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**TOURISM DEVELOPMENT
IN THE OIC COUNTRIES: FURTHER STEPS
TOWARDS PROMOTION OF COOPERATION**

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1. INTRODUCTION

The substantial growth of international tourism activity clearly marks tourism as one of the most remarkable economic and social phenomena of the past century. In recent decades, tourism has become a fully-fledged industry contributing significantly to the economic and social development of many countries in the world. International tourism plays a pivotal role in the promotion of economic, social and cultural interactions amongst nations, thus contributing to the enhancement of sustainable development, poverty alleviation and international peace and security. Today, tourism, which constitutes a vital economic sector for many countries, has not only become an important source of foreign exchange, but also a major potential source of local business and employment for their national economies.

Recent trends in international tourism indicate that tourism activity is still concentrated in the industrialised countries of Europe and the Americas. However, there has been a substantial proliferation of new tourist-generating and tourist-receiving markets in the developing regions of East Asia and the Pacific, South Asia, Africa, and the Middle East. The growth patterns of the emerging tourist destinations in these regions are generally very dynamic, with some countries registering high rates of increase in successive years.

Accordingly, many developing countries, including some OIC members, have focused their attention and effort towards developing their tourism sectors and the tourism-related industries as well as strengthening their cooperation in this important sector. At the national level, although some OIC countries have achieved notable success in this regard, the total OIC international tourism activity is still concentrated in a small number of countries. In addition to Malaysia and Indonesia in the East Asia/Pacific region, the OIC countries in North Africa and in the Mediterranean basin in general, viz., Turkey, Egypt, Tunisia, Morocco, and Lebanon serve as typical examples in this regard.

At the OIC level, tourism represents one of the ten priority areas of the Plan of Action to Strengthen Economic and Commercial Cooperation

among the Member Countries of the OIC. In this context, the First Meeting of the Ministers of Tourism of the OIC Member States was held in October 2000 in Isfahan, the Islamic Republic of Iran. In this meeting, the Ministers adopted the “Isfahan Declaration” in which they decided, among other things, to boost cooperation among Member States in tourism, through promotion of public awareness, education, training, investment opportunities and involvement of private sectors.

This concise paper attempts to look into and to evaluate the performance of the tourism sector in the OIC member countries. The aim of the paper is to identify the problems facing tourism and tourism cooperation in these countries and to propose some policy recommendations for the development of a modern tourism industry in OIC countries and for strengthening their cooperation in this important area. In addition to this section, the paper comprises five other sections structured as follows: Section 2 presents some concepts and definitions related to the data and information used in the paper. Section 3 presents an overview of world and regional trends in international tourism activity. Section 4 examines the basic tourism indicators in the OIC countries for which the data are available. Section 5 attempts to explore the problems facing tourism in the OIC countries, particularly those limiting cooperation amongst them. Section 6 proposes a wide range of policy recommendations for the development of a modern tourism industry in OIC countries and for enhancing intra-OIC cooperation in this important field.

2. CONCEPTUAL ISSUES

According to the World Tourism Organization/United Nations Recommendations on Tourism Statistics¹, *tourism* comprises the activities of persons travelling to and staying in places outside their usual permanent places of residence for not more than one consecutive year for leisure, business and other purposes. In this sense, the term *tourism* covers both international tourism (cross-border) and domestic tourism. *Domestic tourism* involves movement and travel of residents of a certain country within that country. Though vitally important for many countries, domestic tourism is not taken into account in this paper due to the non-availability of data.

¹ For further information on the concepts and definitions in this section see “World Tourism Organization’s Recommendations on Tourism Statistics and Concepts, Definitions and Classifications for Tourism Statistics”, World Tourism Organization, Madrid, Spain.

International tourism, which is the subject of this paper, includes, on the other hand, both *inbound* and *outbound* tourism. **Inbound tourism** refers to the travel of non-residents into a country, while **outbound tourism** is the reverse, with the residents of a certain country travelling across its border to other countries. Since international tourism is more significant than domestic tourism and is the subject of this paper, the term tourism, unless otherwise indicated, refers to international tourism.

Based on the above definitions, the tourism industry includes all the socio-economic activities that are directly or indirectly involved in providing services to tourists. Among others, these include the services of the following sectors: transportation services, hotels and lodging services, food and beverage sector services, cultural and entertainment sectors, banking and financial services, and promotion and publicity. Equally important are the public services that deal directly with the tourists. Most notably amongst these services are immigration control, consulate services, and tourist information and safety services.

For statistical and economic analysis purposes, the following measures (indicators), which are also used in this paper, are generally used to quantify international tourism activity:

International Tourist Arrivals, indicates the volume of international tourism. For a proper understanding of this term, two considerations should be taken into account. First, a *tourist* means a visitor who stays at least one night in a collective or private accommodation in the country visited (overnight visitors). Second, *arrivals* do not refer to the number of persons travelling, but rather to the number of arrivals (visits) in a destination; same-day visitors are not included.

International Tourism Receipts, indicates the value of international tourism activity. This covers all tourism receipts made by visitors from abroad (inbound) on lodging, food and drinks, fuel, transportation in the country, entertainment, shopping, etc. This concept includes receipts generated by overnight as well as by same-day visitors. It excludes however the receipts related to international transport made by non-resident visitors (for instance, ticket receipts from foreigners travelling with a national company). For the sake of consistency with the Balance of Payments recommendations of the IMF, these receipts are classified in a separate category called **International Fare Receipts**.

International Tourism Expenditure are defined as expenditure of outbound visitors in other countries, including their payments for on lodging, food and drinks, fuel, transportation in the country, entertainment, shopping, etc. This includes expenditure made by overnight as well as by same-day visitors. It excludes, however, the expenditure related to international transport made by resident visitors (for instance, ticket expenditures of residents travelling with an international company). Similarly, these expenditures are classified in a separate category called **International Fare Expenditure**.

The **Balance of International Tourism Travel** for a country is obtained by deducting its international tourism receipts from its international tourism expenditure. Similarly, the **Balance of International Fare** is obtained by deducting the international fare receipts from the international fare expenditure. Accordingly, the **Balance of International Tourism Payments** of a country is the result of adding the two sub-balances of international tourism travel and international fare.

3. WORLD OVERVIEW

The number of international tourist arrivals shows an evolution from a mere 25 million in 1950 to almost 698 million in 2000, corresponding to an average annual growth rate of 7 percent. Spurred on by a strong global economy and special events held to commemorate the new millennium, international tourist arrivals grew by an estimated 7.3 percent in 2000, the highest growth rate in nearly a decade and almost double the increase of 1999 (Table 1).

On the other hand, international tourism receipts, at current prices and excluding international transport costs, had an average annual growth rate of 12 percent in the period 1950-2000². International tourism activity generated in 2000 world-wide estimated receipts of US\$ 477 billion, a growth of almost 5 percent over the previous year (Table 2). Per day, this translates to receipts generated by international tourism of US\$ 1.3 billion.

Modern tourism is characterised by strong overall development and by a growing tendency for tourists to visit new destinations, together with

² All the figures and data pertaining to the year 1950 in this section are drawn from "Tourism Market Trends: World Overview & Tourism Topics", 2001 Provisional Edition, World Tourism Organization, Madrid, Spain.

tourism product diversification and increasing competition between destinations. New destinations are steadily increasing their market share. By region, this growing dispersion of tourists is illustrated by above-average growth in the number of international tourist arrivals in East Asia and the Pacific, South Asia, Africa and the Middle East, and by the below-average growth of the more traditional tourist-receiving regions of Europe and the Americas (Table 1).

Europe and the Americas are still the main tourist-receiving regions. From 1950 to 2000, international tourist arrivals in these two regions grew at an average rate of 6.6 and 5.9 percent respectively. In absolute terms, they registered an additional 385 million and 121 million arrivals with respect to the number registered in 1950. But since other regions are growing at a faster pace, the share of these two regions in the world total had narrowed substantially by 2000 to 57.7 percent for Europe and 18.5 percent for the Americas, from 61.8 and 20.3 percent, respectively, in 1990 (Table 1).

All regions of the world hosted more tourists in 2000 (Table 1). East Asia/Pacific is the region that has most benefited from this transformation of the world tourism market. Historic series show that this region experienced the highest growth rate, having obtained a 16 percent share of the world market in 2000. In 1997 and 1998, however, arrivals in this region dropped slightly as a result of the Asian crisis. Nonetheless, figures for 1999 and 2000 show that recovery is well under way. The Middle East and South Asia were other regions of the success stories in 2000, with tourist arrivals growing recently by 12 and 11 percent respectively. Africa was relatively left out of the tourism boom in 2000, with only a 4.5-percent increase in its international tourist arrivals.

On the other hand, the regional shares in international tourism receipts differ somewhat from the shares in arrivals (Table 2). In 2000, Europe was the leader with 48.4 percent of the world total (US\$ 231 billion). It was followed by the Americas with 28.8 percent (US\$ 137 billion), East Asia/Pacific with 17.2 percent (US\$ 82 billion), Africa with 2.3 percent (US\$ 11 billion), the Middle East with 2.2 percent (US\$ 10 billion), and South Asia with a mere 1.1 percent (US\$ 5 billion).

However, when the average growth rates in the five-year period of 1995-99 are considered, the picture becomes completely different, where

South Asia is the leader with a growth rate of 7.2 percent, and the East Asia/Pacific region at the bottom of the list with only 0.2 percent (see Table 2). This is mainly due to the fact that receipts per arrival vary as each region's tourism has its own characteristics with regard to length of stay, purpose of visit, geographical distance, etc. In this regard, the world average tourism receipts per arrival amounted in 1999 to US\$ 684; the highest were found in the Americas (US\$ 1066) followed by South Asia (US\$ 797) and East Asia/Pacific (US\$ 735)³.

According to the World Tourism Organization, world international tourism is not expected to perform quite as well in 2001 as it did in 2000. The world economy has been remarkably strong in 2000 with world economic output measured in real GDP growing at a rate of 4.8 percent. As a result, disposable income increased as well and boosted discretionary spending on tourism. However, growth rates as reached in 2000 for both world tourism and economic output are not expected to hold in 2001. International tourism performance is expected to be influenced by the current downturn in the world economy. In particular, the USA economy is noticeably cooling down in 2001, after an exceptional long and strong growth cycle.

However, in the long-run, the World Tourism Organization forecasts that the number of people travelling internationally is expected to reach over 1.56 billion by 2020 from 698 million in 2000, corresponding to an average annual increase of more than 4 percent. Earnings from international tourism are expected to soar from US \$478 billion in 2000 to more than US \$2 trillion in 2020. The total tourist arrivals by region show that by 2020 the top three receiving regions will be Europe, East Asia/Pacific and the Americas followed by Africa, the Middle East and South Asia.

³ Calculated using the data in Table 1 and 2.

TABLE 1: INTERNATIONAL TOURIST ARRIVALS BY REGION

	Tourist Arrivals (million)					Market Share (%)				Growth Rate (%)		
	1990	1995	1998	1999	2000	1990	1995	1999	2000	98-99	99-00	95-99
World Total	457.2	550.3	626.7	650.2	697.6	100.0	100.0	100.0	100.0	3.8	7.3	4.3
Europe	282.7	323.4	373.7	380.2	402.6	61.8	58.8	58.2	57.7	1.7	5.9	4.1
Americas	92.8	108.9	119.5	122.2	128.9	20.3	19.8	19.6	18.5	2.3	5.5	2.9
East Asia/Pacific	54.6	81.4	87.9	97.4	111.7	11.9	14.8	15.5	16.0	10.8	14.6	4.6
Africa	15.0	20.1	25.0	26.4	27.6	3.3	3.6	3.7	4.0	5.7	4.5	7.1
Middle East	9.0	12.4	15.3	18.1	20.3	2.0	2.2	2.3	2.9	18.1	12.1	10.0
South Asia	3.2	4.2	5.2	5.8	6.4	0.7	0.8	0.8	0.9	10.7	11.0	8.3
OIC Countries	34.5	42.9	50.3	51.4	58.4	7.5	7.8	7.9	8.4	2.2	12.1	3.7

Source: Extracted from Table A.1 in the Annex.

TABLE 2: INTERNATIONAL TOURISM RECEIPTS BY REGION

	Tourism Receipts (US\$ billion)					Market Share (%)				Growth Rate (%)		
	1990	1995	1998	1999	2000	1990	1995	1999	2000	98-99	99-00	95-99
World Total	263.4	406.2	442.4	455.1	477.3	100.0	100.0	100.0	100.0	2.9	4.9	2.9
Europe	143.2	212.8	231.7	232.8	231.1	54.4	52.4	50.9	48.4	0.5	-0.7	2.3
Americas	69.2	99.6	117.2	122.4	137.4	26.3	24.5	25.1	28.8	4.5	12.2	5.3
East Asia/Pacific	39.2	74.5	70.7	75.2	82.1	14.9	18.4	19.0	17.2	6.4	9.1	0.2
Africa	5.3	8.1	9.9	10.3	11.2	2.0	2.0	2.1	2.3	3.6	8.0	6.1
Middle East	4.4	7.6	8.7	9.7	10.4	1.7	1.9	1.9	2.2	12.2	6.7	6.2
South Asia	2.0	3.5	4.3	4.6	5.1	0.8	0.9	0.9	1.1	7.1	11.1	7.2
OIC Countries	14.6	25.9	28.6	28.9	31.5	5.5	6.4	6.4	6.6	1.2	8.1	3.9

Source: Extracted from Table A.2 in the Annex.

4. BASIC TOURISM INDICATORS OF THE OIC COUNTRIES

In the light of the above overview of the world trends in international tourism, this section attempts to examine the basic tourism indicators in OIC countries, and to compare them with those of the world and other regions. To perform this task, the paper concentrates on the volume of OIC countries international tourism in terms of the number of tourist arrivals and the value in terms of tourism receipts in current US dollar prices. It thus does not take into account the capacity factors of the tourism sector, such as number of hotels, beds, etc., mainly due to the limitations of the available statistical information on tourism. For the same reason, it was not possible also to consider inter OIC tourism activity.

Due also to the shortage of data on international fare receipts and expenditure in many OIC countries, it was not possible to calculate the net balance of international tourism payments in these countries. Nevertheless, an attempt has been made at the end of this section to calculate the balance of international tourism travel in selected OIC countries for which the relevant data are available. This balance is then related to the GNP of each country.

4.1. Tourist Arrivals

According to the data of the World Tourism Organization, 58.4 million international tourist arrivals were recorded in 2000 in OIC member countries for which the data are available (Table 3). Accordingly, the OIC tourism volume grew by an impressive 12 percent, its highest ever growth rate and almost 6 times the increase in 1999. In comparison to the world-wide volume of tourist arrivals, although this rate is significantly higher than that of the world total, the relative share of the OIC countries in the world-wide international tourism market accounted for only 8.4 percent, an increase by a mere 0.5 percent compared with their share in 1999.

On average, during the five-year period of 1995-99, the total OIC tourist arrivals increased by 3.7 percent as compared to 4.3 percent in the world-wide average tourist arrivals. When compared with other regions in the world (see Table 3), this indicates a relatively slow expansion in the volume of OIC international tourist arrivals. At the OIC

TABLE 3: OIC INTERNATIONAL TOURIST ARRIVALS BY REGION

	Tourist Arrivals (million)					Market Share (%)				Growth Rate (%)		
	1990	1995	1998	1999	2000	1990	1995	1999	2000	98-99	99-00	95-99
OIC Total	34.5	42.9	50.3	51.4	58.4	100.0	100.0	100.0	100.0	2.2	12.1	3.7
Middle East (*)	9.0	12.4	15.3	18.1	20.3	26.1	28.9	35.2	34.8	18.1	12.1	10.0
East Asia/Pacific	10.0	12.3	11.1	12.7	15.2	29.0	28.7	24.7	26.0	12.1	17.2	0.6
Africa	9.7	9.2	11.1	10.5	10.4	28.1	21.4	20.4	17.8	-5.1	-1.7	2.7
Europe	4.8	7.6	10.6	7.6	9.6	13.9	17.7	14.8	16.4	-39.6	20.7	0.1
South Asia	0.9	1.3	2.0	2.4	2.9	2.6	3.0	4.7	5.0	14.7	19.0	17.4
Americas	0.1	0.1	0.2	0.1		0.3	0.3	0.2		6.8		-2.4

Source: Extracted from Table A.1 in the Annex.

(*) The Middle East region includes countries, which are all OIC member countries.

regional level, except the OIC Middle East and OIC South Asia regions, the number of tourist arrivals in the other OIC regions grew at a lower pace compared to the growth rates of the same world-wide regions during the period 1995-99.

In terms of the shares of the OIC regions in the total OIC international tourist market in 2000, the OIC Middle East region comes at the top with 34.8 percent followed by the OIC East Asia/Pacific region with 26 percent. The OIC countries in Africa accounted for 17.8 percent in the total OIC tourist arrivals market. In Europe, Turkey accounted for 16.4 percent in the OIC total market. In contrast, although the OIC countries in South Asia recorded the lowest share in the total OIC tourist arrivals market (5 percent), their growth rate of international tourist arrivals was the highest (17.4 percent) amongst the other OIC regions in the period 1995-99 (Table 3).

TABLE 4: OIC MAIN TOURISM DESTINATIONS

	Tourist Arrivals (million)			Market Share in OIC (%)		Average Annual Growth (%)	
	1995	1999	2000	1995	2000	95-99	99-2000
OIC Total	42.9	51.4	58.4	100.0	100.0	3.7	12.1
Malaysia	7.5	7.9	10.2	17.5	17.5	1.5	28.9
Turkey	7.1	6.9	9.6	16.6	16.4	-0.7	39.1
Indonesia	4.3	4.7	5.1	10.0	8.7	2.3	7.1
Tunisia	4.1	4.8	5.1	9.6	8.7	4.1	4.1
Egypt	2.3	4.5	5.1	5.4	8.7	11.8	14.0
Morocco	2.6	3.8	4.1	6.1	7.0	10.1	7.4
Iran	0.5	1.3	1.7	1.2	2.9	30.7	28.7
Jordan	1.1	1.4	1.4	2.6	2.4	6.0	5.1
Algeria	0.5	0.7	0.9	1.2	1.5	9.6	14.7
Lebanon	0.1	0.7	0.7	0.2	1.2	10.6	10.3
Maldives	0.3	0.4	0.5	0.7	0.9	8.1	8.6
Sub-total	30.4	37.1	44.4	70.9	76.0	4.1	16.4

Source: Extracted from Table A.1 in the Annex.

At the individual country level, the figures in Table 4 indicate that international tourist arrivals in the OIC countries are concentrated in a small number of countries. In terms of absolute numbers of tourist arrivals and shares in the total OIC market, the main OIC tourist destinations are Malaysia, Turkey, Indonesia, Tunisia, Egypt, Morocco, Iran, Jordan, Algeria, Lebanon, and Maldives. In 2000, this group of OIC countries received 44.4 million international tourist arrivals,

corresponding to 76 percent of the total OIC tourism market and to an increase by 16.4 percent. During the period of 1995-99, tourist arrivals in these countries as a group grew, on average, by 4.1 percent compared to 3.7 percent in the total OIC market (Table 4).

4.2. Tourism Receipts

On the other hand, the figures in Table 5 and 6 reflect the picture in terms of the value of international tourism activity in the OIC countries, i.e., the value of tourism receipts in terms of the current US dollar. In this regard, the trends in international tourism receipts in OIC countries and regions followed, to a large extent, the trends in international tourist arrivals.

In 2000, international tourism in the OIC countries for which the data are available generated US\$ 31.5 billion, corresponding to an increase by 8.1 percent as compared to an increase by only 1.2 percent in 1999. Although this rate is significantly higher than the rate of increase in world-wide international tourism receipts (4.9 percent) in 2000, the relative share of OIC countries' tourism receipts in the world total accounted for only 6.6 percent, an increase by a mere 0.2 percent compared with their share in 1999. However, during the five-year period of 1995-99, total OIC tourism receipts increased on average by 3.9 percent compared to 2.9 percent on the average world-wide tourism receipts (see Table 2).

The shares of OIC tourism receipts, at the regional level, in the world-wide tourism receipts differ somewhat from the shares in tourist arrivals. This is also true, as shown in Tables 5 and 6, for the shares of OIC regions and individual countries in the total OIC tourism receipts. This, as has been mentioned in the above section, is due to the fact that receipts per arrival vary as each region's and country's tourism has its own characteristics with regard to length of stay, purpose of visit, types of shopping, etc.

In terms of the shares of OIC regions in the total OIC tourism receipts, the OIC Middle East region is also the leader with a 33 percent market share in the OIC total, followed by the OIC East Asia/Pacific region with 31.7 percent. The OIC countries in Europe (mainly Turkey) accounted for 24.3 percent in the total OIC tourism receipts. The OIC

TABLE 5: OIC INTERNATIONAL TOURISM RECEIPTS BY REGION

	Tourism Receipts (US\$ billion)					OIC Market Share (%)				Growth Rate (%)		
	1990	1995	1998	1999	2000	1990	1995	1999	2000	98-99	99-00	95-99
OIC Total	14.6	25.9	28.6	28.9	31.5	100.0	100.0	100.0	100.0	1.2	8.1	3.9
Middle East (*)	4.4	7.6	8.7	9.7	10.4	30.1	29.3	33.6	33.0	12.2	6.2	6.3
East Asia/Pacific	3.8	9.2	6.8	8.3	10.0	26.0	35.5	28.7	31.7	17.3	17.4	-2.1
Europe	3.2	5.2	8	5.9	7.6	21.9	20.1	20.4	24.3	-36.3	23.3	2.3
Africa	2.8	3.2	4.1	3.9	2.1	19.2	12.4	13.5	6.7	-3.7	-84.6	3.8
South Asia	0.3	0.5	0.9	1.1	1.3	2.1	1.9	3.8	4.1	16.5	16.9	15.7
Americas	0.1	0.1	0.1			0.7	0.4					-13.4

Source: Extracted from Table A.2 in the Annex.

(*) Middle East region includes countries, which are all OIC member countries.

countries in Africa accounted for only 6.7 percent of the total OIC tourism receipts. In contrast, although the OIC countries in South Asia recorded the lowest share in the total OIC tourism receipts (4.1 percent), the growth rate of their tourism receipts was the highest (15.7 percent) amongst the other OIC regions in the period 1995-99 (Table 5).

TABLE 6: OIC MAIN TOURISM EARNERS

	Tourism Receipts (US\$ million)			Market Share in OIC (%)		Average Annual Growth (%)	
	1995	1999	2000	1995	2000	95-99	99-2000
OIC Total	25927	28904	31450	100.0	100.0	3.9	8.1
Turkey	4957	5203	7636	19.1	24.3	1.2	46.8
Indonesia	5229	4710	5046	20.2	16.0	-2.6	7.1
Malaysia	3909	3540	4947	15.1	15.7	-2.1	17.4
Egypt	2684	3903	4345	10.4	13.8	9.8	11.3
Morocco	1304	1880	2037	5.0	6.5	9.6	8.4
Tunisia	1393	1560	-	5.4	-	2.9	-
Iran	190	662	850	0.7	2.7	36.6	28.4
Lebanon	710	673	742	2.7	2.4	-1.3	10.3
Jordan	652	795	722	2.5	2.3	5.1	-9.2
Maldives	210	325	344	0.8	1.1	11.5	5.8
Sub-total	21238	23251	26669	81.9	84.8	4.7	12.8

Source: Extracted from Table A.2 in the Annex.

As in the OIC tourist arrivals, the figures in Table 6 indicate that the tourism receipts in the OIC countries are concentrated in a small number of countries, which are almost the same as the countries which are the main OIC tourist destinations. In descending order, the main OIC tourism earners are Turkey, Indonesia, Malaysia, Egypt, Morocco, Tunisia, Iran, Lebanon, Jordan, and Maldives. In 2000, this group of OIC countries earned US\$ 26.7 billion as tourism receipts, corresponding to 84.8 percent of the total OIC tourism receipts and to an increase by 12.8 percent. During the period of 1995-99, tourism receipts earned by these countries as a group grew on average by 4.7 percent compared to 3.9 percent in the OIC total tourism receipts (Table 6).

4.3. Balance of International Tourism Travel

In this section, the balance of international tourism travel in terms of current US dollars is calculated for each OIC individual country for which the relevant data are available (see Table A.3 in the Annex). This has been done by deducting the international tourism receipts of each

country from its international tourism expenditure. The outcome is then related, as an attempt to evaluate the role of the tourism sector in the economies of OIC member countries, to the GNP of each country. In addition, the international tourism receipts are also related, as a percentage, to the exports of goods and services of each country. The result of this exercise is illustrated in the Annex in Tables A.4 and A.5, respectively.

TABLE 7: TOP 10 BALANCES OF INTERNATIONAL TOURISM TRAVEL IN THE OIC COUNTRIES (US\$ Million)

	1994	1995	1996	1997	1998
Turkey	3435	4045	4697	6372	6055
Malaysia	1446	1595	1872	224	2456
Indonesia	2885	3056	3909	2910	1943
Egypt	939	1406	1887	2380	1411
Tunisia	1101	1151	1277	1254	1389
Morocco	933	1000	1374	1133	1249
Lebanon	672	710	715	1000	1221
Syria	637	840	693	490	610
Jordan	187	235	362	376	402
Maldives	153	179	228	246	261

Source: Table A.3 in the Annex.

Table 7 shows, in descending order, the top 10 OIC countries in terms of their balance of international tourism travel in millions of US dollars. When compared with Table 4 and Table 6, it is clear that most of these countries constitute the main OIC tourism destinations as well as the main OIC tourism earner countries. However, when we examine the role of the tourism sector in the economies of OIC countries in terms of the contribution of tourism activity to GNP and the exports of goods and services of each country, the picture reflects a widely different situation. This is clear in Tables 8 and 9 below.

As for the contribution of tourism to the GNP of the OIC countries, Table 8 lists the OIC countries, in descending order, according to their balance of international tourism travel as percentage of their GNP. This has been calculated into 6 ranges, the highest of which includes records of 50 percent and above, and the lowest includes sub-zero records. In a similar manner, Table 9, on the other hand, lists the OIC countries according to their international tourism receipts as a percentage of their exports of goods and services.

**TABLE 8: BALANCE OF INTERNATIONAL TOURISM TRAVEL
AS A PERCENTAGE OF GNP (Average 1994-98)**

(%)	Countries
50 +	Maldives (78.4 %)
25 - 49	--
10 - 24	Guyana (10.7 %)
5 - 9	Comoros, Suriname, Lebanon, Tunisia
0.1 - 4.9	Jordan, Syria, Morocco, Bahrain, Gambia, Turkey, Egypt, Albania, Senegal, Malaysia, Indonesia, Benin, Sierra Leone, Oman, Kyrgyz Rep.
(-) - 0.0	Algeria, Uzbekistan, Iran, Togo, Cameroon, Uganda, Niger, Oman, Bangladesh, Libya, Turkmenistan, Pakistan, Yemen, Guinea, Mali, Azerbaijan, Gabon, Nigeria, Kuwait

Source: Table A.4 in the Annex.

The information in Table 8 indicates that, in general, the role of tourism in OIC countries is a function neither of the size nor of the level of affluence of the economy. In this regard, tourism is found to be the main economic activity in Maldives, the only country with a very high contribution of tourism in the economy (78 percent of GNP). In addition, tourism is found to have a relative important role compared to the size of the economy in few countries. This group includes the OIC countries in which tourism accounted for 5 to 10 percent of their GNP (i.e., Guyana, Comoros, Suriname, Lebanon, and Tunisia).

More interestingly, the information in Table 8 indicates that the tourism sector plays a limited role in most of the economies of the main tourism destination and earner countries of the OIC. This group includes the OIC countries in which tourism accounted for 0.1 to 4.9 percent in their GNP (e.g., Jordan, Morocco, Turkey, Egypt, Malaysia, Indonesia, etc.). Moreover, the balance of tourism travel is found to have a negligible or even a negative impact in the economies of the majority of the OIC countries for which the data are available (i.e., the countries with a zero or negative balance of tourism travel).

On the other hand, the information in Table 9 indicates that tourism seems to play a more significant role in the economies of the OIC countries as a source of foreign exchange earnings. In 1994-98, the tourism activity generated, on average, foreign exchange earnings of more than four times those generated by exports of goods and services in Maldives, and almost three times the value of exports of goods and services in Comoros and more than twice that value in Gambia and

Lebanon. In the same period, international tourism receipts accounted for 87 percent and 73.6 percent of the total exports of goods and services in Egypt and Suriname, respectively. It also accounted for between 10 and 24 percent of the value of exports of goods and services in 9 countries and between 5 and 9 percent in 5 countries. Yet, tourism is found to have a small role in generating foreign exchange earnings in many OIC countries (those countries for which international tourism receipts accounted for less than 5 percent of their exports of goods and services, see Table 9).

**TABLE 9: INTERNATIONAL TOURISM RECEIPTS
AS A PERCENTAGE OF EXPORTS OF GOODS AND SERVICES
(Average 1994-98)**

(%)	Countries
50 +	Maldives (411 %), Comoros (261.2 %), Gambia (153.8 %), Lebanon (118.9 %), Egypt (87 %), Suriname (73.6%)
25 – 49	Jordan (41.7%), Syria (34.6%), Albania (30.9%), Turkey (26.7%), Tunisia (26.5%)
10 – 24	Morocco, Senegal, Sierra Leone, Uganda, Turkmenistan, Guyana, Azerbaijan, Burkina Faso, Indonesia
5 – 9	Mali, Benin, Niger, Bahrain, Togo
0.1 - 4.9	Malaysia, Yemen, Cameroon, Iran, Oman, Pakistan, Kuwait, Sudan, Bangladesh, Kyrgyz Rep., Nigeria, Uzbekistan, Guinea, Gabon, Algeria, Libya

Source: Table A.5 in the Annex.

Taking the above into account, it seems that, so far, only the countries with inherent (natural, historical, cultural, etc.) tourism potential tend generally to develop and extend their tourism industries. The results of the exercise undertaken above indicate that tourism development is neglected in some resource-rich as well as in most poor OIC countries. This is mainly due to the lack of awareness of the economic role of tourism in both groups, but also to the lack of resources and insufficient infrastructures in the latter. Thus, though a crucial factor, potential in natural resources alone cannot make a successful tourism industry. That has to be coupled with insightful planning, public and social awareness, and prudent strategies and policies.

5. PROBLEMS FACING TOURISM IN THE OIC COUNTRIES

The problems facing the tourism sector and the development of tourism activity in the OIC countries are diverse as each country has its own

tourism features, level of development, and national development priorities and policies. However, these problems, *inter alia*, can be summarised into the following:

- ***Lack of inherent tourism potential (natural, historical, cultural, etc.)***. In some cases, the development of tourism is impeded by the country's lack of inherent historical or cultural tourism resources. However, though it is a crucial factor, tourism resources potential alone cannot make a successful tourism industry.
- ***Lack of knowledge and awareness***. Presumably, all OIC countries are aware of the cultural value of tourism. However, in many OIC countries there is still a fundamental lack of awareness of the economic importance of tourism as an industry. This is true both for its positive impact as potential source of foreign exchanges and employment or its negative impact as a possible leakage of the country's own resources.
- ***Lack of technical know-how and weak promotional activity***. Even when that fundamental awareness is there, in many cases there is generally a lack of knowledge and know-how as to where to make a start and how. Tourism as a modern industry is recent in the world. Apart from the OIC countries in which there has been a history of tourism as a lifestyle, tourism is also a new and unfamiliar activity in many OIC countries. Another related problem is the absence or weak publicity promotion and mass media exposure due in many cases to the limited technological services available.
- ***Lack of tourism-related infrastructures***. Many OIC countries lack the sufficient infrastructures necessary for the development of a successful tourism sector. The most important amongst these are hotels and lodging services, transportation and communication, safety and security and tourism information services.
- ***Lack of tourism investments***. While investment in services is a well-established economic activity in the developed countries, it is still lagging behind in developing countries. Investment in service-oriented projects in developing countries, particularly in tourism, is often regarded as a high-risk investment. Accordingly, though they may have natural tourism potential, it is very difficult for OIC poor

and least-developed countries to have access to reasonable financing for their touristic projects even when they manage to tackle the problems of project identification and planning.

- ***Lack of tourism diversification.*** For many years, international tourism has been characterised by its concentration in coastal or watercourse areas, and in summer, for rest, relaxation and leisure. However, modern tourism activity has shown a growing tendency for diversification and change. This makes it difficult for many OIC countries, including those with a relatively developed tourism sector, to keep pace with the rapidly changing and complex requirements of tourists. In a highly competitive international tourism market and with the emerging of new tourist destinations, the improvement of the conditions that foster modern tourism development is not an easy process.
- ***Lack of tourism safety.*** The safety of tourists is among the primary factors for any successful tourism industry and thus should be one of the basic objectives of tourism planning and provisions. Tourism safety-related problems whether real or perceived exert a negative impact on the reputation of host countries. In this regard, negative perceptions appear to play a detrimental role in the prospects of tourism in many OIC countries. Even such factors as rumours may cause great damage on complete tourist seasons.

6. POLICY RECOMMENDATIONS AND ACTIONS FOR COOPERATION

Despite the diverse problems facing tourism in the OIC countries and the modest share of the latter in the world tourism market, there still is a wide scope for the development of a modern tourism industry and intra-OIC cooperation in this important field. Overall, this calls for the adoption of articulate long-term strategies as well as medium to short-term plans and programs at the national level that would be accompanied by a process of creating a supportive OIC cooperation environment. In this regard, a wide range of policy recommendations can be proposed at both the national and OIC levels as follows:

6.1. At the National Level

- Objectives and programs of action to promote and develop tourism as a modern industry are to be outlined specifically in the national

development plans and strategies. This is to be accompanied by developing new resources and facilities as well as raising public awareness of inherent qualities and resources.

- Developing and raising tourism-oriented education. This will help change people's perceptions regarding tourism and raising their awareness of the opportunities and challenges involved in tourism. This should be accompanied by making efficient use of the mass media and other promotional facilities to publicise and promote existing attractions and available resources.
- Improving the quality and efficiency of the basic tourism-related infrastructures and services such as hotels, roads, public amenities, transportation and communication to provide world class services to visitors and tourists. These include also tourism information, immigration and visa, and police services. In this regard, necessary laws and regulations should be put into place to control the quality of services provided by the private sector to tourists. Equally important is the providing of technical training on different aspects of tourism, particularly to the people and personnel engaged directly in the sector activities.
- Encouraging and promoting extensive private sector involvement in tourism development. In this regard, endeavours should be made to establish an atmosphere that raises confidence and encourages private sector investment in touristic projects and establishing joint ventures particularly in the areas of capacity building and improving the quality of tourism services.
- Improving banking and financial services, particularly those facilitating the transfer of money. In this regard, a safe and efficient system of money transfer is among the main factors of a successful tourism industry.
- Enhancing cooperation and benefiting from the opportunities available in OIC countries and countries in other regions as well as in the relevant international institutions. In this context, efforts should be made to establish joint actions at bilateral and multilateral levels to strengthen and expand tourism activities. In this regard, the IFC of the World Bank has developed a special program for tourism

development. OIC countries should make use of these resources and others to help identify, plan and fund tourism activities.

6.2. At the OIC Level

Specific measures should be taken by the OIC countries as well as the OIC institutions for effective implementation of the recommendations under the area of tourism in the Plan of Action (POA) to Strengthen Economic and Commercial Cooperation among the Member Countries of the OIC. Similar measures should also be taken for the fulfilment and implementation of the commitments and resolutions made at the “First Islamic Conference of Ministers of Tourism” which was held in Isfahan, the Islamic Republic of Iran in October 2000 and the “Isfahan Declaration”. Stressing the importance and the relevance of the recommendations contained in the POA and the commitments of the Isfahan Declaration, it is worth singling out the following among them:

1. Boosting cooperation among OIC Member States in tourism activity through promotion of public awareness, education, training, investment opportunities and involvement of private sectors.
2. Supporting joint actions at bilateral and multilateral levels to strengthen and expand tourist activities among the OIC member countries and beyond.
3. Underlining the need to preserve and protect the Islamic monuments, sites, and places, as they constitute the common cultural heritage of the Islamic world.
4. Improving further the existing procedures and arrangements, with due respect to the national laws, so as to facilitate development of intra-OIC tourism.
5. Enhancing further cooperation among the OIC Secretariat, concerned specialist and affiliated institutions and subsidiary organs of the OIC, as well as with the World Tourism Organization and other relevant international institutions.
6. Requesting the Islamic Development Bank to pay a particular attention to tourism through provision of financial facilities for development of tourism among OIC countries.

7. Holding of expert meetings on ways and means towards effective implementation of the relevant provisions of the OIC POA on tourism.
8. Setting up a follow-up committee with a view to pursuing resolutions and decisions of the ministerial meetings and coordinating the activities of the member countries on tourism.

However, practical steps and modalities are still needed in order to translate these broad objectives and ideas into realistic policies aimed at promoting intra-OIC tourism. In this context, the paper wishes to single out the importance of the ease of travel among the OIC Member States. To enhance intra-OIC tourism, OIC member countries should endeavour to ease entry and movement of visitors among them. Visa and other travel procedures need to be simplified in member countries. In this regard, the idea of concluding the framework of an agreement on visa arrangements among the OIC Member States should be seriously considered. Furthermore, direct air and sea routes should be established between the capitals and major cities of the OIC countries. Such measures would be in harmony with the Islamic free trade area and the Islamic common market strategies. The ultimate objective should be to create a border free Islamic world.

ANNEX

TABLE A.1: INTERNATIONAL TOURIST ARRIVALS BY REGION, SUB-REGION AND OIC COUNTRY OF DESTINATION

	Tourist Arrivals (1000)					Market Share (%) ¹		Growth Rate (%)		
	1990	1995	1998	1999	2000	1995	1999	98/99	99/2000	1995/99
Africa	14959	20082	25004	26430	27624	100.0	100.0	5.7	4.5	7.1
<i>North Africa</i>	8398	7305	8676	9437	10066	36.4	35.7	8.8	6.7	6.6
Algeria	1137	520	678	749	859	2.6	2.8	10.5	14.7	9.6
Morocco	4024	2602	3242	3817	4100	13.0	14.4	17.7	7.4	10.1
Sudan	33	63	38	39	50	0.3	0.1	2.6	28.2	-11.3
Tunisia	3204	4120	4718	4832	5057	20.5	18.3	2.4	4.7	4.1
OIC North Africa	8398	7305	8676	9437	10066	36.4	35.7	8.8	6.7	6.6
<i>West Africa</i>	1352	1913	2410	2655	-	9.5	10.0	10.2	-	8.5
Benin	110	138	152	-	-	0.7	-	-	-	-
Burkina Faso	74	124	160	218	-	0.6	0.8	36.3	-	15.1
Gambia	100	45	91	-	-	0.2	-	-	-	-
Guinea	-	-	23	27	33	-	0.1	17.4	22.2	-
Mali	44	42	83	87	91	0.2	0.3	4.8	4.6	20.0
Mauritania	-	-	-	24	-	-	0.1	-	-	-
Niger	21	35	42	43	50	0.2	0.2	2.4	16.3	5.3
Nigeria	190	656	739	-	-	3.3	-	-	-	-
Senegal	246	280	352	369	-	1.4	1.4	4.8	-	7.1
Sierra Leone	98	38	6	6	10	0.2	0.0	0.0	66.7	-37.0
Togo	103	53	69	70	60	0.3	0.3	1.4	-14.3	7.2

OIC West Africa	986	1411	1717	844	244	7.0	3.2	-103.4	-245.9	-29.6
<i>Central Africa</i>	351	357	513	452	-	1.8	1.7	-11.9	-	6.1
Cameroon	89	100	135	-	-	0.5	-	-	-	-
Chad	9	19	41	47	40	0.1	0.2	14.6	-14.9	25.4
Gabon	109	125	195	175	-	0.6	0.7	-10.3	-	8.8
OIC Central Africa	207	244	371	222	40	1.2	0.9	-67.1	-455.0	-30.3
<i>East Africa</i>	2852	4516	5674	5945	-	22.5	22.5	4.8	-	7.1
Comoros	8	23	27	24	-	0.1	0.1	-11.1	-	1.1
Djibouti	33	21	21	-	-	0.1	-	-	-	-
Somalia	46	10	10	-	-	0.0	-	-	-	-
Uganda	69	188	238	-	-	0.9	-	-	-	-
OIC East Africa	156	242	296	24	-	1.1	0.1	-	-	-
<i>Southern Africa</i>	2006	5991	7731	7941	-	29.8	30.0	2.7	-	7.3
OIC Africa	9747	9202	11060	10527	10350	45.8	39.8	-5.1	-1.7	2.7
Americas	92799	108931	119475	122223	128889	100.0	100.0	2.3	5.5	2.9
<i>North America</i>	71748	80491	84654	87005	91957	73.9	71.2	2.8	5.7	2.0
<i>Caribbean</i>	11411	14040	15951	16129	17088	12.9	13.2	1.1	5.9	3.5
<i>Central America</i>	1748	2607	3453	3990	4296	2.4	3.3	15.6	7.7	11.2
<i>South America</i>	7892	11793	15417	15099	15549	10.8	12.4	-2.1	3.0	6.4
Guyana	64	106	68	75	-	0.1	0.1	10.3	-	-8.3
Suriname	46	43	55	57	-	0.0	0.0	3.6	-	7.3
OIC South America	110	149	123	132	-	0.1	0.1	6.8	-	-2.4
OIC Americas	110	149	123	132	-	0.1	0.1	6.8	-	-2.4
East Asia/Pacific	54598	81354	87910	97445	111693	100.0	100.0	10.8	14.6	4.6
<i>North-East Asia</i>	27969	44102	50732	55235	63995	54.2	56.7	8.9	15.9	5.8
<i>South-East Asia</i>	21469	29173	28851	33356	38124	35.9	34.2	15.6	14.3	3.4
Brunei	377	498	964	-	-	0.6	-	-	-	-
Indonesia	2178	4324	4606	4728	5064	5.3	4.9	2.6	7.1	2.3

Malaysia	7446	7469	5551	7931	10221	9.2	8.1	42.9	28.9	1.5
OIC North-East Asia	10001	12291	11121	12659	15285	15.1	13.0	12.1	17.2	0.6
<i>Pacific Ocean</i>	5160	8079	8327	8855	9574	9.9	9.1	6.3	8.1	2.3
OIC East Asia/Pacific	10001	12291	11121	12659	15285	15.1	13.0	12.1	17.2	0.6
Europe	282744	323353	373723	380181	402644	100.0	100.0	1.7	5.9	4.1
<i>Northern Europe</i>	29086	37638	43869	43613	44081	11.6	11.5	-0.6	1.1	3.8
<i>Western Europe</i>	113838	116747	131429	135747	141576	36.1	35.7	3.3	4.3	3.8
<i>Cent./Eastern Europe</i>	43809	85780	74772	72823	76594	20.3	19.2	-2.6	5.2	2.6
Azerbaijan	-	93	483	602	-	0.0	0.2	24.6	-	59.5
Kyrgyz Rep.	-	36	59	69	-	0.0	0.0	16.9	-	17.7
Tajikistan	-	-	511	-	-	-	-	-	-	-
Turkmenistan	-	218	300	-	-	0.1	-	-	-	-
Uzbekistan	-	92	272	-	-	0.0	-	-	-	-
OIC Cent./E. Europe	-	439	1625	671	-	0.1	0.2	-142.2	-	8.9
<i>Southern Europe</i>	88588	91790	110528	116359	125721	28.4	30.6	5.3	8.0	6.1
Albania	30	40	28	39	-	0.0	0.0	39.3	-	-0.6
OIC South. Europe	30	40	28	39	-	0.0	0.0	39.3	-	-0.6
<i>East Medit. Europe</i>	7423	11398	13125	11639	14673	3.5	3.1	-11.3	26.1	0.5
Turkey	4799	7083	8960	6893	9587	2.2	1.8	-23.1	39.1	-0.7
OIC E. Md. Europe	4799	7083	8960	6893	9587	2.2	1.8	-23.1	39.1	-0.7
OIC Europe	4829	7562	10613	7603	9587	2.3	2.0	-39.6	20.7	0.1
Middle East	8959	12352	15324	18098	20294	100.0	100.0	18.1	12.1	10.0
Bahrain	1376	1396	1750	1991	-	11.3	11.0	13.8	-	9.3
U.A.E (Dubai)	633	1601	2184	2481	-	13.0	13.7	13.6	-	11.6
Egypt	2411	2871	3213	4489	5116	23.2	24.8	39.7	14.0	11.8
Iraq	748	61	51	-	-	0.5	-	-	-	-
Jordan	572	1074	1256	1358	1427	8.7	7.5	8.1	5.1	6.0
Kuwait	15	69	77	-	-	0.6	-	-	-	-

Lebanon	-	450	631	673	742	3.6	3.7	6.7	10.3	10.6
Libya	96	56	32	40	-	0.5	0.2	25.0	-	-8.1
Oman	149	279	423	502	-	2.3	2.8	18.7	-	15.8
Palestine	-	-	201	271	330	-	1.5	34.8	21.8	-
Qatar	136	294	-	-	-	2.4	-	-	-	-
Saudi Arabia	2209	3325	3700	-	-	26.9	-	-	-	-
Syria	562	815	1267	1386	-	6.6	7.7	9.4	-	14.2
Yemen	52	61	88	-	-	0.5	-	-	-	-
OIC Middle East ²	8959	12352	15324	18098	20294	100.0	100.0	18.1	12.1	10.0
South Asia	3158	4200	5219	5777	6415	100.0	100.0	10.7	11.0	8.3
Afghanistan	8	4	4	-	-	0.1	-	-	-	-
Bangladesh	115	156	172	173	200	3.7	3.0	0.6	15.6	2.6
Iran	154	452	1008	1321	1700	10.8	22.9	31.1	28.7	30.7
Maldives	195	315	396	430	467	7.5	7.4	8.6	8.6	8.1
Pakistan	424	378	429	432	543	9.0	7.5	0.7	25.7	3.4
OIC South Asia	896	1305	2009	2356	2910	31.1	40.8	14.7	19.0	17.4
World Total	457200	550300	626700	650200	697600	100.0	100.0	3.8	7.3	4.3
OIC Total	34542	42861	50250	51375	58426	7.8	7.9	2.2	12.1	3.7

Source: World Tourism Organisation "Tourism Market Trends: World Overview and Tourism Topics", 2001 provisional edition, May 2001, Madrid, Spain.

Notes: A tourist means a visitor who stays at least one night in a collective or private accommodation in the country visited. Arrivals do not refer to the number of persons travelling, but rather to the number of arrivals (visits) in a destination.

- (1) Market share in the region.
- (2) All the countries in the Middle East region are OIC member countries.
- (3) (-) Data are not available.

TABLE A.2: INTERNATIONAL TOURISM RECEIPTS BY REGION, SUB-REGION AND OIC COUNTRY OF DESTINATION

	Tourism Receipts (US\$ million)					Market Share (%) ¹		Growth Rate (%)		
	1990	1995	1998	1999	2000	1995	1999	98/99	99/2000	1995/99
Africa	5298	8103	9917	10275	11200	100.0	100.0	3.6	8.0	6.1
<i>North Africa</i>	2292	2732	3295	3467	-	33.7	33.7	5.2	-	6.1
Algeria	64	27	24	-	-	0.3	-	-	-	-
Morocco	1259	1304	1712	1880	2037	16.1	18.3	9.8	8.4	9.6
Sudan	21	8	2	2	-	0.1	0.0	0.0	-	-29.3
Tunisia	948	1393	1557	1560	-	17.2	15.2	0.2	-	2.9
OIC North Africa	2292	2732	3295	3442	2037	33.7	33.5	4.3	-69.0	4.7
<i>West Africa</i>	575	693	948	990	-	8.6	9.6	4.4	-	9.3
Benin	28	27	33	-	-	0.3	-	-	-	-
Burkina Faso	11	25	42	-	-	0.3	-	-	-	-
Gambia	26	23	33	-	-	0.3	-	-	-	-
Guinea	30	1	1	7	12	0.0	0.1	600.0	71.4	62.7
Mali	47	25	50	50	50	0.3	0.1	0.0	0.0	18.9
Mauritania	9	11	20	28	-	0.1	0.3	40.0	-	26.3
Niger	17	15	18	24	-	0.2	0.2	33.3	-	12.5
Nigeria	25	54	142	-	-	0.7	-	-	-	-
Senegal	167	161	178	166	-	2.0	1.6	-6.7	-	0.8
Sierra Leone	19	6	8	8	12	0.1	0.1	0.0	50.0	7.5
Togo	58	13	11	6	-	0.2	0.1	-45.5	-	-17.6
OIC West Africa	437	361	536	289	74	4.5	2.8	-85.5	-290.5	-4.4
<i>Central Africa</i>	98	91	87	125	-	1.1	1.2	44.0	-	8.3
Cameroon	53	36	40	-	-	0.4	-	-	-	-
Chad	8	10	10	-	-	0.1	-	-	-	-

Gabon	3	7	8	11	7	0.1	0.1	37.5	-36.4	12.0
OIC Central Africa	64	53	58	11	7	0.7	0.1	-427.3	-57.1	-27.0
<i>East Africa</i>	1092	1947	2331	2605	-	24.0	25.4	11.8	-	7.6
Comoros	2	21	16	19	-	0.3	0.2	18.8	-	-2.5
Djibouti	6	4	4	-	-	0.0	-	-	-	-
Uganda	10	78	144	149	-	1.0	1.5	3.5	-	17.6
OIC East Africa	18	103	164	168	-	1.3	1.6	2.4	-	10.3
<i>Southern Africa</i>	1241	2640	3256	3087	-	32.6	30.0	-5.2	-	4.0
OIC Africa	2811	3249	4053	3910	2118	40.1	38.1	-3.7	-84.6	3.8
Americas	69203	99647	117195	122416	137373	100.0	100.0	4.5	12.2	5.3
<i>North America</i>	54813	77456	88175	92275	105024	77.7	85.8	4.6	13.8	4.5
<i>Caribbean</i>	8707	12205	14959	15822	17225	12.2	14.1	5.8	8.9	6.7
<i>Central America</i>	742	1552	2263	2735	2926	1.6	2.2	20.9	7.0	15.2
<i>South America</i>	4941	8434	11798	11584	12197	8.5	9.5	-1.8	5.3	8.3
Guyana	27	78	52	-	-	0.1	-	-	-	-
Suriname	11	31	61	53	-	0.0	0.0	-13.1	-	14.3
OIC South America	38	109	113	53	-	0.1	0.0	-113.2	-	-13.4
OIC Americas	38	109	113	53	-	0.1	0.0	-113.2	-	-13.4
East Asia/Pacific	39197	74538	70698	75238	82106	100.0	100.0	6.4	9.1	0.2
<i>North-East Asia</i>	17605	33547	36748	37603	41118	45.0	50.0	2.3	9.3	2.8
<i>South-East Asia</i>	14473	27932	20940	23915	26868	37.5	31.8	14.2	12.3	-3.8
Brunei	35	37	37	-	-	0.0	-	-	-	-
Indonesia	2105	5229	4331	4710	5046	7.0	6.3	8.8	7.1	-2.6
Malaysia	1667	3909	2456	3540	4947	5.2	4.7	44.1	39.7	-2.4
OIC North-East Asia	3807	9175	6824	8250	9993	12.3	11.0	17.3	17.4	-2.1
<i>Pacific Ocean</i>	7119	13059	13010	13719	14120	17.5	18.2	5.5	2.9	1.2
OIC East Asia/Pacific	3807	9175	6824	8250	9993	12.3	11.0	17.3	17.4	-2.1

Europe	143235	212801	231663	232844	231103	100.0	100.0	0.5	-0.7	2.3
<i>Northern Europe</i>	24749	32571	35695	34937	34850	15.3	15.0	-2.1	-0.2	1.8
<i>Western Europe</i>	63176	82035	79529	82640	80241	38.6	35.5	3.9	-2.9	0.2
<i>Cent./Eastern Europe</i>	4849	22668	29107	26128	-	10.7	11.2	-10.2	-	3.6
Azerbaijan	-	70	125	81	-	0.0	0.0	-35.2	-	3.7
Kazakhstan	-	122	407	363	-	0.1	0.2	-10.8	-	31.3
Kyrgyz Rep.	-	5	8	-	-	0.0	-	-	-	-
Turkmenistan	-	-	192	-	-	0.1	-	-	-	-
Uzbekistan	-	-	21	-	-	0.0	-	-	-	-
OIC Cent./E. Europe	-	197	753	444	-	0.1	0.2	-69.6	-	17.6
<i>Southern Europe</i>	44582	65818	75802	79084	77578	30.9	34.0	4.3	-1.9	4.7
Albania	4	65	54	211	-	0.0	0.1	290.7	-	34.2
OIC South. Europe	4	65	54	211	-	0.0	0.1	290.7	-	34.2
<i>East Medit. Europe</i>	5879	9709	11530	10055	12630	4.6	4.3	-12.8	25.6	0.9
Turkey	3225	4957	7177	5203	7636	2.3	2.2	-27.5	46.8	1.2
OIC E. Md. Europe	3225	4957	7177	5203	7636	2.3	2.2	-27.5	46.8	1.2
OIC Europe	3229	5219	7984	5858	7636	2.5	2.5	-36.3	23.3	2.3
Middle East	4402	7638	8667	9720	10364	100.0	100.0	12.2	6.2	6.3
Bahrain	135	247	366	408	-	3.2	4.2	11.5	-	13.4
U.A.E (Dubai)	169	389	562	607	-	5.1	6.2	8.0	-	11.8
Egypt	1100	2684	2565	3903	4345	35.1	40.2	52.2	11.3	9.8
Iraq	55	13	13	-	-	0.2	-	-	-	-
Jordan	512	652	773	795	722	8.5	8.2	2.8	-9.2	5.1
Kuwait	132	121	207	243	-	1.6	2.5	17.4	-	19.0
Lebanon	-	710	1221	673	742	9.3	6.9	-44.9	10.3	-1.3
Libya	6	6	18	28	-	0.1	0.3	55.6	-	47.0
Oman	69	92	112	104	-	1.2	1.2	-7.1	-	3.1
Palestine	-	126	114	132	155	1.6	1.4	15.8	17.4	1.2

Saudi Arabia	1884	1210	1462	-	-	15.8	-	-	-	-
Syria	320	1338	1190	1360	-	17.5	14.0	14.3	-	0.4
Yemen	20	50	64	-	-	0.7	-	-	-	-
OIC Middle East²	4402	7638	8667	9720	10364	100.0	100.0	12.2	6.2	6.3
South Asia	2029	3468	4270	4575	5085	100.0	100.0	7.1	11.1	7.2
Bangladesh	11	23	51	50	59	0.7	1.1	-2.0	18.0	21.4
Iran	61	190	477	662	850	5.5	14.5	38.8	28.4	36.6
Maldives	89	210	303	325	344	6.1	7.1	7.3	5.8	11.5
Pakistan	156	114	98	76	86	3.3	1.7	-22.4	13.2	-9.6
OIC South Asia	317	537	929	1113	1339	15.5	24.3	16.5	16.9	15.7
World Total	263400	406200	442400	455100	477300	100.0	100.0	2.9	4.9	2.9
OIC Total	14604	25927	28570	28904	31450	6.4	6.4	1.2	8.1	3.9

Source: World Tourism Organisation "Tourism Market Trends: World Overview and Tourism Topics", 2001 provisional edition, May 2001, Madrid, Spain.

Notes:

- (1) Market share in the region.
 - (2) All the countries in the Middle East region are OIC member countries.
- (-) Data are not available.

**TABLE A.3: BALANCE OF INTERNATIONAL TOURISM TRAVEL IN
SELECTED OIC COUNTRIES (US\$ Million)**

	1994	1995	1996	1997	1998
Albania	52	58	65	22	49
Algeria	12	-15	-16	..	..
Azerbaijan	..	-76	-64	-24	-45
Bahrain	157	125	154	189	224
Bangladesh	-191	-206	-168	-111	-147
Benin	17	..	23	24	26
Cameroon	-30	-69	..	..	..
Comoros	10	14	23	26	13
Egypt	939	1406	1887	2380	1411
Gabon	-138	-166	..	..	..
Gambia	16	9	16	16	..
Guinea	-23	-20	-21	-23	-26
Guyana	62	57	70	60	52
Indonesia	2885	3056	3909	2910	1943
Iran	4	-51	-14	-55	-311
Jordan	187	235	362	376	402
Kuwait	-2045	-2127	-2308	-2189	-2310
Kyrgyz Rep.	1	2	-2	3	..
Lebanon	672	710	715	1000	1221
Libya	7	..	-209	-148	-125
Malaysia	1446	1595	1872	224	2456
Maldives	153	179	228	246	261
Mali	-18	-24	-17	-16	21
Morocco	933	1000	1374	1133	1249
Niger	-5	-6	-6	-6	-7
Nigeria	-824	-852	-1219	-1698	-1425
Oman	41	45	52	61	..
Pakistan	-269	-335	-754	-247	-254
Senegal	67	89	96	100	178
Sierra Leone	6	4	8	3	..
Sudan	-43	-35	-20	-30	-22
Suriname	10	28	38	63	44
Syria	637	840	693	490	610
Togo	-7	-5	..	..	..
Tunisia	1101	1151	1277	1254	1389
Turkey	3435	4045	4697	6372	6055
Turkmenistan	..	..	-7	-51	192
Uganda	-38	-2	-18	-2	..
Uzbekistan	..	..	15	19	..
Yemen	-59	-26	-32	-12	1

Source: SESRTCIC staff calculation based on the data available in "Compendium of Tourism Statistics 1994-1998", 20th edition, World Tourism Organisation, Madrid 2000.

(..) Data are not available.

**TABLE A.4: BALANCE OF INTERNATIONAL TOURISM TRAVEL
AS PERCENT OF GNP IN SELECTED OIC COUNTRIES (%)**

	1994	1995	1996	1997	1998	Average
Albania	4.1	2.8	2.4	0.9	1.8	2.4
Algeria	-0.0	-0.0	-0.0	..	..	0.0
Azerbaijan	-2.2	-1.8	-0.6	-1.2	..	-1.2
Bahrain	3.4	2.5	3.0	3.7	4.6	3.4
Bangladesh	-0.5	-0.5	-0.4	-0.3	-0.3	-0.4
Benin	0.9	..	1.1	1.1	1.1	0.8
Cameroon	-0.3	-0.8	..	..	..	-0.2
Comoros	4.3	6.5	11.1	12.6	6.6	8.2
Egypt	1.9	2.5	2.9	3.3	1.8	2.5
Gabon	-3.2	-3.9	..	..	..	-1.4
Gambia	4.4	2.3	4.1	4.0	..	3.0
Guinea	-0.7	-0.6	-0.5	-0.6	-0.7	-0.6
Guyana	14.5	11.1	11.1	8.8	7.9	10.7
Indonesia	1.7	1.6	1.8	1.3	1.4	1.6
Iran	0.0	-0.0	-0.0	-0.1	-0.3	-0.1
Jordan	3.1	3.6	5.5	5.5	5.8	4.7
Kuwait	-7.0	-6.6	-6.6	-6.2	-6.4	-6.6
Kyrgyz Rep.	0.0	0.1	0.1	0.1	..	0.1
Lebanon	8.1	6.8	6.0	7.3	8.1	7.3
Libya	0.0	..	-0.6	-0.7	-0.6	-0.4
Malaysia	2.1	2.0	2.0	0.2	3.1	1.9
Maldives	71.2	73.7	83.8	82.3	80.8	78.4
Mali	-0.7	-1.0	-0.7	-0.6	-0.8	-0.8
Morocco	3.1	3.4	3.9	3.3	3.6	3.5
Niger	-0.3	-0.3	-0.3	-0.3	-0.4	-0.3
Nigeria	-3.5	-3.6	-4.4	-5.1	-3.9	-4.1
Oman	0.4	0.4	0.5	0.6	..	0.4
Pakistan	-0.5	-0.6	-1.2	-0.4	-0.4	-0.6
Senegal	1.7	2.1	2.1	2.1	3.7	2.3
Sierra Leone	0.8	0.5	0.9	0.4	..	0.5
Sudan	-0.6	-0.4	-0.3	-0.4	-0.3	-0.4
Suriname	3.1	7.8	8.8	11.6	6.4	7.5
Syria	4.0	4.9	4.0	3.1	3.9	4.0
Togo	-0.5	-0.4	..	..	..	-0.1
Tunisia	7.2	7.0	7.0	6.5	7.2	7.0
Turkey	2.2	2.4	2.7	3.2	3.0	2.7
Turkmenistan	..	..	-0.2	-1.7	..	-0.4
Uganda	-1.1	-0.0	-0.3	-0.0	..	-0.3
Uzbekistan	..	..	0.1	0.1	..	0.0
Yemen	-1.4	-0.7	-0.8	-0.3	0.0	-0.6

Source: SESRTCIC staff calculation based on the data available in "Compendium of Tourism Statistics 1994-1998", 20th edition, World Tourism Organisation, Madrid 2000.

(..) Data are not available.

**TABLE A.5: INTERNATIONAL TOURISM RECEIPTS AS PERCENT
OF EXPORTS IN SELECTED OIC COUNTRIES (%)**

	1994	1995	1996	1997	1998	Average
Albania	40.6	32.2	36.5	19.4	26.0	30.9
Algeria	0.4	0.3	0.2	0.0	0.2	0.2
Azerbaijan	..	12.9	7.3	20.7	13.5	13.6
Bahrain	8.4	6.0	5.6	7.1	10.3	7.5
Bangladesh	0.7	0.7	1.0	1.6	1.3	1.1
Benin	5.9	6.5	5.5	7.3	8.8	6.8
Burkina Faso	6.9	4.7	10.1	15.9	17.6	11.0
Cameroon	2.0	2.2	..	..	..	2.1
Comoros	133.3	175.0	164.3	433.3	400.0	261.2
Egypt	57.7	77.8	90.5	95.1	113.9	87.0
Gabon	0.2	0.3	..	..	..	0.25
Gambia	85.7	143.8	172.2	213.3	..	153.8
Guinea	0.2	0.2	1.0	..	0.1	0.4
Guyana	18.6	17.1	13.5	9.3	10.7	13.9
Indonesia	11.9	11.5	12.7	10.0	8.3	10.9
Iran	0.8	1.0	1.1	1.8	3.7	1.7
Jordan	40.8	37.4	40.9	42.2	47.4	41.7
Kuwait	0.9	0.9	1.2	1.3	2.2	1.3
Kyrgyz Rep.	0.9	1.2	0.8	1.2	..	1.0
Lebanon	117.3	96.9	70.5	139.5	170.5	118.9
Libya	0.1	..	0.1	0.1	0.3	0.1
Malaysia	5.9	5.3	5.7	3.4	3.4	4.7
Maldives	393.5	420.0	450.8	391.8	398.7	411.0
Mali	7.1	5.7	6.6	4.6	17.1	8.2
Morocco	30.9	18.9	24.3	20.6	23.0	23.6
Niger	7.1	5.2	6.0	6.7	8.7	6.8
Nigeria	0.4	0.5	0.5	0.7	1.2	0.6
Oman	1.6	1.5	1.3	1.4	..	1.5
Pakistan	1.7	1.4	1.6	1.3	1.2	1.4
Senegal	14.6	16.6	15.1	16.4	33.2	19.2
Sierra Leone	8.7	24.0	21.3	17.6	..	17.9
Sudan	0.8	1.4	1.3	0.7	1.3	1.1
Suriname	25.0	64.6	88.4	90.0	100.0	73.6
Syria	37.7	37.6	30.2	26.4	41.2	34.6
Togo	6.8	6.2	..	..	..	6.5
Tunisia	28.3	25.6	26.3	25.4	27.1	26.5
Turkey	23.9	22.9	25.7	30.8	30.1	26.7
Turkmenistan	..	..	3.9	9.9	37.9	17.2
Uganda	9.8	16.9	19.9	24.4	..	17.8
Uzbekistan	..	..	0.3	0.4	..	0.4
Yemen	2.0	2.6	1.7	2.8	5.6	2.9

Source: SESRTCIC staff calculation based on the data available in "Compendium of Tourism Statistics 1994-1998", 20th edition, World Tourism Organization, Madrid 2000.

(..) Data are not available.