000-2001) for the purpose of designing a tourism master plan and action plans for the country, and also conducted the Data Collection Survey in 2010 to examine the possibility of future corporation in Tunisia. However, the number of the foreign tourists arrival drastically decreased after the Revolution of January 2011 and it was necessary to attract new tourist segments from Asian countries in addition to the current segment of European and its neighbor countries in order to recover the tourism industry.</p>										
Objectives of the Project	<p>Through i) establishment of an organizational mechanism for promoting the public and private partnership in the tourism sector, ii) training on tourism marketing and promotion, and iii) planning, implementation and monitoring of the tourism marketing and promotion activities based on the action plans, the project aimed at strengthening tourism marketing and promotion capacity in the target areas, thereby contributing to diversification of tourists.</p> <ol style="list-style-type: none"> Overall Goal: Tourists are diversified through implementation of marketing and promotion in the target areas under the public and private partnership. Project Purpose: Tourism marketing and promotion capacity is strengthened in the target areas through building partnership among the Ministry of Tourism and Handicrafts (MOTH), the Tunisian National Tourism Office (ONTT) and other relevant organizations, including the private sector. 										
Activities of the Project	<ol style="list-style-type: none"> Project site: Tozeur Governorate and Kébili Governorate Main activities: (i) Establishment of an organizational mechanism for strengthening the public and private partnership in the tourism sector, (ii) training on tourism marketing and promotion, and (iii) planning, implementation and monitoring of the tourism marketing and promotion activities based on the action plans Inputs (to carry out above activities) <table border="0" style="width: 100%;"> <tr> <td style="width: 50%;">Japanese Side</td> <td style="width: 50%;">Tunisian Side</td> </tr> <tr> <td>1) Experts: 9 persons</td> <td>1) Staff allocated: 40 persons</td> </tr> <tr> <td>2) Trainees received: 17 persons</td> <td>2) Facilities and equipment: Project office, office furniture and equipment</td> </tr> <tr> <td>3) Equipment: printer and projector</td> <td>3) Local cost: travelling cost for seminar participants</td> </tr> </table> 			Japanese Side	Tunisian Side	1) Experts: 9 persons	1) Staff allocated: 40 persons	2) Trainees received: 17 persons	2) Facilities and equipment: Project office, office furniture and equipment	3) Equipment: printer and projector	3) Local cost: travelling cost for seminar participants
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2) Trainees received: 17 persons	2) Facilities and equipment: Project office, office furniture and equipment										
3) Equipment: printer and projector	3) Local cost: travelling cost for seminar participants										
Project Period	January 2013 – January 2016	Project Cost	(ex-ante) 270 million yen, (actual) 303 million yen								
Implementing Agency	Tunisian National Tourism Office (ONTT), Ministry of Tourism and Handicrafts (MOTH)										
Cooperation Agency in Japan	JTB Corporate Sales Inc										

II. Result of the Evaluation

1 Relevance
<p><Consistency with the Development Policy of Tunisia at the Time of Ex-Ante Evaluation and Project Completion></p> <p>The project was consistent with Tunisia’s development policies of “the 12th Five-Year Development Plan” (2010-2014), “the Economic and Social Programme (Jasmine Plan)” (2011-2016), and “the Five-Year Development Plan” (2016-2020) emphasizing promotion of regional development.</p> <p><Consistency with the Development Needs of Tunisia at the Time of Ex-Ante Evaluation and Project Completion></p> <p>The project was consistent with Tunisia’s development needs of promoting the regional development in the Southern Region of the country through strengthening tourism marketing and promotion capacity in the Southern Region.</p> <p><Consistency with Japan’s ODA Policy at the Time of Ex-Ante Evaluation></p> <p>The project was consistent with Japan’s ODA policy for Tunisia at the time of ex-ante evaluation in 2012 putting priority on (i) upgrading the industries, (ii) mitigation of regional disparities, and (iii) environmental protection¹.</p> <p><Evaluation Result></p> <p>In light of the above, the relevance of the project is high</p>
2 Effectiveness/Impact
<p><Status of Achievement of the Project Purpose at the time of Project Completion></p> <p>The Project Purpose was achieved by the time of project completion. New materials for promoting tourism in the target areas such as a Japanese website, DVDs, photo libraries and two kinds of brochures were created under the public and private partnership, and they were revised and updated at least four times during the project period (Indicator 1). Also, the Tourism Fair such as the Tourism EXPO Japan was held three times in 2013, 2014, 2015 under the public and private partnership (Indicator 2).</p>

¹ Source: Ministry of Foreign Affairs, Japan, “ODA Country Data Book 2012”.

<Continuation Status of Project Effects at the time of Ex-post Evaluation>

The project effects have been continued after the project completion. The photo library created by the project was integrated to the other master photo library that ONTT owns. The materials such as DVD and brochures have been regularly updated since the project completion. The tourism fair has been organized continuously under the public and private partnership after the project. For example, total 87 tourism fairs were organized in 2018 including 1 in Japan, 62 in EU (including 14 in France), and 24 in other countries.

<Status of Achievement for Overall Goal at the time of Ex-post Evaluation>

The Overall Goal has been achieved by the time of ex-post evaluation. The number of nights Japanese and Chinese tourists spent in the target areas has increased by 12,779 nights (Indicator 1). Also, the share of Japanese and Chinese tourists in the overall tourists has increased by 204% in terms of number of nights spent in the target areas (Indicator 2). The contributing factors for full achievement of the above two indicators are considered to be: (i) the ONTT's strategy to target the big Chinese market; (ii) the cooperative approach with the Embassy of Tunisia in Japan to promote a collaboration with the Japan Association of Travel Agents (JATA); and (iii) mitigation of security alert level of Tunisia by the Ministry of Foreign Affairs of Japan (February 2018 and March 2019). The number of nights spent by tourists of all nationalities in the target areas was 473,604 as of October 2019 (Indicator 3). According to the ONTT, they are estimating another 130,230 nights of tourist in November and December 2019 due to the major touristic events in these two months. Given those facts and the upward trend of the tourist arrivals for the recent years, it is reasonable to say that the target will be achieved in 2020.

<Other Impacts at the time of Ex-post Evaluation>

No other positive or negative impacts of the project were confirmed at the time of ex-post evaluation.

<Evaluation Result>

Therefore, the effectiveness/impact of the project is high.

Achievement of Project Purpose and Overall Goal

Aim	Indicators	Results																									
(Project Purpose) Tourism marketing and promotion capacity is strengthened in the target areas through building partnership among the MOTH, the ONTT and other relevant organizations including the private sector,	Indicator 1 New materials for promoting tourism to the target areas under the public and private partnership (such as a website and brochures) will be revised and updated at least four times during the project period.	Status of the Achievement: achieved (continued) (Project Completion) <ul style="list-style-type: none"> The project created a Japanese website. DVDs, photo libraries and two kinds of brochures. After the creation of website in April 2014, the following updates were made: <ul style="list-style-type: none"> ➢ Added special topics with pictures on the Northern region in April 2014 ➢ Added special topics with pictures on the Southern region in June 2014 ➢ Display of the website was revised in August 2014 ➢ Updated the news page in December 2015 and January 2016 After the brochure for the Northern region and the Southern region are made respectively in September 2013 and in September 2014, they were revised in 2015 and a Japanese tourist map of Tunisia was prepared. (Ex-post Evaluation) (i)Number of revision and updates <table border="1" data-bbox="703 1178 1469 1323"> <thead> <tr> <th></th> <th>2016</th> <th>2017</th> <th>2018</th> <th>2019 *</th> </tr> </thead> <tbody> <tr> <td>Website</td> <td>10</td> <td>6</td> <td>1</td> <td>1</td> </tr> <tr> <td>DVDs</td> <td>0</td> <td>0</td> <td>1</td> <td>0</td> </tr> <tr> <td>Photo libraries</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> </tr> <tr> <td>Brochures</td> <td>0</td> <td>0</td> <td>1</td> <td>0</td> </tr> </tbody> </table> *As of June 2019. (ii) Type of contents revised and updated <ul style="list-style-type: none"> After the completion of project, the photo library created by the Project was integrated to the other master photo library that ONTT owns. Annually, ONTT reviews the integrated photo library and replace with new ones if necessary. Tangible materials such as DVD and brochures are updated less frequently every 3 years. 		2016	2017	2018	2019 *	Website	10	6	1	1	DVDs	0	0	1	0	Photo libraries	1	1	1	1	Brochures	0	0	1	0
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Indicator 2 Tourism Fair is to be held at least three times under the public and private partnership.	Status of the Achievement: achieved (continued) (Project Completion) <ul style="list-style-type: none"> The MOTH/ONTT assisted the Tourism EXPO Japan in 2013, 2014, 2015 as planned (total three times). The public and private sectors discussed and determined the theme of the exhibition display, and the results of promotion activities in the exhibition were shared in the working group session. (Ex-post Evaluation) (i)Number of Tourism Fair <table border="1" data-bbox="703 1821 1469 1966"> <thead> <tr> <th></th> <th>2016</th> <th>2017</th> <th>2018</th> <th>2019 *</th> </tr> </thead> <tbody> <tr> <td>Japan</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> </tr> <tr> <td>France</td> <td>16</td> <td>16</td> <td>14</td> <td>11</td> </tr> <tr> <td>Other EU countries</td> <td>54</td> <td>49</td> <td>48</td> <td>42</td> </tr> <tr> <td>Other countries</td> <td>9</td> <td>28</td> <td>24</td> <td>17</td> </tr> </tbody> </table> *As of June 2019.		2016	2017	2018	2019 *	Japan	1	1	1	1	France	16	16	14	11	Other EU countries	54	49	48	42	Other countries	9	28	24	17	
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(Overall Goal) Tourists are diversified through implementation of marketing and promotion in the target areas under the public	Indicator 1 The number of nights of Japanese and Chinese tourists increase by 7,800 nights in the target areas.	(Ex-post Evaluation) achieved <ul style="list-style-type: none"> The total number of nights of Japanese and Chinese tourists increased by 11,704 nights in the target areas in comparison between 12,779 nights in 2013 and 24,483 in 2019. In terms of the number of nights of Japanese tourists, it declined sharply from 9,948 nights in 2013 to 3,469 in 2016, mainly due to security concern after a series 																									

<p>and private partnership,</p>	<p>of terrorism attacks occurred in Tunisia from 2015 to 2016.</p> <p>Number of nights of Japanese and Chinese tourists in Tozeur Governorate and Kébili Governorate</p> <table border="1" data-bbox="699 159 1513 528"> <thead> <tr> <th></th> <th>2013 (baseline)</th> <th>2016</th> <th>2017</th> <th>2018</th> <th>2019 *</th> </tr> </thead> <tbody> <tr> <td>Japanese</td> <td>9,948</td> <td>3,469</td> <td>3,006</td> <td>5,119</td> <td>5,084</td> </tr> <tr> <td>Chinese</td> <td>2,831</td> <td>4,880</td> <td>20,320</td> <td>29,073</td> <td>19,399</td> </tr> <tr> <td>Sub-total</td> <td>12,779</td> <td>8,349</td> <td>23,326</td> <td>34,192</td> <td>24,483</td> </tr> <tr> <td>All foreign tourists</td> <td>N.A.</td> <td>N.A.</td> <td>N.A.</td> <td>N.A.</td> <td>N.A.</td> </tr> <tr> <td>All nationality</td> <td>506,417</td> <td>282,841</td> <td>435,172</td> <td>503,455</td> <td>473,604</td> </tr> <tr> <td>Share of Japanese and Chinese in all tourists (all nationality)</td> <td>2.52%</td> <td>2.95%</td> <td>5.36%</td> <td>3.82%</td> <td>5.16%</td> </tr> </tbody> </table> <p>* As of October 2019.</p>		2013 (baseline)	2016	2017	2018	2019 *	Japanese	9,948	3,469	3,006	5,119	5,084	Chinese	2,831	4,880	20,320	29,073	19,399	Sub-total	12,779	8,349	23,326	34,192	24,483	All foreign tourists	N.A.	N.A.	N.A.	N.A.	N.A.	All nationality	506,417	282,841	435,172	503,455	473,604	Share of Japanese and Chinese in all tourists (all nationality)	2.52%	2.95%	5.36%	3.82%	5.16%	<p>Indicator 2 The ratio of the number of nights of Japanese and Chinese tourists to the one of overall tourists increases by 26% in the target areas</p> <p>(Ex-post Evaluation) achieved</p> <ul style="list-style-type: none"> The ratio of the number of nights of Japanese and Chinese tourists to the one of overall tourists increased by 204% in the target areas in comparison between 2.52% in 2013 and 5.16% in 2019. <p>Indicator 3 The number of nights spent by tourists of all nationalities in the target areas (Tozeur and Kébili) will increase by 16.2 % from 506,417 in 2013 to 588,208 in 2020.</p> <p>(Ex-post Evaluation) achieved</p> <ul style="list-style-type: none"> The number of nights spent by tourists of all nationalities in the target areas was 473,604 as of October 2019, which represents 80.5% of the target value in 2020. According to the ONTT, the total number of nights for November and December 2019 is estimated to reach 130,230 (45,826 in November and 84,404 in December) as the major touristic events such as “Festival de musique électronique” (normally take place in spring-summer) are postponed in November 2019 and the tourist arrival is highly likely to increase in the rest of the year and catch up the loss of the past months. Given those facts and the upward trend of the tourist arrivals for the recent years, it is reasonable to say that the target will be achieved in 2020.
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Source: Terminal Evaluation Report, Answer to the questionnaire by ONTT.

3 Efficiency

Although the project cost exceeded the plan (ratio against the plan: 112%), the project period was within the plan (ratio against the plan: 100%). The outputs were produced as planned. Therefore, the efficiency of the project is fair.

4 Sustainability

<Policy Aspect>

The Five-Year Development Plan” (2016-2020) focuses on “Human Development and Social Inclusion” as the 3rd pillar and executing the tourism strategy in favor of the local communities and promoting utilization of national resources such as national heritages are raised as one of the prioritized actions. Moreover, the tourism sector is one of the important pillars in the regional development plans such as those of the southern regions.

<Institutional Aspect>

There has not been any change in the institutional structure for the tourism promotion system in Tunisia. ONTT is responsible for implementation of the national tourism strategy, and undertakes (i) tourism sector development, (ii) management and regulation of the tourism industry, (iii) tourism marketing and promotion, and (iv) trainings for the tourism industry. On the other hand, “PPP Taskforce” which is a platform between the public and private sector for the tourism promotion in Tunisia established in Tozeur Governorate by the project, has been maintained. Although PPP Taskforce has not been formed in Kebili Governorate, discussions have been regularly made between the public and private sectors for tourism promotion in the governorate. The Regional Commissariat of Tourism initiated the dialogue with the private sector (including NGO and associations), which can be considered as an alternative of the PPP Taskforce.

<Technical Aspect>

In order to disseminate the knowledge transferred by project, ONTT organized several training courses. Also, ONTT regional office organized a series of seminars and conference for the capacity building of trainers of tourism centers and schools. The target area was expanded to the whole regions of Tunisia. Furthermore, the collaborative working approach among the different actors practiced in the project or the experiences obtained in targeting of the Japanese market were applied with emphasizing an importance to assure the security risk and establishing the PPP initiative at the regional level.

Among three activities under the PPP Taskforce, which are (i) tourism marketing and promotion, (ii) tourism product development, and (iii) tourism human resource development, the activity for (iii) the tourism human resource development has been undertaken by the public and private partnership in Tozeur Governorate continuously.

<Financial Aspect>

The ONTT manages to conduct the maintenance of the website, updating brochures, training programs, and coordination for PPP Taskforce introduced by the project with the current budget. While more budget allocation is desirable to expand as well as to further develop tourism promotion activities in Tunisia, it can be considered manageable.

ONTT Training Program

Training course	No. training sessions	No. of Participants
(i) Human resource development in the tourism sector	2 (in 2016)	10
(ii) Tourism marketing and promotion	1 (in 2017)	13
(iii) Tourism product development	1 (in 2017)	13
(iv) Service standards	8 (in 2018)	More than 10 for each session
(iv) Hospitality	8 (in 2018)	More than 10 for each session

<Evaluation Result>

Therefore, the sustainability of the effects through the project is high.

5 Summary of the Evaluation

The project has achieved the Project Purpose and the Overall Goal to diversify tourists through strengthening tourism marketing and promotion capacity in the target areas under the public and private partnership. As for efficiency, the project cost exceeds the plan. The project effects have been continued after the project completion as the tourism promotion activities based on the public and private partnership have been maintained in Tozeur Governorate and ONTT have been trying to disseminate the knowledge transferred by project.

Considering all of the above points, this project is evaluated to be highly satisfactory.

III. Recommendations & Lessons Learned

Recommendations for Implementing Agency:

- Currently, only 1 or 2 theme(s) are developed in the training program for a particular year. Therefore, training programs should desirably be improved, for instance, by increasing the frequency of the training session and by upgrading the contents/subjects of the program.

Lessons Learned for JICA:

- Relation-building and collaboration with the key actors such as the Embassy of Tunisia in Japan facilitated to conduct the activities to promote tourism in Tunisia including facilitation to the GoT's participation in tourism fairs, maintenance and update of the Japanese website. The Embassy can play a significant role in facilitating the understanding of the Tunisian on important elements such as Japanese tourists' preferences and expectations. According to the ONTT, this is one of the contributing factors for the increase in tourist arrivals including the Japanese tourists. Therefore, it is important to identify the key collaborators and to build a good relation with them in order to keep the project activity and its impacts sustainable both during and after the project period.



Joint Committee Meeting (in Kebili Governorate)



Visit to a ONTT Hotel School (in Tozeur Governorate)