

## **Lot 3 - Evaluation of ROP 2014-2020 interventions**

# **FINAL REPORT**

## **Theme 7. Diversifying local economies through tourism sustainable development**

**MAY 2019**

**BENEFICIARY:**

**Ministry of Regional Development and Public Administration**

**PROJECT IMPLEMENTED BY:**

**Lattanzio Advisory SpA (Lead partner)**

**Lattanzio Monitoring & Evaluation Srl (Partner)**

## ***Lot 3 - Evaluation of ROP 2014-2020 interventions***

### **Theme 7. Diversifying local economies through tourism sustainable development**

## **EVALUATION REPORT - FINAL VERSION**

#### **DISCLAIMER**

This report is the result of an independent evaluation conducted by the consortium led by Lattanzio Advisory Spa (Lead partner) and Lattanzio Monitoring & Evaluation Srl (Partner 2) on the basis of the contract concluded with the Ministry of Regional Development and Public Administration in September 2018.

The expressed opinions are of the consortium and do not necessarily reflect the views of the Contracting Authority, namely the Ministry of Regional Development and Public Administration, nor of the Managing Authority for the Regional Operational Program 2014-2020.

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<i>No.</i>	<i>Date</i>	<i>Description</i>	<i>Action</i>	<i>Pages</i>
<b>1</b>	<b>14/05/2019</b>	<b>Evaluation Report - Final Version</b>	<b>For approval</b>	<b>1-96</b>

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## List of Abbreviations

<b>CA</b>	<b>Contracting Authority</b>
<b>RDA</b>	Regional Development Agencies
<b>ROP MA</b>	Managing Authority for the Regional Operational Program
<b>NAPA</b>	National Authority for Public Procurement
<b>ANTREC</b>	National Association of Rural, Ecological and Cultural Tourism in Romania
<b>ROP EO</b>	Office for the Evaluation of the Regional Operational Program
<b>ACE</b>	Administrative Compliance and Eligibility
<b>ECC</b>	Evaluation Coordination Committee
<b>ToR</b>	Terms of Reference
<b>ROP MC</b>	Monitoring Committee of the Regional Operational Program
<b>TFE</b>	Technical and Financial Evaluation
<b>FAQ</b>	Frequently Asked Questions
<b>ERDF</b>	European Regional Development Fund
<b>NIRDT</b>	National Institute for Research and Development in Tourism
<b>NIS</b>	National Institute for Statistics
<b>EP/ TO</b>	Employed person/ Turnover
<b>IB</b>	Intermediate Body
<b>MEP</b>	Multiannual Evaluation Plan
<b>ROP</b>	Regional Operational Programme
<b>SUERD</b>	EU Strategy for the Danube Region
<b>ATU</b>	Administrative Territorial Unit
<b>TAI</b>	Tourist attractiveness index

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## Executive Summary

### Conclusions and recommendations related to the programming of tourism interventions

Priority Axis 7 of the Regional Operational Programme (ROP) acts primarily on the basic infrastructures related to the tourism valorisation of the attractiveness factors of the beneficiary tourist resorts. The analysis of the case studies was performed taking into account the tourist attractiveness index, which allows the isolation of four attractiveness related components: component A. natural resources (landscape, environment, health, safeguard); B. anthropic resources (historic and architectural heritage, culture, traditions, knowledge); C. specific tourist infrastructure (responsiveness, travel services for different segments, the usefulness of tourist attraction factors); D. technical infrastructure component (accessibility of main transport arteries by road, rail or air, as well as ensuring the basic infrastructure, such as an appropriate sewage system and waste water treatment, the presence of an adequate network of distribution and supply of electricity, natural gas and broadband).

Axis 7 mainly influences one of the components, i.e. C (specific infrastructure) and, in particular, the utilization degree of the attractiveness factors of tourist resorts by:

- restoring roads inside the resorts;
- creating cycling trails;
- equipping recreational areas;
- sports infrastructure;
- improving treatment resorts' services;
- interventions for the re-naturalization and the use of natural resources (lakes, parks)

Moreover, Axis 7 influences on Component B. (anthropic resources), especially in improving the historical and architectural heritage, as well as the recreation places used for cultural, musical and traditional events.

The carried out analysis reflects a large local positive perception regarding the capacity of these interventions to attract additional tourists; this perception was confirmed almost for all the analysed tourism segments by the panel of experts as well. However, the potential impact of ROP Axis 7 should be pursued within a general framework that includes other factors of the tourism attractiveness index, which are decisive for the consolidation of the expected impact scenarios.

In particular, reference is made to several elements intercepted by the ROP and other Community programs:

1. interventions in the roads network of regional importance (Axis 6);
2. interventions on cultural heritage (Axis 5);
3. interventions on sustainable urban development (Axis 4);
4. measures to promote the competitiveness of SMEs (Axis 2);
5. interventions for the diversification of the rural economy (Measure 6.4 and 7 of the National Rural Development Program- NRDP).

In order to strengthen its impact, Axis 7 should, on the one hand, stimulate private investment aimed at improving and expanding the accommodation offer and, on the other hand, should



guide other public interventions aimed at improving accessibility, the use of cultural heritage and the quality of the community life.

This aspect was analysed within the panel of experts attended by the RDAs, the Ministry of Tourism, the National Institute for Research and Development in Tourism and the Romanian Cities Association, which agreed with the need to rethink the possibility of financing integrated tourism development projects at the local level.

One weak point resulting from the analysis is related to the marketing strategies within the funded projects: these are strategies designed and implemented at local or county level, which, in the evaluator's opinion, must be designed and implemented at national level and by tourism segment. If the overall goal is to attract additional tourist flows, marketing strategies should be designed (and shared) at a level where it is possible to place the territories in a system rather than in competition.

The main recommendations of the evaluator concern both the programming of interventions at central, regional and local level and implementation issues.

From the analysis (including the matrix-based complementarity analysis), it emerged the need for the public policy maker to equip itself with an instrument capable of facilitating, on the one hand, **a tourism policy at the system level**, able to include in the programming of interventions all the components of the attractiveness on several financing lines (other ROP axes and other operational programs) and, on the other hand, able to direct the projects' selection by paying a special attention to their coherence and relevance for the territorial tourism needs.

The tourism attractiveness index, used as a key to interpret the local context, allowed the evaluation to focus on:

- the coherence of the interventions promoted by Axis 7 in relation to the value assumed by the indicators of each component of the tourism attractiveness index at local level (e.g. Horezu having a strong anthropogenic component B. implements ROP projects influencing component B);
- the need to evaluate each intervention in a wider framework that includes additional, synergistic and complementary interventions, with an impact on other components of tourist attractiveness, which are not under Axis 7 (Axes 4, 5 and 6). Synergy and complementarity are often defined in funding applications by mentioning generic Programs and Plans rather than specific projects;

The evaluator's recommendation is to analyse **the possibility of using an agile instrument to "interpret" tourist contexts, such as the tourism attractiveness index**, enabling programming and prioritization at the central level, as well as projects' design at the local level.

Future programming should, on the one hand, take account of the need to reduce territorial imbalances by favouring the development of marginal areas and, on the other hand, of the need to create connections (including by exploiting the existing cluster potential in the territory) and to have a vision of the tourism "sector" and of the segment tourism.

This is also related to another recommendation regarding **tourism marketing**. In fact, each project provides a punctual marketing strategy at local level or at the county level at the most. These initiatives, in the evaluator's view, may have relative effectiveness compared to certain segments of tourism, more open to international competition, for which it is necessary to develop and to achieve a promotion at country system (national) level. Increasing tourist flows, not just visitors flow, can be further encouraged by actions that favour thematic touristic

packages (segments) in international markets where figures make the difference, especially in terms of diversifying the accommodation offer and capacity. The direction of these actions should be oriented at a higher level of governance (regions, ministries).

### Conclusions and recommendations regarding the indicators and future evaluations

With regard to program indicators and lessons learned for the future evaluations, the analysis of program indicators has identified two elements that should be considered in the future in monitoring similar projects targeting the sustainable development of the tourism sector, in the phase of defining and quantifying program indicators:

- Output indicators should take into account what can actually be defined as a policy target in the tourism sector. For example, the surface in m<sup>2</sup> is correctly an output indicator, which, however, can be quantified only after selecting the projects, thus being used to verify the actual realization of the project. The number of funded projects can be instead a target objective established at the program level, taking into account the allocation of financial resources. The number of additional visitors is, instead, a result indicator, as it is manifested as an effect of the investment made.
- The increase in the number of employees is, however, an indicator that could be used as a result indicator only if the investment would concern a specific tourism structure that hires employees.

Taking into account the results of the analysis, it is recommended to use at the program level the number of financed projects as an output indicator, the number of additional tourists as a result indicator and the number of employed persons as an impact indicator. At the project level, it is suggested to use the surfaces (m<sup>2</sup>) concerned by the interventions as an output indicator, the km of rehabilitated/ built roads/ hikes and the number of additional tourist as a result indicator.

We consider that the employment indicator represents a level of impact that requires to be quantified at the program level by the evaluator, and not by the beneficiaries, nor by the ROP MA in the ex ante phase. The reason for this is that in both the ex ante phase and in the current evaluation phase (when there are no completed projects) the establishment of a target would depend solely on the adopted estimation methodology, thus not representing a reference value in order to understand the extent to which the program was effective. What can be done in the ex-post phase, instead, is to analyse the extent to which the employment impact of the program influences the context data related to the persons employed in the tourism sector. This approach is used by DG Agri in evaluating the impact of the Operational Programs for Rural Development (EU Regulation 808/2014 Art. 7), and in this evaluation study in fact we used an analysis methodology based on calculating the capacity of the investment to **"activate" a unit of workforce** by increasing tourism turnover, driven by the increase in the flow of tourists, a methodology that can be applied in the future.

## Conclusions and recommendations regarding the implementation system

Regarding the implementation system, the analysis of SMIS data with regard to projects under implementation suggests that, although the projects contracting rate is relatively advanced, being of about 76% compared to the EU allocation (February 2019), the progress in implementation is relatively low, payments to beneficiaries amounting to 3.14% of the allocated EU contribution. The data provided by the ROP MA regarding the progress of the calls for projects and the survey with the RDAs suggest that the Priority Axis will have no problems in absorbing the funds, considering that all RDAs have projects in the evaluation and contracting phases and so far the beneficiaries responded very well to the calls for project proposals, the value of the submitted projects exceeding by more than 3 times the amount allocated to this axis.

However, in interviews and surveys, the beneficiaries with implementing projects often highlighted **investment bottlenecks**, mainly due to delays in approving award documents or completing public procurement procedures (e.g. appeals or cancellations), which suggests the need to closely monitor the physical and financial progress of the projects in order to prevent the implementation bottlenecks.

The evaluator's recommendations on improving the implementation system are thus focused on procedural aspects regarding public procurement and project preparation stages, namely:

- it is recommended **the decentralization of calls management at regional level**, so that both the timing of the launches and the specific content of the guides to be personalized according to the specific regional context, the organizational context of the RDAs, the administrative context of the potential beneficiaries and the socio-economic context of the reference communities;
- It is also recommended to provide an **increased, structured and systematic support to the beneficiaries, in terms of preparing and performing public procurement**, which is obviously one of the elements likely to block or delay the investments. This support could be provided by the help desk within the RDAs or by decentralized structures of the National Authority for Public Procurement or by other structured mechanisms provided through Technical Assistance (Axis 12 of ROP or Technical Assistance Operational Program).
- Furthermore, it is recommended to provide a **more personalized support to the beneficiaries** so that if the allocations of the priority axis do not allow the investment to enter under PA 7, the beneficiaries will be guided to other financing solutions, since ROP has various axis which allow the financing of similar and complementary actions to those funded from PA 7;
- Finally, in order to increase the overall absorption rate of the ROP 2014-2020, it is recommended to evaluate the opportunity of **reallocation of resources** from other axes that did not have a great success on the axes where the applications for funding amount to more than 3 times the allocated amount.

## Chapter 1. Existing situation

Centralized and up-to-date data (February 2019) regarding the launched calls and the projects submitted, evaluated and under implementation provided by the ROP MA show that, at the time of drafting this Report, there were 28 projects under implementation with a total value of **356,158,557.39 lei (EU contribution) representing 76.74% of the total amount allocated to PA 7, out of which 32,638,577.96 lei SUERD projects (2 projects)**, and the total amount of payments made to the beneficiaries amounts to 14,587,514.79 lei, representing 3.14% of the allocated value.

The amount of the launched calls reaches 85,872,341.00 euros, respectively 399,572,589.91 lei, while 95 funding applications were submitted for these calls, amounting to more than 1.37 billion lei, which represents more than 3 times the allocated amount.

The following table summarizes the information extracted from the most recent centralizations available at ROP MA's level at the time of writing this report:

**Table 2: Main indicators related to the projects' progress within PA 7**

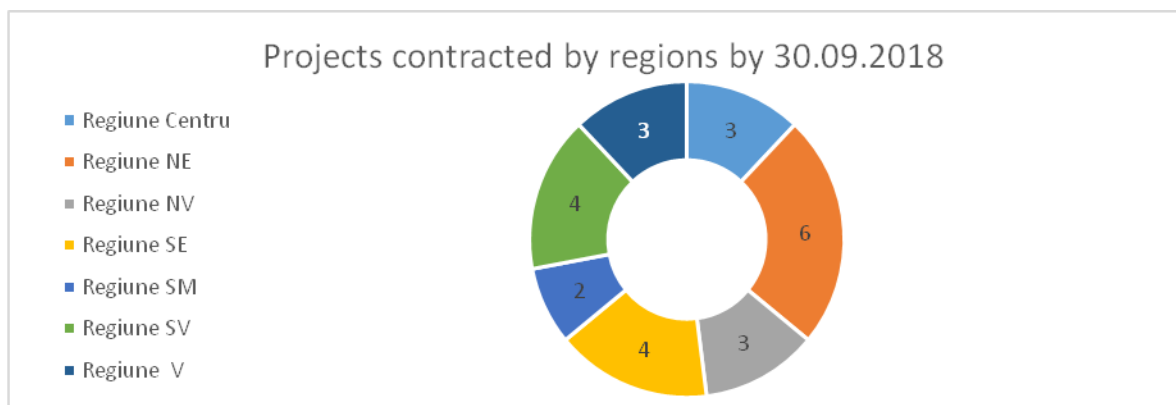
Total value of projects under implementation (ERDF contribution)	<b>356,158,557.39</b>
Total value of projects under implementation	<b>423,315,873.25</b>
Value of SUERD projects in implementation (lei)	<b>32,638,577.96</b>
Axis 7 allocation (lei)	<b>464,087,625.98</b>
% Value of submitted projects compared to the launched calls	343.32
% Value of projects in implementation compared to the allocation	76.74
% payments compared to the allocation	3.14

Source: Evaluator's calculations on the data present in the database provided by the ROP MA

The date to which the qualitative data analysis is reported, i.e. the application of the interpretative model in the evaluation of the projects financed under Axis 7, is 30 September 2018. At that time, there were 25 projects in implementation, distributed fairly evenly, with a slight predominance of the NE region (6 projects) and of the SE and SW regions (4 projects each), see the following figure<sup>1</sup>.

<sup>1</sup> On December 31, 2018, there were 2 more projects in implementation. These were taken into account both in analysing the progress, as presented in Table 1, and in conducting the survey among beneficiaries. However, for the definition of the case-study methodology, only the 25 projects under implementation by 30.09.2018 were considered due to the fact that the evaluation activities were in progress in December 2018, and the case-study methodology had been previously defined in the period November-December 2018. In any case, two more projects do not alter the relevance of the analysis and the conclusions reached.

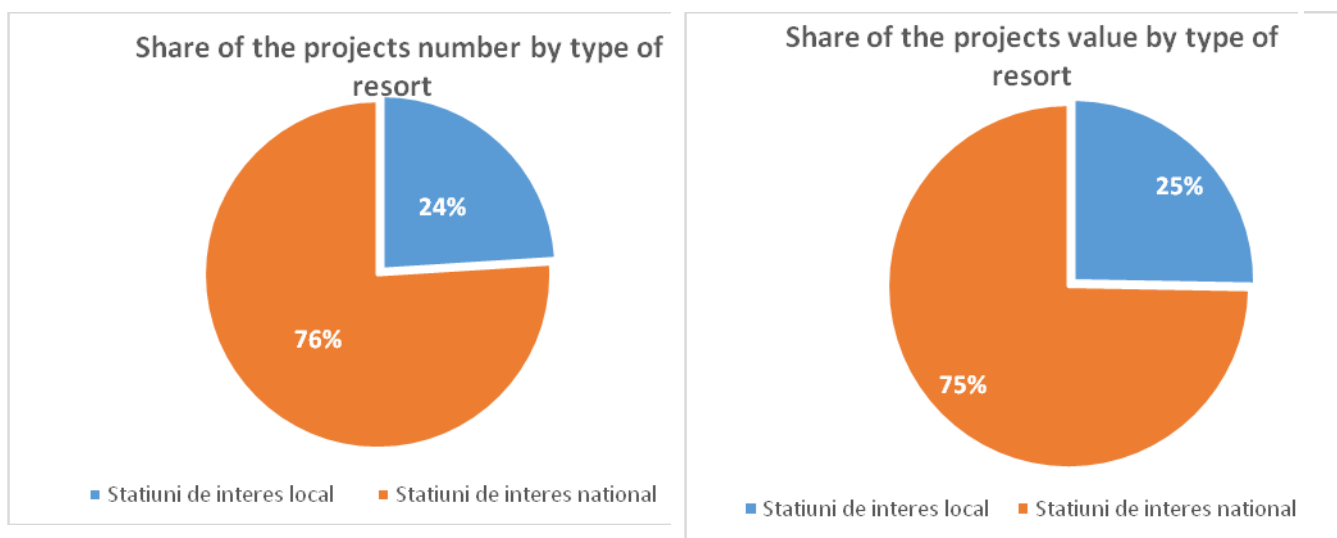
**Figure 1.1. Projects contracted by regions by 30 September 2018**



Source: Evaluator's calculations on the data present in the database provided by the ROP MA

Moreover, the analysis of the financed projects by type of tourist resorts reveals a predominance of national interest resorts (76%) compared to those of local interest (24%). Approximately 75% of the total value of the projects is allocated to the first ones, while the remaining 25% to the latter.

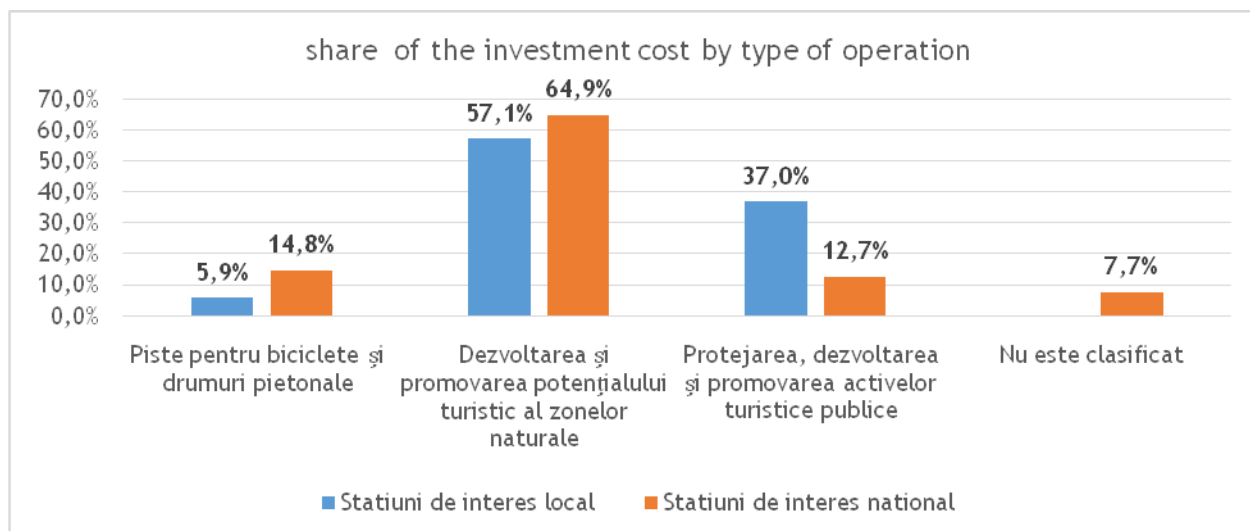
**Figure 1.2. Share of the number and value of the projects by type of resort**



Source: Evaluator's calculations on the data present in the database provided by the ROP MA

An overview of the projects, based on the three main categories of operations, shows how resources focus on the typology of the development of tourism potential in natural areas. In particular, a balanced distribution can be found for the tourist resorts of national interest on the other two typologies (7.7% of the resources are not classified as they contain a combination of several typologies).

Figure 1.3. Share of investment cost by type of operation



Source: Evaluator's calculations on the data present in the database provided by the ROP MA

For tourist resorts of local interest, there is instead a higher concentration of the allocated resources on the typology related to public tourist activities.

The 25 funded projects are located in 22 different areas, with 3 projects in Vatra Dornei municipality and 2 in Horezu. 12 projects out of the 19 financed for the national interest resorts and 2 projects financed for local interest resorts will conclude the interventions in 2020. This means that, from the point of view of the ex-post evaluation of the Programme, in 2023 it will be possible to extract the data observed in the intervention contexts.

As the details provided in Annex 2 show, project monitoring data has been enriched, in particular, with more information and data processing:

- tourist attractiveness index (without detailing the disaggregated values for the four dimensions of the index, according to the methodology used in the National Spatial Plan by the date of drafting this working document)
- the typology of resort (of national or local interest);
- typology of tourism segment (especially balneo-climatic, seaside, mountain or cultural);
- the indication whether a project falls within the same locality or not;
- the output indicator regarding the surface (expressed in m<sup>2</sup>) which was exploited, rehabilitated, created by the investment
- the output indicator regarding tourism sustainability, expressed in additional visitors/ year due to the project;
- the performance indicator "investment for additional tourist" (to check the consistency of the presented data regarding the increase of the flow of tourists, compared to the evolution context of the tourist flow at county level)
- the "investment per m<sup>2</sup>" efficiency indicator (to verify the existence of potential substantial differences in the efficiency of the investments compared to the concerned areas)
- the context indicator on the average annual growth (from 2010 to 2017) of the number of tourists at the county level (rather than the locality level);
- the ratio between the output indicator regarding the number of additional tourists/ year and the context indicator (to check the consistency of the output indicator)

By correlating the SMIS data with the NIS context data we were able to highlight deviations of the indicators quantified by the beneficiaries compared to the evolution of the tourist flows at the county level.

Taking into account that context data does not specifically refer to the intervention locality, the existence of these discrepancies may suggest the need to verify **the specific evolution of the tourists flow in each interested locality**, through case studies, so as to highlight the reasoning behind the initial estimates.

Thus, in more than 20 projects (including a locality where the additional tourists' indicator is not used) out of the 25 financed projects, there is an "anomaly" in the estimation of tourist flows (very high estimates at project level, compared to statistical series at county level). Thus, the indicator on the increase of the tourists number estimated by the funding beneficiaries was discussed and reviewed in the case study analysis, while the in-depth interviews conducted in this context allowed the definition of a series of control questions that were used in the survey with the rest of the beneficiaries, in order to interpret the impact scenario on the tourists flow evolution in the concerned areas.



## Chapter 2. Phases of the study

### a) Specialized literature analysis

#### International literature

Much of the specialized literature has investigated, on the one hand, the nature of the relationship between expansion and growth of tourism in a country and, on the other hand, the general economic growth and the development level. Many theoretical and empirical studies involved the use of statistical tests on data from different countries, including time series data. They sometimes involved statistical analyses to identify the correlation level between the various measures and indicators.

A series of studies have focused on economic performance and on the extent to which it correlates with or can be partly determined by tourism. In particular, a large number of studies have identified a strong correlation between tourism levels - in terms of number of arrivals and visits - and the economic growth, mainly measured through the GDP<sup>2</sup>.

Among the most commonly used evaluation methods in analysing the impact of tourism at socio-economic level, there are methods of qualitative survey among project beneficiaries, as well as case studies, including on-site visits to the project locations and interviews with both project representatives and with community stakeholders.<sup>3</sup>

Thus, according to the analysis of the international literature, it should be noted that there is a relatively clear understanding of the economic impact of tourism in terms of GDP, jobs, investments and other macroeconomic indicators, but the less tangible impact of a destination, such as conserving biodiversity or protecting cultural heritage - can be more difficult to capture. Impact measurement and reporting is an important first part of the puzzle, but determining what this impact means and how important it is remains a more challenging question.

The analysis of the specialized literature at the international level was the basis of the methodology for the reconstruction of the potential impact of the ROP interventions on the local economies, with reference to the increase of the jobs generated by the additional revenues (sectoral turnover) deriving from the tourist flow estimated increase.

#### European literature

The analysis of specialized literature at European level<sup>4</sup> has identified a number of major challenges affecting the development of the tourism industry at EU level, including:

- seasonality of tourism activity;
- unequal regional development;
- insufficiently qualified workforce.

<sup>2</sup> Lee and Chang (2008), Proenca and Soukiazis (2008), Dritsakis (2012), Brau, Lanza and Pigliaru (2007) and Aslan (2013).

<sup>3</sup> Evaluation of the ARC Program for Tourism, Cultural Heritage and Natural Goods Projects, Appalachian Commission - Regional Technology Strategies, 2010.

<sup>4</sup> "Study on the Impact of EU Policies and Measures taken in their Field on Tourism" (Final Report -2012- Analysts Risk & Policy Limited, EU-DG Enterprise.



Due to the complexity of the phenomena related to the potential impact of the tourism sector development on the territory, and taking into account also the type of interventions actually funded, the evaluation experiences focused mainly on the use of interviews, on-line surveys and case studies. The ex-post evaluation of the ROP 2007-2013 for Axis 5 suggested that: the analysis of the impact on the jobs should be further analysed after a certain period of time after the completion of the projects; the impact of the interventions on the improvement of some quality aspects should also be analysed (e.g. impact on service quality, correlation with other local strategies and sustainability of interventions through measures adopted by the management of tourism and heritage structures should also be considered).

European literature, including studies and lessons learned from the analysis of European funded interventions, deriving from European tourism support policies, allowed the identification of certain contextual factors typical of the tourism sector to be considered in estimating the impact of the investments and also the identification of the most appropriate evaluation methods for defining this impact.

### **National Literature (used to validate the methodology)**

In the phase of structuring the methodological tools needed to implement the model based on the case studies, the Evaluator consulted a series of national studies and documents needed to frame the context and analyse the case studies, including:

- The National Spatial Plan methodology according to the Government Emergency Ordinance no. 142/2008 regarding the approval of the National Spatial Plan Section VIII - Areas with Tourism Resources, with subsequent amendments;
- The publication "Travel expenses of non-residents in 2017" (NIS, 2018) and the correlated database;
- Quantitative study "Research on the behaviour, motivations and expectations of Romanian tourists who were accommodated in boarding houses in the last year"<sup>5</sup>.

In particular, the two studies/ publications were analysed from the perspective of extracting quantitative data usable for the economic impact scenarios, starting from the tourists' average expenses and taking into account the incidence of the two components, foreign and Romanian tourists.

On the other hand, the National Spatial Plan methodology (in force at the time of drafting this study) was used to analyse the tourism potential and to define the impact scenarios of the PA 7 interventions, depending on the incidence of the projects on certain components of the Tourist Attractiveness Index, taking into account the type of investments targeted by the selected projects.

The methodology for the evaluation of the tourist potential in the basic administrative-territorial units provides for the analysis of the following components:

#### A. Natural tourism resources

A1. Natural framework

A2. Natural therapeutic factors

A3. Protected areas

#### B. Cultural heritage

B1. Historical monuments

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<sup>5</sup> Material developed within the project "Entrepreneurs in tourism - Pensions in Romania" implemented by the National Foundation of Young Managers (FNTM) within the SOP HRD 2007-2013.

B2. Museums and public collections

B3. Art and folk tradition

B4. Performing and concert institutions

B5. Annual/ repeatable cultural events

C. Tourism specific infrastructure

C1. Accommodation units

C2. Wellness facilities

C3. Meeting rooms, exhibition centres, etc.

C4. Ski slopes and cableway installations

C5. Other recreational facilities (golf courses, "Blue Flag" certified beaches, water recreational facilities, amusement parks, stable of horses)

D. Technical Infrastructure

D1. Accessibility to major transport infrastructure

D2. Urban infrastructure

D3. Telecommunication Infrastructure

Being an index calculated at the level of all localities in Romania, based on criteria established and agreed with specialists, **the Tourist Attractiveness Index is a potentially powerful tool to be considered for scheduling and evaluating public policies and punctual interventions aimed at developing the tourism sector.**

## b) Data collection

The choice of appropriate techniques and tools contributed to providing a useful information basis for formulating answers to the evaluation questions, in particular using:

- Survey questionnaire addressed to the RDAs officers, to highlight the strengths and weaknesses of PA 7 implementation process;
- Questionnaires with open ended questions for the panel of experts, to validate the case study selection strategy and to obtain in-depth elements for drafting the case studies (first panel of experts);
- Guides for semi-structured interviews addressed to a limited number of actors who directly or indirectly structured and promoted the projects included in the case studies, in order to obtain significant estimates on the number of additional tourists;
- Survey questionnaire addressed to the beneficiaries who were not included in the case study analysis, in order to collect additional information on the status of projects implementation, type of funded investments, expected results and investments' sustainability;
- Simplified project fiches for the implementation of nominal group techniques for drafting scenarios on tourism attractiveness (second panel of experts);
- Directions for deepening the obtained results and the preliminary recommendations made by the evaluator, discussed in a Focus Group with the RDAs and other relevant stakeholders for tourism policies at national level.

Concerning the survey among beneficiaries with projects under evaluation, foreseen in the Initial Report, it is stated that: after analysing, in December 2018/ January 2019, the applications for funding of the projects selected for the case studies, we have clarified the main procedural aspects regarding the formulation of the projects and we verified the existence of synergies and complementarities with other initiatives at the local level, likely to affect the direct and

indirect impact of the projects, which needed to be analysed in depth in the interviews with the beneficiaries having approved projects. We therefore preferred to carry out two additional case studies covering a larger number of local projects and contexts than to try to involve potential beneficiaries with projects under evaluation, whose availability to participate in the evaluation activities is generally low. The approach was, therefore, to focus on defining the potential impact of interventions in specific contexts, discussing with the beneficiaries about the result indicators and the real implementation problems encountered. The information was finally triangulated through the two surveys (beneficiaries with implementation projects not included in the case studies and RDAs).

As regards the evaluation brainstorming, it was replaced by the Nominal Group Technique applied in the works of the second panel of experts.

With regard to the unit cost analysis, following the analysis of the typology of funded interventions, it was concluded that the unit cost analysis based on the rehabilitated/ created surfaces would not provide adequate quantitative information, given the variability of the funded interventions, which would have rendered irrelevant the comparison of the unit cost.

Besides the primary data obtained directly from the evaluator, a secondary database was obtained from the ROP MA and official sources (monitoring data and statistical sources, respectively) that were used for:

- analysing funded projects, identifying financial and physical aspects and obtaining information on the expected results (► Annex 3);
- acquiring additional elements on the intervention contexts related to the tourism sector (attractiveness index, tourist flows, flow typology, market segments) and economic sector (annual turnover and employment) (► Par.3.c).

In the following paragraph we will analyse in detail the methods used, the activities of observation (data collection) and analysis (information processing and introducing information into the system).

In the next matrix, the evaluation questions are correlated with the used methods, thus identifying the response strategy to the evaluation questions and the related triangulation method, i.e. the methodological options that the evaluator has adopted to obtain an information heritage useful to answer the evaluation questions, providing reliable and rigorous data.

Evaluation question code	Question content	Modality/ method of response	Triangulation method
EG1 (General evaluation Question 1...)	<ul style="list-style-type: none"> <li>■ To what extent <i>has ROP contributed so far and will contribute in the future</i> to the diversification of local economies through the sustainable development of tourism through:</li> </ul>	Analysis of context data and of project monitoring data (typologies of interventions according to SMIS information) Carrying out the case studies Panel of experts Survey among beneficiaries	The method of the case studies selection has been validated by the panel of experts.  Context data analysis has been triangulated through in-depth interviews with the beneficiaries selected to carry out the case studies.
EG1.1	<ul style="list-style-type: none"> <li>○ increasing the average number of employees in tourist resorts</li> </ul>	Carrying out the case studies	Impact scenarios developed for the case studies have been triangulated by the Panel of
EG1.2	<ul style="list-style-type: none"> <li>○ increasing accessibility and developing specific natural and cultural</li> </ul>	Carrying out the case studies	

	resources?		Experts.  The survey among beneficiaries that were not included in the case studies was used to triangulate the scenario analysis, with reference to the potential impact of the interventions and the typology of existing synergies with other interventions.
T7.1 (Theme 7 Question 1...)	<ul style="list-style-type: none"> <li>■ To what extent are the elements of the intervention logic verified in practice (in implementation)? (e.g. stronger effects from the perspective of endogenous potential development are registered when the financed interventions are part of a territorial development strategy - as concluded by the ROP 2007-2013 impact evaluation) How can the logic of intervention be improved within this Priority Axis or for similar future interventions?</li> </ul>	Carrying out the case studies Panel of experts RDA Survey Final Focus Group Survey among beneficiaries	Implementation mechanisms, mainly regarding sustainability and complementarity, were analysed in the case studies (impact scenarios), they were discussed with the panel of experts and verified by the survey among beneficiaries who were not included in the case studies.  Issues related to the implementation system (e.g. procedural implementation difficulties) were analysed in the case studies and triangulated through surveys among beneficiaries and RDAs.
T71.1	<ul style="list-style-type: none"> <li>○ What mechanisms/ types of interventions have proven to be effective and why?</li> </ul>	Carrying out the case studies Panel of experts	Sustainability and complementarity issues have been deepened through the matrix-based analysis.
T71.2	<ul style="list-style-type: none"> <li>○ What is the degree of sustainability of the cultural heritage and of the tourism dimension in the actions promoted through the ROP?</li> </ul>	Carrying out the case studies (including in-depth interviews with beneficiaries) Panel of experts Survey among beneficiaries	The conclusions and recommendations derived from the analysis of the intervention logic and the way how it is actually verified have been discussed and validated within a focus group.
T7.2 (additional question)	<ul style="list-style-type: none"> <li>■ To what extent have the financed interventions contributed to increasing the attractiveness of the tourist destination through specific actions, marketing included?</li> </ul>	Carrying out the case studies Panel of experts Survey among beneficiaries	Case studies analysis (i.e. impact scenarios on tourism attractiveness index and the analysis of planned marketing activities) was discussed in the panel of experts, and eventually triangulated through the survey among beneficiaries not included in the case studies.  Aspects of complementarity from the perspective of increasing the tourist attractiveness have been deepened through the matrix-based analysis.

### c) Description of the methodology

The choice of the methodological approach for PA 7 evaluation during the projects' implementation focused on what the evaluation literature calls "interpretative model", based on case studies. This choice was determined by the following:

- the impossibility to observe the expected changes (measurable by the program indicators) in the intervention context, as all the projects are still under implementation (► Chapter 1). The need to change the subject of the analysis, from the observation of what happened, to the **perception of possible effects** at the project level by the main local stakeholders;
- the need to represent the different intervention contexts in terms of demand (demand for goods and tourism services) and supply (intercepted tourist segments), and taking into account the starting conditions of the tourist potential (tourist attractiveness) and the institutional *capacity building* (local government);
- the need to understand **the mechanisms that can influence the expected results**, in order to outline the possible impact scenarios through specific interventions, in synergy with other Axis of ROP 2014-2020 and other regional and national policy instruments;

The case studies selection was done by reconstructing an ideal "mosaic" of funded projects, taking into account the variables that together (as deduced from the specialized literature and from the experts panel) may influence the project's results<sup>6</sup>. Therefore, the correct choice of project stratification variables is relevant and essential for obtaining results from the case study analysis, from which a mosaic of ROP effects can be drawn, while a wrong choice can undermine the results of the evaluation process.

The case studies were selected taking into account the projects in the MySMIS database by 30 September 2018. The analysis of the monitoring data of the 25 projects was conducted in order to verify the consistency of the estimates provided from the perspective of the potential impact evaluation.

Thus, the evaluation strategy envisaged the estimation of project impact scenarios, taking into account the following variables:

- the number of additional visitors/ year (output indicator) expected to be achieved due to the investment;
- average expenses per tourist, per type of tourist (Romanian, foreign) and per tourism segment (balneo-climatic/ seaside/ mountain/ urban/ cultural/ rural);
- additional/ yearly turnover (multiplying the number of additional tourists by the average expenses on tourist typology)
- employment growth, obtained by applying to the additional/ annual turnover, the turnover/ employment activation coefficient available at county level without sectoral breakdown. The number of employees expected to be activated due to the investment on the overall local economy is a result indicator that is not evaluated in the projects.

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<sup>6</sup> Reference is made to tourism segmentation and tourist attractiveness index

In order to identify the stratification variables needed to represent the mosaic of projects for the case studies selection, we chose those that would most likely influence the impact of the projects:

- tourist attractiveness of the tourist resort (tourist attractiveness index, TAI), dividing it into homogeneous groups based on the "intervals" existing in distributing the index, ordering it from the lowest to the highest;
- the main morphological territorial characteristic (i.e. mountainous area and non-mountainous area, characterized by often complex, differentiated tourist segments, such as balneo-climatic and mountain, mountain and cultural tourism, balneo-climatic and seaside, as the case may be).

The mosaic of the selected projects for carrying out the case studies is presented below.

Table 2.c.1: Stratification of projects in view of carrying out the case studies

segments \ TAI	Non-mountainous area	Mountain area	TOTAL
Low	4	3	7
Medium	2	5	7
High	5	6	11
<b>TOTAL</b>	<b>11</b>	<b>14</b>	<b>25</b>

Source: the evaluator's processing of the existing data from the database provided by the ROP MA

Thus, it was proposed to carry out a case study for each layer, taking into account the following additional variables representative for the project universe:

- 1 the belonging region;
- 2 a better representation of tourism segmentation;
- 3 the possibility to analyse projects that fall within the same locality, creating a potentially higher impact in the area of interest.

The list of pre-selected projects for the case studies and the correlated justification is presented in Annex 3.

In addition to the analysis of the potential impact of PA 7 projects, the analysis of the case studies was useful to verify and deepen to what extent there are significant synergies, at the level of the localities interested in the investments financed from Priority Axis 7, with other investments financed by other Priority Axes of the ROP 2014-2020, such as the Urban Development (Priority Axis 4), the rehabilitation and valorisation of cultural heritage (Priority Axis 5) and those concerning the road infrastructure at the county level (Priority Axis 6), these synergies being likely to have a direct or indirect impact on the evolution of the tourist attractiveness index in the area.

Starting from these prerequisites, the adopted evaluation model foresaw to co-opt a panel of tourism experts in order to ensure greater robustness of the evaluation results.

Experts have been selected taking into account their role in the tourism sector, as: policy makers, experts on the subject and experts in the field.

The panel was activated in two specific moments of the evaluation process:



- prior to conducting the case studies, in order to validate the choice of the variables used to identify the layers, by checking the empirical consistency of the layers in tourism segmentation and to provide guidance on the context aspects to be considered for the cases;
- after conducting the case studies, in order to analyse the main results obtained and to identify possible scenarios of tourism (and at the same time economic) development of the areas.

Due to the territorial specialization of the 15 stakeholders (e.g. Bucovina Tourism Association, Oltenia Tourism Association, the Balneo-climatic Cluster of Transylvania, etc.) contacted in the previous stage, the involvement of the experts panel was made by e-mail: they were sent a working document on the selection of the case studies and a form for collecting the observations. About a quarter of those who were asked for a point of view (especially the tourism research environment and a few associations representing tourism clusters) provided suggestions and indications, confirming the value of the choices made by adopting the proposed methodology for the selection of the case studies. Taking into consideration the presence of a research body with national coverage and subordinated to the Ministry of Tourism, i.e. the National Institute for Tourism Research and Development, the answers received can be considered absolutely representative and, above all, reliable.

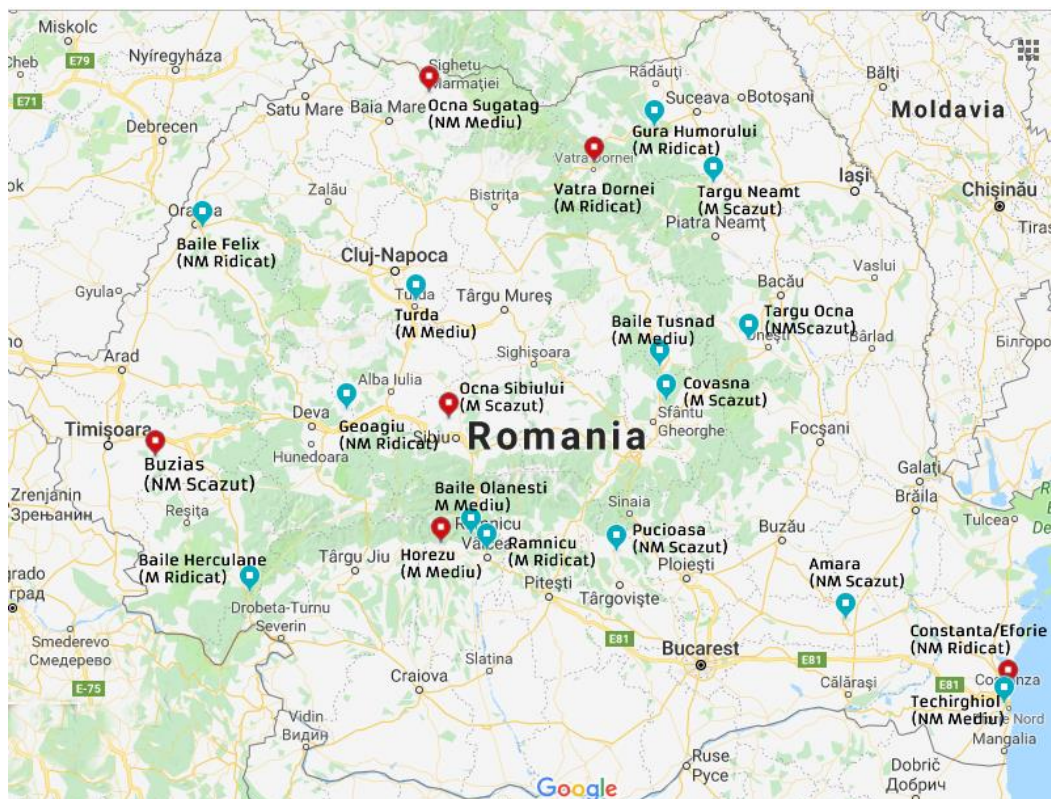
In the second stage, a meeting was organized with the representatives of the Ministry of Tourism, the academic and research environment (National Institute for Tourism Research and Development and the Romanian Academy, the Institute of National Economy), as well as the travel agencies, while the representatives of the category associations couldn't participate or weren't interested in participating in this activity (although they were repeatedly contacted both in writing and by telephone, both in the first stage of the consultation with the experts panel and in the second stage).

During the meeting, through the Nominal Group Technique (NGT), the panel of experts was guided in rebuilding development scenarios of the identified tourism segments and scenarios to attract tourist flows to the localities subject of the case studies. The results were verified with the help of the case study results, with reference to the coherence of locally identified development scenarios.

Thus, the development scenarios of the tourism potential after 2023, the year in which the ROP effects can be manifested, were carried out through a participatory approach, through the involvement of the Experts Panel, following the steps outlined below:

1. Presentation of the territorial distribution of the financed projects, represented by the following map, showing the location of each tourist resort according to the classification used for the case studies selection. The localities selected for the case studies are highlighted in red.

**Figure 2.c.1. Localization of the projects under implementation within PA 7 (by 30 September 2018) and of the selected case studies**



Source: the evaluator's processing of the existing data from the database provided by the ROP MA

2. Identification of the tourist segments subject of the analysis with their relevant demographic characteristics, in particular the latest data on the resident population and the relative rate of demographic change observed between 2010 and 2018.
3. Description of tourist segments, by area and tourist attractiveness index and application of a nominal group technique (NGT) to identify, for each segment and for each tourist typology intercepted by the segment, the potential increase of the tourist flows by 2023. This is how development scenarios were built for the six identified segments.
4. Description of the carried out case studies (see Chap. 3) and the subsequent development of scenarios (through NGT) on the ROP projects' capacity to attract additional tourist flows. Six scenarios were developed for each resort subject to the case studies.

The obtained results were correlated with those obtained from the case studies in order to define the ROP's role in the evolution of tourism potential (Chapter 4).

Moreover, an on-line survey was drafted and administered in order to collect information on the current status of the projects financed from PA 7, which were not included in the case studies. The structure of the drafted questionnaire incorporated some of the elements addressed in the case studies, with an increased focus on the possible critical issues related to the project implementation process (see details in Chap. 3 b.4 and Annex 9).



The evaluation strategy foresaw as a final stage before drawing up the conclusions and recommendations, the organization of a focus group with national and regional authorities involved in ROP management and in the management of other regional development programs and policies (human capital, competitiveness, tourism).

The objective was to analyse the results of the evaluation and to make recommendations to be considered in the short/ medium/ long term (future programming period). Thus, the focus group was structured and used as a **tool for analysing the feasibility of the recommendations**, so as to present to the Managing Authority a series of reflections addressed to both local and central government, which can be accepted and integrated into policies and programming at local, regional and national level. An evaluation activity that provides recommendations that cannot be put into practice is not useful for the administration.

#### d) Limitations, constraints and solutions

##### Limitations, methodological constraints and solutions

The carried out evaluation activities were aimed at investigating the potential impact of the funded projects in the intervention contexts, taking into account the expected output and result indicators: increasing the number of visitors and increasing the number of jobs.

In this respect, we underline that the purpose of the analyses was not to give an opinion on the effectiveness and/ or the efficiency of the target values set in the ex ante phase. In fact, the analysis of the effectiveness and of the efficiency would entail the existence of outcome and result indicators whose targets are not subject to estimation processes neither too arbitrary nor too much influenced by external elements of the programme.

At program level, for example, it is foreseen that the employment increase in tourist resorts will be in the year 2023 equal to approximately 5,000 (4,907) new units (indicator code 1S26).

Coming to the level of the output indicators (even if the indicator regarding the increase of the visitors number cannot be considered as an "output" indicator, but rather of result or impact), the ROP sets the following target values:

- CO09 Sustainable tourism: Increase of the expected number of visits to the supported sites and attractions of the cultural and natural heritage: Visits/ year Target 2023 no. 10,000
- 1S27 Open space surface/ created/ rehabilitated buildings in tourist resorts/ Danube Delta: Square meters 10,100.

The adopted approach, as already mentioned, is part of the interpretative evaluation models and it is based on the identification of six case studies chosen on the basis of some variables (localization and tourist attractiveness) that can influence the results of the project (increase of tourist flows and employment).

The objective limit of the analysis is that the numbers (indicators) are estimated on the basis of the project results projected for 2023. **The analysis carried out within the evaluation could not enter into the details of actually completed projects** (all projects being under implementation), so that the work carried out together with the local stakeholders aimed at

finding more consistent estimates of the numbers indicated in the project fiches and in the MySmis information system, starting from the increase in the number of tourists.

The model used to estimate the occupational impact is one of the possible methods (i.e. it is not the only possible method), but it has the advantage of being correlated with the result indicator<sup>7</sup> on tourist flows. Thus, from a logical point of view, the model adopts the following sequence: additional tourists → the turnover of additional tourism → additional employees.

By punctual collection of contextual data available at county level and not at municipal level, two coefficients have been calculated that apply to the number of additional tourists, so that the potential increase in employment can be estimated more precisely:

- Turnover in the tourism sector (considering the average tourist expenses by type of tourist and the share of the foreign component);
- Turnover per employee; this ratio, applied to tourism turnover, allows to calculate the number of additional employees who can be employed to support the turnover increase.

However, the identified numbers should be considered as indicative: they should not be taken on a punctual basis because the confidence interval of the estimates is ample.

The ratio between turnover and employment in the tourism sector is based on historical series at county level. The lack of recent data at city/ locality level is not a significant limit to the estimates made. In the specialized literature, Shift and Share analysis procedures (based on the territorialisation at municipal level of regional or county indicators based on other municipal data - for example, taking into account the population) introduce only additional elements to correct the estimates, in our case, do not contribute significantly to the objective of the analysis.

Given that the forecasts on tourism flows (estimated in the in-depth interviews with beneficiaries) were characterized by wide variability margins, because they were based on the perceptions of the interviewees, we tried to reduce the subjectivity of estimates using the following tools:

- Illustration of contextual data on tourism flows to guide the interviewed beneficiaries to highlight the reasons behind the provided estimates;
- Consultation of the tourism experts panel to verify whether and how in the localities interested by the investments there is the real and concrete possibility, as well as the ability, to attract the tourist flows declared by the beneficiaries.

In addition, it is highlighted that:

- In the case studies, the evaluator checked the possible occupational impact, i.e. the socio-economic sustainability of the investment, both on the basis of the information included in the funding applications and by interviewing the beneficiaries.
- The environmental impact evaluation can only be carried out in the light of the legal provisions in force at national level with regard to investment projects, which are presumed to have been complied with at the stage of submitting the application for funding and the annexed documents. The environmental sustainability aspect will need to be deepened in the ex-post phase, by analysing the actual additional tourism flows

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<sup>7</sup> As already noted, this ROP indicator is conceived as an output indicator

and by analysing the anthropic pressure on the local system (sewerage, waste management, exploitation of natural resources).

- Equal opportunities evaluation does not apply to the projects providing for infrastructure investments, except if the evaluation pursues a 'gender' approach, which is different from the approach proposed by the European Commission.

### Other limitations of the evaluation

The following table briefly summarizes the weaknesses that can be additionally underlined in the evaluation process, with the related implications for its results.

Weaknesses	Implications on the results of the evaluation process
Involvement of the panel of experts in the validation phase of the case studies selection methodology	<p>Only 4 of the 15 organizations invited to participate in the written consultation provided feedback on the case studies selection methodology.</p> <p>The rest of the contacted organizations did not provide indications or comments, even after repeated (written and phone) requests to reply to the original message.</p> <p>The indications of the experts involved (2 of them are representatives of a regional cluster in the field of tourism and 2 are research institutes with national coverage) confirmed in any case the value of the selection methodology based on the tourism segment and the tourism attractiveness index according to the National Spatial Plan methodology, see Annex 3), this parameter being used at national level for strategic territorial planning.</p>
Involvement of experts panel in the construction of scenarios on tourist flows and the capacity to attract them in localities where ROP investments are made	<p>Only 6 of the 12 contacted experts participated in the NGT session to create impact scenarios.</p> <p>However, we underline the high level of specialization and the scientific value of the panel members, including the Romanian Academy, the National Institute for Research and Development in Tourism, the Ministry of Tourism and the representatives of the travel agencies.</p> <p>It is also pointed out that the results represent the agreed estimations on the evolution of the tourist flows after 2023, based on the analysis of the statistical data series analysed at county level (Annex 2)</p>
Final Focus Group regarding the recommendations	<p>Only 6 of the 15 invited organizations participated in the focus group session.</p> <p>The lack of participation of the ROP MA has certainly reduced the effectiveness of the process of sharing the recommendations in terms of better formulation and in view of assessing the feasibility of their application in the current and future programming period.</p>

## Chapter 3. Analysis and interpretation

### a) Collected Data

There are two types of data collected and used for the analysis; all collected data is exploited in paragraph b) Data analysis:

- qualitative data,
  - A. regarding the case studies on the beneficiaries' perceptions of the investments potential effects;
  - B. regarding the online surveys for RDAs and beneficiaries, on their perceptions on the effectiveness of the implementation phase;
  - C. regarding the experts panel, on the perceptions related to the development scenarios of the tourism segments financed by the ROP
- quantitative data,
  - A. regarding the case studies, monitoring data on output and result indicators (Annex 1);
  - B. regarding the context data (Chap. 2 (b) and (c)) on tourist flows at county level, on the turnover in the tourism sector and the number of employees at county level, on the average expenses of foreign and Romanian tourists;
  - C. regarding the case studies and the online surveys with RDAs and beneficiaries, of various types: estimates of additional tourists, workloads etc.

Quantitative data and qualitative indications were useful to capitalize the program's indicators and the additional indicators defined in the initial report, as shown in the following table.

Table 3.a.1: Quantification of the indicators proposed in the evaluation model

Indicator	UM	Indicator type	Source (ROP/ Proposal)	Observations	Quantified Value:
Average number of employees in tourist resorts	Number of employees	Result <sup>8</sup>	ROP	Insufficient indicator for the typology of the funded interventions <sup>9</sup>	
Increase in the expected number of visits to the cultural and natural heritage sites and attractions benefiting from support	Number of visits/ year	Outcome <sup>10</sup>	ROP and qualitative scenario analysis	The indicator refers to the additional tourists expected for 2023	77,056
Surface of the open areas/ created/ rehabilitated buildings in tourist resorts/ Danube Delta	Square meters	Outcome	ROP	The indicator refers to the value in the SMIS (if valued)	1,020,156
Additional indicator 1 Unitary cost of the created infrastructure/ number of visitors	Lei	Additional	Own calculations	For the 6 localities subject of the case studies	2,212

<sup>8</sup> It should be an impact indicator

<sup>9</sup> See explanations after the clarification table.

<sup>10</sup> It should be a result indicator

Indicator	UM	Indicator type	Source (ROP/ Proposal)	Observations	Quantified Value:
Additional indicator 2 Beneficiaries who have developed sustainability strategies and systems for the intervention/ created/ rehabilitated structures	number	Additional	Own calculations from qualitative analysis	For the 6 localities subject of the case studies	100% (6 out of the 6 consulted beneficiaries)
Additional indicator 3 Increasing the tourist attractiveness index	Tourist attractiveness index	Additional	Own calculations from qualitative analysis	For the 6 localities subject of the case studies	Increasing B and C components
Additional indicator 4 The potential impact on employment growth	qualitative	Additional	Own calculations from qualitative analysis	For the 6 localities subject of the case studies	889

Source: Evaluator's processing of the collected primary, secondary, quantitative and qualitative data

In particular, the projects' analysis showed that the indicator "Average number of employees in tourist resorts" is rarely capitalized in the MySmis system (only in one case), and it does not apply to most projects, as they do not provide specific interventions on public structures issuing a ticket at the entrance of the visitors. In fact, only in this case you would have available information about the number of employees hired before the project and the commitment of the beneficiary to employ personnel after the investment.

The additional employment impact indicator was estimated for the 6 analysed case studies, taking into account the increase in the tourists flow and their average expenses, on the basis of what was indicated in the application, in conjunction with the interviews with the beneficiaries' representatives and the context data extracted from the specialized literature. In the cases where the provided estimates did not correspond to the average trend of the additional annual tourists flows, these estimates were corrected taking into account that the indicator refers to additional tourists and not to additional visitors (data provided by ROP monitoring system involving the possibility of punctual registration of the visitors flow into a public structure that issues entry tickets).

### Findings regarding the output, result and impact indicators

Regarding the program indicators and the lessons learned for the future evaluations, the analysis of program indicators has identified two elements that should be considered in the future in monitoring similar projects targeting the sustainable development of the tourism sector, in the phase of defining and quantifying program indicators:

- Output indicators should take into account what can actually be defined as a policy target in the tourism sector. For example, the area in m<sup>2</sup> is correctly an output indicator, which, however, can be quantified only after selecting the projects, thus being used to verify the actual realization of the project. The number of funded projects can be instead a target objective established at the program level, taking into account the allocation of financial resources. The number of additional visitors is, instead, a result indicator, as it is manifested as an effect of the investment made.
- The increase in the number of employees is, however, an indicator that could be used as a result indicator only if the investment would concern a specific tourism structure that hires employees.

## b) Data analysis

### B1) MATRIX-BASED ANALYSIS

As mentioned in the analysis of intervention logic included in the Initial Report, PA 7 interventions focus on (but are not limited to) balneary and balneo-climatic resorts, mainly because there are other national programs financing other tourism segments. We refer in particular to the Tourism Investments Development Program adopted by G.D. 558 in 2017, which provides for the financing of tourist infrastructure of national interest (Făgăraș Mountains, Danube Delta and Sulina, Constanța Tourist Port) and tourist infrastructure of local interest, on various tourist segments (e.g. mountain areas, natural spaces, as well as balneary resorts, sports and so on). The matrix of complementarity between PA 7 and this program can be found in the following table. The analysis of the list of projects included in the national program suggests that there is a high degree of complementarity between the national program and the ROP 2014-2020, as the list includes also various localities that have projects under implementation through PA 7 (for example in the localities of Geoagiu, Amara, Băile Tușnad, Covasna, Techirghiol, Sârbgeorz-Băi, Eforie, Băile Olănești, etc.).

Table 3.b.1.1 Matrix of complementarity between ROP PA 7 and the National Program for the development of tourism investments

Complementary program / correlated relevant actions	Tourist investments of national interest			Tourist investments of local interest
	Development of the ski infrastructure, Făgăraș Mountains	Balanced and integrated development of the tourist area in the Danube Delta and of Sulina resorts	Development of the tourist leisure infrastructure - tourist port, Constanța	Investment in the tourist infrastructure in mountain areas, natural spaces, adventure park, recreation areas, spa resorts, sports facilities, and so on
Tourism Investments Development Program - Tourism Investment Master plan	√	√	√	√
ROP 2014-2020 Axis 7				√

Source: The evaluator's processing from the documentary analysis

There are various strategic documents drawn up at national level to support the tourism sector, namely:

- Master Plan for the Development of National Tourism 2007-2026,
- Master Plan for the development of balneary tourism 2009,
- National Strategy for Ecotourism Development in Romania 2009,
- Strategic guidelines for the sustainable development of deprived mountain areas.



However, all these documents, except for the Strategic Guidelines for the Sustainable for the sustainable development of deprived mountain areas<sup>11</sup>, are out-dated and have been drawn up more 10 years ago. In addition, they may be purely theoretically relevant, but they are not concretely relevant to the creation of synergies as they are not accompanied by an implementation plan with a specific budget and specific implementation measures. From this point of view, the National Rural Development Program (NRDP) 2014-2020, which specifically finances measures for the development of tourism accommodation and tourism services in rural areas, presents much more interesting aspects of complementarity with ROP 2014-2020 (see the matrix below), being able to increase the reception capacity of tourist localities, as compared to the increase in tourist flow.

Regarding the measures promoted by the NRDP 2014-2020, there is a potential complementarity (whose effective manifestation depends on the capacity of the NRDP eligible beneficiaries to absorb the allocated funds, in the localities that have projects under implementation from PA7) with the measures aimed at diversifying the rural economy, which aim, among other things, at the development of craft and tourist activities (tourist accommodation structures, leisure facilities, sports activities, tourist services, etc.), these measures being likely to increase the potential impact on the local economy of the infrastructures created through PA7.

Table 3.b.1.2 Matrix of complementarity between ROP PA 7 and NRDP 2014-2020

Complementary program/ related relevant activities	Craft activities	Tourist activities (accommodation services and structures)				Access infrastructure to the tourist resort	Infrastructure for tourism leisure / sport	Rehabilitation of green spaces	Rehabilitation of open spaces	Rehabilitation of natural spaces
		Agro-tourism	Recreational tourism services	Park / tourist accommodation services	Tourist guide services					
National Rural Development Program 2014-2020 Sub-measure 6.2 and 6.4 Support for the establishment of non-agricultural activities in rural areas	√	√	√	√	√					
ROP 2014-2020 Axis 7						√	√	√	√	√

Source: The evaluator's processing from the documentary analysis

Besides the above mentioned measures, we can mention the main programs of the Ministry of Culture (non-exhaustive list), which may be able to create synergies with the infrastructure interventions financed from PA7. Among these we mention:

<sup>11</sup> Which, moreover, includes a specific strategic objective dedicated to increasing the attractiveness of mountain areas, including through tourism development measures, mainly implemented through the NRDP.

- The CultIn program, which targets entrepreneurs working in the cultural and creative industries;
- The ACCES program, which supports cultural actions and projects in the fields of visual arts/ architecture, written culture, cinema/ audio visual, performing arts, intercultural dialogue, immaterial patrimony/ mobile cultural heritage.
- Priority cultural projects, including film festivals, theatre, minority culture, and so on.
- The National Culture Day, which finances the organization of cultural and artistic events and social-cultural actions dedicated to the celebration of the national day.



All these cultural programs and projects can create synergies with PA7 as they represent those soft measures that are lacking in the PA7 intervention logic.

## B2) TOURISM STRATEGIES AND THE PROJECTS' ROLE

Each territory, each tourist locality, through the scheduled interventions incorporates a medium to long-term tourism development strategy. In order to evaluate, in this preliminary stage of the Priority Axis implementation, how the financed interventions will contribute to the development of tourism, and consequently, of the local economies, in drafting the case studies we have tried to understand the tourism development strategies underlying these investments, with the help of project stakeholders. In the 6 analysed localities there are 11 projects (44% of the total financed projects), totalling 170,438,829 lei.

Here are illustrated the punctual elements resulting from each case study for the identified segments.

Table 3.b.2.1: Tourist segments for low tourist attractiveness index localities

segments	Strategy, output, marketing	Non-mountainous area	Mountain area
TAI			
Low	Locality	<b>Buziaș</b> 	<b>Ocna Sibiului</b> 
	Starting tourist segment	Balneo-climatic and cultural	Balneo-climatic and cultural
	Key elements	The project is part of the Local Strategy aimed at increasing the number of tourists in the area. This strategy is designed for the period 2016-2030. Being one of the most visited attractions in Buziaș even	The project aims to create the necessary preconditions to attract investors to the tourist resort by modernizing 3,106 m of road infrastructure and creating a 5,560 m <sup>2</sup> parking area.


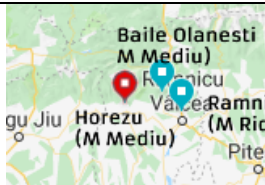


segments	Strategy, output, marketing	Non-mountainous area	Mountain area
		before the implementation of the project, it is certain that after all ideas will be implemented, this tourist attraction will bring more and more tourists. The balneo-climatic resort is a resort of national importance for the treatment of cardiovascular diseases and for its digestive waters.	Increasing tourist attractiveness of the balneo-climatic resort by creating specific recreational facilities on an area of 38,707 square meters, as well as areas for recreation, sports and health (football field, 2 tennis courts, mini-football field) on an area of 14,964 m <sup>2</sup> .
	Target group/ tourist segment	Families, recreation tourism, use of natural resources for tourism purposes	Wellness, recreation tourism, use of natural resources for tourism purposes
	Outputs	A. Rehabilitation of the natural tourist attraction - Buziaș Central Park B. Rehabilitation of 28 hectares of the Central Park - built 140 years ago C. Rehabilitation of 4 hectares surrounding the Central Park D. Rehabilitation of the alleys E. Refurbishment of playgrounds for children F. Rehabilitation of artesian fountains G. Improvement of the street lighting system	The output details include also the capitalization of natural resources such as: - 1 rehabilitated park "Statuia minerului" - 1,715 m <sup>2</sup> - 1 rehabilitated space - "Lacul Pânzelor", 3,457 m <sup>2</sup> - 1 rehabilitated space "Lacul fără fund", 3,964 m <sup>2</sup> - 1 rehabilitated space "Lacul Verde - Popular" (refurbishment of a playground for children aged 1 to 15), 11,873 m <sup>2</sup>
	Strategic links	All the interventions are envisaged in the city's 2016-2030 strategic development plan.	Local development plans
	Marketing	There is a marketing plan at the local and county level	There is a marketing plan at the local and county level

Source: Evaluator's processing of the case study analysis

**Elements to note:** The project under implementation in Buziaș is more focused on the valorisation of recreational areas, while the ongoing project at Ocna Sibiului focuses more on the tourism use of natural resources. Both interventions are integrated into the strategic development plans at local level and provide for a marketing plan (these are mandatory issues in the Applicant's Guide).

Table 3.b.2.2: Tourist segments for localities with a medium tourist attractiveness index



segments	Strategy, output, marketing	Non-mountainous area	Mountain area
TAI			
		Ocna Sugatag	Horezu
Medium	Locality		

segments	Strategy, output, marketing	Non-mountainous area	Mountain area
	<b>Starting tourist segment</b>	Balneo-climatic and cultural	Mountain and cultural
	<b>Key elements</b>	Ocna Șugatag is a tourist resort based on the therapeutic effects of salt, strongly related to the salt mines, 36% of the nitrates in water having strong therapeutic effects. In 1972, the population financed itself a public structure for treatments. Since that time, many boarding houses and hotels have appeared, and the tourist segment has changed a little, after being focused for decades on the middle-aged tourism. In the last ten years the City Hall has begun to think about alternatives to the tourism segment focused on the older population, and this project is part of this alternative.	Creating an emblematic and defining space for the Horezu cultural and historical tourist area, with an area of 5,788.10 square meters, by rehabilitating the pedestrian zone of the resort, using local specific architectural elements.
	<b>Target group/ tourist segment</b>	Families, wellness	Families, cultural events
	<b>Outputs</b>	1. Architectural modernization and exterior landscaping on a total area of 12,617 m <sup>2</sup> . Thus, the rehabilitation of the pedestrian zone and the modernization of the civic center area of the commune are envisaged, with the following measures and intervention directions 2. Rehabilitation of the street network. 14 streets will be restored on an area of 74,831.20 m <sup>2</sup> , with a length of 16,251 km, and also a 375 m <sup>2</sup> parking space, as follows. 3. Upgrading the public lighting network	The rehabilitation of the central area aimed by the project with the related urban and tourist infrastructures (public lighting, public toilets, electrical networks, water-sewage), infrastructures for information (Wi-Fi networks, ambient sound), relaxation (1 gazebo, 5 pergolas, 30 benches) and recreation (a children's play area of 168.72 m <sup>2</sup> , 2 electronic street display panels, electrical connection facilities for the mobile stage and event tents)
	<b>Strategic links</b>	Local development plan. Starting with 2015, the town hall started to show interest the city's growth by attracting young architects who arrived at the resort and had the freedom to imagine the future of the city.	SW Oltenia Regional Development Plan 2014-2020 The Integrated Strategy for Sustainable Development of Valcea County for the period 2015-2022 The Economic and Social Development Strategy of Horezu 2014-2020 Master Plan for National Tourism of Romania 2007-2026 National Strategy for Ecotourism Development in Romania 2016-2020 National Strategic Guidelines for Sustainable Development of the Disadvantaged Mountain Area 2014-2020.
	<b>Marketing</b>	There is a marketing plan at the local level	There is a marketing plan at the local level

Source: Evaluator's processing of the case study analysis

**Elements to be noted:** The project under implementation at Ocna Șugatag focuses mainly on the modernization of basic infrastructure (green spaces, public lighting, streets, car parks) at the level of the tourist area, while the Horezu projects focus on the modernization of structures for cultural events. Both interventions are integrated into the strategic development plans at local level and provide for a marketing plan (these are mandatory issues in the Applicant's Guide).

Table 3.b.2.3: Tourist segments for high tourist attractiveness index localities

segments TAI	Strategy, output, marketing	Non-mountainous area	Mountain area
High	Locality	Eforie 	Vatra Dornei 
	Starting tourist segment	Balneo-climatic and seaside	Balneo-climatic and mountain
	Key elements	The project is part of a tourism promotion strategy for the locality and it envisages: A) Rehabilitation of the tourist attraction of natural utility - Belona Lake B) Rehabilitation and modernization of the public utilities infrastructure in order to capitalize the tourist attractions in the city of Eforie C) Modernization and rehabilitation of the public utilities infrastructure to increase the competitiveness of tourist attractions in Eforie Sud	The project aims at capitalizing the tourist potential of the balneo-climatic resort of Vatra Dornei, by creating and expanding the recreational infrastructure, including the related utilities. The location of the project is on str. Calea Transilvaniei, in the area for sports and leisure activities.
	Target group/ tourist segment	Families	Families, recreational tourism, wellness
	Outputs	1. roads 2. Public lightning 3. Urban amenities 4. sidewalk, tracks, parks, theatres	1. Creation of a leisure area with a surface of 13,246 m <sup>2</sup> in the balneo-climatic resort of Vatra Dornei 2. The construction of a fenced tennis court/ basketball field with an area of 700 m <sup>2</sup> in the balneo-climatic resort of Vatra Dornei 3. The construction of a multisport field (covered in winter with a presostatic balloon), with a surface of 1,042.45 m <sup>2</sup> in the balneo-climatic resort of Vatra Dornei 4. Construction of 676 m <sup>2</sup> of (one way) bicycle tracks 5. Construction of 1,620 m <sup>2</sup> of pedestrian alleyways

segments	Strategy, output, marketing	Non-mountainous area	Mountain area
	<b>Strategic links</b>	<p>2015: National Tourist Information and Promotion Center of Eforie Sud</p> <p>2015: National Tourist Information and Promotion Center of Eforie Nord</p> <p>2013-2015: Eforie Nord tourist promenade</p> <p>2013-2014: Recreation park in the town of Eforie</p> <p>2011-2013: Promotion of marketing activities and specific tourist products for Eforie tourist destination</p>	<p>2012-2015: National Tourist Information and Promotion Center of Vatra Dornei</p> <p>2011-2013: Promotion of the touristic product the Country of Dorna</p> <p>2007-2010: Extension and rehabilitation of the pluvial and domestic wastewater network in Vatra Dornei tourist resort</p> <p>The Economic and Social Development Strategy of Vatra Dornei Municipality 2014-2020</p> <p>Master Plan for the Development of National Tourism 2007-2026</p> <p>Master Plan for balneary tourism development 2009</p>
	<b>Marketing</b>	There is a marketing plan at the local level	There is a marketing plan at the local level

Source: Evaluator's processing of the case study analysis

**Elements to be noted:** Eforie, as it has already been highlighted for some of the previous projects, presents investments partly aimed at capitalizing tourist attractions (e.g. Belona Lake) and it is generally characterized by interventions for improving urban infrastructure in favour of residents and tourists. The Vatra Dornei project focuses more on tourism and leisure infrastructures. Both interventions provide strategies to promote tourism at the local level.

### Findings on the tourism strategies of the localities subject to the case studies

The analysis of tourism strategies in the six localities subject of the case studies provides a framework of the interventions focused on the accessibility and the use of local resources for tourism purposes.

These elements are structured in specific projects that contribute to: improving internal roads infrastructure, rehabilitating the sidewalks, and developing public lighting and recreational structures.

In the absence of an instrument to be used by potential beneficiaries and RDAs for joint analysis and interpretation of the starting and final situation (i.e. after the intervention), there is a risk that the selection of projects will be based solely on the potential of increasing the number of visitors and employees in the public balneo-climatic structures.

In particular, the use of the tourist attractiveness index would allow the identification of a "starting point" in terms of tourism attractiveness, as well as the definition of the attractiveness components targeted by the investment, thus focusing on the potential "arrival point" in terms of tourist attractiveness.

An additional element for understanding the intervention context concerns the identification of the starting touristic segment of the tourist resort (activity carried out together with the Ministry of Tourism and the National Institute for Research and Development of Tourism and

validated with the actors involved in the case studies) and of the target group of the intervention.

These elements would allow the review of tourism strategies even from the perspective of tourism destination management: highlighting, for example, whether, through the financed investments, the tourism resorts consider that they will expanding their current target group of tourists or they want to reach a different target group of tourists (passing, for example, from family tourism to youth tourism).

From the analysis of the six case studies, the tourism strategies, mainly focused on the accessibility of tourist resorts, address the target groups already targeted, highlighting a preference of the beneficiaries to strengthen the strategies for the existing target groups, rather than to diversify the targets. This element, in the evaluator's view, should be subject to a technical evaluation also during the funding applications' submission phase.

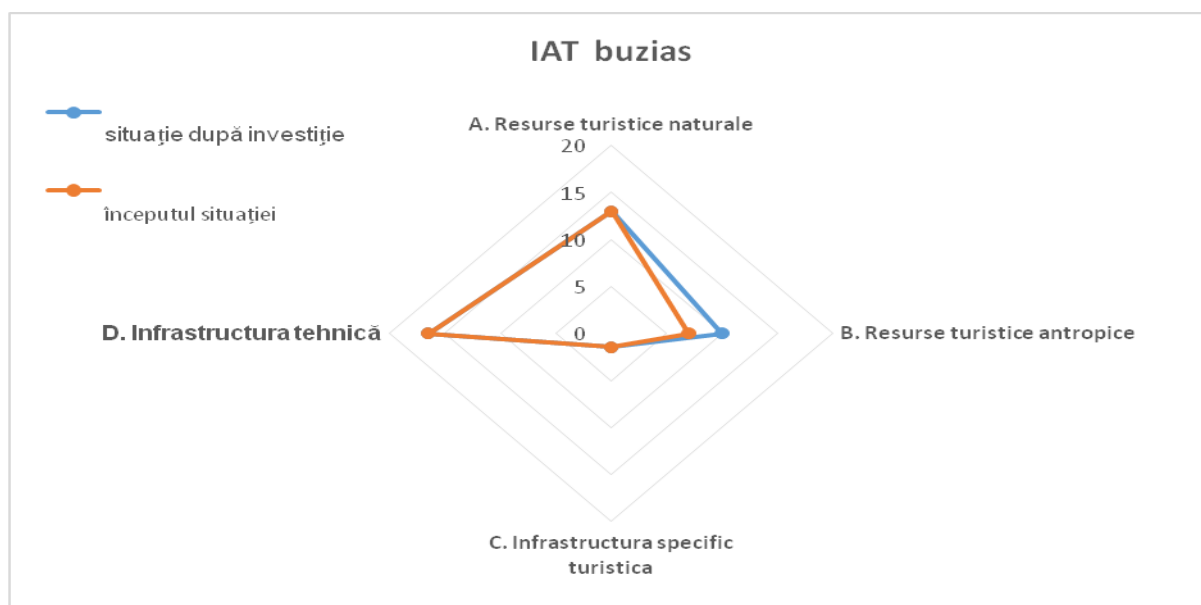
### B.3 EXPECTED IMPACT IN THE RELATED INTERVENTION CONTEXTS

*This chapter presents the outcome of the case study analysis, following the documentary analysis and the interviews with project beneficiaries. These results were finally discussed in the Experts Panel for the validation of the impact scenarios described below.*

#### I. Buziaș

It is anticipated that the interventions promoted in the tourist resort of Buziaș could have an impact especially on 1 element related to tourist attractiveness: tourist offer (component B. anthropic tourism resources), in particular by improving the usability of the Buziaș central park (with 140 years of history), as well as by improving public lighting systems, transport and recreation facilities.

**Figure 3.b.3.1. The potential impact of the ROP PA 7 project on the tourist attractiveness index of Buziaș locality**



Source: Evaluator's processing of the case study analysis

The interviewed representatives of Buziaș ATU predict that the project could attract about 4,000 new tourists per year, mostly Romanian tourists. It is foreseen that the importance of the foreign component after the investment could increase from 2-3% to 9-10%, even due to the "gravitational" effect that Timișoara will be able to exert starting with 2021, when it will cover the title of European Cultural City. It is estimated that the potential increase in the number of employed people thanks to the project could be of 43 employed persons/ Turnover.

### **Synergies with other interventions located in the same area**

At present, there are a number of complementary projects that, together with the project under review, will help to increase the flow of visitors to Buziaș resort. Among these, there are:

- a) "Wine Route" - a project that wants to present the variety of wine types produced in 5 main wineries spread over 500 hectares (TAI component B)
- b) Rehabilitation of a multi-purpose hall hosting sports events (TAI component C)
- c) Organizing 8 cultural festivals (TAI component B)
- d) Creating an aqua-park based on mineral waters (TAI component C)
- e) Public lighting (TAI component B)

Synergy with these interventions could generate a potential increase in tourist flow by around 8,000 tourists per year.

### **Subsequent impacts on dimensions that are not related only to the tourist attractiveness**

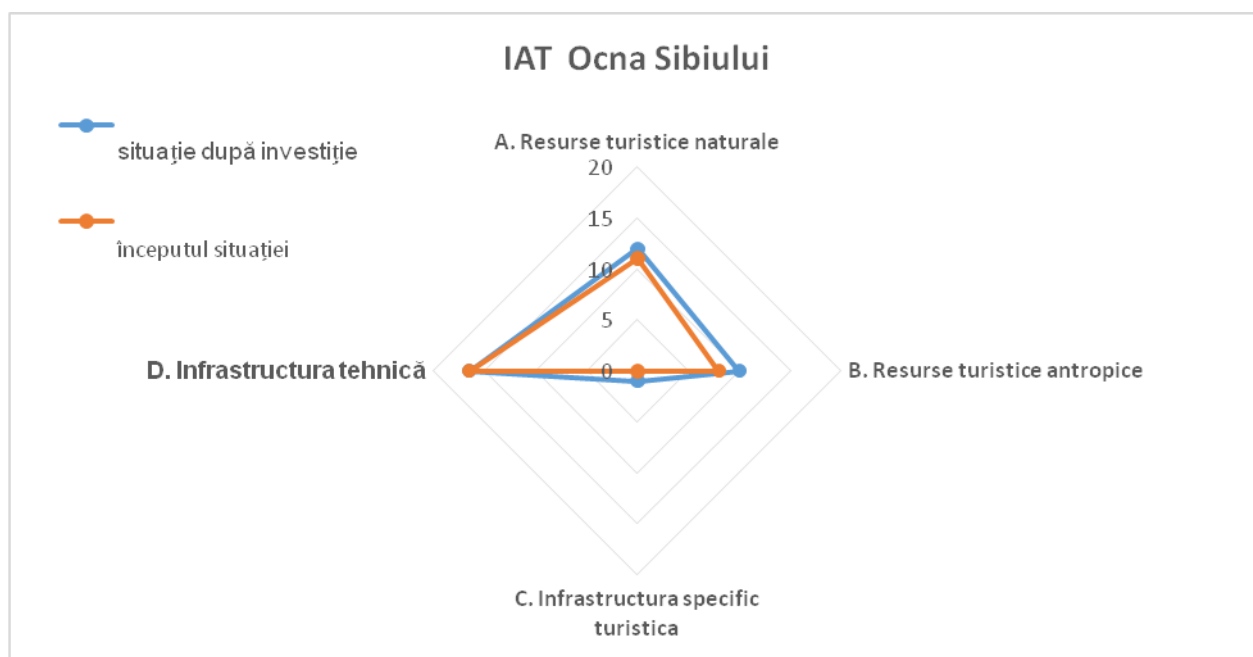
These actions will certainly enhance the quality of citizens' lives, as they will have access to new facilities and will not have to look for them in other areas.

## **II. Ocna Sibiului**

It is foreseen that the interventions promoted in the tourist resort of Ocna Sibiului could have an impact on 3 elements related to tourist attractiveness: to a small extent on the component A, through interventions for the landscaping of the lakes, which will reduce the erosion phenomena; the tourist offer (component B. Anthropoc tourism resources), especially by improving the use of the lake, as well as the component C, by improving the tourist infrastructures (such as signals, benches, restaurants, etc.).



**Figure 3.b.3.2. The potential impact of the ROP PA 7 project on the tourist attractiveness index of Ocna Sibiului locality**



Source: Evaluator's processing of the case study analysis

The interviewees, i.e. the partners of the project (ATU Ocna Sibiului and Sibiu County Council), estimate that the project could improve access to the lake area free of charge (at present a small amount has to be paid for access). Interviewees consider that the flow of visitors (currently up to 40,000 tourists in the peak season) could increase to about 200,000 visitors in the peak season<sup>12</sup>. The importance of the foreign component is of about  $\frac{3}{4}$  of the total. It is estimated that the potential increase in the number of people employed thanks to the project could reach 62 employed persons/ turnover.

At present, people working in the tourist lake related sector are about 270 (without the reception sector). Thus, the estimated growth would be consistent with the start date.

### Synergies with other interventions located in the same area

Other projects included in the tourism development strategy in the concerned area:

- a Romanian private company is investing in a new balneary resort to be opened in the summer of 2019 (TAI component C);
- The county council will soon start the works on the road leading from Sibiu to Ocna Sibiului (TAI Component C);
- New private boarding houses and B & B (TAI component C) are opened in the area.

The project partners expect a positive overall economic impact, although they have not yet identified the travel agencies they will work with. Moreover, they intend to develop twinning

<sup>12</sup> The number of visitors was turned into tourists by dividing the number for 12 months, and under the assumption of an average staying rate of 3 days. It is stated that at the county level the average number of tourists in the last 8 years is of about 33,000 units, which is why the 200,000 hypothesis had to be rebuilt to an index referring to tourists.

projects with other European localities with similar tourist attractions (such as salines, thermal springs, etc.).

### Subsequent impacts on dimensions that are not related only to the tourist attractiveness

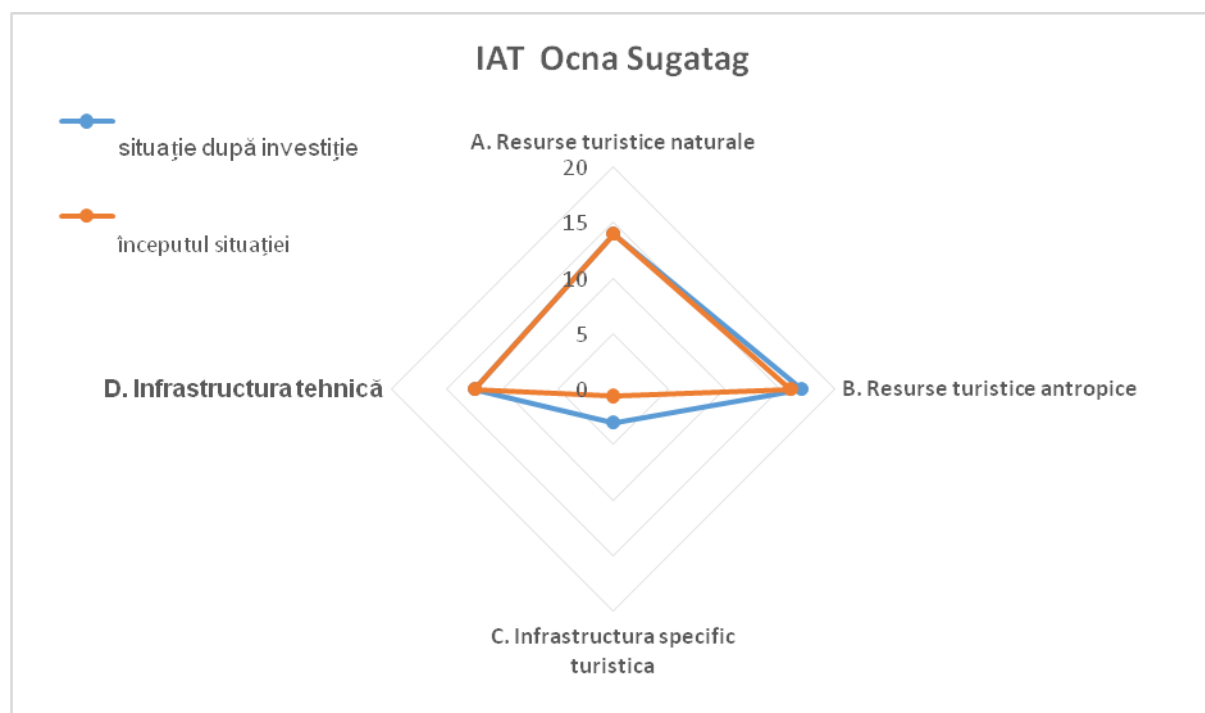
The project partners expect it to greatly benefit from the economic conditions of the area by offering new jobs, creating new businesses and supporting local agricultural products (for example, a local variety of traditional tomatoes).

Taking into account that the village has 3,200 inhabitants, the potential impact expected after the project will be remarkable.

### III. Ocna Șugatag

It is foreseen that the interventions promoted in the Ocna Șugatag tourist resort could have an impact on two elements related to tourist attractiveness: tourist offer (B. anthropic tourism resources), by improving public lighting systems, transport, recreation and specific infrastructure (C) by means of interventions meant to facilitate the use of the balneo-climatic resources for tourism purposes.

Figure 3.b.3.3. The potential impact of the ROP PA 7 project on the tourist attractiveness index of Ocna Șugatag locality



Source: Evaluator's processing of the case study analysis

The interviewed beneficiary's representatives estimate that the project could attract 15,000 additional tourists. The balneo-climatic resort is already attracting tourists from abroad (Ocna Sancta is also a twinned resort), it has a salty water lake that is not exploited yet. Therefore, the resort could attract tourists from Ukraine, Moldova and Russia throughout the year (which is



already happening). Treatment waters are available for 20 boarding houses in the area, and the privates pay for their use: therefore, after the investment is made, nothing will change in terms of the cost for accessing the treatments. It is estimated that following the investment, the occupational growth could be of 293 employed persons/ turnover.

### **Synergies with other interventions located in the same area**

There may be synergies with other projects financed by the ROP or national funds as follows:

- A 3 Million Euro project submitted in the framework of Human Capital OP 2014-2020 (result shortly available), in the social economy field, for the creation of 21 social enterprises, with a support of 100,000 euros each for the start-up phase. The population is quite interested, training will be provided and they will be involved.
- Rehabilitation of the cultural centre (NRDP 2014-2020) (TAI component B)
- Synthetic football ground (NRDP 2014-2020, through the Local Action Groups) (TAI component C)
- Large utilities infrastructure (90% completed sewer system), (TAI component D)
- Project for rehabilitation of technological schools.

### **Subsequent impacts on dimensions that are not related only to the tourist attractiveness**

This project involves community participation, and the public administration has agreed with the local operators that, after the implementation of the project, 9 investments will be made, especially in areas such as sports, tourism-based development, leisure infrastructure, 1 adventure park. Moreover, the City Hall wants to rehabilitate a small railway (which is now abandoned) that could connect Ocna Șugatag with the forest, with a small train that could pass through Breb locality and other localities for 11 km and another 16 -20 km on another route.

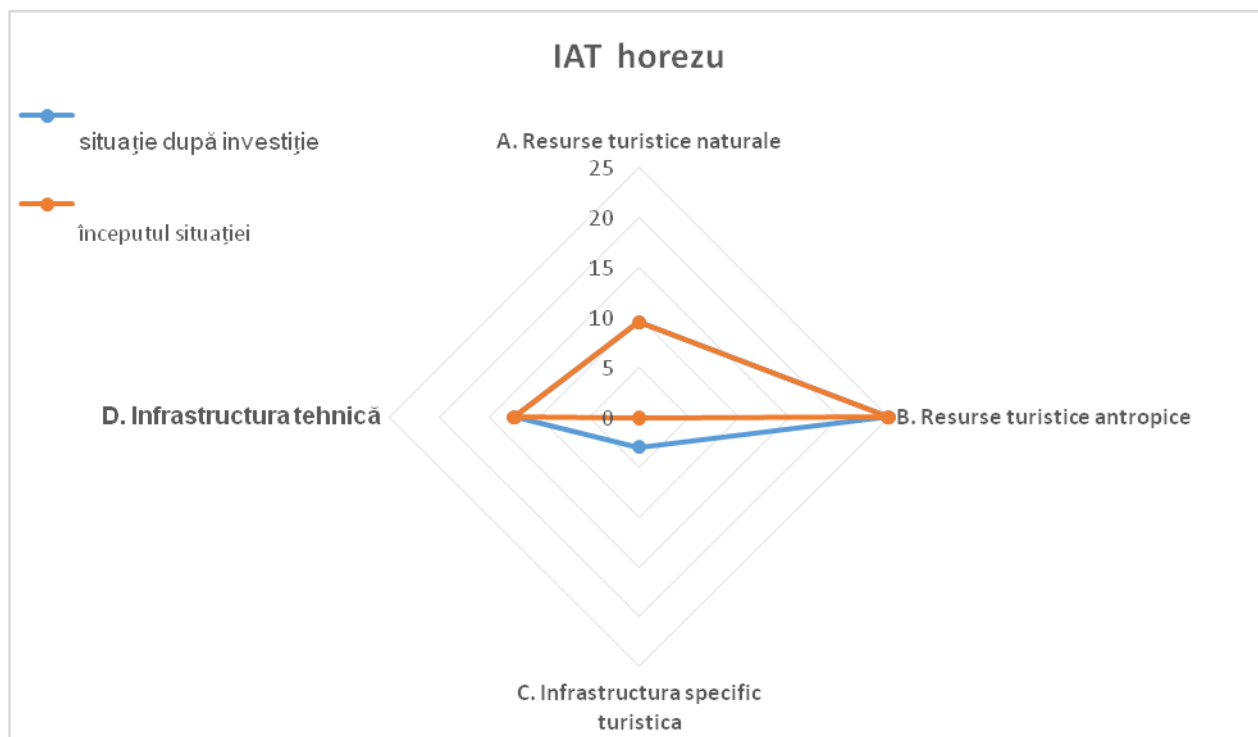
The intervention is expected to have a leverage effect on other sectors as well. For example, after the feasibility study, they also approved a project to develop a health centre and an emergence space for the population.

## **IV. Horezu**

The interviewed beneficiaries' representatives and stakeholders consider that the interventions promoted in the tourist resort of Horezu could have an impact on two elements related to tourist attractiveness:

- Component B, since innovative infrastructure for cultural events will be provided (such as an amphitheatre for concerts and other events lasting more than 3 days). It is worth noting that there are already 5 events lasting over 3 days each year. In this respect, it is emphasized that the specific indicator of Component B is already very high in the town of Horezu.
- Component C, considering that the entire tourist infrastructure will be improved (including recreation areas and other event typologies), offering increased staying opportunities in the town of Horezu.

**Figure 3.b.3.4 The potential impact of the ROP PA 7 projects on the tourist attractiveness index of Horezu**



Source: Evaluator's processing of the case study analysis

Interviewees consider that the potential increase in the tourists flow, estimated to be between 7,000 and 15,000 people per year, is also linked to the ability to attract the over 70,000 residents from the surrounding areas.

This is rather an "occasional" tourism, while for the correct estimation of ROP impact it is necessary to focus on the component of additional tourists.

It is considered that a realistic estimation of the additional tourists could be the more cautious hypothesis, i.e. about 7,000 additional tourists per year, most of them Romanian citizens. The proportion of foreign tourists after the investment could rise from the current 1% to 2%. In this regard, interviewees have highlighted the capacity to attract tourist in the Netherlands and the Czech Republic, especially with regard to camping (camper tourism). It is estimated that thanks to the project, job growth could be of 78 employed persons/ turnover.

#### **Synergies with other interventions located in the same area**

There are many ongoing projects in the area that influence the tourism sector:

- a new camping/ caravan space (1 hectare)
- a new ski resort with numerous chalets ready to be opened in 2020 (Romanian private operator)
- a new multicultural centre/ central city attraction (opening in 2021/2)
- rehabilitation of a promenade area adjoining the locality's historic centre (2020)
- renovation of the monastery of Horezu, UNESCO world heritage site (private operator)
- a new multi-function sports centre near the park supported by the ROP project (2021)

According to interviewees, synergy with interventions could generate an increase in the tourist flow of about 70,000 additional tourists starting from 2025.

### Subsequent impacts on dimensions that are not related only to the tourist attractiveness

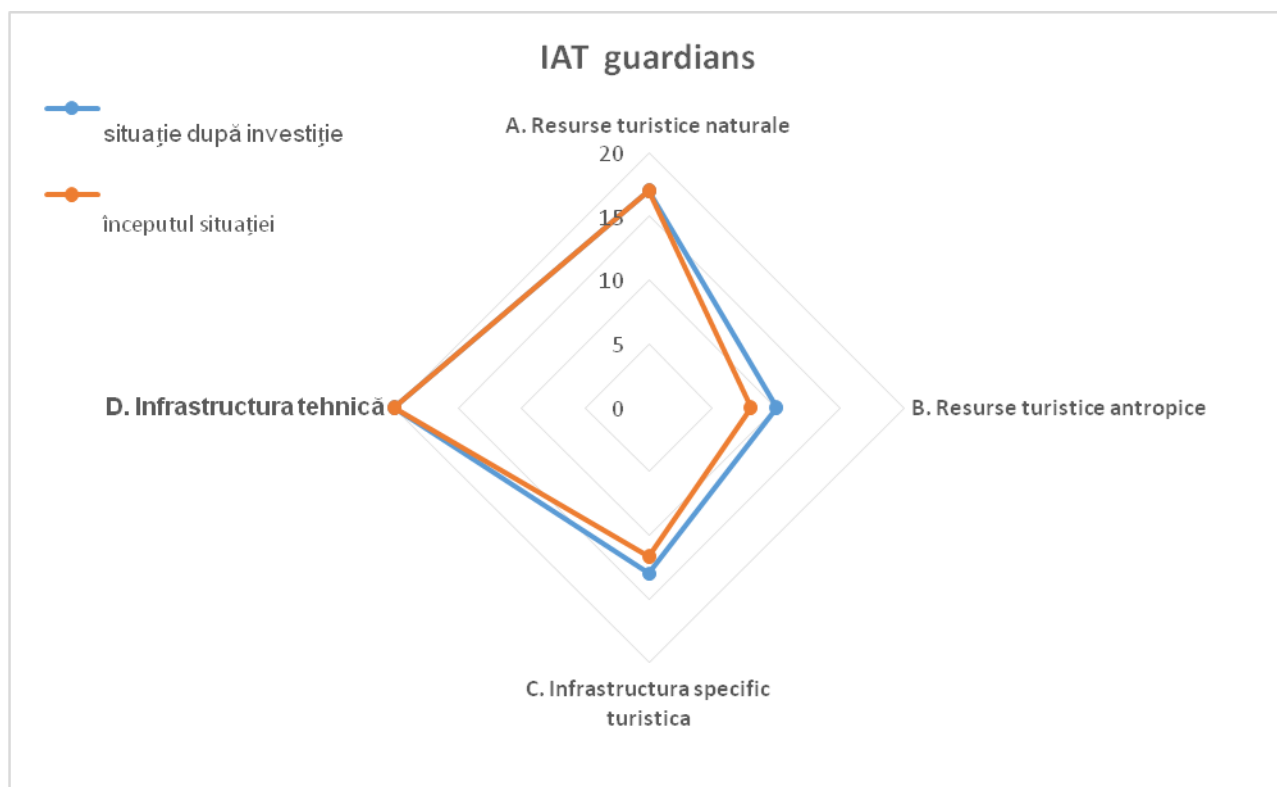
Interviewees believe that new tourism reception activities, especially B&B, could be activated through the project. Moreover, an increase in the sense of identity at the local communities' level is estimated, with a consistent increase in social cohesion and quality of life.

### V. Eforie

The projects included in the Eforie case study, as indicated by the interviewees, refer to three components of the tourism attractiveness index:

- Component A: lake cleaning, bank consolidation, reed cutting in order to ensure the lake's ventilation for a continuous oxygenation
- Component B, by renovating roads, rehabilitating public lighting, service infrastructures such as car parks, benches,
- Component C, by creating paths and bridges to access the Belona Lake area and cycling trails.

Figure 3.b.3.5. The potential impact of the ROP PA 7 projects on the tourist attractiveness index of Eforie



Source: Evaluator's processing of the case study analysis

The interviewed representatives of the beneficiary and stakeholders believe that these interventions can increase the current flow of visitors by 20%, which is estimated to be of around 170,000 visitors per year. The estimation made is of about 34,000 additional tourists in 5 years. The percentage of foreign tourists is in line with the county level figure (approximately 2.6-2.7%), the respondents considering that, due to the project, the percentage share can increase

up to 3% (especially Austrian and Bulgarian tourists). Therefore, the number of employees (additional impact indicator) is estimated to be approximately of 232 employees/ turnover.

### **Synergies with other interventions located in the same area**

According to the interviewees, there are other projects that could have positive and synergistic effects with the ROP financed projects. In particular, reference is made to projects in the field of sustainable mobility (the acquisition of ecological buses), which, in addition to contributing to the traffic fluidity (increasing the number of buses), will make the city more environmentally friendly. At the same time, there is another project underway, which provides for the restoration of two structures for cultural events during the summer.

At the same time, the interviewees sustain that there are also projects implemented by private entities that will increase accommodation offer from 700 to 1500, thus influencing component C of tourist attractiveness. Interviewees consider that, due to these additional investments, the increase in the number of tourists in the coming years could even reach 50,000 additional tourists per year.

### **Subsequent impacts on dimensions that are not related only to the tourist attractiveness**

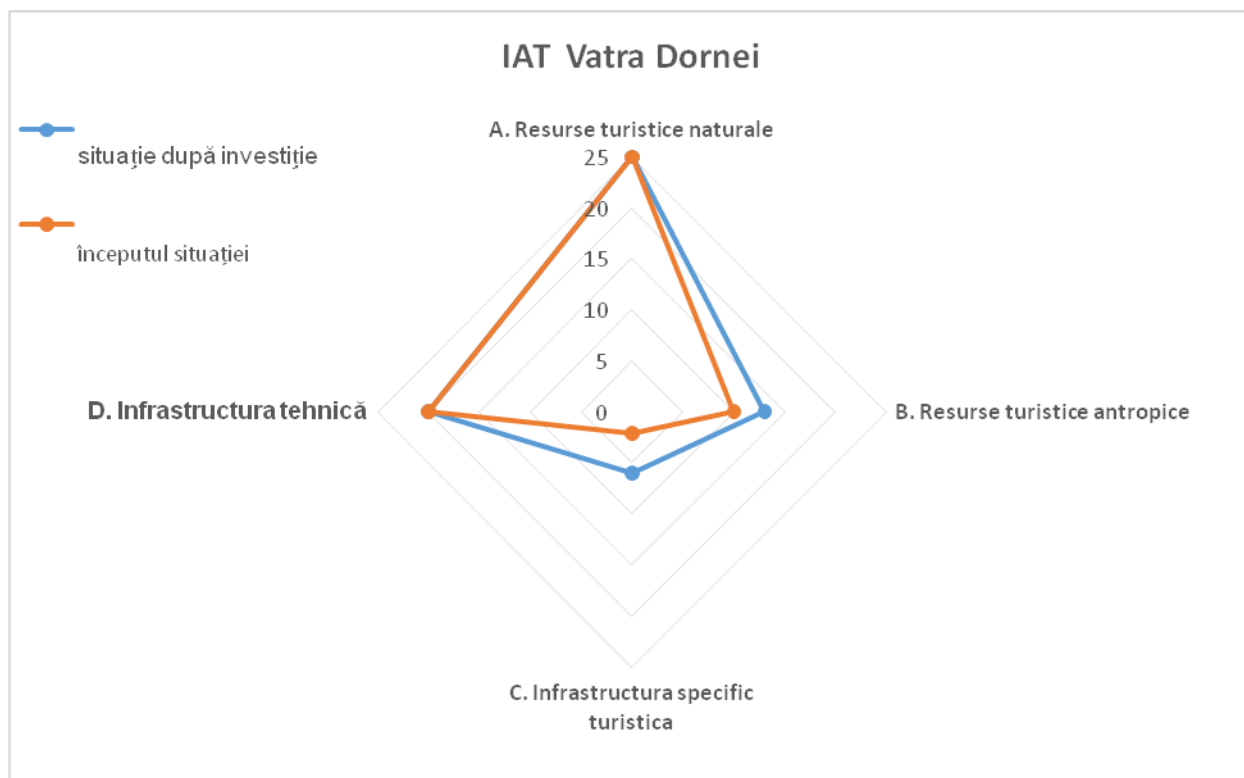
Interviewees consider that the type of funded projects will have a significant impact on the life quality of the residents (inhabitants).

## **VI. Vatra Dornei**

The projects under implementation at Vatra Dornei, just like the others, intervene on the tourist attractiveness through interventions that increase the endowment of services and infrastructures in favour of the inhabitants, acting in particular on the following components:

- Component B, rehabilitation and upgrading of the road infrastructure that allows access to the resort and of two important arteries for access to tourist attractions, as well as the refurbishment of outdoor playgrounds and sports facilities for children and youth in the resort's Central Park;
- Component C, construction of a leisure and recreation area of 13,246 m<sup>2</sup> in the balneary resort, refurbishment of a fenced tennis/ basketball court, installing a multisport surface (covered with a presostatic balloon), bicycle tracks.

**Figure 3.b.3.6. The potential impact of ROP PA7 projects on the tourist attractiveness index of Vatra Dornei**



Source: Evaluator's processing of the case study analysis

In the opinion of the interviewees, the additional tourist flows related to the intervention will amount to approximately 9,500 tourists per year (from 46,200 to 55,000-56,000 in 2023), and a further 2,000 additional tourists can be estimated as an indirect effect, being generated by the activities and services promoted throughout the tourism value chain. The estimation is in line with the increases registered at the county level (one of the few plausible estimates made at the level of the projects).

In the Vatra Dornei area, the percentage of foreign tourists is in line with that of Suceava (15%). The tourist flows are mainly from Germany and Israel, as well as from the Czech Republic, the Republic of Moldova and Poland. It is expected that due to the ROP projects the percentage of foreign tourists will increase even further, and it is estimated that, thanks to ROP interventions, the employment growth could be of 181 employees/ turnover.

#### **Synergies with other interventions located in the same area**

Representatives of the local government consider another relevant project in the field of tourism to be the restoration of the casino in Vatra Dornei, a Baden-Baden (Germany) style building that will be reused for cultural events and shows. In addition, the City Hall is currently developing other projects including the purchase of electric buses, the creation of parking facilities, bike sharing facilities, the improvement of public lighting, the development of rural tourism and the reconstruction of a part of the public hospital. All these interventions will favour the growth of tourist flows.

#### **Subsequent impacts on dimensions that are not related only to the tourist attractiveness**

Interviewees underline the importance of all interventions aimed at improving basic infrastructure (especially access roads), because, in their opinion, as long as the access to the

tourist resort is not improved, private investors will have difficulties and will not assume the task of improving the existing service structures. Thus, even if the investments are aimed at improving the life quality of the inhabitants, the objective is closely linked to the improvement of tourist attractiveness.

### Findings regarding potential impacts in the intervention areas

The analysis of the six case studies allowed an ex ante estimation of the potential occupational impact. This estimate can also be achieved in the future, by rebuilding the expected increase in additional tourist flows as a starting indicator.

From the estimation of the occupational impact, the following elements were highlighted, which should be taken into account in the ex post evaluation, as well as in the future programming, namely:

- The impact dimension refers to the way the funded intervention interacts with the context of the intervention. From the point of view of the actors involved in the case studies, the impact dimension coherently includes also the interventions that will be activated in addition to the ROP financing, such as the investments of the economic operators in tourist accommodation structures and in private spa/ balneary structures, as well as other public investments on basic infrastructures. Thus, the number of additional tourists takes into account the system effect that ROP generates in the intervention area;
- There is an overlap between the concept of visitors and tourists, although they are two different terms. This difference must be brought to a common denominator, and this is an exercise that the evaluator attempted to do in conducting the case studies. With the additional tourists, it is indeed possible to rebuild the amount of the total spending that tourists will be able to generate (through data obtained from studies and statistics at national level, for which reference is made to the specialised literature), starting from the turnover, it is ultimately possible to build the additional occupational impact. Visitors, instead, are a "hybrid" typology of "tourists" (possibly including residents of the same locality or county) who visit the tourist structures for which an entry ticket was provided but who do not stay overnight in the locality, thus generating a limited tourist expense.

Moreover, repeating what we have already highlighted in relation to the indicators, it is not possible to carry out analyses typologies of the efficiency and effectiveness of the financed interventions in relation to the established targets. Using estimates as benchmarking values to assess the effectiveness of ROP generates the risk of rebuilding an inconsistent analysis. Elements that can influence the results cannot be controlled in the ex ante phase. Instead, estimates of potential additional tourists, as well as the expected occupational impact, can be used for scenario analysis (for which reference is made to section B4).

The analysis of the synergies that can be activated locally provides a well-defined framework of the other interventions that influence tourism at the local level. In this respect, in each case study, together with the involved stakeholders, a set of interventions was identified, ranging from basic services (including health services to citizens and tourists), to sustainable mobility, rehabilitation of historic buildings, besides the investments of private operators (on reception facilities, tourism services, spa and commercial services). Complementarities concern other ROP



Axes and other national programs (e.g. Human Capital Operational Programme, NRDP, national funds).

In the evaluator's opinion, a weak point concerns the marketing strategies. These strategies, built to capitalize ROP interventions, have local, sometimes county, coverage. **The promotion of funded interventions should be carried out taking into account the tourism segment and the target group of tourists at a higher, regional and national level, so as to create a critical mass of tourist offer that can be promoted on national and international reference tourism markets (balneo-climatic, mountain, recreational, cultural, etc.) and to specific target groups of tourists.**

#### B4) THE IMPACT OF THE INTERVENTIONS AT THE TERRITORIAL LEVEL - EXPERTS PANEL WORKS

The Panel has reached a common vision of the development scenarios by 2023 for the segments interested in PA 7 funding.

Regarding growth scenarios, the following table summarizes the views of the experts:

Figure 3.b.4.1: Scenarios for the growth of tourist segments

segments IAT	Non-mountainous area					Mountainous area		
	Locality			Macro-region	County	Locality	Macro-region	County
Low	Buzias			WEST	Timiș	Ocna Sibiului	Center	Sibiu
	Amara			South Muntenia	Ialomița	Tg Neamt	NE	Neamt
	Tg Ocna			NE	Bacău	Covasna	CENTER	Covasna
	Pucioasa			South Muntenia	Dâmbovița			
Medium	Ocna Sugatag			NORTH-WEST	Maramureș	Baile Olanesti	SW	Vâlcea
						Baile Tusnad	CENTER	Harghita
	Techirghiol			SE	CONSTANTA	Turda	NORTH-WEST	Cluj
						Horezu	SW	Vâlcea
High	Baile Felix			NORTH-WEST	Bihor	Vatra Dornei	NE	Suceava
	Constanta			SE	CONSTANTA	Râmnicu	S	Vâlcea
						Gura Humorului	N	Suceava
	Geoagiu			EST	Hunedoara	Baile Herculane	WEST	Caras-Severin

Source: Evaluator's processing

For the segment **non-mountainous area with low tourist attractiveness index**, the experts agreed on the rating "**stable**" whereas in this segment we encounter traditional tourism, mainly domestic, but without high financial potential, and tourism attractiveness is low. In the case of the **mountain area with low TAI**, they have also agreed on the rating "**stable**", pointing out that the concerned areas have a high potential, which could be increased through additional investments.

Regarding the **non-mountainous area with medium TAI**, it was agreed that the tourist flow will increase as the potential is well developed and that the balneo-climatic segment provides an influx of tourists throughout the year. **The mountain area with medium TAI** is estimated to grow as a result of the massive potential, with the indication that there should be a better integration with the regional development policies, which is lacking at this time. In particular, problems were mentioned with regard to the privatization of public resources, but through the ROP the scenario is oriented towards an increase in the segment.

As regards the non-mountainous area with high TAI everybody voted for growth, the region being highly attractive. Mountain area with high TAI was also estimated to grow, given the contribution of foreign tourists who tend to spend more than the Romanian tourists.

Regarding the localities subject of the case studies, the Panel has defined common scenarios on the ability to attract additional tourist flows by 2023, as summarized in the following table:

Figure 3.b.4.2: Scenarios for the growth of tourist flows in the localities analysed in the case studies

segments IAT	Non-mountainous area			Mountainous area		
	Locality	Additional tourists / year	Employees (FTE) ROP	Locality	Additional tourists / year	Employees (FTE)
Low	Buzias	4.000	= 43	Ocna Sibiului	5.556	↑ 62
Medium	Ocna Șugatag	15.000	↑ 293	Horezu	7.000	↑ = 78
High	Constanța	34.000	↑ 232	Vatra Dornei	40.000	↑ 631

Source: Evaluator's processing

Regarding **Buziaș**, the panel of experts said that tourist attractiveness would remain stable, as the type of interventions financed are rather corroborated with the life quality and likely to attract more visitors than tourists. About **Ocna Sibiului** it was concluded that the investments made under the ROP are relevant to the balneo-climatic needs and the locality benefits from the proximity of Sibiu and of the airport. It was reached the conclusion that in the long run the flow of tourists will increase.

Regarding **Ocna Șugatag**, the potential is very high, as Maramureș is quite well promoted, so that it was agreed that in the medium term the tourist flow will increase. As regards **Horezu** there is a slight preference for stability, although the majority views lie between growth and stability. The pro-stability view motivates that the resort attracts visitors rather than tourists willing to stay in the resort. In contrast, pro-growth views have claimed that Horezu's strengths are hospitality and service quality.

**Constanța - Eforie** have been characterized by a strong growth of tourist flows. In the case of **Eforie**, it was agreed on a prospective of increase in tourist flows, all the investments made being relevant to the family main tourism segment.

Last but not least, the **Vatra Dornei** case study was discussed, everybody agreeing on the prospective of increasing the tourist flow, as a result of the investments made in the last 20 years, with the mention that the potential for receiving the tourists could be further exploited if the investment rate continues.

Finally, in order to have a framework closer to the potential of each area, the results of the evaluation process (columns C and G) were correlated with the context data (the other columns). In particular, the data were correlated with the historical series of people employed in the tourism and restaurants sector (source TEMPO ON LINE FOM 105F) and with the average variation in tourist flows between 2010-2017.

Table 3.b.4.3: Correlation of case study results with context indicators

Counties included in the case studies	Average change in the number of people employed in tourism (2010/2017) (A)	Average variation in tourists flow per year (2010-2017) (B)	Estimated increase in tourist flows as resulted from the case studies (C)	The ratio (%) between the estimate of growth and the average growth per county (E)	Number of employed people/ tourists (F) = B/ A	Estimates from the case studies (G)
Maramureș (Ocna Șugatag)	183	15,468	15,000	97%	85	51
Sibiu (Ocna Sibiului)	206	33,501	5,556	16.6%	162	90
Suceava (Vatra Dornei)	321	27,330	11,500	42.1%	85	64
Constanța (Eforie)	475	61,778	34,000	55%	130	147
Vâlcea (Horezu)	244	24,737	7,000	28.3%	101	90
Timiș (Buziaș)	302	26,171	4,000	15.3%	87	93

Source: TEMPO ON LINE and case studies.

We highlighted in yellow the most obvious deviations between the estimates made in the case studies and the evolution of the context data by 2017.

In particular, with regard to the forecasts of potential tourist flows, Ocna Șugatag is the only case study where the increase in the number of tourists envisaged for 2023 is 97% of the average growth observed between 2010 and 2017 at the county level. As outlined above, the estimates made take into account a multiplier effect derived from other projects that act synergistically in the reference locality, as well as the capacity to attract the flow of foreign tourists.

As far as occupational results are concerned, the estimates provided are in line with those obtained through the alternative calculation method proposed in the table (column F)<sup>13</sup>

In the case of Ocna Sibiului, the calculation coefficient for the case study data is much lower than the county level indicator, being activated here a new unit of "employed person" for every 90 tourists, while the indicator at County level is almost double (162).

### Findings on potential impact scenarios

Interaction with the Experts Panel on ROP Occupational Impact has enabled the following elements to be identified:

- In the tourist segments characterized by a low tourist attractiveness index, forecasts for the growth of tourist flows after 2023 are stable and in line with current developments. This shows that for the tourist resorts included in this tourism segment they could be lower.
- Thus, in the localities included in the case studies, the ability to attract additional tourist flows could be stable for Buziaș and Horezu and in line with the forecasts for the other localities.

<sup>13</sup> How many tourists are needed to activate an additional unit of "occupied person".

Thus, from the perspective of the ex post evaluation, particular attention should be paid to the analysis of tourist flows for the localities included in the low tourist attractiveness index segment.

As far as the potential occupational impact is concerned, it will be necessary to analyse the share of the "visitors" component in Buziaș and Horezu, as well as the ability to attract tourists who stay overnight in the locality.

## **B.5 ANALYSIS OF THE PA 7 IMPLEMENTATION SYSTEM**

Between the end of January and the beginning of March 2019, a survey was carried out among Regional Development Agencies in order to collect information on the following issues: the state of implementation of the priority axis in each development region; assessment of the allocation of human resources and tasks, as well as the coverage level of the skills needed to manage the calls; assessment of the difficulty and bureaucratic complexity faced by the beneficiaries and how to reduce it; how to cooperate with other institutions relevant for the implementation of the priority axis.

At the same time, during the period from February 14 to March 8, we conducted a survey at the level of ATUs that were not included in the case studies analysis in order to collect information about: the stage of project implementation (focusing on the launch of public procurement procedures); typology of actions funded under PA 7; the way to promote the investments made through the project, after its completion; estimating the capacity to attract a number of additional tourists compared to the current flow; existence of complementary projects; wider predicted impact on the territory and on the population of the locality.

Thus, 17 ATUs with projects under implementation were contacted and the response rate was of about 53% (9 ATUs); by adding it to the beneficiaries contacted to carry out the case studies (covering 11 projects) we obtain the analysis of 75% of all projects and the involvement of 65% of all beneficiaries with ongoing projects.

The following is a summary of the main aspects of these two surveys, as well as the conclusions that come out of them (the full version of the results analysis can be found in the annex).

### Analysis of the survey results at the level of the RDAs

The state of progress of the PA 7 from a procedural point of view, in March 2019 is as follows: all agencies have projects under implementation; 6 RDAs have projects in the contracting phase under PA 7; 4 RDAs have projects in evaluation; 3 RDAs have calls for project proposals published and 1 RDA has calls in the preparation phase.

In general, the intermediate bodies consider that staff allocation is appropriate to the needs (6 agencies out of 7), but 1 agency has a discordant opinion and mentions the following: overlapping of several calls launched in the same period for different investment priorities; verification of some activities related to the investment regarding the compliance with the provisions of the state aid legislation; a series of multiple supporting activities related to the evaluation, selection and contracting process, etc.

The status of the applications for funding submitted, evaluated and contracted during the period 2016-2018 is illustrated in the following table<sup>14</sup>:

Table 3.B.5.1: Situation of the applications for funding submitted, evaluated and contracted during the period 2016-2018 within the PA 7

	Total of applications submitted 2016-2018	Total of applications evaluated 2016-2018	Total of applications contracted 2016-2018	Contracting rate (deposited / funded)	Number of submitted applications - YEAR 2018	Number of evaluated applications - YEAR 2018	Number of funded applications - YEAR 2018	Number of submitted applications - YEAR 2017	Number of evaluated applications - YEAR 2017	Number of funded applications - YEAR 2017	Number of submitted applications - YEAR 2016	Number of evaluated applications - YEAR 2016	Number of funded applications - YEAR 2016
ADR SW Oltenia	14	11	4	28,57	9	6	3	4	4	1	1	1	0
ADR West	5	5	3	60,00	0	1	1	2	2	2	3	2	0
ADR South Munten	12	12	2	16,67	0	6	0	6	2	2	6	4	0
ADR North-West	13	13	5	38,46	0	6	4	7	7	1	6	0	0
ADR North-East	21	21	6	28,57	8	8	3	4	10	3	9	3	0
ADR Center	19	31	4	21,05	0	9	2	9	12	2	10	10	0
total	84	93	24	28,57	17	36	13	32	37	11	35	20	0

Source: Evaluator's processing of the survey results at the level of the RDAs

The distribution of the working tasks is relatively balanced and it highlights the importance of the tasks related to the **evaluation of applications for funding, contracting, monitoring and on-site visits, verification and authorization of the expenses, which obviously represent the most important processes in terms of allocating the RDAs resources.** At the same time, the distribution of tasks on the job profiles allows for the identification of many overlapping of functions, especially for leadership positions.

Regarding the degree of difficulty in managing calls for project proposals, most agencies stated that it is neither difficult nor easy for all the mentioned issues (technical, administrative, legal, IT, etc.)

Regarding the functionality of the IT systems for the management of the procedures, 5 Agencies out of 7 consider it appropriate ("satisfactory") as regards: the preparation of the funding applications to be submitted by the beneficiaries, financial support for financial investigations and monitoring support, and 4 other agencies consider it suitable for preparing the call. On the other hand, 3 agencies find it less satisfactory for the preparation of the call and 2 more agencies consider it less satisfactory for the other functions.

Regarding the difficulty of the administrative and management aspects faced by the beneficiaries, the intermediate bodies mentioned as being difficult the process of obtaining the certificates and authorizations, and 5 agencies mention the process of carrying out the public

<sup>14</sup> The differences compared to the values registered in the SMIS database with respect to the projects under implementation may be due to the fact that there are two projects under implementation since 2015. The highest contracting rates are found in the West and North West regions. At the same time, in the western region there is a relatively small number of submitted financing applications, while the largest number of projects submitted during the period 2016-2018 is observed in the North-East regions (21 projects)<sup>14</sup> and Centre (19 projects), where, however, the contracting rate is below 30%. The lowest contracting rate is found in the South Muntenia region, where from the 12 submitted projects only 2 were contracted by 30 September 2018.

procurement procedures as being difficult and even very difficult. In this context, 4 agencies out of 7 adopted measures to reduce administrative tasks for the beneficiaries.

The completeness of the documentation produced by the beneficiaries is considered satisfactory by all the agencies, and the quality of the annexes to the project (technical documentation) is considered satisfactory (6 agencies out of 7) and more than satisfactory (1 agency).

All Agencies responded that they had provided tools to facilitate access of the beneficiaries to funding, especially all the agencies provided for meetings on the territory, while most agencies provided information material (6 out of 7 agencies), guides and operational manuals (5 agencies out of 7), webinar and other remote information tools (4 agencies out of 7). The additional tools included technical assistance through the Information Office, e-mail, letters, as well as meetings at the IB headquarters.

Among the good management practices mentioned by the IBs, there are regional working meetings, working meetings between the MA and the IBs and the use of tested models. Instead, critical aspects of the implementation include the fact that call preparation is an activity carried out exclusively by the Managing Authority and, at least for PA 7, the financial allocation is considered to be insufficient by at least one agency.

#### Analysis of the survey results at the level of the beneficiaries (not covered by the case studies)

The survey at the level of the beneficiaries not covered by the case studies shows that the projects are in a generally incipient stage of implementation, given the stage of the main public procurement. Thus, only 2 cases out of 9 have ongoing procurement contracts. Another 4 beneficiaries are having awarding documentation in preparation and published procedures (the weights consider several possible acquisitions in a single project), and another 2 beneficiaries are having the documentation in the endorsement stage or they are in the stage of evaluation of the offers.

The free comments provided by the beneficiaries in addition to the information on the status of the public procurement reveal the existence of various problems that lead to delays in the conduct and completion of the public procurement procedures.

Moreover, it is mentioned that there is at least one case involving a beneficiary currently in the evaluation phase of the tenders for the award of the technical design contract and of other services, so that it is not possible yet to speak of the acquisition of works (i.e. the implementation of the project is at an even earlier stage).

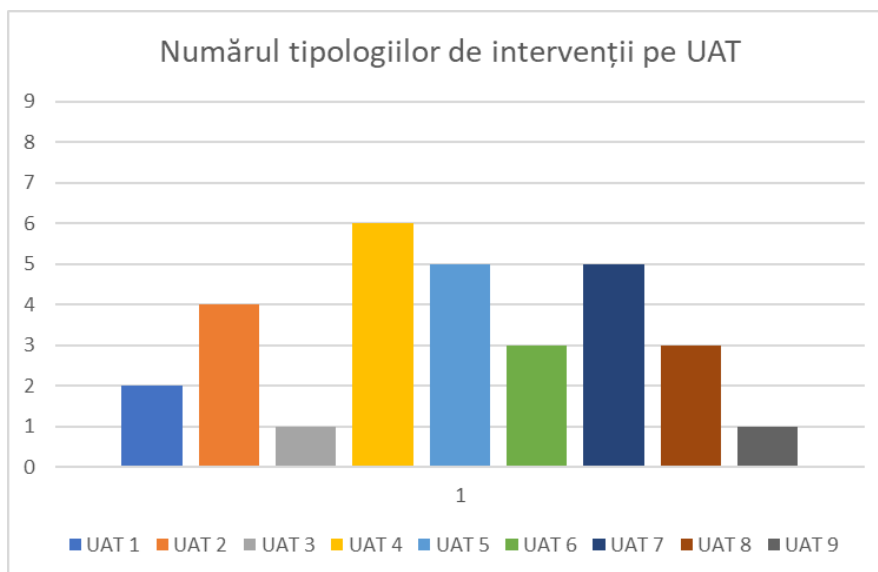
Two-thirds of the respondents (i.e. 6 of 9 TAU) stated that the projects target the following typologies of interventions: Interventions on sidewalks/ alleys/ pedestrian routes; rehabilitation of green spaces; creation/ refurbishment/ rehabilitation of recreational / leisure facilities.

And one-third of the respondents (i.e. 3 of 9 TAU) said their projects aim at: Interventions on road infrastructure and roadside utilities; building bicycle tracks; rehabilitation of the natural tourist attractions, including the construction of the related public utility infrastructure.

Thus, two thirds of the beneficiaries involved in the survey (6 ATUs) mentioned less than half of the 9 areas of intervention; in three cases the beneficiaries mentioning only one or two typologies, and only one beneficiary indicated that the proposed project enters 6 of the 9 investment categories.



Figure 3.B.5.1: Number of intervention typologies per ATU



Source: Evaluator's processing of the survey results at the level of the beneficiaries

With regard to the marketing component, only 5 respondents out of 9 said that the project foresees a marketing and external promotion action to communicate the results of the project in a tourism key, after its completion. Thus, all those who will carry out marketing actions include among them the preparation and dissemination of tourist information and tourism marketing materials through online media and mass media.

Referring to this question, the following is stated: the marketing plan is mandatory, but the question in the questionnaire refers to post-implementation marketing actions from the perspective of the sustainability of tourism promotion. Here the beneficiaries said the truth: i.e. the marketing plans probably do not include strong tourism marketing actions, but they are limited to promoting the project results, which in some cases do not concern a tourist structure, but access infrastructure, green spaces, and so on.

That is, the "tourism key" part of the marketing action may not be very strong or it may be completely missing. The answer to this question in fact demonstrates that only a part of the beneficiaries has inserted the PA 7 investment into a wider and more strategic tourism marketing strategy for promoting the tourist sector in the locality.

Regarding the increase in the tourist flow, 5 respondents out of 9 believe that through investment and appropriate marketing operations, the flow of tourists will increase by up to 2,000-3,000 units and over, and 8 out of 9 ATUs consider that this increase will concern also the foreign tourists.

Regarding the complementary investments, the vast majority of the respondents said that there are other relevant projects in the area, which could increase the tourist attractiveness of the locality. Most of the mentioned projects concern investments in road modernization/rehabilitation, private investments in accommodation infrastructure and investments for cultural heritage conservation.

Among the additional elements of the investments' potential impact on localities and communities, respondents mentioned: stimulating a favourable increase in employment;

increasing tourists' stay in the area as a result of capitalizing the natural and tourist potential; stimulating the development of private investments; reintegration of local communities into the cultural, social and economic life of the area, but also in the regional, national and international tourist circuit; enhancing road safety; improving the quality of the environment; improving the living standard of the population.

### Findings on the implementation process

Surveys conducted among RDAs and beneficiaries of ongoing projects allow the identification of the following elements:

- The priority axis should not have problems absorbing the funds in terms of contracting rate, considering that all RDAs have projects in evaluation and contracting, and so far the beneficiaries have responded very well to calls for project proposals, the value of the submitted projects exceeding by more than 3 times the value allocated to this axis.
- Although the RDAs generally consider satisfactory the quality of the funding applications and of the documents submitted by the beneficiaries, the projects success rate is differentiated at regional level, and it is below the average of about 28% in the regions of South Muntenia and Centre.
- Nevertheless, during the interviews and the survey, the beneficiaries with projects under implementation have often highlighted situations of investments blockage, mainly due to delays in the approval of the award documentation or in the completion of public procurement procedures (e.g. appeals or cancellations).

Regarding the level of internal integration and coherence of the investments financed under ROP PA 7, the sustainability of investments and the complementarity with other local initiatives, the results of the survey among the beneficiaries who were not involved in the case studies suggest the following:

- Funded projects are mainly focused on certain aspects (e.g. accessibility, improvement of community spaces, development of recreational structures), the complexity of the projects being not very high;
- Although the marketing plan is a mandatory document required when applying for funding, only a part of the beneficiaries has inserted the ROP investment into a truly "tourism" marketing strategy of the locality, with a "post-investment" promotion perspective;
- There are various other relevant infrastructure investments in the vicinity of the localities concerned by the ROP investments, especially concentrated on the county roads or bypasses of the main towns near the concerned locality, cultural heritage rehabilitation, urban development strategies and private investments in tourist accommodation structures.

### c) Results from the analysis

Evaluation question code	Question content	Observations
EG1 (General evaluation Question 1...)	<ul style="list-style-type: none"> <li>■ To what extent <i>has ROP contributed so far and will contribute in the future</i> to the diversification of local economies through the sustainable development of tourism through:</li> </ul>	The analysis is based on the potential scenarios of tourism development by 2023, carried out through the case studies and the panel of experts.
EG1.1	<ul style="list-style-type: none"> <li>○ increasing the average number of employees in tourist resorts</li> </ul>	The indicator takes into account the occupational impact, not only the "employees" but also of the stakeholders working upstream and downstream of the tourist industry chain.
EG1.2	<ul style="list-style-type: none"> <li>○ increasing accessibility and developing specific natural and cultural resources?</li> </ul>	The indicator takes into account how projects will affect component B in the tourist attractiveness index

**Answer:** The analysed case studies and the survey at the level of the beneficiaries not included in the case studies have shown that investments in tourism infrastructure provide for interventions to improve and develop road infrastructure, car parks, cycling paths, sidewalks and access ways to the natural and balneo-climatic areas. These are investments that have an impact on the quality of life of the inhabitants and consequently on tourists, often improving the access infrastructure to the tourist resort, as well as accessibility and usability of public spaces for tourist and recreation purposes (including green areas, parks and areas adjacent to roads).

Thus, two-thirds of the beneficiaries involved in the survey (representing 6 ATUs out of 9 respondents and 35% out of the 17 beneficiaries to which the questionnaire was sent) mentioned, among the funded investment typologies, access infrastructure to the tourist resort, and another third of the respondents (i.e. 3 ATUs) mentioned investments for the rehabilitation of natural tourist attractions (e.g. lakes).

A more in-depth analysis of the case studies has shown that some of the investments aim at improving green areas and historic parks, as well as at improving support infrastructures for recreational (sports infrastructures) and cultural activities (stadiums and theatres). In these cases, the components of the intercepted tourist attractiveness refer to the anthropic (cultural, architectural) and technical specific component (services for tourists). The following table shows the main TAI components concerned by the proposed investments for each locality, thus demonstrating the emphasis on components B and C, namely anthropogenic tourist resources (with strong elements of local cultural heritage) and specific tourist infrastructures (i.e. recreational facilities) :

Locality	Main tourist attractiveness index components affected by the investment
Buziaș	Component B
Ocna Sibiului	Components A, B and C
Ocna Șugatag	Components B and C
Horezu	Components B and C
Eforie	Components A, B and C
Vatra Dornei	Components B and C

The cultural component of tourism resources is indirectly supported by setting up spaces that can be used for cultural events, and generally by capitalizing tourist resorts as areas of national and local

interest, with cultural and historical traditions strongly rooted in the territory, but PA 7 does not finance directly the rehabilitation of cultural heritage.

Regarding the increase in the number of employees in tourist resorts, the documentary analysis of the approved applications for the projects included in the case studies showed that only in 1 case the beneficiary quantified this indicator, being directly related to the creation of jobs within the tourism structure targeted by the investment. In all the other cases, the indicator was not quantified, not being assumed by the beneficiaries. However, applications for funding include an estimate of the number of jobs to be created as a result of the investments, derived from the intention statements made by the economic operators in the consultation meetings organized during the investment programming phase.

Regarding the increase in the number of visitors to the tourist resorts, as it was envisaged and assumed in the financing applications, the employment impact scenarios identified through the Experts Panel suggest greater caution in the occupational performance of the tourism segments characterized by the flows of visitors rather than tourists staying overnight in the localities (Buziaș and Ocna Sibiului).

However, the analyses carried out show potential employment growth in all segments; these forecasts are based on the tourist flows envisaged by the projects and estimated at approximately 890 full-time employees (around 190,000 lei in infrastructure investments to generate a unit/ employed person).

Evaluation question code	Question content	Observations
T7.1 (Theme 7 Question 1...)	<ul style="list-style-type: none"> <li>■ To what extent are the elements of the intervention logic verified in practice (in implementation)? (e.g. stronger effects from the perspective of endogenous potential development are registered when the financed interventions are part of a territorial development strategy - as concluded by the ROP 2007-2013 impact evaluation). How can the logic of intervention be improved within this Priority Axis or for similar future interventions?</li> </ul>	The analysis is based on the potential scenarios of tourism development by 2023, built through case studies and experts panel, as well as on the results of the survey among beneficiaries
T71.1	<ul style="list-style-type: none"> <li>○ What mechanisms/ types of interventions have proven to be effective and why?</li> </ul>	The analysis takes into account the synergies with other existing tools/ programs at national level, as well as the existing initiatives at local level, according to the results of case studies.
T71.2	<ul style="list-style-type: none"> <li>○ What is the degree of sustainability of the cultural heritage and of the tourism dimension in the actions promoted through the ROP?</li> </ul>	The analysis takes into account the potential effect of projects on component A of the tourism attractiveness index. Moreover, the sustainability dimension was mainly focused on the socio-economic component deriving from the potential impact of the increase in the tourist flow.

**Answer:** All funded interventions are included in local development plans and they are linked to other programming tools at regional and sometimes national level. What can be noticed is that in the evaluation of the application for funding, in the evaluator's opinion and in the design of the interventions, there are no instruments capable of providing an integrated vision of the development of territorial tourism.

Within the evaluation, the TAI (Tourism Attractiveness Index) was used as an analytical tool for the context. The TAI in its various components (with the mention that another instrument could also be used, as long as it is used by everybody at the local level and it is known and agreed at regional and national level) has the advantage of identifying the factors of tourism development, the elements that establish the starting point of tourist attractiveness and hence the point of arrival.

However, as already mentioned in the answer to the previous question, PA 7 interventions are only part of a wider intervention strategy, which can be financed, for example, by other ROP Axes and other Programs:

- interventions in the roads network of regional importance (Axis 6);
- interventions on cultural heritage (Axis 5);
- interventions on sustainable urban development (Axis 4);
- measures to promote the competitiveness of SMEs (Axis 2);
- interventions for the diversification of the rural economy (Measure 6.4 and 7 of the National Rural Development Program, NRDP).

In this respect, the implementation mechanisms of the ROP do not allow an overview of the tourism strategy that each tourist resort could activate through other funds, thus failing to get a clearer view of the arrival point.

Therefore, the evaluator's recommendation for the next programming period is to discuss at the level of the Ministry of Regional Development and Public Administration/ Ministry of Tourism the opportunity to transform the tourism "axis" into an axis that integrates several financing instruments, allowing the development of more complex investments, where the integrated approach would be more obvious. This indication could have implications at a political level, as it pushes the territories towards greater competition in terms of public resources dedicated to the development of urban and rural localities. During the current programming period, PA 7 is exclusively dedicated to recognized tourist resorts, so PA 7 delimits public interventions on service infrastructures for the population and tourists, **just** within these typologies of localities.

In the tourist resorts where the case studies have been carried out, however, there is a link with other projects (not with strategies and programs), which in the coming years will have effects on the sustainable mobility, the recovery of architectural heritage, the development of events and cultural shows, private investments in tourist infrastructure and the increase in the number of accommodation places.

Regarding the dimension of sustainability, it is noted that in the case studies, the evaluator verified what the occupational impact could be, i.e. the socio-economic sustainability of the investment, both on the basis of the information included in the funding applications and by interviewing the beneficiaries. Thus, the scenario analysis has demonstrated that interventions will have a positive impact on the socio-economic development, by creating new jobs, as a result of the increase in the flow of tourists and, respectively, of the increase in the related economic activities.

As regards the dimension of the environmental sustainability of the interventions, the following clarifications are required:

- the sustainability of the effects of the project site on the environment is currently ensured by the ex ante evaluation procedures provided by law (Law no. 292/2018 and earlier on the assessment of the impact of certain public and private projects on the environment);
- the environmental sustainability of the projects under implementation and of the way in

which the increase in tourist flows could exert pressure on local environmental parameters (waste, sewerage, pressure on natural and cultural resources) should be addressed in the ex post evaluation, also taking into account other complementary projects to PA 7 that will be able to intervene on the service infrastructures offered to the local population (sewerage, waste, etc.).

In view of these considerations, it can be concluded that the environmental sustainability cannot be the subject of ongoing evaluation (but only of the ex ante or ex post evaluation).

Evaluation question code	Question content	Observations
T7.2 (additional question)	<p>■ To what extent have the financed interventions contributed to increasing the attractiveness of the tourist destination through specific actions, marketing included?</p>	<p>The analysis is based on the potential scenarios of tourism development by 2023, carried out through the case studies and the panel of experts.</p>
<p><b>Answer:</b> As already mentioned, since the projects are still partially implemented and partially under development, the contribution of the ROP to the attractiveness increase can only be analysed in qualitative terms on the tourism components and in quantitative terms with regard to the estimated additional tourist flows. In terms of attractiveness, ROP projects funded under PA 7 have an impact on the infrastructures of services and access to balneo-climatic areas. As the actors interviewed in the case study in Vatra Dornei synthesize: "As long as the access to the tourist resort is not improved, private investors will not take responsibility for improving the existing service structures. Thus, even if the investments aim at improving the life quality of the inhabitants, the objective is closely linked to the improvement of the tourist attractiveness".</p> <p>The effect of the marketing actions on the increase in the number of tourists cannot be assessed at present, although it is certain that local marketing actions will help to increase the visibility of the improvements to the infrastructure. However, according to the evaluator, it is missing a tourism segment marketing strategy, namely a strategy to be implemented after all the investments have been made, and there is no regional/ national strategy for dialogue and competition on international markets. Furthermore, the beneficiaries' survey confirmed that PA 7-funded investments are not always included in a wider tourism marketing strategy, to be developed after the end of the ROP project. Although the marketing plan is a mandatory document, it does not ensure that the investment will be promoted into a truly "tourist" key in the coming years.</p> <p>The Focus group with the RDAs and other stakeholders involved in the analysis, programming and promotion of tourism sector development interventions at various levels of governance (the Ministry of Tourism, the National Institute for Tourism Research and Development, Romanian Towns Association) highlighted how the Tourism Destination Law (which at the time of drafting this report is in the process of being approved) could allow for the involvement of the Destination Management Organization in future activities of capitalizing and promoting tourism interventions.</p>		



## Chapter 4. Conclusions, recommendations and lessons learned

### Findings regarding the output, result and impact indicators

Regarding the program indicators and the lessons learned for the future evaluations, the analysis of program indicators has identified two elements that should be considered in the future in monitoring similar projects targeting the sustainable development of the tourism sector, in the phase of defining and quantifying program indicators:

- Output indicators should take into account what can actually be defined as a policy target in the tourism sector. For example, the area in m<sup>2</sup> is correctly an output indicator, which, however, can be quantified only after selecting the projects, thus being used to verify the actual realization of the project. The number of funded projects can be instead a target objective established at the program level, taking into account the allocation of financial resources. The number of additional visitors is, instead, a result indicator, as it is manifested as an effect of the investment made.
- The increase in the number of employees is, however, an indicator that could be used as a result indicator only if the investment would concern a specific tourism structure that hires employees.

### Recommendations regarding the output, result and impact indicators

Taking into account the results of the analysis, it is recommended to use at the program level the number of financed projects as an output indicator, the number of additional tourists as a result indicator and the number of employed persons as an impact indicator. At the project level, it is suggested to use the surfaces (m<sup>2</sup>) concerned by the interventions as an output indicator, the km of rehabilitated/ built roads/ hikes and the number of additional tourist as a result indicator.

It is worth noting that sqm indicator regarding the surface concerned by the intervention falls within the Program performance indicators. The evaluator considers that this indicator is too random to be linked to performance and thus suggests identifying an alternative performance indicator that is linked to the number of funded projects.

We consider that the employment indicator represents a level of impact that requires to be quantified at the program level by the evaluator, and not by the beneficiaries, nor by the ROP MA in the ex ante phase. The reason for this is that in both the ex ante phase and in the current evaluation phase (when there are no completed projects) the establishment of a target would depend solely on the adopted estimation methodology, thus not representing a reference value in order to understand the extent to which the program was effective. What is recommended to be done in the ex-post phase, instead, is to analyse the extent to which the employment impact of the program influences the context data related to the persons employed in the tourism sector. This approach is used by DG Agri in evaluating the impact of the Operational Programs for Rural Development (EU Regulation 808/2014 Art. 7), and in this evaluation study in fact we used an analysis methodology based on calculating the capacity of the investment to "activate" a **unit of workforce** by increasing tourism turnover, driven by the increase in the flow of tourists, a methodology that can be applied in the future.

## Findings on the tourism strategies of the localities subject to the case studies

The analysis of tourism strategies in the six localities subject of the case studies provides a framework of the interventions focused on the accessibility and the use of local resources for tourism purposes.

These elements are structured in specific projects that contribute to: improving internal roads infrastructure, rehabilitating the sidewalks, and developing public lighting and recreational structures.

In the absence of an instrument to be used by potential beneficiaries and RDAs for joint analysis and interpretation of the starting and final situation (i.e. after the intervention), there is a risk that the selection of projects will be based solely on the potential of increasing the number of visitors and employees in the public balneo-climatic structures.

In particular, the use of the tourist attractiveness index would allow the identification of a "starting point" in terms of tourism attractiveness, as well as the definition of the attractiveness components targeted by the investment, thus focusing on the potential "arrival point" in terms of tourist attractiveness.

An additional element for understanding the intervention context concerns the identification of the starting touristic segment of the tourist resort (activity carried out together with the Ministry of Tourism and the National Institute for Research and Development of Tourism and validated with the actors involved in the case studies) and of the target group of the intervention.

These elements would allow the review of tourism strategies even from the perspective of tourism destination management: highlighting, for example, whether, through the financed investments, the tourism resorts consider that they will expanding their current target group of tourists or they want to reach a different target group of tourists (passing, for example, from family tourism to youth tourism).

From the analysis of the six case studies, the tourism strategies, mainly focused on the accessibility of tourist resorts, address the target groups already targeted, highlighting a preference of the beneficiaries to strengthen the strategies for the existing target groups, rather than to diversify the targets. This element, in the evaluator's view, should be subject to a technical evaluation also during the funding applications' submission phase.

## Recommendations and lessons learned

The suggestions below focus on the next programming period.

First, it is considered necessary to adopt a common tool for analysing and interpreting the tourism context. In conducting the case studies, the evaluator took into account the tourism attractiveness index, defined according to the National Spatial Plan (NSP) methodology (in force at the date of this report).

The use of an instrument such as the tourist attractiveness index (TAI) would allow for the identification of a "start-up" situation in which investment projects are to be inserted, as well as for the definition of the "arrival" target.

TAI is proving to be an interesting tool as it can be divided into several components that can accommodate the different dimensions of tourism. In the final focus group, aimed at discussing

the recommendations, the representative of the Cities Association agreed on the need to adopt a shared context analysis tool, such as the TAI, avoiding it to be used as an instrument for access to funds (e.g. without excluding from financing localities with a TAI higher than a certain value).

In defining tourism strategies, even the starting tourist segments and target groups should be taken into account, in order to understand to what extent the beneficiaries decide whether or not to strengthen their tourist offer to groups already targeted or to diversify offer to new target groups.

### Findings regarding potential impacts in the intervention areas

The analysis of the six case studies allowed an ex ante estimation of the potential occupational impact. This estimate can also be achieved in the future, by rebuilding the expected increase in additional tourist flows as a starting indicator.

From the estimation of the occupational impact, the following elements were highlighted, which should be taken into account in the ex post evaluation, as well as in the future programming, namely:

- The impact dimension refers to the way the funded intervention interacts with the context of the intervention. From the point of view of the actors involved in the case studies, the impact dimension coherently includes also the interventions that will be activated in addition to the ROP financing, such as the investments of the economic operators in tourist accommodation structures and in private spa/ balneary structures, as well as other public investments on basic infrastructures. Thus, the number of additional tourists takes into account the system effect that ROP generates in the intervention area;
- There is an overlap between the concept of visitors and tourists, although they are two different terms. This difference must be brought to a common denominator, and this is an exercise that the evaluator attempted to do in conducting the case studies. With the additional tourists, it is indeed possible to rebuild the amount of the total spending that tourists will be able to generate (through data obtained from studies and statistics at national level, for which reference is made to the specialised literature), starting from the turnover, it is ultimately possible to build the additional occupational impact. Visitors, instead, are a "hybrid" typology of "tourists" (possibly including residents of the same locality or county) who visit the tourist structures for which an entry ticket was provided but who do not stay overnight in the locality, thus generating a limited tourist expense.

Moreover, repeating what we have already highlighted in relation to the indicators, it is not possible to carry out analyses typologies of the efficiency and effectiveness of the financed interventions in relation to the established targets. Using estimates as benchmarking values to assess the effectiveness of ROP generates the risk of rebuilding an inconsistent analysis. Elements that can influence the results cannot be controlled in the ex ante phase. Instead, estimates of potential additional tourists, as well as the expected occupational impact, can be used for scenario analysis (for which reference is made to section B4).

The analysis of the synergies that can be activated locally provides a well-defined framework of the other interventions that influence tourism at the local level. In this respect, in each case study, together with the involved stakeholders, a set of interventions was identified, ranging from basic services (including health services to citizens and tourists), to sustainable mobility, rehabilitation of historic buildings, besides the investments of private operators (on reception

facilities, tourism services, spa and commercial services). Complementarities concern other ROP Axes and other national programs (e.g. Human Capital Operational Programme, NRDP, national funds).

In the evaluator's opinion, a weak point concerns the marketing strategies. These strategies, built to capitalize ROP interventions, have local, sometimes county, coverage. The promotion of funded interventions should be carried out taking into account the tourism segment and the target group of tourists at a higher, regional and national level, so as to create a critical mass of tourist offer that can be promoted on national and international reference tourism markets (balneo-climatic, mountain, recreational, cultural, etc.) and to specific target groups of tourists.

### Recommendations and lessons learned

The suggestions below focus on the next programming period.

The future program should focus on the possibility of inserting the theme of tourism into an integrated tourism development axis, with public and private beneficiaries, including Tourism Destination Management Organizations, and selection criteria that take into account the synergy between funded interventions, from a system perspective.

Thus, participatory processes will need to be promoted to develop a common vision of tourism development strategies for the 2021-2027 programming through national, regional and county consultations involving key public and private actors.

It is also recommended to update the national strategic and tourism policy framework, starting from the lessons learned and the results of the Master Plan for Tourism 2007-2026, in close cooperation with the responsible institutional actors (Ministry of Tourism and subordinated agencies). This process should involve strong participation of private-sector associations, in addition to local public authorities.

There is, moreover, the need to set **at a high-level of policy formulation**, segment-oriented tourism strategies that address international markets, with the possibility of capitalizing on the provisions of the law project regarding the management of tourism destinations, as well as involving organizations that will be set up at different levels of governance (national/ regional/ local).

In this context, promotional and marketing tools, which will necessarily have to accompany and support future investments in tourism, will be able to be programmed within a tourist destination logic, within a system approach, in relation to more extensive markets.

### Findings on potential impact scenarios

Interaction with the Experts Panel on ROP Occupational Impact has enabled the following elements to be identified:

- In the tourist segments characterized by a low tourist attractiveness index, forecasts for the growth of tourist flows after 2023 are stable and in line with current developments. This shows that for the tourist resorts included in this tourism segment they could be lower.
- Thus, in the localities included in the case studies, the ability to attract additional tourist flows could be stable for Buziaș and Horezu and in line with the forecasts for the other localities.

Thus, from the perspective of the ex post evaluation, particular attention should be paid to the analysis of tourist flows for the localities included in the low tourist attractiveness index segment.

As far as the potential occupational impact is concerned, it will be necessary to analyse the share of the "visitors" component in Buziaș and Horezu, as well as the ability to attract tourists who stay overnight in the locality.

### Recommendations and lessons learned

The suggestions and lessons learned are related to how to carry out the ex-post evaluation activity, which will have to take into account the potential scenarios of local development of the localities, considering the interaction with other ROP axis and interventions financed from other sources. Efficiency analysis will not be able to provide information that can be used to understand whether and how the ROP has achieved the set targets. The analysis will instead focus on verifying the ROP's contribution to the increase of tourist flows, analysing the data series on the evolution available at county level, as well as on how the financed interventions were able to activate new tourists' flows.

In particular, lower TAI tourism segments will need to be analysed to see whether the scenarios of the experts confirm or not the stabilization of flows and a relevant share of visitors component compared to tourists component, with a consistent limitation of the development capacity of tourism expenses and, respectively, of the activation of new jobs.

### Findings on the implementation process

Surveys conducted among RDAs and beneficiaries of ongoing projects allow the identification of the following elements:

- PA 7 should not have problems absorbing the funds in terms of contracting rate, considering that all RDAs have projects in evaluation and contracting, and so far the beneficiaries have responded very well to calls for project proposals, the value of the submitted projects exceeding by more than 3 times the value allocated to this axis.
- Although the RDAs generally consider satisfactory the quality of the funding applications and of the documents submitted by the beneficiaries, the projects success rate is differentiated at regional level, and it is below the average of about 28% in the regions of South Muntenia and Centre.
- Nevertheless, during the interviews and the survey, the beneficiaries with projects under implementation have often highlighted situations of investments blockage, mainly due to delays in the approval of the award documentation or in the completion of public procurement procedures (e.g. appeals or cancellations).

Regarding the level of internal integration and coherence of the investments financed under ROP PA 7, the sustainability of investments and the complementarity with other local initiatives, the results of the survey among the beneficiaries who were not involved in the case studies suggest the following:

- Funded projects are mainly focused on certain aspects (e.g. accessibility, improvement of community spaces, development of recreational structures), the complexity of the projects being not very high;

- Although the marketing plan is a mandatory document required when applying for funding, only a part of the beneficiaries has inserted the ROP investment into a truly "tourism" marketing strategy of the locality, with a "post-investment" promotion perspective;
- There are various other relevant infrastructure investments in the vicinity of the localities concerned by the ROP investments, especially concentrated on the county roads or bypasses of the main towns near the concerned locality, cultural heritage rehabilitation, urban development strategies and private investments in tourist accommodation structures.

## Recommendations and lessons learned

The recommendations and lessons learned with regard to the ROP implementation system relate both to the improvement of the current system and to the definition of mechanisms valid for the next period.

Regarding the current programming period, the Evaluator's recommendations include:

- Analysing the opportunity to strengthen the helpdesk functions of RDAs to support beneficiaries both in the guidance/ training phase and in the implementation phase, as part of the monitoring of procedural issues related to public procurement.
- In this respect, the JASPER approach could be adopted for large projects with an itinerant task force, or it could be envisaged that the contracting of specific expertise in the field of public procurement to be an eligible expenditure in support of implementation.
- Analysing the opportunity of not wasting the administrative effort of administrations that had unapproved projects, by reallocating resources from other less performing axes, taking into account the possibility of transposing unreported expenditures into 2021-2027 programming period.

For the next period, it is suggested to analyse the opportunity of regionally decentralizing the call for project management (in the next period) in order to ensure greater personalization of calls based on local/ regional specificities (e.g. local tourism resources, needs, the capacity of the eligible beneficiaries, and so on).

*The following table presents in a tabular and synthetic format the correlation between the evaluation questions, the findings, the conclusions, the recommendations, the responsible organizations and the priority of the proposed recommendations.*



Table 4.1: The Matrix of Findings, Conclusions and Recommendations

EQ	Evaluation Methods	Findings	Conclusions (necessity)	Recommendations	Priority category (H, M, L)	Responsible entity	Involved organizations
EG1	Analysis of context data and project monitoring data. Case Studies Panel of experts Survey among beneficiaries	PA 7 investments provide for interventions to improve and develop infrastructures that will have an impact on improving the life quality of local communities.  Investments funded under PA 7 have the potential to improve in particular the Component C of the Tourist Attractiveness Index, which is focused on the infrastructure component of accessibility of the resources and areas with tourism potential within the tourist locality.  Impact analysis should take into account the components that can be effectively activated locally throughout the tourism value chain. In the case studies, the increase in the flow of tourists is consistently correlated with other interventions that are systemically activated: private investments in accommodation and public catering structures, other public investments and training actions.  By improving the access conditions to the tourist resort and by creating tourist infrastructures and recreation areas, PA 7 interventions have a	C1. Investments in tourism should be based on a common interpretation of the starting situation and the desired situation after the investment. Moreover, account should be taken of the tourism segment and target group concerned by the investment.  C2. Other investments addressed to private operators and financed from the ROP, which can target the tourism sector (e.g. in the field of innovation and competitiveness) could be integrated into a single tourism axis, which would allow a clearer view of the ROP contribution to the development of this sector.	<i>Recommendations for 2021-2027 programming period</i>  R1. Using an instrument such as TAI, which would allow to identify a "starting point" of the attractiveness of the tourist resort and to define the attractiveness components concerned by the investment.  R2. Ensuring a stronger focus on the tourism segment and on the concerned target groups in order to better define the local tourism development strategy  R3. Analysing the possibility of inserting the theme of tourism into an integrated tourism development axis, with public and private beneficiaries, including	M	ROP MA	Ministry of Tourism Local Public Authorities Associations
EG1.1	Case Studies				M	ROP MA	Ministry of Tourism Local Public Authorities Associations
EG1.2	Case Studies		C3.a There is a need to revise the overall approach to Program Indicators for the Tourism Axis, so that they can be effectively quantified by the beneficiaries according to the actual carried out activities.		M	ROP MA	RDAs Local Public Authorities Associations



EQ	Evaluation Methods	Findings	Conclusions (necessity)	Recommendations	Priority category (H, M, L)	Responsible entity	Involved organizations
		<p>potential for employment growth in almost all the tourism segments concerned. The experts panel considers that minor effects will be recorded in low-TAI localities and in Horezu, these tourist segments being rather characterized by the presence of day-time visitors, who are not staying overnight in the tourist resort. Program indicators used so far, with reference to the increase in the number of visitors (output indicator) and in the number of employees (impact indicator), do not provide information that can be used to carry out efficacy analyses. The indicator "Increasing the expected number of visits" to tourist attractions should be considered as a result indicator and refer to tourists. On the other hand, employment growth should be considered as an impact indicator and used for scenario analysis in the ex ante phase.</p> <p>The indicator regarding the surface in square meters, concerned by the intervention, is part of the program performance indicators.</p>	<p>C3.b Calculation of the occupational impact of the tourism axis can be used in the analysis phase of potential impact scenarios.</p> <p>C4. From the perspective of the ex post evaluation, account should be taken of the elements resulting from employment impact scenarios (e.g. with reference to the specific context of low TAI localities and the components of visitors versus visitors staying overnight).</p> <p>C5. The evaluator considers that the performance indicator regarding the rehabilitated/created surfaces is too random (probably deriving from an estimate based on cost unit) to be performance related.</p>	<p>Management Organizations of the tourist destination, and selection criteria that take into account the synergy between funded interventions</p> <p>R4. Adopting a set of output indicators at program level to be related to the number of projects targeted for funding, and project-level output indicators to be correlated with intervention typologies carried out by the beneficiaries (e.g. sqm and km). Program-level result indicators could refer to the number of additional tourists, whose target value would anyway be a planned estimate of the ROP's contribution to the increase in the flow of tourists.</p>	M	ROP MA	RDAs

EQ	Evaluation Methods	Findings	Conclusions (necessity)	Recommendations	Priority category (H, M, L)	Responsible entity	Involved organizations
				<p>Recommendations for the current programming period:</p> <p>R5. The ex-post evaluation of the impact on the created jobs must take into account the main factors capable of influencing the occupational impact, namely: tourist flows post 2023 and the ability to attract tourists (not visitors).</p> <p>R6. Identifying an alternative performance indicator that is related to the number of funded projects.</p>	<p>L</p> <p>L</p>	<p>ROP MA/ independent evaluator</p> <p>ROP MA</p>	<p>European Commission</p>

EQ	Evaluation Methods	Findings	Conclusions (necessity)	Recommendations	Priority category (H, M, L)	Responsible entity	Involved organizations

EQ	Evaluation Methods	Findings	Conclusions (necessity)	Recommendations	Priority category (H, M, L)	Responsible entity	Involved organizations
T7.1	Case Studies of experts RDA Survey Final Focus Group Survey among beneficiaries	All funded interventions are included in local development plans (this is also an eligibility condition) and are linked (at least on paper) to other programming tools at regional and sometimes national level  The analysis of the case studies shows that the investments are synergic with other existing local and regional initiatives (e.g. transport infrastructure of regional interest and investments for cultural heritage rehabilitation) financed from other axes of the ROP.	C6. Although the investments funded under PA 7 are embedded in development strategies, at least locally, and they are complementary to other territorial investments made at different levels of governance (national/ regional/ local) and by various types of actors (public/ private), there is a need to create a strategic vision shared at regional and local level, that is dedicated exclusively to the integrated development of the tourism sector.	R7. Promoting participatory processes to develop a common vision of tourism development strategies for the 2021-2027 programming period, through national, regional and county consultations involving key public and private actors.	H	RDAs	Ministry of Tourism Local Public Authorities Associations
T71.1	Case Studies of experts						
T71.2	Case Studies of experts Survey among beneficiaries	The analysed funding applications show that funded interventions are seen complementarily to private tourism-related investments (e.g.	The tourism sector strategy should	R8. Updating the national strategic and policy framework in the field of tourism, starting from the lessons learned and the results obtained from the	H	Ministry of Tourism	Ministry of Regional Development and Public Administration Ministry of

EQ	Evaluation Methods	Findings	Conclusions (necessity)	Recommendations	Priority category (H, M, L)	Responsible entity	Involved organizations
		<p>accommodation structures, commercial activities, and so on) and to public investments in sustainable mobility, these being essential issues for the sustainability of tourist flows.</p> <p>The experience of the evaluation process and the results of the survey at the level of the RDAs suggest that the involvement of the representative associations of tourism firms (e.g. ANAT) and tourist segments (e.g. The Association of balneary Tourism, the Association of Ecotourism, etc.) is low.</p> <p>Although the RDAs generally consider the quality of the documents submitted by the beneficiaries to be satisfactory, the contracting rate is relatively low, with an average of about 28%, while the "offer" of submitted projects exceeds 3 times the allocated budget.</p> <p>The projects are in an early stage of implementation: many of the beneficiaries involved in the evaluation activities have not awarded yet the necessary works to rehabilitate the structures/ rehabilitate the premises, and so on.</p> <p>Given the state of implementation, at this stage of the evaluation the investments sustainability could be</p>	<p>include a way of interpreting/ analysing the context so that the programming document (ROP, with axes and measures) and the related tools (project calls) are able to integrate an analysis of the starting situation in the intervention area and of the arrival situation, which is to be obtained from the investment.</p> <p>Case study analysis suggests that local tourism strategies are not integrated into a broader segment and system vision.</p> <p>C7. There is a need for project beneficiaries to be supported more in the project preparation phase, in order to ensure a higher success rate or to redirect beneficiaries to alternative sources of funding.</p> <p>C8. There is also a need to closely monitor the technical and financial progress of the projects, with specific attention to procurement procedures, so as to assist</p>	<p>elaboration of the Tourism Master Plan 2007-2026.</p> <p>This process should involve strong participation of the private-sector associations, in addition to local public authorities.</p> <p>R9. Analysing the opportunity to strengthen the helpdesk functions of the RDAs to support beneficiaries both in the guidance/ training phase and in the implementation phase, as part of the monitoring of procedural issues related to public procurement.</p> <p>In this respect, the JASPER approach could be adopted, for large projects with an itinerant task force, or the contracting of specific expertise in the field of public procurement could be envisaged as eligible expense, in support of implementation.</p>	H	ROP MA	<p>Culture</p> <p>RDAs</p>

EQ	Evaluation Methods	Findings	Conclusions (necessity)	Recommendations	Priority category (H, M, L)	Responsible entity	Involved organizations
		considered only in terms of socio-economic sustainability, deriving from the job creation potential of the tourist resort.	beneficiaries in unblocking the procedural problems they may face.	R10. Analysing the opportunity of decentralization at the regional level of the project call management function (in the next period), in order to ensure better personalization of calls based on local/regional specificities (e.g. local tourism resources, needs, capacity of eligible beneficiaries and so on)	M	ROP MA	RDAs
			C9. The environmental sustainability of the projects under implementation and of the way in which the increase in tourist flows could exert pressure on local environmental parameters (waste, sewerage, pressure on natural and cultural resources) should be addressed in the ex post evaluation, also taking into account other complementary projects to Axis 7, that will be able to intervene on the service infrastructures offered to the local population (sewerage, waste, etc.).	R11. Analysing the opportunity of not wasting the administrative effort of the administrations that had unapproved projects, by reallocating resources from other less performing axes, taking into account the possibility of translating unreported expenditures into 2021-2027 programming period.	H	ROP MA	RDAs



EQ	Evaluation Methods	Findings	Conclusions (necessity)	Recommendations	Priority category (H, M, L)	Responsible entity	Involved organizations
T7.2	Case Studies Panel of experts Survey among beneficiaries	<p>All funded interventions include a marketing plan (and this is a condition of eligibility)</p> <p>Most marketing plans adopt strategies to capitalize investments only at local or county level.</p>	<p>C10. The role of tourism marketing needs to be strengthened in order to ensure more effectively the economic sustainability of the investments, taking into account the increase in tourist flows, which can ensure the sustainability of the expected occupation.</p> <p>Marketing should have national and international coverage, in order to expand the potential of tourism flows and target groups that can be attracted.</p>	<p>R12. In order to strengthen the link between marketing strategies and tourism segments and target groups, it is necessary to adopt an approach based on the management of tourist destinations.</p> <p>The law project on the Management Organizations of tourist destination provides for them to be set up as entities responsible for managing tourist destinations at different levels (national, regional, local). Thus, in the future, these organizations should be ROP beneficiaries so as to create synergies with other national tourism promotion actions implemented in close cooperation with other institutional actors (the Ministry of Tourism and its agencies).</p>	H	ROP MA	RDAs

## Annexes

### Annex 1. Bibliography of specialized literature

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## Annex 2. National Spatial Plan (NSP) methodology

### NSP methodology - tourism potential

The Emergency Ordinance no. 142/2008 regarding the approval of the National Spatial Plan, the 8th section regarding the areas with tourism resources, approved by the Law 190/2009.

#### Methodology on tourism potential evaluation in the basic administrative-territorial units

The touristic potential of the basic administrative-territorial units in Romania was evaluated starting from the existing theoretical-methodological approaches regarding the principles of carrying out the tourist zoning of the territory. For this purpose, the following elements of analysis were established for the delimitation of the national territory:

- natural tourism potential
- cultural heritage
- general infrastructure
- tourism specific infrastructure
- quality of the environment

Following consultation with tourism and related-field specialists and after consulting the specific legislation in force, the following model for classifying the potential and infrastructure components resulted:

#### A. Natural tourism resources

A1. The natural framework comprising 6 components:

- terrain
- geomorphology
- vegetation
- fauna
- hydrography
- landscape

A2. Natural therapeutic agents comprising the following components:

- therapeutic mineral waters,
- therapeutic lakes,
- therapeutic sludge (sapropelic, mineral, peat, etc.)
- therapeutic natural gases (mofetes, solariums),
- the set of physico-chemical elements of the marine littoral;
- the set of climatic elements of the marine littoral;
- sanogenic factors of the main bioclimatic types of Romania, including caves and salines

(tonic-stimulant bioclimate, sedative-indifferent or sparing bioclimate, excitant-demanding bioclimate etc.).

A3. Protected areas comprising the following types:

- biosphere reserves,
- national parks,
- natural parks,
- other nature reserves and monuments

## **B. Cultural heritage**

B1. Historical monuments, with the following categories (cf. Law 422/2001): monument, assemblies, sites such as:

- archaeology
- architecture
- public monuments
- memorial-funeral monuments

B2. Museums and public collections with the following categories:

- Memorial-funeral monuments, museums
- public collections

B3. Art and folk tradition including:

▪ traditional events: celebrations, festivals, fairs, customs and traditional rituals, festivities, etc.

▪ Traditional folk crafts:

- textile objects: fabrics, rugs, popular costumes, stitches;
- painting on glass and wood, engraving.
- workshops for working with wood, metal, stone, leather;

B4. Performing and concert institutions

B5. Annual/ repeatable cultural events

## **C. Tourism specific infrastructure**

C1. Accommodation units

C2. Wellness facilities

C3. Meeting rooms, exhibition centres, etc.

C4. Ski slopes and cableway installations

C5. Other recreational facilities (golf courses, "Blue Flag" approved beaches, water sports recreational facilities, amusement parks, hermitages)

## **D. Technical Infrastructure**

D1. Accessibility to major transport infrastructure

D2. Urban infrastructure

D3. Telecommunication Infrastructure

The establishment of criteria and ratings for evaluation and hierarchy of the basic administrative-territorial units (communes, towns) was carried out by the specialists of the institutions involved in the project.

For the evaluation and ranking of the territorial-administrative units, based on the component elements of the tourist valences, the method of analysis trees on basic criteria and sub-criteria was chosen, the assignment of the levels of appreciation being done by a process of weighing a total of 100 points.

The award of the scores on different components was carried out in consultation with the specialists from different fields (tourism economy, landscaping, geography, sociology, architecture, geology, medicine etc.), public and private sector tourism operators, central or local public authorities, Romanian tourism associations, universities, etc.

## A. Natural tourism resources

Following the evaluation of the natural tourism resources, which was attended by elaborators, specialists of the Institute of Geography of the Romanian Academy and the National Institute for Recovery, Physical Medicine and Balneoclimatology of the Ministry of Health, they were awarded maximum 25 points distributed on the following criteria:

Starting from the above criteria, a score ranging from 1 to 10 was awarded for the natural environment of each basic territorial administrative unit (1 being the minimum and 10 maximum, awarded to units with exceptional natural tourism potential).

The second criterion in the evaluation of natural tourism resources (Natural Therapeutic Factors) was analysed as follows:

- categories of localities with natural therapeutical factors:
  - General interest resorts entering the international circuit - this category includes the resorts with maximum of traditional therapeutical natural resources, facilities for treatment, accommodation and recreation.
  - Resorts of general interest - in this category enter the resorts with numerous therapeutical natural resources, facilities for treatment and accommodation.
  - Resorts of local interest - they are resorts with minimum natural therapeutic factors and facilities

## CATEGORY

### MAX POINTS

A1. Natural framework 10

A2. Natural therapeutic factors 10

A3. Protected natural areas 5

TOTAL 25

- Position on levels of relief
  - plain - 1
  - hills and plateaus - 2
  - subcarpathians - 3
  - mountains 4
  - Seaside and Danube Delta - 4
- geomorphology
  - the presence of keys, steepness, castical relief, vicinity to some imposing units - 1
  - forest vegetation over 30% - 1
  - forest below 30% - 0.5
  - great hunting interest - 1
  - medium hunting interest - 0.5
  - hydrography the presence of lakes, fishponds, mineral springs, waterfalls - 1
  - landscape

high interest 2

medium interest 1

treatment and accommodation for a relatively small number of patients, usually coming from nearby areas.

- Localities with potential of natural therapeutic factors - they are localities with certain natural therapeutical factors - usually mineral waters, without special treatment facilities.
    - the duration of treatment and accommodation during the year:
  - Permanent resorts
  - Seasonal resorts
- according to the existing natural therapeutic factors:
- Bioclimatic
    - relaxing, sedative, indifferent, hill
    - tonic-stimulating, mountainous
    - exciting, seaside
    - exciting, plain
  - Mineral waters
    - oligomineral, carbonated, chlorinated, sodium
    - iodurate ferruginous sulphurous sulphate
  - salty therapeutic lake
  - Therapeutic sludge:
    - sapropelic
    - peat
    - mineral
  - Another natural therapeutic factor:
    - mofeta (solfatar)
    - saline
    - extracted salt
    - sea water

▪ according to therapeutic indications for various types of conditions, depending on the type of existing natural therapeutic factors.

For the categories of localities with natural therapeutical factors, we did not distinguish between balneo-climatic and climatic resorts, the difference being self-evident from the list of factors (climate resorts not usually having mineral waters, sludge, etc.). An exception is the balneo-climatic resort of Sinaia - which also has springs of mineral waters used in the internal cure.

The duration criterion is clear and is based on the multitude of therapeutic factors used and on the existing treatment options. This criterion essentially covers all the natural therapeutic factors.

In the case of mineral waters, the mineral composition and the therapeutic recommendations were considered for various types of diseases.

For each of the therapeutic factors, possibly used in a resort, an equal, non-discriminatory score was given.

According to these criteria, a score was calculated for each resort.

Thus, the maximum score lies with the permanent resorts of the hill area, of general interest, with maximum natural therapeutic factors and therapeutic indications.

The resorts were grouped according to the very close score obtained in three categories that determine the importance of the resort:

- Category I: General interest resorts entering the international circuit - 10 points
- Category II: Resorts of general interest - 6 points
- Category III: Local interest resorts - 3 points
- Category IV: locality with therapeutic natural factors - 1 point



The hierarchy solution of the resorts according to the stated criteria is strictly related to the balneoclimatic aspect, using a cumulative score. This resulted in a selective list that can give a general idea of the existing balneoclimatic resort network in Romania and of their importance. The final criterion for the analysis of natural tourism resources is represented by the protected natural areas. The final score is between 1-5 points, 5 points representing the maximum score (awarded to basic administrative units comprising national parks, biosphere reserves, natural parks or special nature reserves) and 1 is the minimum score.

The evaluation was based on the following criteria, among which:

- the degree of representativeness of the protected natural areas - 1p
- Total protected area (as a share of the surface area) - 1 p
- conservation degree and current state of the reservation - 1 p
- the landscape value of the protected natural area - 1p
- the possibility to practice a form of tourism - 1 p

Starting from the score given to each reserve, a general score was given to each administrative unit that includes a protected natural area.

When an administrative unit includes two or more natural protected areas, the final score awarded to it is the highest score given to one of the reserves.

## **B. Anthropoc tourism resources**

The evaluation of the anthropic resources of the administrative-territorial units was carried out by the Centre for Studies and Research in the Field of Culture within the Ministry of Culture and Religion in collaboration with the National Institute of Historical Monuments, the National Centre for Preservation and Conservation of Traditional Culture, the Institute for Cultural Memory (CIMEC).

The score for anthropic tourism resources is maximum 25 points broken down according to the table below:

### **CATEGORY MAX POINTS**

B1. Historical monuments of national interest 8

*I - archeology*

*II - architecture*

*III- public monuments*

*IV - memorials*

B2. Museums and public collections 9

*I. Museums*

*II. Public collections*

B3. Art and folk tradition

8 (or 4 - see below)

*I. Festivals, fairs, customs, festivities, etc.*

*II. Popular crafts*

B4. Performing and concert institutions

8 (or 4 - see below)

*philharmonic, orchestra,*

*instrumental, choral or vocal bands, etc.*

B5. Repeatable cultural manifestations 0 or 4

**TOTAL**

**25**

They were evaluated the historical monuments classified according to legislation in group A - historical monuments of national and universal value (according to Law 422/2001 with subsequent amendments and additions).

The category "Repeatable Cultural Events" includes events or institutions under B2 or B3 or B4). That's why it was marked with 0 points. For example, theatre institutions, which by their nature organize "repeatable cultural events", were awarded the score 8 at the theatre institution and 0 at "repeatable activities". Where this was not the case (repeatable events that do not fit into any of the B2), B3) or B4) categories) a score of 0 to 8 was given at B5) category. For example, if there is an annual theatre festival, 4 points were awarded for the existence of the show institution and 4 for the festival.

These combinations aimed at achieving a maximum score of 8 points for the three cumulative categories, namely B3, B4, and B5. Therefore, in some situations, a maximum score of 4 points resulted for the category B3 or B4. In fact, each group has 8 weighted points, so that the maximum possible score on each basic administrative-territorial unit does not exceed 25.

In the same way, the score for each B3I and B3II subcategory was awarded, so that together they obtain up to 8 points.

The UNESCO-listed core administrative units were awarded the maximum score of 25 points.

### C. Tourism Specific Infrastructure

The second stage of the evaluation consisted of evaluating the specific tourist and technical infrastructure, without which no high quality tourism activities could be carried out.

The evaluation of the *specific tourist infrastructure* within the territorial-administrative units was carried out by the National Institute for Research and Development in Tourism on the basis of the information provided by the National Tourism Authority, the National Institute for Recovery, Physical Medicine and Balneoclimatology of the Ministry of Health, the National Authority for Tourism, the National Forestry Directorate (ROMSILVA) - the Cabal Exploitation Department, the Romanian Convention Bureau - the National Association of Conferences and Exhibitions Organizers.

For the specific tourism infrastructure, a maximum score of 20 points was awarded, distributed on sub-criteria as follows:

#### CATEGORY

#### MAX POINTS

- C1. Accommodation units 7
- C2. Treatment plants 5
- C3. Meeting rooms, exhibition centres 6
- C4. Ski slopes and cableway installations 1
- C5. Other Recreational Facilities 1

#### TOTAL 20

Within the evaluation of the tourism specific infrastructure, the accommodation units approved (on July 1, 2006) by the National Authority for Tourism were awarded a maximum score of 7 points.

Depending on the distribution of the number of rooms per types of tourist accommodation structures, the following scores were assigned:

- hotels - 5 points
- tourist boarding houses - 1 point
- other types of accommodation units, except hotels and tourist boarding houses- 1 point

Awarding points at the level of each territorial administrative unit was based on the operating accommodation capacity (calculated as the product between the number of rooms and the number of operating days). Thus, the maximum score was assigned to ATUs with the highest operating accommodation capacity at the level of hotels, tourist boarding houses and other accommodation units.

The distribution of scores among the other ATUs was done proportionally.

These scores were corrected in addition or in minus according to the distribution of rooms by comfort category. Where there is a difference in the distribution of the category chambers in addition, the scores were rounded up, otherwise they were rounded down.

For treatment facilities endorsed by the Ministry of Health maximum score of 5 points was assigned.

The criteria for the evaluation of the treatment facilities were the following:

- the number of treatment facilities
- the procedures carried out by the treatment facilities
- types of appliances used
- the presence of wellness facilities
- the locality with the most treatment facilities.

The availability of wellness facilities constituted an advantage for the assessed ATU, as it received an additional score, but without exceeding the maximum of 5 points.

For the tourist infrastructure represented by conference rooms and exhibition centres, 6 points were awarded, starting from the premise that business tourism is an important revenue-generating sector compared to other forms of tourism.

The criteria underlying the evaluation process of the infrastructure for conferences, meetings, exhibitions were as follows:

- the number of individual meeting rooms
- the total capacity of these spaces expressed in number of seats
- the city with the most capacity to organize meetings.

#### **Nr. of seats in conference rooms**

##### **Score**

More than 10,000 places

6.00

5000 - 9999 seats

4.00

4000 - 4999 seats

3.75

3500 - 3999 seats

3.50

3000 - 3499 seats

3.25

2500 - 2999 places

3.00

2000 - 2499 places

2.75

1500 - 1999 seats

2.50

1000 - 1499 places

2.25

800 to 999 seats

2.00

650 - 799 seats  
1.75  
500 - 649 seats  
1.50  
250 - 499 seats  
1.25  
100 - 249 seats  
1.00  
50 - 99 seats  
0.5  
under 50 seats  
0.25

For the evaluation of the skiing facilities they were taken into account only the slopes approved by the NTA and the cableway installations approved by ISCIR Romania. The maximum score for this infrastructure component was of 1 point, ski slopes and cableway installations received 0.5 points each.

The criteria underlying the evaluation process of the ski slopes and cableway facilities were as follows:

- the number of ski slopes and cable transport installations;
- the diversity of transport facilities;
- the length and the optimal reception/ transport capacity;
- the locality with the most cableway installations.

The section other recreational facilities included those recreational facilities which motivate the tourists to travel, namely: golf courses, Blue Flag approved beaches, water recreational facilities, amusement parks, stable of horses. Maximum score awarded for them is of 1 point.

The criteria for the evaluation of the recreational facilities were the following:

- the number of recreational facilities
- the diversity of leisure facilities.

The maximum score awarded to ATU from the point of view of the recreational facilities existing on the unit's territory is of 1 point.

#### **D. Technical infrastructure**

The evaluation of the technical infrastructure was carried out by INCĐ URBANPROIECT and a maximum of 30 points were awarded to the level of technical equipment of the administrative territorial units.

For the assessment of the accessibility to the major transport infrastructure, it was considered the presence on their territory of major passenger transport routes/ nodes, a prerequisite for a territory to be included in the tourism activity.

Out of the 30 points for the evaluation of the importance of technical equipment of a locality for tourism, 16 were directed to the accessibility criterion. The four indicators that were considered to assess the direct access of the territorial administrative units to the major network of transport were weighted according to their importance in an international transport network and to the intermodality in passenger transport.

The score was done after multiplying the evaluation points (between 0 and 1) for each indicator with the weighting score on indicators from the 16 points of the criterion, as follows:

- for access to the national or European road and railways 5 points were granted out of a total of 16, but they are only granted if the locality has access to both ways of transport.
- if the basic territorial administrative unit has access only to the national road or rail then it will only receive half the score (i.e.  $0.5 \times 5 = 2.5$ ).

#### TECHNICAL INFRASTRUCTURE: 30 points

For urban infrastructure 9 points were awarded out of the total of 30. Of these, water supply in centralized system and sewage sewage were noted with 5, and gas supply (centralized system) with 4 points, being known that its lack can be more easily compensated.

According to the available data the network power supply covers all territorial units and therefore this indicator was not taken into consideration, although at the local level it can sometimes be a poor situation which cannot be evaluated due to lack of data.

The calculation methodology from the first criterion was kept, so for the system of water supply and sewerage, it has been made differently for the presence of both systems and for the presence of only the water system.

The provision of electronic communications services was marked with 5 points out of the total of 30. These were granted only to the territorial administrative units in which the GSM network can be accessed. For the territorial administrative units that have just fixed network, only 2.5 points were awarded.

The score was awarded according to the situation in the territory as for the data of the year 2003, which showed that many basic territorial administrative units do not have a fixed network either.

### Annex 3. Database of the funded projects with the related project monitoring indicators and performance indicators

SMIS code	Project Title	Beneficiary name	Region	County	Locality	Tourist attractiveness index	Total project value	Resort of national interest (YES/NO)	Tourist segments	the same location	Output indicator or Surface (m²)	Output indicator tourist growth/year	Investment per tourist	Investment per m²	Annual average tourist's growth (number) 2010-2017	% of project growth/average growth	% of foreign tourists out of total	GDP / employed person (lei) average 2010 - 2015
115,717	TOURISM VALORISATION AND SPECIALIZED INFRASTRUCTURE MODERNIZATION IN THE BALNEO-CLIMATIC RESORT OF TÂRGU OCNA	TÂRGU OCNA TAU	NE	Bacău	TG. OCNA	36.56	21,468,011,	YES	Balneo-climatic		125,923	10,396	2,065	170	11,584	90%	10%	117,430
118,971	CONSTRUCTION OF LEISURE INFRASTRUCTURE	TÂRGU NEAMȚ TAU	NE	NEAMȚ	TG. Neamt	29.18	15,795,149,	NO	cultural tourism, nearby ecotourism		1,643	16,494	958	9,615	15,401	107%	8%	106,884
119,557	T.U.R.I.S.T (URBAN TERRITORY REVITALIZED WITH THE SUPPORT TOURISM INFRASTRUCTURE) GURA HUMORULUI	GURA HUMORULUI TOWN	NE	SUCEAVA	GURA HUMORULUI	60.94	11,609,595,	YES	cultural, religious, mountain tourism		10,026	35,880	324	1,158	27,330	131%	15%	119,054
120,455	REHABILITATION AND MODERNIZATION OF THE ROAD INFRASTRUCTURE IN THE VATRA DORNEI BALNEO-CLIMATIC RESORT	VATRA DORNEI MUNICIPALITY	NE	SUCEAVA	VATRA DORNEI	57.09	14,823,842,	YES	Balneo-climatic and mountain	1		49,357	300		27,330	181%	15%	119,054
118,996	MODERNIZATION OF ACCESS ROADS AND RECREATION PLACES IN VATRA DORNEI BALNEO-CLIMATIC RESORT	VATRA DORNEI MUNICIPALITY	NE	SUCEAVA	VATRA DORNEI	57.09	11,795,908,	YES	Balneo-climatic and mountain	1	36,225	56,674	208	326	27,330	207%	15%	119,054



SMIS code	Project Title	Beneficiary name	Region	County	Locality	Tourist attractiveness index	Total project value	Resorts of national interest (YES/NO)	Tourist segments	the same location	Output indicator or Surface (m²)	Output indicator for tourist growth/year	Investment per tourist	Investment per m²	Annual average tourist's growth (number) 2010-2017	% of project growth/average growth	% of foreign tourists out of total	GDP / employed person (lei) average 2010 - 2015
									ain									
117,890	CREATING A LEISURE AREA IN THE VATRA DORNEI BALNEO-CLIMATIC RESORT	VATRA DORNEI MUNICIPALITY	NE	SUCEAVA	VATRA DORNEI	57.09	2,977,271	YES	Balneo - climatic and mountain	1	1,983	55,700	53	1,501	27,330	204%	15%	119,054
118,331	Rehabilitation of the tourist attraction of natural utility - Belona Lake, Eforie City	Territorial Administrative Unit of Eforie City	SE	CONSTANTA	EFORIE	56.65	20,834,232	YES	Balneo - climatic and seaside	2	145	22,890	910	143,684	61,778	37%	6%	161,096
118,447	Development of infrastructure for balneary tourism and recreational activities in Techirghiol resort, Constanta county	TAU OF TECHIRGHIOI TOWN	SE	CONSTANTA	TECHIRGHIOI	46.39	15,515,651	YES	Balneo - climatic and seaside		-	16,005	969		61,778	26%	6%	161,096
112,734	Rehabilitation and modernization of the public utilities infrastructure to capitalize on the tourist attractions in Eforie City	Territorial Administrative Unit of Eforie City	SE	CONSTANTA	CONSTANTA	56.65	21,965,417	YES	Balneo - climatic and seaside	2	56,810	183,100	120	387	61,778	296%	6%	161,096
115,374	Tourist development in Saturn resort	TERRITORIAL ADMINISTRATION UNIT MANGALIA MUNICIPALITY	SE	CONSTANTA	CONSTANTA	68.75	19,112,081	YES	Balneo - climatic and seaside		36,500	60,000	319	524	61,778	97%	6%	161,096

SMIS code	Project Title	Beneficiary name	Region	County	Locality	Tourist attractiveness index	Total project value	Resorts of national interest (YES/NO)	Tourist segments	the same location	Output indicator or Surface (m²)	Output indicator tourist growth/year	Investment per tourist	Investment per m²	Annual average tourist's growth (number) 2010-2017	% of project growth/average growth	% of foreign tourists out of total	GDP / employed person (lei) average 2010 - 2015
119,643	Development of tourism infrastructure in the balneo-climatic resort of Pucioasa town	PUCIOASA TOWN	South Muntenia	Dâmbovița	Pucioasa	37.53	21,429,171	YES	Balneo-climatic and cultural		67,146	14,400	1,488	319	7,137	202%	7%	151,392
119,697	Rehabilitation and modernization of the Summer Garden, Amara, Ialomița County	AMARA CITY	South Muntenia	Ialomița	Amara	23.57	13,801,295	YES	Balneo-climatic		Missing data	Missing data			930	0,00%	7%	130,142
118,342	Construction of the recreation park "Constantin Brâncoveanu" in Horezu, Vâlcea county	Horezu TAU	SW	Vâlcea	Horezu	47.07	9,453,899	NO	Mountain and cultural	3	30,020	21	451,260	315	24,737	0.08%	3%	109,995
119,090	Improvement of the tourism infrastructure in the Baile Olanesti resort - Modernization of the Unirii Park	TAU OF BĂILE OLĂNEȘTI TOWN	SW	Vâlcea	Baile Olanesti	43.95	6,817,412	YES	Balneo-climatic, mountain and cultural		11,284	14,000	487	604	4,737	57%	3%	109,995
117,762	Rehabilitation of the pedestrian center of Horezu tourist resort, Valcea County, in order to consolidate local identity and tourism development	Horezu TAU	SW	Vâlcea	Horezu	47.07	5,599,819	NO	Mountain and cultural	3	5,788			967	24,737	0.00%	3%	109,995
118,784	Modernization of the streets of the Calimanesti-Caciulata resort -asphalting, sidewalks rehabilitation, execution of	CALIMANESTI TAU	SW	Vâlcea	Calimanești-Caciulata resort	60.08	20,192,901	YES	Balneo-climatic,		111	28,159	717	181,661	24,737	114%	3%	109,995

SMIS code	Project Title	Beneficiary name	Region	County	Locality	Tourist attractiveness index	Total project value	Resorts of national interest (YES/NO)	Tourist segments	the same location	Output indicator or Surface (m²)	Output indicator tourist growth/year	Investment per tourist	Investment per m²	Annual average tourist's growth (number) 2010-2017	% of project growth/average growth	% of foreign tourists out of total	GDP / employed person (lei) average 2010 - 2015
	storm water drainage channels, Călimănești town, Vâlcea county				streets				mountain and cultural									
118,764	Conservation and valorisation of natural and built heritage for balneary tourism development in Baile Herculane Resort	BĂILE HERCULANE TAU	WEST	Caras-Severin	Băile Herculane	64.05	15,459,435	YES	Balneo-climatic, mountain and cultural		24,757	117,963	131	624	14,162	833%	5%	125,709
118,023	Construction of recreation and leisure facilities in the Geoagiu-Băi Resort	GEOAGIU TAU	WEST	Hunedoara	GEOAGIU	57.62	2,649,597	YES	Balneo-climatic and cultural		4,589	15	176,640	577	13,764	0%	10%	91,367
114,475	Development of the balneary tourism infrastructure in Buzias resort	BUZIAȘ TOWN TAU	WEST	Timiș	Buziaș	37.95	21,698,501	YES	Balneo-climatic and cultural		305,972	16,250	1,335	71	26,170	62%	29%	131,602
119,214	Development of Baile Felix resort infrastructure- the Lotus of Romanian Tourism	SINMARTIN TAU	North-West	BIHOR	Baile Felix	56.4	14,420,751	YES	Balneo-climatic and cultural		41,082	122,260	118	351	35,902	341%	16%	90,010

SMIS code	Project Title	Beneficiary name	Region	County	Locality	Tourist attractiveness index	Total project value	Resorts of national interest (YES/NO)	Tourist segments	the same location	Output indicator or Surface (m²)	Output indicator tourist growth/year	Investment per tourist	Investment per m²	Annual average tourist's growth (number) 2010-2017	% of project growth/average growth	% of foreign tourists out of total	GDP / employed person (lei) average 2010 - 2015
115,522	Rehabilitation and modernization of road infrastructure and of the roadside utilities in Baile Turda	Turda Municipality	North-West	CLUJ	Turda Municipality	45.41	22,550,603	NO	Balneo-climatic, mountain and cultural		63,146	25,952	869	357	44,424	58%	21%	127,226
114,590	ETOS - EXCELLENCE IN TOURISM IN OCNA ȘUGATAG	OCNA ȘUGATAG TOWN/ OCNA ȘUGATAG TOWN HALL	North-West	MARAMUREȘ	Ocna Șugatag	43.11	22,564,465	NO	Balneo-climatic and cultural		87,448	10,281	2,195	258	15,468	66 %	18%	103,705
115,563	Development of tourism infrastructure in the Ocna Sibiului balneo-climatic resort, beneficiary	OCNA SIBIU CITY AND THE TERRITORIAL ADMINISTRATIVE UNIT OF SIBIU COUNTY	Centre	Sibiu	Ocna Sibiului	35.53	19,613,388	NO	Balneo-climatic, mountain and cultural		100,769	200,000	98	195	33,500	597%	27%	109,572
119,330	Parks and green spaces in the balneary resort of Baile Tusnad	BĂILE TUȘNAD TAU	Centre	HARGHITA	BĂILE TUȘNAD	44.02	6,777,980	YES	Balneo-climatic, mountain and cultural		8,789	6,740	1,006	771	14,058	48%	24%	104,409
119,599	Rehabilitation of road infrastructure in the Covasna	COVASNA CITY TAU	Centre	Covasna	Covasna	36.86	19,041,336	YES	Balneo-			333,111	57		6,174	5,395%	11%	96,562

SMIS code	Project Title	Beneficiary name	Region	County	Locality	Tourist attractiveness index	Total project value	Resorts of national interest (YES/NO)	Tourist segments	the same location	Output indicator or Surface (m²)	Output indicator tourist growth/year	Investment per tourist	Investment per m²	Annual average tourist's growth (number) 2010-2017	% of project growth/average growth	% of foreign tourists out of total	GDP / employed person (lei) average 2010 - 2015
	balneo-climatic resort		e						climatic, mountain and cultural									

*Evaluator's note: Data regarding the output indicators that are not in line with the context evolution are coloured in red (data out of the interval) and yellow (data possibly out of the interval). Taking into account that context data does not specifically refer to the intervention locality, the existence of these discrepancies may suggest the need to verify the specific evolution of the tourists flow in each interested locality, through case studies, so as to highlight the rationale behind the initial estimates.*

## Annex 4. Modality of case studies' selection

**Low Tourist Attractiveness Index - "Non-Mountain Area" (the selected project is highlighted in green)**

SMIS Code	Region	County	Project localisation	TAI	Tourist segments	A. Natural tourism resources	B. Anthropoc tourism resources	C. Tourism Specific Infrastructure	D. Technical infrastructure
119,697	South Muntenia	Ialomița	Amara	23.57	Balneo-climatic	8.5	0	2.57	12.5
115,717	NE	Bacău	TG. OCNA	36.56	Balneo-climatic	11.5	6	0.06	19
119,643	South Muntenia	Dâmbovița	Pucioasa	37.53	Balneo-climatic and cultural	14.5	1	3.03	19
114,475	WEST	Timiș	Buziaș	37.95	Balneo-climatic and cultural	13	7	1.45	16.5
Max TAI per component						25	25	20	30

This layer represents a cluster (group) of homogeneous projects, characterized by a low value of the TAI components B that refers to the presence of anthropic resources (cultural, artistic, manifestations...) and C, which refers to the specific tourist infrastructure. The SMIS 114475 project (Buziaș locality) was selected because it was considered to be representative of the balneo-climatic tourism in the western region of the country.

**Low Tourist Attractiveness Index - "Mountainous Area" (the selected project is highlighted in green)**

SMIS Code	Region	County	Project localisation	TAI	Tourist segments	A. Natural tourism resources	B. Anthropoc tourism resources	C. Tourism Specific Infrastructure	D. Technical infrastructure
118,971	NE	NEAMȚ	TG. Neamt	29.18	cultural tourism, nearby ecotourism	7	3	0.18	19
115,563	Centre	Sibiu	Ocna Sibiului	35.53	Balneo-climatic, mountain and cultural	11	8	0.03	16.5
119,599	Centre	Covasna	Covasna	36.86	Balneo-climatic, mountain and cultural	16	8	1.36	11.5

This layer is a cluster of homogeneous projects, characterized by a relatively low value of the TAI component B and an extremely low component C, which refers to the specific tourist infrastructure. The cluster includes 2 projects located in the central macroregion and 1 in the northeast. The SMIS 115563 project (Sibiu area) was selected because it is representative of the central macro-region due to a multiple combination of tourism typologies.

**Medium Tourist Attractiveness Index - "Non-Mountainous Area" (the selected project is highlighted in green)**

SMIS Code	Region	County	Project localisation	TAI	Tourist segments	A. Natural tourism resources	B. Anthropoc tourism resources	C. Tourism Specific Infrastructure	D. Technical infrastructure
114,590	North-West	MARAMURES	Ocna Șugatag	43.11	Balneo-climatic and cultural	14	16	0.61	12.5
118,447	SE	CONSTANTA	TECHIRGHIOI	46.39	Balneo-climatic and seaside	11	15	0.39	20

This layer is a cluster of homogeneous projects, characterized by the high value of B component (cultural/ artistic) and low value of component C (tourist infrastructure, reception units, hotels, etc.). The SMIS 114590 project (Maramureș area) was selected because it was considered representative for the balneo-climatic and cultural tourism in the North-West region.

**Medium Tourist Attractiveness Index- "Mountain area" (the selected projects are highlighted in green)**

SMIS Code	Region	County	Project localisation	TAI	Tourist segments	A. Natural tourism resources	B. Anthropoc tourism resources	C. Tourism Specific Infrastructure	D. Technical infrastructure
119,090	SW	Vâlcea	Baile Olanesti	43.95	Balneo-climatic, mountain and cultural	23	7	3.95	10
119,330	Centre	HARGHITA	BĂILE TUȘNAD	44.02	Balneo-climatic, mountain and cultural	23.5	0	0.52	20
115,522	North-West	CLUJ	Turda Municipality	45.41	Balneo-climatic, mountain and cultural	10	11	0.41	24
118,342	SW	Vâlcea	Horezu	47.07	Mountain and cultural	9.5	25	0.07	12.5
117,762	SW	Vâlcea	Horezu	47.07	Mountain and cultural	9.5	25	0.07	12.5

This layer represents a cluster of heterogeneous projects, some of them characterized by a high value of component A (tourist/ natural) and others by a high value of component B (cultural/ artistic), in both cases the component C has a relative low value. Horezu has been selected because it will allow an integrated vision of two funded projects.



**High Tourist Attractiveness Index - "Non-Mountainous Area" (the selected projects are highlighted in green)**

Code SMIS	Region	County	Project localisation	TAI	Tourist segments	A. Natural tourism resources	B. Anthropogenic tourism resources	C. Tourism Specific Infrastructure	D. Technical infrastructure
119,214	North-West	BIHOR	Baile Felix	56.4	Balneo-climatic and cultural	21	8	7.4	20
118,331	SE	CONSTANTA	EFORIE	56.65	Balneo-climatic and seaside	17	8	11.65	20
112,734	SE	CONSTANTA	CONSTANTA	56.65	Balneo-climatic and seaside	17	8	11.65	20
118,023	WEST	Hunedoara	GEOAGIU	57.62	Balneo-climatic and cultural	18.5	16	1.62	21.5
115,374	SE	CONSTANTA	CONSTANTA	68.75	Balneo-climatic and seaside	20	13	14.75	21

This layer represents a cluster of heterogeneous projects, characterized by a high value of component A and a relative high value of component B, as well as by heterogeneous but generally high values of component C (tourist infrastructures, reception units, hotels...). The Constanta area has been selected as it will allow an integrated vision of three funded projects.

**High Tourist Attractiveness Index - "Mountainous Area" (the selected projects are highlighted in green)**

SMIS Code	Region	County	Project localisation	TAI	Tourist segments	A. Natural tourism resources	B. Anthropogenic tourism resources	C. Tourism Specific Infrastructure	D. Technical infrastructure
120,455	NE	SUCEAVA	VATRA DORNEI	57.09	Balneo-climatic and mountain	25	10	2.09	20
118,996	NE	SUCEAVA	VATRA DORNEI	57.09	Balneo-climatic and mountain	25	10	2.09	20
117,890	NE	SUCEAVA	VATRA DORNEI	57.09	Balneo-climatic and mountain	25	10	2.09	20
118,784	SW	Vâlcea	Râmnicu	60.08	Balneo-climatic, mountain and cultural	25	11	4.08	20
119,557	NE	SUCEAVA	GURA HUMORULU	60.94	cultural, religious,	11.5	25	0.44	24

			I		mountain tourism				
118,76 4	WEST	Caras-Severin	Băile Herculane	64.05	Balneo-climatic, mountain and cultural	25	15	6.55	17.5

This layer is a cluster of projects with a high tourist potential, characterized by low tourist infrastructure (C component), but high values of natural resources (A component) and anthropic resources (B component). Vatra Dornei was selected because it will allow an integrated vision of three funded projects.

## Annex 5.a Case studies drafting modality

The objective of the case study is to understand the impact of the project.

The impact that will be reflected in the evaluation analyses is due to the increase in employment, measured as a new generated job (full-time equivalent).

There are two levels of impact to be investigated through the interviews:

- the direct occupational impact of the project; through the number of new tourists/ year that the interviewees believe it can be attributed to the project, and
- the indirect occupational impact of the project; through the number of new tourists/ year that interviewers believe it may be attributed to the indirect effects of the project.

The case study has been carried out by guiding the experts in interviewing the stakeholders' privileged witnesses in the project with the use of a Guide dedicated to this purpose.

The structure of the Guide provides a **first part pre-filled with the context indicators** regarding the county and the localities, which were useful, during the interview, to accompany the participants in identifying the potential direct and indirect tourist flows, in particular:

- the historical series of tourist flows in the reference county in order to verify the reliability of the estimates provided by the participants;
- the share of the domestic and foreign tourist component (available at the county level) to apply average travel expenses per tourist (higher for foreign tourists);
- tourist attractiveness index of the tourist locality concerned by the intervention (available at the level of tourist locality); it is necessary to position the intervention in one of the dimensions of the index, that can be changed by the intervention and to understand if and how it can generate a direct and indirect effect.

A **second pre-filled part** of the survey tool included a brief description of the key elements of the project uploaded into the MySMIS system.

A **third part** of the Guide included the questionnaire questions for the interviewees. The questionnaire was organized so as to obtain the following information:

- the current stage of the project;
- the components related to the tourist attractiveness index on which the project has direct effects;

- the relevance of the project to attract new tourist flows;
- related marketing and promotion actions;
- an estimate of new annual tourists due to the project;
- the possible growth of the foreign component of tourism demand;
- the existence of other financing projects that may/ might influence tourist attractiveness;
- Activation before (tour operators with regard to the supply) and after (tour package organizers) of the territorial tourism branch of the subsequent actions, capable of increasing the overall impact of the project;
- an estimate of the increase in tourist flows as a result of all external components that the project will be able to indirectly activate.

## Annex 5.b Database of context indicators to calculate the tourists flow

Attached separately.

## Annex 6.a The modality to estimate the result and impact indicators

The process used to provide a preliminary estimate of the employment effects generated by the funded projects starts from the reconfiguration of the data on the increase of the tourist flow related to the projects analysed through the case studies, passing through the following stages:

- identifying average expenses by type of tourist (domestic, foreign);
- calculating the total turnover annually generated (based on the case studies' indications for the external (foreign) and domestic (local) component);
- using labour productivity in the Hotels and restaurants reference sector (from the average data of the observation period 2008-2016) to track the number of new employees potentially to be activated by additional tourist flows.

To take account of the different level of expenses by types of tourists, the following expenditure profiles were applied:

- for domestic component (domestic tourism), the average tourist expenses are of 840 lei per person for accommodation, meals, transport, various expenses and entertainment; those who spent overnight at the hotel spent a little more (1070 lei), tourists from Bucharest and the central region spent more, tourists from the South Muntenia region spent less<sup>15</sup>, therefore it is considered realistic to estimate expenditures at 840 lei per person;
- for the foreign component (foreign tourism) the average figure provided by the official statistics for 2017 equals 2.199,4 lei, the figure was rounded to 2,200 lei.

A domestic (local) tourist spends 62% less than a foreign tourist.

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<sup>15</sup> taken from a national survey as part of a draft SOPHRD 2007-2013 on the behaviour of tourists who spent the night in tourist boarding houses (Entrepreneurs in Tourism - Pensions in Romania - February 2012)

The total turnover directly and indirectly<sup>16</sup> activated through the ROP financed project will be estimated by multiplying the number of additional domestic (national) and foreign tourists by their respective average expenses. The value thus obtained will be divided by the turnover per working unit in the tourism sector, thus providing a realistic estimate of the potential jobs generated by the ROP.

From the official statistics<sup>17</sup> we can find the turnover per working unit in the tourism sector: expressed by the ratio between turnover and employees. This ratio shows how high the turnover produced by each employee is and, at the same time, the turnover needed to activate an employee.

The following table presents the historical series in the field (Hotels and Restaurants, 2008-2016) for the counties where ROP projects were financed.

**Tab. 2.** Turnover in the industry (Hotels and restaurants) per employee (occupied person) historical series 2008-2016 and Average value over the time frame taken into account.

Macroregions. development regions and counties	Year (Lei Ron per employee)									Average value
	Year :2010	2009	2010	2011	2012	2013	2014	2015	Year 2016	
	RON	RON	RON	RON	RON	RON	RON	RON	RON	
Bihor	68,011	65,366	69,286	73,091	75,301	66,146	71,052	75,885	79,114	71,472
Cluj	105,070	99,802	99,025	100,565	95,508	96,926	108,252	122,173	127,312	106,070
Maramureș	54,890	51,919	52,047	50,322	53,526	48,978	57,569	65,383	65,400	55,559
Covasna	73,879	72,638	80,498	76,817	71,338	64,927	65,392	69,861	57,603	70,328
Harghita	63,133	60,147	67,689	63,470	62,660	57,074	61,691	68,814	69,246	63,769
Sibiu	75,092	74,850	81,013	77,064	75,813	70,012	75,040	89,257	99,344	79,721
Bacau	81,121	79,444	111,289	93,137	71,395	68,070	65,271	73,684	70,007	79,269
Neamt	95,411	78,904	96,053	90,485	91,297	63,492	63,544	78,092	77,760	81,671
Suceava	68,475	58,417	70,061	70,267	69,783	68,273	69,155	82,933	77,496	70,540
Constanta	121,224	118,583	114,239	114,761	128,429	123,020	131,340	153,537	157,523	129,184
Dâmbovița	71,261	48,193	50,038	60,664	44,418	44,885	46,821	64,229	58,737	54,361
Ialomița	180,000	61,644	59,480	52,124	46,573	42,097	41,820	46,927	44,084	63,861
Valcea	90,969	81,928	67,528	83,214	73,337	69,622	71,754	79,716	83,856	77,992
WEST	70,996	66,730	65,380	65,837	64,929	63,506	67,179	83,600	89,758	70,879

<sup>16</sup> See case studies in this regard

<sup>17</sup> National Institute of Statistics, TEMPO-Online database

Macroregions.	Year (Lei Ron per employee)									Average
Caras-Severin	53,769	50,052	54,233	46,302	41,943	44,470	53,677	60,488	61,141	51,786
Hunedoara	84,105	67,582	69,340	66,113	62,074	58,031	63,434	84,973	78,831	70,498
Timiș	74,074	72,441	69,000	75,603	80,423	81,383	82,983	103,510	116,207	83,958

Source: TEMPO ONLINE INT104D

The following information was used to calculate the indicators:

the share of the foreign component	
Buziaș	5%
Ocna Sibiului	4%
Horezu	2%
Constanta	3%
Vatra Dornei	20%
Ocna Șugatag	18%

Source: TEMPO ON LINE and Case study estimates

#### Annex 6.b Case studies database.

Attached separately.

#### Annex 7. Questionnaire completed for the case study (Annexes 7.1-7.6)

Attached separately.

#### Annex 8.a Questionnaire regarding the PA 7 implementation system

Attached separately.

#### Annex 8.b Database of the received answers

Attached separately.

#### Annex 9.a Questionnaire for the beneficiaries who were not included in the case studies

Attached separately.

#### Annex 9.b Database of the received answers

Attached separately.

#### Annex 10. Presentation/ experts panel work

Attached separately

#### Annex 11: Analysis of the surveys' results regarding the implementation system

Attached separately.

#### Annex 12 Power point presentation

Attached separately.

## Annex 13. Table of comments/ recommendations of the ROP Evaluation Office/ CEC members and settlement proposals

Attached separately.