

ESD/CTM03/SM

**PROBLEMS AND PROSPECTS OF
SUSTAINABLE TOURISM DEVELOPMENT IN
THE OIC COUNTRIES WITH SPECIAL
REFERENCE TO ECOTOURISM**

**THIRD ISLAMIC CONFERENCE OF
MINISTERS OF TOURISM**

**6-9 October 2002
Riyadh, Kingdom of Saudi Arabia**

**STATISTICAL, ECONOMIC AND SOCIAL RESEARCH
AND TRAINING CENTRE FOR ISLAMIC COUNTRIES
(SESRTCIC/ANKARA CENTRE)**

Attar Sokak No. 4, 06700 G.O.P., Ankara, Turkey
Tel. (90-312) 4686172-76, Fax. (90-312) 4673458
E-mail: oicankara@sesrtcic.org, URL: <http://www.sesrtcic.org>

PROBLEMS AND PROSPECTS OF SUSTAINABLE TOURISM DEVELOPMENT IN THE OIC COUNTRIES WITH SPECIAL REFERENCE TO ECOTOURISM

1. INTRODUCTION

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 purposes¹. Based on this broad definition, tourism industry includes all socio-economic activities that are directly or indirectly involved in providing services to tourists. More than 185 supply-side economic activities that have significant connections to tourism are listed under the World Tourism Organisation's Standard Classification of Tourism Activities. These include, among others, the services of the following sectors: transportation, hotels and lodging, food and beverage, cultural and entertainment, banking and finance, and promotion and publicity services.

Defined by this impressive network of businesses and services and by the infrastructure needed to support it, tourism is one of the world's largest industries involving a wide range of stakeholders including private sector tourism businesses, governmental and intergovernmental organisations, non-governmental organisations (NGOs) networks, consumers and host communities.

In recent decades, the tourism industry has shown sustained growth in both revenues and number of tourists, and has left broad economic, social, cultural and environmental footprint reaching almost every part of the world. Touristic activity generates significant economic benefits to both host countries and tourists' home countries alike. Especially in developing countries, one of the primary motivations for a country to promote itself as a tourism destination is the expected economic improvement, mainly through foreign exchange earnings, contributions to government revenues, and generation of employment and business opportunities.

¹ See "Recommendations on Tourism Statistics and Concepts, Definitions and Classifications for Tourism Statistics", World Tourism Organisation, Madrid, Spain (<http://www.world-tourism.org>).

The recent trends in international tourism indicate that touristic 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 as well. The growth patterns of some tourist destinations in East Asia and the Pacific, South Asia, Africa, and the Middle East are generally very dynamic, with some countries in these regions registering high rates of increase over successive years.

Given their rich and diverse natural, geographical, historical and cultural heritage assets, the OIC countries have vast potential for the development of sustainable tourism sector. Like all regions of the world, the OIC region hosted more tourists in 2000 with the total tourist arrivals amounting to 65.6 million, an impressive increase by 20.6 percent, its ever-highest growth rate and almost three times the increase in 1999. However, considering the modest share of those countries in the world tourism market (9.4 percent), it seems that this inherent potential has not yet manifested itself in desirable levels of tourism development in many OIC countries and in the OIC region as a whole. Moreover, it is observed that touristic activity in the OIC region is still concentrated in a small number of member countries. Malaysia, Turkey, Egypt, Indonesia, Tunisia, and Morocco serve as typical examples in this regard.

In fact, tourism is a very important sector that could play a significant role in the economic development of the OIC countries not only due to their existing and potential tourism resources, but also because their citizens travel in large numbers around the world for business, leisure and other purposes. It is then not surprising that tourism represents one of the ten priority areas of the Plan of Action to Strengthen Economic and Commercial Co-operation among the Member Countries of the OIC. Indeed, tourism co-operation activities have recently assumed greater importance on the agenda of the OIC. In this context, three Islamic conferences of ministers of tourism, including the present one, have been held just within the short period of the last three years.

This paper attempts to look into and evaluate the performance of the tourism sector in the OIC member countries. It aims to identify the problems facing tourism in these countries and propose some policy recommendations, within the framework of the OIC Plan of Action, for the development of a modern and sustainable tourism industry in the

OIC countries and strengthening their co-operation in this important area. In addition, the paper sheds light on ecotourism as an important market segment of the tourism industry and presents a brief discussion on the occasion of the “International Year of Ecotourism 2002” and the World Ecotourism Summit which was held in Québec, Canada, on 19-22 May 2002.

2. RECENT TRENDS IN WORLD TOURISM ACTIVITY

The number of international tourist arrivals increased from 457.2 million in 1990 to 696.7 million in 2000, corresponding to an average annual growth rate of 4.3 percent. In 2000, international tourist arrivals grew by 7.2 percent, the highest growth rate in the last decade (Table 1). However, for the first time since 1982, there has been a small reduction in 2001 in which there have been 692.7 million international tourist arrivals, corresponding to a slight decrease of 0.6 percent from the previous year. Tourism growth has been affected by the deterioration in the economic conditions of major North American, European and Asian economies in late 2000 and during 2001, with worldwide economic growth dropping to 2.5 percent in 2001, down from 4.7 percent in 2000.

Europe and the Americas are still the main tourist-receiving regions. International tourist arrivals in these two regions grew over the period 1990-2000 by an average rate of 3.6 and 3.3 percent respectively. In absolute terms, they registered 120 million and 36 million additional arrivals in 2000 compared to the number registered in 1990. But since other regions are growing at a faster pace, the share of these two regions in the world total narrowed substantially by 2001, to 57.8 percent for Europe and 17.4 percent for the Americas from 61.8 and 20.3 percent, respectively in 1990 (Table 1).

However, since modern tourism is characterised by a growing tendency for tourists to visit new destinations, and together with tourism product diversification and increasing competition, 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, the Middle East, South Asia, and Africa, and by below-average growth of the more traditional tourist-receiving regions of Europe and the Americas (Table 1).

As shown in Table 1, all the regions of the world hosted more tourists in 2000. East Asia/Pacific is the region that most benefited from this transformation of the world tourism market. Historic series show that this region experienced the highest growth rate, having obtained 16.6 percent share of the world market in 2001. The Middle East and South Asia were other regions of the success stories in 2000, with tourist arrivals growing by 13.2 and 5.2 percent respectively. Africa was relatively left out of the tourism boom in 2000, with only 3.4 percent increase in its international tourist arrivals. Yet, not every destination was equally affected by the decrease in world tourist arrivals in 2001. Most affected was South Asia (a drop of 6.3 percent) followed by the Americas (-5.9 percent), the Middle East (-3.1 percent), and Europe (-0.6 percent).

On the other hand, international tourism receipts, at current prices and excluding international transport costs, recorded an average annual growth rate of 6.1 percent in the period 1990-2000. In 2000, worldwide international touristic activity generated US\$ 474.4 billion, a growth of 4 percent over the previous year (Table 2). Per day, this translates to receipts generated by international tourism of US\$ 1.3 billion. However, world tourism receipts decreased to US\$ 462.2 billion in 2001, corresponding to a reduction of 2.6 percent from the previous year. It is then obvious that the decrease in tourism receipts in 2001 exceeded the decrease in the number of tourist arrivals. This is due to the fact that in economically tight times, tourists typically react not so much by refraining from travel but by trading down, i.e., they choose for instance shorter stays in less expensive destinations with travel and accommodation in lower categories.

The trends in the average growth rates of tourism receipts and the regional market shares in world tourism receipts differ somewhat from those in the case of tourist arrivals. This is mainly due to the fact that receipts per arrival vary as each region's tourism has its own character with regard to length of stay, purpose of visit, geographical distance, etc. In this regard, the world average tourism receipts per arrival in 2001 amounted to US\$ 667, the highest being in the Americas (US\$ 1013) followed by South Asia (US\$ 825) and East Asia/Pacific (US\$ 712) (calculated using the data in Tables 1 and 2).

In 2001, Europe was the top tourism earner with US\$ 230.1 billion or 49.8 percent share of the world tourism receipts. It was followed by the Americas with US\$ 122.4 billion or 26.5 percent. East Asia/Pacific

comes third with US\$ 82 billion or 17.7 percent followed by Africa with US\$ 11.7 billion or 2.5 percent, the Middle East with US\$ 11.2 billion or 2.4 percent, and South Asia with US\$ 4.7 billion or only 1 percent share. However, when the average growth rates of tourism receipts in the period 1990-2000 are considered, the picture becomes completely different, where South Asia is leader with 9.8 percent, and Europe at the bottom of the list with 4.9 percent (see Table 2).

According to the World Tourism Organisation, influenced by the rebound in global economic growth in the first part of 2001, it has become evident that recovery in world international tourism is under way. Fear is progressively fading away and business is gradually returning to normal. Recovery is most visible in intra-regional travel and in the regions of East Asia/Pacific (influenced by the Football World Cup), Europe and Africa. In the long run, the World Tourism Organisation forecasts that the number of people travelling internationally is expected to reach over 1.56 billion by 2020 from 697 million in 2000, corresponding to an average annual increase of more than 4 percent. Earnings from international tourism are expected to soar from US\$ 474 billion in 2000 to more than US\$ 2 trillion in 2020. The total number of tourist arrivals by region shows 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. 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 the OIC countries, and compare them with those of the world and other regions. In particular, the paper concentrates on the volume (i.e., the number of tourist arrivals) and the value (i.e., tourism receipts in current US dollar values) of international tourism activity in the OIC countries. In addition, an attempt is made at the end of this section to evaluate the role of the tourism sector in the economies of these countries. This is been done by calculating the balance of international tourism in terms of current US dollar for each individual country for which the relevant data are available (i.e., by deducting international tourism expenditure from international tourism receipts). This balance is then related to the GNP of each country. The international tourism receipts are also related, as percentage, to the exports of each country.

TABLE 1: INTERNATIONAL TOURIST ARRIVALS BY REGION

	Tourist Arrivals (millions)				Market Share (%)				Growth Rate (%)		
	1990	1999	2000	2001	1990	1999	2000	2001	90-00	99-00	00-01
World Total	457.2	652.2	696.7	692.7	100.0	100.0	100.0	100.0	4.3	7.2	-0.6
Europe	282.7	380.6	402.7	400.3	61.8	58.2	57.8	57.8	3.6	5.8	-0.6
Americas	92.8	122.1	128.2	120.8	20.3	19.6	18.4	17.4	3.3	5.0	-5.9
East Asia/Pacific	54.6	96.8	109.1	115.1	11.9	15.5	15.7	16.6	7.2	12.7	5.5
Africa	15.0	26.3	27.2	28.2	3.3	3.7	3.9	4.1	6.1	3.4	3.8
Middle East	9.0	20.5	23.2	22.5	2.0	2.3	3.3	3.2	10.0	13.2	-3.1
South Asia	3.2	5.8	6.1	5.7	0.7	0.8	0.9	0.8	6.8	5.2	-6.3
OIC Countries	34.3	54.4	65.6	-	7.5	8.3	9.4	-	6.7	20.6	-

Source: World Tourism Organisation.

TABLE 2: INTERNATIONAL TOURISM RECEIPTS BY REGION

	Tourism Receipts (\$ billion)				Market Share (%)				Growth Rate (%)		
	1990	1999	2000	2001	1990	1999	2000	2001	90-00	99-00	00-01
World Total	263.4	456.3	474.4	462.2	100.0	100.0	100.0	100.0	6.1	4.0	-2.6
Europe	143.2	232.8	233.0	230.1	54.4	50.9	49.1	49.8	4.9	0.1	-1.3
Americas	69.2	122.4	132.8	122.4	26.3	25.1	28.0	26.5	7.1	8.5	-8.5
East Asia/Pacific	39.2	75.2	81.4	82.0	14.9	19.0	17.2	17.7	7.7	8.2	0.7
Africa	5.3	10.3	10.9	11.7	2.0	2.1	2.3	2.5	7.8	5.8	6.8
Middle East	4.4	9.7	11.5	11.2	1.7	1.9	2.4	2.4	9.0	18.6	-2.7
South Asia	2.0	4.6	4.9	4.7	0.8	0.9	1.0	1.0	9.8	6.5	-4.3
OIC Countries	14.6	27.6	33.4	-	5.5	6.1	7.0	-	8.6	21.0	-

Source: World Tourism Organisation.

3.1. Tourist Arrivals

According to the data of the World Tourism Organisation, 65.6 million international tourist arrivals were recorded in 2000 in OIC member countries for which the data are available (Table A.1 in the Annex). Accordingly, tourist arrivals in those countries grew by an impressive 20.6 percent in 2000, its highest growth rate ever and almost three times the increase in 1999. Yet, although this rate is significantly higher than that of the world total, the relative share of the OIC countries in the worldwide international tourism market accounted for only 9.4 percent in 2000, an increase by 1.1 percentage point compared with their share in 1999 (Table 3).

However, the growth rate of OIC international tourist arrivals during the 1990s was, on average, significantly higher than that of the world total and the traditional tourist-receiving regions of Europe and the Americas and relatively comparable with other developing regions in the world. At the OIC regional level, except for the OIC African region, the number of tourist arrivals in the other OIC regions grew at a higher pace compared to the growth rates of the same worldwide regions during the period 1990-2000 (Tables 1 and 3).

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 34.5 percent, followed by the OIC East Asia/Pacific region with 24.8 percent. The OIC countries in Africa accounted for 18.3 percent in the total OIC tourist arrivals and those in Europe (including those in Central Asia) for 18 percent. In contrast, although the OIC countries in South Asia recorded only 4.4 percent share in the total OIC tourist arrivals market, their growth rates of international tourist arrivals were the highest amongst the other OIC regions during the 1990s (Table 3).

At the individual country level, the figures in Table 3 indicate that international tourist arrivals in the OIC countries are concentrated in a small number of countries. In terms of the absolute number of tourist arrivals and shares in total OIC market, the main OIC tourist destinations are Malaysia, Turkey, Saudi Arabia, Egypt, Indonesia, Tunisia, Morocco, United Arab Emirates, Bahrain, and Iran. In 2000, this group of OIC countries received 53.5 million international tourist arrivals, corresponding to 81.6 percent of the total OIC tourism market

**TABLE 3: OIC INTERNATIONAL TOURIST ARRIVALS BY REGION
AND MAIN TOURIST DESTINATIONS**

	Tourist Arrivals (millions)				Market Share (%)				Growth Rate (%)		
	1990	1995	1999	2000	1990	1995	1999	2000	99-00	95-00	90-00
World Total	457.2	550.3	652.2	696.7	100.0	100.0	100.0	100.0	7.2	4.8	4.3
OIC Total	34.3	42.9	54.4	65.6	7.5	7.8	8.3	9.4	20.6	8.9	6.7
<i>OIC Regions:</i>	Share in OIC Market										
Middle East	8.8	12.1	18.9	22.6	25.7	28.2	34.7	34.5	19.6	13.4	9.9
East Asia/Pacific	10.0	12.3	13.6	16.3	29.2	28.7	25.0	24.8	19.9	5.8	5.0
Africa	9.7	9.4	11.6	12.0	28.3	21.9	21.3	18.3	3.4	4.9	2.1
Europe & C. Asia	4.8	7.8	7.9	11.8	14.0	18.2	14.5	18.0	49.4	17.5	9.3
South Asia	0.9	1.3	2.4	2.9	2.6	3.0	4.4	4.4	26.1	15.9	12.6
Americas	0.11	0.14	0.13	0.16	0.3	0.2	0.2	0.3	23.1	1.8	4.0
<i>Main Destinations:</i>											
Malaysia	7.4	7.5	7.9	10.2	21.6	17.5	14.5	15.5	29.1	6.3	3.3
Turkey	4.8	7.1	6.9	9.6	14.0	16.6	12.7	14.6	39.1	6.2	7.2
Saudi Arabia	2.2	3.3	4.6	6.3	6.4	7.7	8.5	9.6	37.0	13.8	11.1
Egypt	2.4	2.9	4.5	5.1	7.0	6.8	8.3	7.8	13.3	12.0	7.8
Indonesia	2.2	4.3	4.7	5.1	6.4	10.0	8.6	7.8	8.5	3.5	8.8
Tunisia	3.2	4.1	4.8	5.1	9.3	9.6	8.8	7.8	6.3	4.5	4.8
Morocco	4	2.6	3.8	4.1	11.7	6.1	7.0	6.3	7.9	9.5	0.2
U.A.E.	0.6	1.6	3.4	3.9	1.7	3.7	6.3	5.9	14.7	19.5	20.6
Bahrain	1.4	1.4	2	2.4	4.1	3.3	3.7	3.7	20.0	11.4	5.5
Iran	0.2	0.5	1.3	1.7	0.6	1.2	2.4	2.6	30.8	27.7	23.9
Sub-total	28.4	35.3	43.9	53.5	82.8	82.3	80.7	81.6	21.9	8.7	6.5

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

and to an increase by 21.9 percent over 1999. During the period of 1990-2000, tourist arrivals in these countries as a group grew, on average, by 6.5 percent, a rate which is almost equal to that of the average OIC during the same period (Table 3).

3.2. Tourism Receipts

On the other hand, the figures in Table 4 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\$ 33.4 billion, corresponding to an increase by 21.0 percent over the previous year. This rate was significantly higher than the rate of increase in worldwide international tourism receipts (4 percent) in the same year. Moreover, during the period of 1990-2000, the total OIC tourism receipts increased on average by 8.6 percent per annum compared to 6.1 percent for the average worldwide tourism receipts. Yet, the share of OIC countries' tourism receipts in the world total accounted for only 7 percent in 2000, an increase by a mere 0.9 percentage point compared with their share in 1999 (Table 2).

The shares of OIC tourism receipts, at the regional level, in the worldwide tourism receipts differ somewhat from the shares in tourist arrivals. This is also true for the shares of OIC regions and individual countries in the total OIC tourism receipts. This, as mentioned above, is due to the fact that receipts per arrival vary as the tourism of each region and country has its own characters 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 East Asia/Pacific region is the leader with 32 percent market share followed by the OIC Middle East region with 26.3 percent. The OIC countries in Europe (mainly Turkey) accounted for 25.4 percent of the total OIC tourism receipts. The OIC countries in Africa accounted for 12.3 percent of the same total. In contrast, although the OIC countries in South Asia recorded the lowest share in the total OIC tourism receipts (3.9 percent), the growth rate of their tourism receipts

TABLE 4: OIC INTERNATIONAL TOURISM RECEIPTS BY REGION AND MAIN EARNERS

	Tourism Receipts (\$ billion)				Market Share (%)				Growth Rate (%)		
	1990	1995	1999	2000	1990	1995	1999	2000	99-00	95-00	90-00
World Total	263.4	406.2	456.3	474.4	100.0	100.0	100.0	100.0	4.0	3.2	6.1
OIC Total	14.6	26.2	27.6	33.4	5.5	6.5	6.1	7.0	21.0	4.9	8.6
<i>OIC Regions:</i>	Share in OIC Market										
East Asia/Pacific	3.8	9.2	8.3	10.7	26.0	35.1	30.1	32.0	28.9	3.1	10.9
Middle East	4.4	7.8	8.1	8.8	30.1	29.8	29.3	26.3	8.6	2.4	7.2
Europe & C. Asia	3.2	5.3	5.9	8.5	21.9	20.2	21.4	25.4	44.1	9.9	10.3
Africa	2.8	3.3	4.2	4.1	19.2	12.6	15.2	12.3	-2.4	4.4	3.9
South Asia	0.3	0.5	1.1	1.3	2.1	1.9	4.0	3.9	18.2	21.1	15.8
Americas	0.03	0.09	0.06	0.01	0.3	0.4	0.4	0.0	-83.3	-35.6	-10.4
<i>Main Earners:</i>											
Turkey	3.2	5.0	5.2	7.6	21.9	19.1	18.8	22.8	46.2	8.7	9.0
Indonesia	2.1	5.2	4.7	5.7	14.4	19.8	17.0	17.1	21.3	1.9	10.5
Malaysia	1.7	3.9	3.5	4.9	11.6	14.9	12.7	14.7	40.0	4.7	11.2
Egypt	1.1	2.7	3.9	4.3	7.5	10.3	14.1	12.9	10.3	9.8	14.6
Morocco	1.3	1.3	1.9	2.0	8.9	5.0	6.9	6.0	5.3	9.0	4.4
Tunisia	0.9	1.4	1.6	1.5	6.2	5.3	5.8	4.5	-6.3	1.4	5.2
Syria	0.3	1.2	1.0	1.1	2.1	4.6	3.6	3.3	10.0	-1.7	13.9
U.A.E.	0.2	0.7	0.9	1.0	1.4	2.7	3.3	3.0	11.1	7.4	17.5
Iran	0.1	0.2	0.7	0.9	0.7	0.8	2.5	2.7	28.6	35.1	24.6
Lebanon	-	0.7	0.7	0.7		2.7	2.5	2.1	0.0	0.0	-
Sub-total	10.9	22.3	24.1	29.7	74.7	85.1	87.3	88.9	23.2	5.9	10.5

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

was the highest (15.8 percent) amongst the other OIC regions in the period 1990-2000 (Table 4).

As in the case of OIC tourist arrivals, the figures in Table 4 indicate that tourism receipts in the OIC countries are concentrated in a small number of countries, almost the same countries of the main OIC tourist destinations. In a descending order, the main OIC tourism earners are Turkey, Indonesia, Malaysia, Egypt, Morocco, Tunisia, Syria, United Arab Emirates, Iran, and Lebanon. In 2000, this group of OIC countries earned US\$ 29.7 billion as tourism receipts, corresponding to 88.9 percent of the total OIC tourism receipts and to an increase by 23.2 percent over the previous year. During the period of 1990-2000, tourism receipts earned by those countries as a group grew on average by 10.5 percent per annum compared to 8.6 percent in the OIC total tourism receipts.

3.3. Balance of International Tourism

In this section, the balance of international tourism in terms of current US dollar is calculated for each OIC country for which the relevant data are available (see Table A.3 in the Annex). This is done by deducting the international tourism expenditure of each country from its international tourism receipts. The outcome is then related to the GNP of each country, in an attempt to evaluate the role of the tourism sector in their economies. In addition, the international tourism receipts are also related, as percentage, to the exports of each country. The result of this exercise is illustrated in the Annex in Tables A.4 and A.5, respectively.

TABLE 5: TOP 10 OIC COUNTRIES WITH RESPECT TO THEIR BALANCE OF INTERNATIONAL TOURISM (US\$ million)

	1996	1997	1998	1999	2000
Turkey	4697	6372	6055	3732	5925
Malaysia	1878	112	671	1567	4947
Egypt	1887	2380	1417	2825	3272
Indonesia	3908	2910	2229	2357	2552
Morocco	1374	1133	1288	1440	1610
Tunisia	1160	1126	1322	1321	1233
Syria	652	468	437	401	442
Jordan	362	376	420	440	335
Bahrain	154	189	224	249	300
Maldives	228	247	261	280	298

Source: Table A.3 in the Annex.

Table 5 shows, in a descending order, the top 10 OIC countries in terms of their balance of international tourism in millions of US dollars. When compared with Tables 3 and 4, it is clear that most of these countries constitute the main OIC tourism destinations as well as the main OIC tourism earners. However, when we examine the role of the tourism sector in the economies of OIC countries in terms of its contribution to the GNP and exports of each country, the picture reflects a widely different situation. This is clear in Tables 6 and 7 below.

As for the contribution of tourism to GNP of the OIC countries, Table 6 lists those countries, in a descending order, according to their balance of international tourism as percentage of their GNP. This has been calculated into 5 ranges, the highest of which including records of 50 percent and above, and the lowest including sub-zero records. In a similar manner, Table 7 lists the OIC countries according to their international tourism receipts as percentage of their exports.

**TABLE 6: BALANCE OF INTERNATIONAL TOURISM
AS PERCENTAGE OF GNP (Average 1996-2000)**

(%)	Countries
50 ⁺	Maldives (78.2 %)
5 – 10 ⁺	Comoros (10.1%), Guyana (9.3%), Tunisia (6.4%), Jordan (5.2%)
1 - 4.9	Lebanon, Morocco, Gambia, Syria, Bahrain, Albania, Egypt, Turkey, Malaysia, Senegal, Indonesia, Benin
0.1 - 0.9	Sierra Leone, Mali, Togo, Uganda, Uzbekistan, Kyrgyz Rep.
(-) - 0.0	Iran, Niger, Bangladesh, Sudan, Pakistan, Libya, Guinea, Yemen, Cameroon, Turkmenistan, Kazakhstan, Côte d'Ivoire, Azerbaijan, Mauritania, Gabon, Nigeria, Kuwait, Oman

Source: Table A.4 in the Annex.

The information in Table 6 indicates that, in general, the role of tourism in OIC countries is neither a function of the size nor 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 to the economy (78.2 percent of GNP). In addition, tourism is found to play a relatively important role compared to the size of the economy in a few countries. This group includes the OIC countries in which tourism accounted for 5 to 10 percent of their GNP (i.e., Comoros, Guyana, Tunisia, and Jordan).

More interestingly, the information in Table 6 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 1 to 4.9 percent of their GNP (e.g., Malaysia, Turkey, Egypt, Indonesia, Morocco, Lebanon, etc.). Moreover, the balance of tourism is found to have a negligible or even negative impact on 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-deficit in tourism).

On the other hand, the information in Table 7 indicates that tourism seems to play a more significant role in the economies of the OIC countries as a source of foreign exchange earnings. On average, touristic activity generated foreign exchange earnings during the period 1996-2000 of more than four times those generated by exports in Maldives, and almost three times the value of exports in Comoros and almost twice that value in Gambia. In the same period, international tourism receipts accounted, on average, for 128.1 percent of the total exports in Lebanon, 94 percent in Egypt, 76.9 percent in Sierra Leone, and 62.4 percent in Albania. They also accounted for between 25 and 49 percent of the value of exports in 5 countries, 10 and 24 percent in 8 countries and 5 and 9 percent in 3 countries. Yet, tourism is found to have a small role in generating foreign exchange earnings in many OIC countries, i.e. those countries for which international tourism receipts accounted for less than 5 percent of their exports (see Table 7).

**TABLE 7: INTERNATIONAL TOURISM RECEIPTS AS
PERCENTAGE OF EXPORTS IN OIC COUNTRIES
(Average 1996-2000)**

(%)	Countries
50 +	Maldives (442.5%), Comoros (273.8%), Gambia (180.8%), Lebanon (128.1%), Egypt (94%), Sierra Leone (76.9%), Albania (62.4%)
25 - 49	Jordan (41.5%), Turkey (26.7%), Tunisia (25.9%), Uganda (25.5%), Syria (25.1%)
10 - 24	Morocco, Senegal, Burkina Faso, Turkmenistan, Azerbaijan, Mali, Guyana, Indonesia
5 - 9	Bahrain, Benin, Kazakhstan
0.1 - 4.9	Malaysia, Mauritania, Niger, Yemen, Togo, Iran, Côte d'Ivoire, Oman, Kuwait, Pakistan, Bangladesh, Kyrgyz Rep., Sudan, Nigeria, Guinea, Uzbekistan, Gabon, Libya, Suriname, U.A.E.

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 generally tend to develop and extend their tourism sectors. The results of the exercise undertaken above indicate that tourism development is neglected in some natural-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, the potential of inherent natural tourism resources alone cannot make a successful tourism industry. If this potential is to be realized, it must be developed and managed on the basis of strict sustainability criteria and has to be coupled with insightful planning, public and social awareness, and prudent strategies and policies.

4. PROBLEMS FACING SUSTAINABLE TOURISM DEVELOPMENT IN THE OIC COUNTRIES

Given their significant and diverse natural, geographical, historical and cultural heritage assets, the OIC countries have vast potential for the development of a sustainable tourism sector. However, considering their modest share in the world tourism market, it seems that this inherent potential has not yet manifested itself in desirable levels of tourism development in many of them and in the OIC region as a whole.

The problems facing tourism and the development of a sustainable tourism sector in the OIC countries are diverse as each country has its own touristic features, level of development, and national development priorities and policies. However, these problems, *inter alia*, can be summarised as follows:

- ***Lack of inherent tourism potential (natural, historical, cultural, etc.)***. In some countries, the development of tourism is impeded by their lack of inherent natural, historical or cultural tourism resources. However, as mentioned earlier, though it is a crucial factor, tourism heritage assets alone cannot make a successful tourism industry.
- ***Lack of knowledge and awareness***. In some countries, there still is a fundamental lack of basic cognisance of the economic importance of tourism as an industry and its positive impact as a potential source of foreign exchange and employment.

- ***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 tourism knowledge and professionals. Tourism as a modern industry is recent in the world. It is also a new and unfamiliar activity in many OIC countries. Another related problem is the absent 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. Primary amongst these are hotels and lodging services, transportation and communication, safety and security and tourism information services. This makes it difficult to provide the standards of facilities and services which tourists require.
- ***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 ones. Investment in service-oriented projects, particularly in tourism, in developing countries is often regarded as a high-risk task. Accordingly, though they may have natural tourism potential, it is very difficult for many poor and least developed OIC countries to gain access to reasonable financing for their touristic projects even when they manage to tackle the problems of project identification and planning.
- ***Lack of consistent tourism strategies and policies.*** In many OIC countries, there are still difficulties in getting integrated tourism policy-making due in general to policy conflicts between the government departments and the tourism private agencies. This is coupled in many cases with the lack of effective administration, regulation and institutional frameworks of touristic activity.
- ***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 touristic activity has shown a growing tendency towards 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 considering the emergence of new touristic destinations, 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 should, thus, be one of the basic objectives of tourism planning and provisions. Safety-related tourism 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 to complete tourist seasons.

5. ISSUES OF SUSTAINABILITY AND DEVELOPMENT OF THE TOURISM INDUSTRY: ECOTOURISM

The principles of sustainable tourism were envisaged by the World Tourism Organisation in 1988 as “leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems”².

The tourism industry has recently shown sustained growth and achieved global recognition as a major sector. It has broad economic, social, cultural and environmental footprints reaching almost every part of the globe. Yet, the tourism industry is at a crossroads; it is struggling to cope with the corresponding ecological effects. Environmental and social accountability is not entirely defined by the many industry players, particularly those of the ecotourism sector, the subject of this special section.

5.1. Ecotourism

Much has been written about ecotourism and there have been many attempts to define it. However, due to the many forms in which ecotouristic activities are offered by a large and wide variety of operators and practised by an even larger array of tourists, there is little consensus about its meaning. Ecotourism has been marketed as a form

² The World Tourism Organisation, “Sustainable Development of Tourism”, <http://www.world-tourism.org/sustainable/IYE/WTO-UNEP-Concept-Paper.htm>.

of nature-based tourism. But development experts, academics and NGOs have also studied it as a sustainable development tool since 1990.

In 1991, the International Ecotourism Society produced one of the earliest definitions of ecotourism as being: “responsible travel to natural areas that conserves the environment and sustains the well-being of local people”³. The World Conservation Union states in 1996 that ecotourism “... is environmentally responsible travel and visitation to relatively undisturbed natural areas, in order to enjoy and appreciate nature and any accompanying cultural features that promotes conservation, has low negative visitor impact, and provides for beneficially active socioeconomic involvement of local populations”⁴.

Also useful is the definition by the European Federation of National Parks which defines sustainable tourism in natural areas as: “all forms of tourism development, management and operations which maintain the environmental, social and economic integrity and well-being of natural, built and cultural resources in perpetuity”⁵. The World Tourism Organisation accepts that “ecotourism is tourism practised in relatively undisturbed natural areas, for the main purposes of admiring and learning about them”⁶.

Considering these definitions, the term ecotourism, therefore, refers, on the one hand, to a specific tourism market segment and, on the other, to a concept based on a set of principles. Ecotourism is a small but rapidly growing touristic activity. It is primarily advertised as a form of nature tourism and has strong links with rural and cultural tourism. Thus, it is a niche market that fits into the larger tourism market.

Since the years when the concept was first defined, a general consensus has formed on the basic elements of ecotourism as follows⁷: It (1) contributes to conservation of biodiversity, (2) sustains the well-being of

³ The United Nations Environment Programme (UNEP), “About Ecotourism”, <http://www.uneptie.org/pc/tourism/ecotourism/home.htm>.

⁴ *ibid.*

⁵ <http://www.world-tourism.org/sustainable/IYE/RegionalActivities/Mozambique/Speech>.

⁶ World Tourism Organisation, “Recommendations on Tourism Statistics and Concepts, Definitions and Classifications for Tourism Statistics”, <http://www.world-tourism.org>.

⁷ Further discussion of guidelines, accreditation systems, and sustainability criteria for the ecotourism industry can be found in UNEP’s Ecotourism Principles, Practices and Policies for Sustainability, <http://www.uneptie.org/pc/tourism/ecotourism/home.htm>.

local people, (3) includes an interpretation/learning experience, (4) involves responsible action on the part of tourists and the tourism industry, (5) requires the lowest possible consumption of nonrenewable resources, and (6) stresses local participation, ownership and business opportunities, particularly for rural people.

If properly planned and managed, ecotourism can be a viable source of economic benefits for governments, private entrepreneurs and local communities alike. Furthermore, it can serve as an effective tool for the conservation of natural and cultural assets. Ecotourism is, therefore, a component of the field of sustainable tourism. It aspires in all cases to achieve sustainable development results. However, it is important to stress that all tourism activities, be they geared to holidays, business, conferences or fairs, health, adventure or ecotourism, should aim to be sustainable. This means that the planning and development of the tourism infrastructure, its subsequent operation, and its marketing should focus on environmental, social, cultural and economic sustainability criteria.

5.2. International Year of Ecotourism 2002

Recognising the growing global importance of ecotourism, and based on a recommendation by the Economic and Social Council in July 1998, the United Nations General Assembly designated and declared the year 2002 the International Year of Ecotourism (IYE). This was considered an encouragement for intensified co-operative efforts by governments and international and regional organisations as well as non-governmental organisations to achieve the aims of Agenda 21 in promoting development and the protection of the environment⁸.

The United Nations Economic and Social Council invited its Member States, members of the specialised agencies and relevant intergovernmental and governmental organisations to exert all possible

⁸ Agenda 21 was adopted by 182 Governments at the United Nations Conference on Environment and Development (Earth Summit), Rio de Janeiro, 3-14 June 1992. It calls for the full integration of sustainable development in the tourism industry in order to ensure, inter alia, that travel and tourism provide a source of income for many people; that travel and tourism contribute to the conservation, protection and restoration of the Earth ecosystem; that international trade in travel and tourism services take place on a sustainable basis; and that environmental protection is an integral part of tourism development.

efforts for the success of the IYE, in particular regarding ecotourism in the developing countries. The Council requested the Commission on Sustainable Development and other venues within the United Nations system to implement the IYE. The Commission, in turn, mandated the World Tourism Organisation (WTO) and the United Nations Environment Programme (UNEP) to prepare and co-ordinate supportive activities for and during the IYE.

The IYE offers an opportunity to review ecotourism experiences worldwide in order to consolidate tools and institutional frameworks that ensure its sustainable development in the future. This means maximising the economic, environmental and social benefits from ecotourism while avoiding its negative impacts. Considering this, the WTO and UNEP aimed at involving all the actors in the field of ecotourism during the IYE, with the following objectives in mind:

1. Generating greater awareness among public authorities, the private sector, the civil society and consumers regarding ecotourism's capacity to contribute to the conservation of the natural and cultural heritage in natural and rural areas, and the improvement of standards of living in these areas.
2. Disseminating methods and techniques for the planning, management, regulation and monitoring of ecotourism to guarantee its long-term sustainability.
3. Promoting the exchange of successful experiences in the field of ecotourism.
4. Increasing opportunities for the efficient marketing and promotion of ecotourism destinations and products on international markets.

In order to reach the above goals, the two organisations envisaged to jointly undertake the following main activities:

1. Publishing, jointly with the World Conservation Union, a guide for the sustainable development and management of tourism in national parks and protected areas, which are prime destinations for ecotourism.
2. Facilitating and participating in regional conferences and seminars on specific aspects of ecotourism to take place during 2001 and early 2002 worldwide.

3. Dedicating the World Tourism Day of 2002⁹ to the subject of ecotourism.
4. Creating a web-based venue to allow various organisations and stakeholders' representatives to access information about activities and events and exchange lessons learned on ecotourism projects.

5.3. World Ecotourism Summit

Among the many activities that have been undertaken at the global, regional, national and local levels on the occasion of the IYE, the World Ecotourism Summit, which was held in Québec, Canada, on 19-22 May 2002, was the major landmark. The Summit was the first and largest ever worldwide gathering of all types of stakeholders involved in ecotourism. Over 1,100 delegates from 133 different countries participated in the Summit, including Ministers, public sector officials, tourism companies and their trade associations, local authorities, national park managers, NGOs relevant to the ecotourism sector, the academic community, and others.

The Summit's global objective and spirit were in line with the philosophy of the United Nations in the field of sustainable development and, more particularly, with the UNEP Principles for the implementation of Sustainable Tourism. The Summit also drew inspiration from the Global Code of Ethics for Tourism¹⁰, approved unanimously by all the WTO Member States during the 13th Session of the WTO General

⁹ It was at its 3rd Session in September 1979 that the General Assembly of the World Tourism Organisation (WTO) decided on the recommendation of the WTO's Executive Council to celebrate the World Tourism Day on 27 September each year by appropriate events on themes selected by the General Assembly. The main purpose of the World Tourism Day is to foster awareness among the international community of the importance of tourism and its social, cultural and economic values. At its 14th Session in September 2001, the General Assembly of the WTO decided to select the following theme of the World Tourism Day for 2002: "Ecotourism, the key to sustainable development". The official celebration of this day will take place in Costa Rica on Friday, 27 September 2002.

¹⁰ The Global Code of Ethics for Tourism sets a frame of reference for the responsible and sustainable development of world tourism at the dawn of the new millenium. It is needed to help minimise the negative impacts of tourism on the environment and on cultural heritage while maximising the benefits for tourism host destinations. The full document of the Global Code of Ethics for Tourism is available at <http://www.world-tourism.org/projects/ethics/ethics.html>.

Assembly held in Santiago, Chile, in October 1999. The detailed objectives of the Summit were:

1. To open a wide review on the potential contribution of ecotourism to sustainable development;
2. To exchange information on good practice techniques and lessons learned in the sustainable planning, development, management and marketing of ecotourism;
3. To advance the knowledge of the social, economic and environmental impacts of ecotourism and assess the effectiveness of regulatory mechanisms for monitoring and controlling these impacts;
4. To strengthen the capacity of governments, the private sector and NGOs to effectively use ecotourism as a tool for sustainable development and the conservation of natural and cultural resources;
5. To find ways to encourage a more responsible behaviour by all those acting in the field of ecotourism, including public sector officials, private business people, and the tourists themselves;
6. To define new areas for international and regional collaboration with a view to contributing to the sustainable development and management of ecotourism throughout the world.

The WTO and UNEP, in consultation with other organisations and ecotourism stakeholders, have defined the following four main discussion themes for the Summit¹¹:

1. Ecotourism Policy and Planning: The Sustainability Challenge.
2. Regulation of Ecotourism: Institutional Responsibilities and Frameworks.
3. Product Development, Marketing and Promotion of Ecotourism: Fostering Sustainable Products and Consumers.
4. Monitoring Costs and Benefits of Ecotourism: Ensuring Equitable Distribution Among All Stakeholders.

In all these themes, the focus was on two crosscutting issues. *First*, the sustainability of ecotourism from the environmental, economic and socio-cultural points of view. *Second*, the involvement and empowerment of local communities and indigenous people in the ecotourism development process, management and monitoring of ecotourism activities, and sharing of profits resulting from it.

¹¹ See <http://www.unepite.org/pc/tourism/ecotourism/wes-themes.htm>.

The conclusions and recommendations of the Summit have been included in the “Québec Declaration on Ecotourism”¹², which presents a new tool for the international development of this type of tourism. The Document includes a series of recommendations for the sustainable development, planning and management of ecotourism proposed to all stakeholders involved in this type of tourism in order to make the overall tourism industry more sustainable by increasing economic and social benefits for host communities while contributing to the conservation of their natural and cultural resources. The Document has already become the point of reference for all discussions and debates on Ecotourism. It was officially presented for more global deliberation at the World Summit on Sustainable Development, held in Johannesburg, South Africa, in August/September 2002.

In this connection, it is worth mentioning that the OIC region has very large areas of diverse natural habitat with attractive landscapes and flora and fauna. These features, extended over protected areas hosting a wide variety of ecosystems and rich and unique traditional cultures, are a major attraction for nature-oriented tourism and of considerable interest to tourists.

In many OIC countries, particularly African ones, vast national and wildlife parks count for classical game-watching tourism, and many forms of ecotourism activities are practised in natural areas of different status, under different structures, involving stakeholders from all sectors of the society. The opportunity to learn about local culture and wildlife in some OIC African countries can be a way of attracting tourists to diversify their tourism experience. This, in turn, creates economic opportunities for local communities around parks and protected areas in these countries.

These natural and cultural heritage assets are significant to the development of a sustainable ecotourism sector in the OIC region. In fact, there is much for the OIC countries to learn from the World Ecotourism Summit with great hope for the full implementation of the conclusions and recommendations included in the Québec Declaration on Ecotourism.

¹² The full document is available at:
<http://www.unepite.org/tourism/documents/WESoutcomes/Quebec-Declar-eng.pdf>.

6. POLICY RECOMMENDATIONS AND ACTIONS FOR CO-OPERATION

Despite the diverse problems facing tourism in the OIC countries and their modest share in the world tourism market, there still is a wide scope for the development of a modern and sustainable tourism industry and intra-OIC co-operation 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 co-operation environment at the regional level.

In this regard, the broad objectives and programmes of action defined under the chapter of 'Tourism' in the Plan of Action to Strengthen Economic and Commercial Co-operation among the Member Countries of the OIC could be a source of a wide range of policy recommendations that can be proposed at both the national and OIC co-operation levels as follows:

6.1. At the National Level

- Objectives and programmes of action for the sustainable development of the tourism industry are to be outlined specifically in the national development plans and strategies and formulated in consultation with the relevant local stakeholders. This is to be accompanied by developing new resources and facilities as well as raising public awareness of inherent natural and cultural resources.
- The new focus of sustainable development and management of tourism should be on the promotion of economic incentives and environmental education and on local capacity building rather than merely on the establishment of rules and regulations, which proved to be largely ineffective.
- Developing and raising tourism-oriented education. This will help change people's perceptions regarding tourism and raise 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.

- Providing training and education programs on different aspects of tourism, particularly to the people and personnel directly engaged in the sector activities. These should cover a broad range of subjects such as foreign languages, business and tourism techniques, the environmental and socio-cultural impacts of tourism, history, culture, local and national flora and fauna, etc. To facilitate these programmes, steps must be taken to provide local communities with financial and technical backing, a field in which governments and NGOs have a key role to play.
- Physical planning and strengthening the sustainability of tourism destinations, in general, and ecotourism products, in particular, in order to preserve the environmental and cultural quality of these destinations. Planning of the tourism sector should be based on international standards and regulations. These should underpin the integration of regional proposals and joint marketing activities.
- 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, the necessary laws and regulations should be put into place to control the quality of the services provided to tourists.
- Tourism is a business and primarily an area for private sector activity. Thus, efforts should be made to encourage and promote 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 tourism projects and establishing joint ventures particularly in the areas of capacity building and improving the quality of tourism services.
- Efforts should be made to find and obtain access to funding for tourism projects. Steps must be taken to improve and optimise a broad range of funding resources, including the public and private sectors, and other sources such as NGOs, academic institutions and international foundations.
- Strengthening public-private sector cooperation with a view to establishing policies, strategies and regulations relative to

sustainable tourism development and strengthening institutional tourism management.

- Diversifying tourism products (tourism supply) by the inclusion of socio-cultural programs and traditional activities involving local communities. In this regard, efforts should be made to improve planning, management and marketing of ecotourism, not only as a sector with a great potential for economic development—especially in remote areas where few other possibilities exist—but also as a significant tool for conservation of the natural environment.
- 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 co-operation 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 action at the bilateral and multilateral levels to strengthen and expand tourism activities. In this regard, the International Finance Corporation (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 touristic activities.

6.2. At the OIC Co-operation Level

Within the framework of co-operation at the OIC regional level, tourism represents one of the ten priority areas of the Plan of Action to Strengthen Economic and Commercial Co-operation among the Member Countries of the OIC. As major objectives of OIC co-operation in this area, the Plan of Action seeks to: *“Support and develop joint action, at the bilateral and multilateral levels, to strengthen, promote and expand tourist activities among the member countries, and in the Islamic world in general”*. The Plan also seeks to: *“Formulate co-ordinated OIC action addressed to the improvement and enhancement of supply in the area of tourism, through the establishment of new facilities and activities in the member countries, in order to attain globally*

*competitive standards in terms of facilities, quality of services and diversity of tourist activities*¹³.

In this connection, the First Islamic Conference of Ministers of Tourism of the OIC countries was held in October 2000 in Isfahan, the Islamic Republic of Iran. At the Conference, the Ministers adopted the “Isfahan Declaration” in which they decided, among others, to boost co-operation among Member States in tourism, through the promotion of public awareness, education, training, investment opportunities and involvement of private sectors.

In the Second Islamic Conference of Ministers of Tourism, which was held in October 2001 in Kuala Lumpur, Malaysia, a Resolution on Tourism Development was adopted. In order to achieve the goals set forth in the Isfahan Declaration as well as the Resolution on Tourism Development, the Conference also adopted the Kuala Lumpur Programme of Action for the Development and Promotion of Tourism among the OIC Member States. The Programme identified three possible areas of co-operation in tourism, namely *Tourism Facilitation*, *Tourism Marketing* and *Research and Training*.

Stressing their importance and relevance, specific measures should be taken by the OIC countries as well as the OIC institutions for the fulfillment and effective implementation of the commitments, recommendations and resolutions made at the above-mentioned Conferences. In this context, the paper ends with an attempt to elaborate on the three possible areas of co-operation in tourism set out in the Kuala Lumpur Programme of Action.

A. Tourism Facilitation

Under this area, co-operation efforts and actions of the OIC member countries will be along the following lines:

- Removing obstacles to tourists flow within the OIC member countries through establishing and facilitating linkages in air, land/rail and sea transportation with a view to easing access from one destination to another within the OIC region.

¹³ OIC Strategy and Plan of Action, SESRTCIC Publications, Ankara, 1997, P. 17.

In this regard, the following policy actions, which would also be in harmony with the Strategy of the Plan of Action to Strengthen Economic and Commercial Co-operation among the Member Countries of the OIC, could be suggested:

1. One of the important and basic conditions for easing entry and movement of tourists among the OIC countries and enhancing intra-OIC tourism is the simplification or even abolition of visa and other travel procedures. In this regard, the idea of concluding the framework of an agreement on visa arrangements among the OIC countries should be seriously considered. In this context, waiving of the visa requirement, if possible, or otherwise expediting the visa issuing process, including the possibility of issuance of electronic or joint visa, could also be suggested.
2. Establishing alliances among the airlines of the OIC countries with the possibility of having an open-sky policy and direct flights between their capitals and major cities.
3. Expanding co-operation efforts of aviation companies in the OIC countries in order to make maximum profit from the inter-OIC aviation network through, inter alia, organising extra flights among OIC countries with encouraging prices for tourists during various seasons.
4. Equipping and mobilising aero-navigation of the OIC countries, establishing air-transport joint companies, and offering a discount on airport taxes and services on a reciprocal basis among Islamic countries.
5. Modernising the infrastructure of railway transportation in the OIC countries and linking the railway networks of these countries to each other.
6. Renewing and modernising the road transportation vehicles and networks in the OIC countries and linking these networks to each other within the OIC region.
7. Since most of the OIC countries have access to the high seas, establishing direct sea transportation routes among the major

seaports of these countries will further expand tourist flows among them.

8. Encouraging efforts to conduct bilateral and multilateral air, road/rail and sea Passengers Transport Treaties among OIC countries.
9. Granting preferential treatment and making special arrangements to facilitate customs formalities and immigration clearance such as discounts and reduction of tariffs and other charges levied on tourists traveling among OIC countries.
10. Encouraging public and private joint investment projects in tourism through providing special facilities and preferential treatment for investors from the OIC countries and identifying international and regional financial institutions to support finance and investment in tourism development.

B. Tourism Marketing and Publicity

One of the most important elements of strengthening and promoting intra-OIC touristic activity is to design and implement effective joint programmes and projects in the field of tourism marketing and publicity. In this regard, the following policy actions can be suggested:

1. Steps should be taken to promote alliances between tourism stakeholders in OIC countries, particularly the official tourism promotion bodies, with a view to strengthening tourism marketing and promoting co-operation efforts.
2. Developing and applying scientific methods of joint tourism marketing and advertisement supported by tools that have a major impact on consumers, e.g. the Internet. In addition to its capacity for the massive dissemination of information, the Internet also facilitates direct transactions between suppliers and consumers.
3. Developing tourism websites for the dissemination of information regarding tourism in all OIC countries to render familiar their natural, historical, and cultural heritage assets.
4. Organising Islamic tourism fairs and exhibitions and food and cultural festivals on a regular basis similar to the Islamic Trade Fair

along with the production and publication of Tourism Best Practices in OIC countries.

5. Jointly producing TV and CD-ROM documentaries, press releases, brochures, etc., to show and promote the cultural heritage and the diversity and landmarks of the OIC countries as a single cultural world.
6. Developing joint dissemination and exchange of information on tourism investment opportunities in the OIC countries through, for example, the joint production of investment handbooks or investment guidelines on investment opportunities in the OIC countries.

C. Tourism Research and Training

Under this area of tourism co-operation, the following policy actions can be suggested:

1. Holding joint training-vocational courses, workshops, seminars and conferences on the tourism industry by the relevant training institutes in the OIC countries.
2. Joint development or exchange of training programs and courses in human resources development in the field of tourism and the joint development of tourism occupational skills standards among OIC countries.
3. Establishing linkages or networks among Tourism Training Institutes in OIC countries and exchanging research on tourism development as well as sharing the methodology of assessing tourism resources, marketing and promotion.
4. Carrying out joint capacity studies that take account of the environmental, social and economic impacts of tourism in the OIC countries.

ANNEX

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

	Tourist Arrivals (1000)					Growth Rate (%)			
	1990	1995	1998	1999	2000	98/99	99/2000	1995/2000	90/2000
<u>OIC Africa</u>	9747	9439	11302	11571	11969	2.4	3.4	4.9	2.1
Algeria	1137	520	678	749	866	10.5	15.6	10.7	-2.7
Benin	110	138	152	-	-	-	-	-	-
Burkina Faso	74	124	160	218	-	36.3	-	-	-
Cameroon	89	100	135	-	-	-	-	-	-
Chad	9	19	41	47	54	14.6	14.9	23.2	19.6
Comoros	8	23	27	24	24	-11.1	0.0	0.9	11.6
Côte d'Ivoire	-	237	301	-	-	-	-	-	-
Djibouti	33	21	21	-	-	-	-	-	-
Gabon	109	125	195	175	155	-10.3	-11.4	4.4	3.6
Gambia	100	45	91	96	-	5.5	-	-	-
Guinea	-	-	23	27	33	17.4	22.2	-	-
Mali	44	42	83	82	86	-1.2	4.9	15.4	6.9
Mauritania	-	-	-	24	30	-	25.0	-	-
Morocco	4024	2602	3242	3817	4113	17.7	7.8	9.6	0.2
Niger	21	35	42	43	50	2.4	16.3	7.4	9.1
Nigeria	190	656	739	776	813	5.0	4.8	4.4	15.6
Senegal	246	280	352	369	389	4.8	5.4	6.8	4.7
Sierra Leone	98	38	6	6	10	0.0	66.7	-23.4	-20.4
Somalia	46	10	10	-	-	-	-	-	-
Togo	103	53	69	70	60	1.4	-14.3	2.5	-5.3
Sudan	33	63	25	29	38	16.0	31.0	-9.6	1.4
Tunisia	3204	4120	4718	4832	5057	2.4	4.7	4.2	4.7
Uganda	69	188	192	187	191	-2.6	2.1	0.3	10.7

<u>OIC Americas</u>	110	149	123	132	163	7.3	23.5	1.8	4.0
Guyana	64	106	68	75	105	10.3	40.0	-0.2	5.1
Suriname	46	43	55	57	58	3.6	1.8	6.2	2.3
<u>OIC East Asia/Pacific</u>	10001	12291	11121	13626	16269	22.5	19.4	5.8	5.0
Brunei	377	498	964	967	984	0.3	1.8	14.6	10.1
Indonesia	2178	4324	4606	4728	5064	2.6	7.1	3.2	8.8
Malaysia	7446	7469	5551	7931	10221	42.9	28.9	6.5	3.2
<u>OIC Europe/C. Asia</u>	4829	7764	10359	7894	11778	-23.8	49.2	8.7	9.3
Albania	30	40	28	26	39	-7.1	50.0	-0.5	2.7
Azerbaijan	-	93	483	602	681	24.6	13.1	48.9	-
Kazakhstan	-	202	257	304	1471	18.3	383.9	48.7	-
Kyrgyz Rep.	-	36	59	69	-	16.9	-	-	-
Turkey	4799	7083	8960	6893	9587	-23.1	39.1	6.2	7.2
Turkmenistan	-	218	300	-	-	-	-	-	-
Uzbekistan	-	92	272	-	-	-	-	-	-
<u>OIC Middle East</u>	8823	12058	15570	18930	22629	21.6	19.5	13.4	9.9
Bahrain	1376	1396	1640	2019	2420	23.1	19.9	11.6	5.8
Egypt	2411	2871	3213	4489	5116	39.7	14.0	12.2	7.8
Iraq	748	61	51	30	78	-41.2	160.0	5.0	-20.2
Jordan	572	1074	1256	1358	1427	8.1	5.1	5.8	9.6
Kuwait	15	69	77	-	79	-	-	-	18.1
Lebanon	-	450	631	673	742	6.7	10.3	10.5	-
Libya	96	56	32	178	174	456.2	-2.2	25.5	6.1
Oman	149	279	423	503	571	18.9	13.5	15.4	14.4
Palestine	-	-	201	271	330	34.8	21.8	-	-
Saudi Arabia	2209	3325	3700	4572	6296	23.6	37.7	13.6	11.0
Syria	562	815	1267	1386	1416	9.4	2.2	11.7	9.7
U.A.E.	633	1601	2991	3393	3907	13.4	15.1	19.5	20.0
Yemen	52	61	88	58	73	-34.1	25.9	3.7	3.5

<u>OIC South Asia</u>	896	1305	2009	2356	2923	17.3	24.1	17.5	12.6
Afghanistan	8	4	4	-	-	-	-	-	-
Bangladesh	115	156	172	173	199	0.6	15.0	5.0	5.6
Iran	154	452	1008	1321	1700	31.1	28.7	30.3	27.1
Maldives	195	315	396	430	467	8.6	8.6	8.2	9.1
Pakistan	424	378	429	432	557	0.7	28.9	8.1	2.8
OIC Total	34296	42857	50484	54377	65568	7.7	20.6	8.9	6.7
World Total	457200	550300	626700	650200	696700	3.7	7.2	4.8	4.3
OIC as % of world	7.5	7.8	8.1	8.4	9.4				

Source: World Tourism Organisation.

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.

(-) Relevant data are not available.

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

	Tourism Receipts (US\$ million)					Growth Rate (%)			
	1990	1995	1998	1999	2000	98/99	99/2000	1995/2000	90/2000
<u>OIC Africa</u>	2811	3342	4192	4211	4060	0.5	-3.6	4.0	3.7
Algeria	64	27	24	-	-	-	-	-	-
Benin	28	27	33	-	-	-	-	-	-
Burkina Faso	11	25	42	-	-	-	-	-	-
Cameroon	53	36	40	-	-	-	-	-	-
Chad	8	10	10	-	-	-	-	-	-
Comoros	2	21	16	19	15	18.8	-21.1	-6.5	22.3
Côte d'Ivoire	-	93	98	100	57	2.0	-43.0	-9.3	-
Djibouti	6	4	4	-	-	-	-	-	-
Gabon	3	7	8	11	7	37.5	-36.4	0.0	8.8
Gambia	26	23	33	-	-	-	-	-	-
Guinea	30	1	1	7	12	600.0	71.4	64.4	-8.8
Mali	47	25	89	77	71	-13.5	-7.8	23.2	4.2
Mauritania	9	11	20	28	-	40.0	-	-	-
Morocco	1259	1304	1712	1880	2040	9.8	8.5	9.4	4.9
Niger	17	15	18	24	-	33.3	-	-	-
Nigeria	25	54	142	171	200	20.4	17.0	29.9	23.1
Senegal	167	161	178	166	140	-6.7	-15.7	-2.8	-1.7
Sierra Leone	19	6	8	8	12	0.0	50.0	14.9	-4.5
Togo	58	13	13	9	5	-30.8	-44.4	-17.4	-21.7
Sudan	21	8	2	2	5	0.0	150.0	-9.0	-13.4
Tunisia	948	1393	1557	1560	1496	0.2	-4.1	1.4	4.7
Uganda	10	78	144	149	-	3.5	-	-	-

<u>OIC Americas</u>	38	92	54	68	16	25.9	-76.5	-29.5	-8.3
Guyana	27	78	52	59	-	13.5	-	-	-
Suriname	11	14	2	9	16	350.0	77.8	2.7	3.8
<u>OIC East Asia/Pacific</u>	3807	9175	6824	8250	10696	20.9	29.6	3.1	10.9
Brunei	35	37	37	-	-	-	-	-	-
Indonesia	2105	5229	4331	4710	5749	8.8	22.1	1.9	10.6
Malaysia	1667	3909	2456	3540	4947	44.1	39.7	4.8	11.5
<u>OIC Europe/ C. Asia</u>	3229	5295	7984	5872	8459	-26.5	44.1	9.8	10.1
Albania	4	65	54	211	389	290.7	84.4	43.0	58.0
Azerbaijan	-	70	125	81	63	-35.2	-22.2	-2.1	-
Kazakhstan	-	122	407	363	356	-10.8	-1.9	23.9	-
Kyrgyz Rep.	-	5	8	14	15	75.0	7.1	24.6	-
Turkey	3225	4957	7177	5203	7636	-27.5	46.8	9.0	9.0
Turkmenistan	-	63	192	-	-	-	-	-	-
Uzbekistan	-	13	21	-	-	-	-	-	-
<u>OIC Middle East</u>	4402	7797	8811	8122	8821	-7.8	8.6	2.5	7.2
Bahrain	135	247	366	408	469	11.5	15.0	13.7	13.3
Egypt	1100	2684	2565	3903	4345	52.2	11.3	10.1	14.7
Iraq	55	13	13	-	-	-	-	-	-
Jordan	512	652	773	795	722	2.8	-9.2	2.1	3.5
Kuwait	132	121	207	92	98	-55.6	6.5	-4.1	-2.9
Lebanon	-	710	1221	673	742	-44.9	10.3	0.9	-
Libya	6	6	18	28	-	55.6	-	-	-
Oman	69	92	112	106	120	-5.4	13.2	5.5	5.7
Palestine	-	104	114	132	155	15.8	17.4	8.3	-
Saudi Arabia	1884	1210	1462	-	-	-	-	-	-
Syria	320	1165	1017	1031	1082	1.4	4.9	-1.5	13.0
U.A.E.	169	743	859	893	1012	4.0	13.3	6.4	19.6
Yemen	20	50	84	61	76	-27.4	24.6	8.7	14.3

OIC South Asia	317	537	929	1113	1330	19.8	19.5	19.9	15.4
Bangladesh	11	23	51	50	50	-2.0	0.0	16.8	16.3
Iran	61	190	477	662	850	38.8	28.4	34.9	30.1
Maldives	89	210	303	325	344	7.3	5.8	10.4	14.5
Pakistan	156	114	98	76	86	-22.4	13.2	-5.5	-5.8
OIC Total	14604	26238	28794	27636	33382	-4.0	21.0	4.9	8.6
World Total	263400	406200	442400	456300	474400	3.1	4.0	3.2	6.1
OIC as % of world	5.5	6.5	6.5	6.1	7.0				

Source: World Tourism Organisation.

(-) Relevant data are not available.

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

	1996	1997	1998	1999	2000
Albania	65	22	49	199	117
Azerbaijan	-54	-24	-45	-58	-69
Bahrain	154	189	224	249	300
Bangladesh	-168	-111	-147	-162	-251
Benin	23	24	26	-	-
Côte d'Ivoire	-128	-110	-115	-122	-169
Egypt	1887	2380	1417	2825	3272
Gabon	-169	-171	-172	-172	-167
Gambia	16	16	-	-	-
Guinea	-21	-	-26	-24	-24
Indonesia	3908	2910	2229	2357	2552
Iran	-285	-350	-311	-256	-
Jordan	362	376	420	440	335
Kazakhstan	-120	-156	-91	-31	-52
Kuwait	-2308	-2189	-2310	-2178	-2353
Kyrgyz Rep.	-2	3	5	3	-1
Libya	-209	-148	-125	-122	-
Malaysia	1878	112	671	1567	4947
Maldives	228	247	261	280	298
Mali	-17	-16	37	33	30
Mauritania	-17	-27	-22	-27	-
Morocco	1374	1133	1288	1440	1610
Niger	-6	-6	-7	-2	-
Nigeria	-1219	-1698	-1425	-449	-530
Oman	-150	-141	-175	-217	-221
Pakistan	-754	-247	-254	-104	-166
Senegal	96	100	124	112	-
Sierra Leone	8	-	4	4	-
Sudan	-20	-29	-27	-33	-50
Suriname	6	-2	-9	-4	-7
Syria	652	468	437	401	442
Togo	8	7	10	6	-
Tunisia	1160	1126	1322	1321	1233
Turkey	4697	6372	6055	3732	5925
Turkmenistan	-7	-51	-	-	-
Uganda	-18	22	49	8	-
Yemen	-22	-54	-46	-75	-

Source: SESRTCIC staff calculation based on the data available in the "Compendium of Tourism Statistics", 2002 Edition, World Tourism Organisation, Madrid 2002.

(-) Relevant data are not available.

TABLE A.4: BALANCE OF INTERNATIONAL TOURISM AS PERCENTAGE OF GNP IN OIC COUNTRIES (%)

	1996	1997	1998	1999	2000	Average 1996-2000
Albania	2.4	0.9	1.8	6.3	3.1	2.9
Azerbaijan	-1.8	-0.7	-1.1	-1.3	-1.4	-1.3
Bahrain	3.0	3.7	4.6	3.8	3.8	3.7
Bangladesh	-0.4	-0.3	-0.3	-0.3	-0.5	-0.4
Benin	1.2	1.1	1.1	-	-	1.1
Comoros	11.1	12.6	6.6	-	-	10.1
Côte d'Ivoire	-1.4	-1.1	-1.1	-1.2	-1.6	-1.3
Egypt	2.9	3.3	1.8	3.3	3.4	2.9
Gabon	-3.7	-3.4	-3.7	-4.3	-4.3	-3.9
Gambia	4.1	3.9	-	-	-	4.0
Guinea	-0.5	-	-0.7	-0.7	-0.7	-0.7
Guyana	11.1	8.8	7.9	-	-	9.3
Indonesia	1.8	1.3	1.7	2.0	2.1	1.8
Iran	-0.3	-0.3	-0.3	-0.3	-	-0.3
Jordan	5.2	5.2	5.6	5.7	4.1	5.2
Kazakhstan	-0.6	-0.7	-0.4	-0.2	-0.3	-0.4
Kuwait	-7.2	-7.3	-9.1	-7.3	-6.2	-7.4
Kyrgyz Rep.	-0.1	0.1	0.3	0.2	-0.1	0.1
Lebanon	3.5	4.4	5.5	3.6	-	4.3
Libya	-0.6	-0.5	-0.4	-0.3	-	-0.4
Malaysia	2.0	0.1	0.8	2.0	6.3	2.3
Maldives	81.7	80.7	78.1	76.5	73.9	78.2
Mali	-0.7	-0.6	1.4	1.3	1.2	0.5
Mauritania	-1.5	-2.5	-2.1	-2.7	-	-2.2
Morocco	3.9	3.3	3.7	4.3	4.8	4.0
Niger	-0.3	-0.3	-0.3	-0.1	-	-0.3
Nigeria	-4.3	-5.3	-4.5	-1.5	-1.6	-3.4
Oman	-0.9	-1.0	-1.1	-1.1	-1.1	-1.1
Pakistan	-1.2	-0.4	-0.4	-0.2	-0.3	-0.5
Senegal	2.1	2.1	2.7	2.4	-	2.3
Sierra Leone	0.9	-	0.6	0.6	-	0.7
Sudan	-0.2	-0.3	-0.3	-0.4	-0.5	-0.3
Suriname	1.5	-0.4	-1.6	-0.6	-1.2	-0.5
Syria	4.1	3.0	2.6	2.5	2.8	3.0
Togo	0.6	0.5	0.7	0.4	-	0.5
Tunisia	6.4	5.9	6.9	6.7	6.1	6.4
Turkey	2.7	3.2	3.0	2.0	2.9	2.8
Turkmenistan	-0.2	-1.7	-	-	-	-1.0
Uganda	-0.3	0.3	0.7	0.1	-	0.2
Uzbekistan	0.1	0.1	-	-	-	0.1
Yemen	-0.5	-1.1	-0.8	-1.2	-	-0.9

Source: SESRTCIC staff calculation based on the data available in the "Compendium of Tourism Statistics", 2002 Edition, World Tourism Organisation, Madrid 2002.

(-) Relevant data are not available.

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

	1996	1997	1998	1999	2000	Average 1996-2000
Albania	37.0	19.4	26.3	79.9	149.0	62.4
Azerbaijan	7.3	20.7	20.6	8.7	3.6	12.2
Bahrain	5.6	7.1	11.2	9.9	8.2	8.4
Bangladesh	1.0	1.6	1.3	1.3	1.1	1.2
Benin	4.4	4.6	8.0	-	-	5.7
Burkina Faso	13.2	16.8	13.2	-	-	14.4
Comoros	383.3	650.0	133.3	118.8	83.3	273.8
Côte d'Ivoire	2.1	2.0	2.1	2.1	1.4	2.0
Egypt	90.5	95.1	81.9	109.7	92.6	94.0
Gabon	0.2	0.2	0.3	0.3	0.2	0.3
Gambia	147.6	213.3	181.5	-	-	180.8
Guinea	1.0	-	0.1	0.9	1.4	0.9
Guyana	13.5	9.3	11.1	11.3	-	11.3
Indonesia	12.7	10.0	8.9	9.7	9.3	10.1
Iran	1.1	1.8	3.6	3.1	3.1	2.5
Jordan	40.9	42.2	42.9	43.4	38.1	41.5
Kazakhstan	3.4	4.4	7.5	6.5	3.9	5.1
Kuwait	1.2	1.3	2.2	0.8	0.5	1.2
Kyrgyz Rep.	0.8	1.2	1.6	3.1	3.0	1.9
Lebanon	97.1	155.5	184.4	99.4	103.9	128.1
Libya	0.1	0.1	0.3	0.4	-	0.2
Malaysia	5.7	3.4	3.4	4.2	5.0	4.3
Maldives	450.8	391.8	409.5	507.8	452.6	442.5
Mali	6.7	4.6	16.0	13.5	18.8	11.9
Mauritania	3.7	4.2	3.8	5.9	-	4.4
Morocco	24.3	20.6	23.9	25.5	27.5	24.4
Niger	5.2	6.6	5.4	0.8	-	4.5
Nigeria	0.5	0.8	1.4	1.2	1.0	1.0
Oman	1.4	1.5	2.1	1.5	1.1	1.5
Pakistan	1.6	1.3	1.2	0.9	0.9	1.2
Senegal	15.1	16.9	18.4	16.2	14.0	16.1
Sierra Leone	21.3	-	114.3	133.3	38.7	76.9
Sudan	1.3	0.7	0.3	0.3	0.3	0.6
Suriname	3.2	1.3	0.5	1.5	3.1	1.9
Syria	29.1	25.9	35.2	29.8	5.6	25.1
Togo	2.5	2.8	1.3	2.3	1.5	2.1
Tunisia	25.6	24.5	27.1	26.6	25.6	25.9
Turkey	25.7	30.8	29.0	19.6	28.7	26.7
Turkmenistan	8.8	12.5	16.2	-	-	12.5
Uganda	19.9	24.3	28.7	28.8	-	25.5
U.A.E.	2.6	2.1	2.0	2.1	2.5	2.2
Uzbekistan	0.3	0.4	0.6	-	-	0.5
Yemen	1.7	2.8	5.6	2.5	1.9	2.9

Source: SESRTCIC staff calculation based on the data available in the "Compendium of Tourism Statistics", 2002 Edition, World Tourism Organisation, Madrid 2002.

(-) Relevant data are not available.

