



## **SCREENING CHAPTER 20 ENTERPRISE AND INDUSTRIAL POLICY**

### **AGENDA ITEM NO XVII: TOURISM**

**Country Session: The Republic of TURKEY  
4-5 May 2006**



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## Overview

### Basic Indicators (2005)

<b>Tourist Arrivals</b>	21.1 million <sup>(3)</sup>
<b>Tourism Receipts</b>	14.48 billion Euros <sup>(3)</sup>
<b>Tourism Enterprises (Accommodation)</b>	11,100 <sup>(1)</sup>
<b>Bed Capacity</b>	1,160,000 <sup>(1)</sup>
<b>Travel Agencies</b>	4,825 <sup>(1)</sup>
<b>Tourism Receipts / GNP</b>	5 % <sup>(2)</sup>
<b>Tourism Receipts / Total Exports</b>	24.8 % <sup>(2)</sup>

Source: 1. MoCT

2. Central Bank

3. TURKSTAT



## Overview (CONT'D)

### World's Top Tourism Destinations (2004)

Rank	Country	International Tourist Arrivals (Million)	Market Share (%)
1	France	75.1	9.8
2	Spain	53.6	7.0
3	United States	46.1	6.0
4	China	41.8	5.5
5	Italy	37.1	4.9
6	United Kingdom	27.8	3.6
7	Hong Kong (China)	21.8	2.9
8	Mexico	20.6	2.7
9	Germany	20.1	2.6
10	Austria	19.4	2.5
11	Canada	19.2	2.5
12	<b>Turkey</b>	<b>16.8</b>	<b>2.2</b>
13	Malaysia	15.7	2.1
14	Ukraine	15.6	2.0
-	<i>World</i>	<b>763</b>	<b>100</b>

Source: UNWTO



## Overview (CONT'D)

### Tourism Receipts Worldwide (2004)

Rank	Country	Billion Euros	Change 2004/2003 (%)
1	United States	59.8	5.3
2	Spain	36.4	3.8
3	France	32.8	1.5
4	Italy	28.6	3.8
5	Germany	22.2	8.9
6	United Kingdom	21.9	9.6
7	China	20.7	34.5
8	Turkey	12.8	9.4
9	Austria	12.3	0.0
10	Australia	10.4	14.2

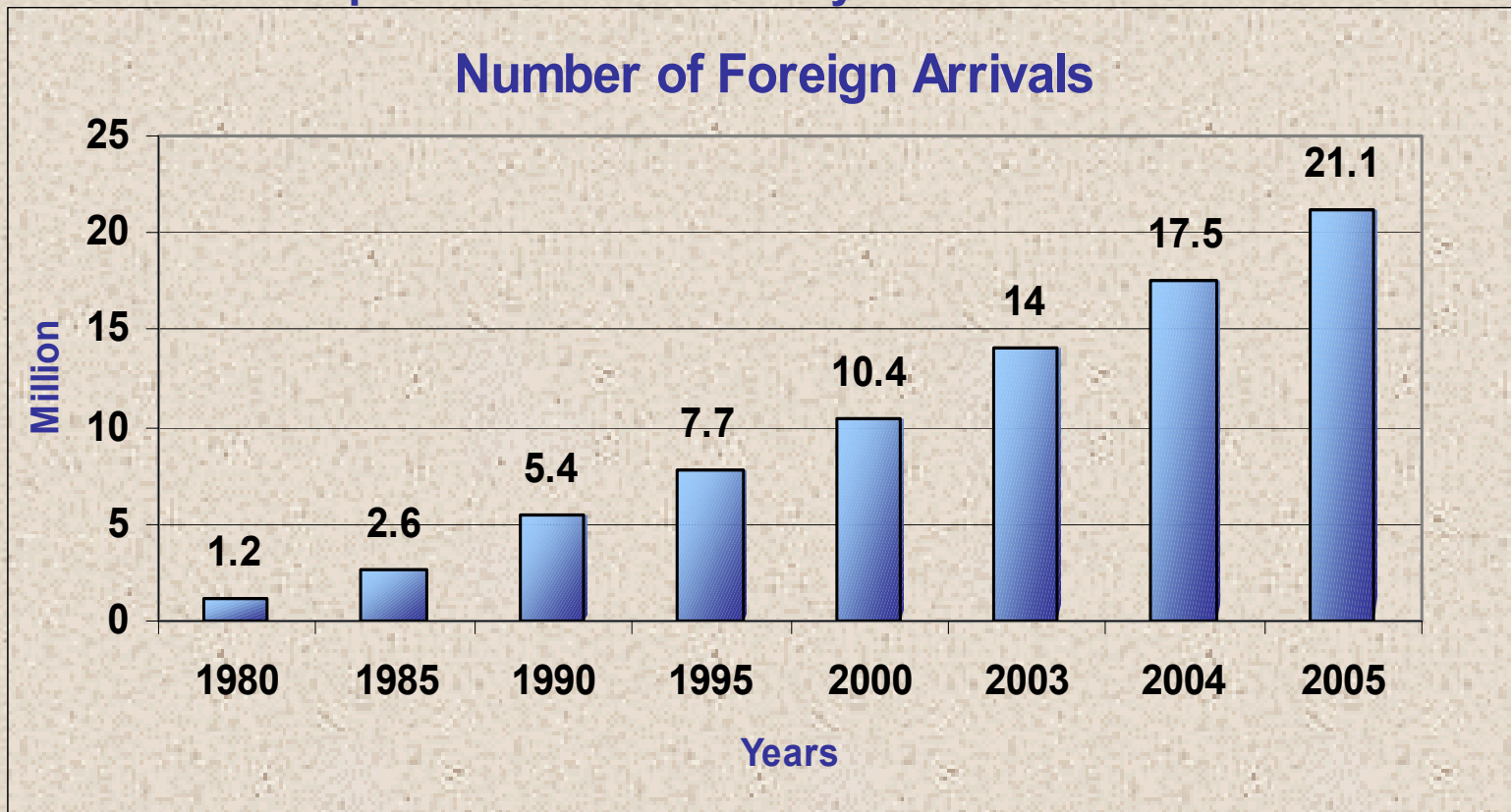
Source: UNWTO





## Overview (CONT'D)

### Tourism Development Trend in Turkey

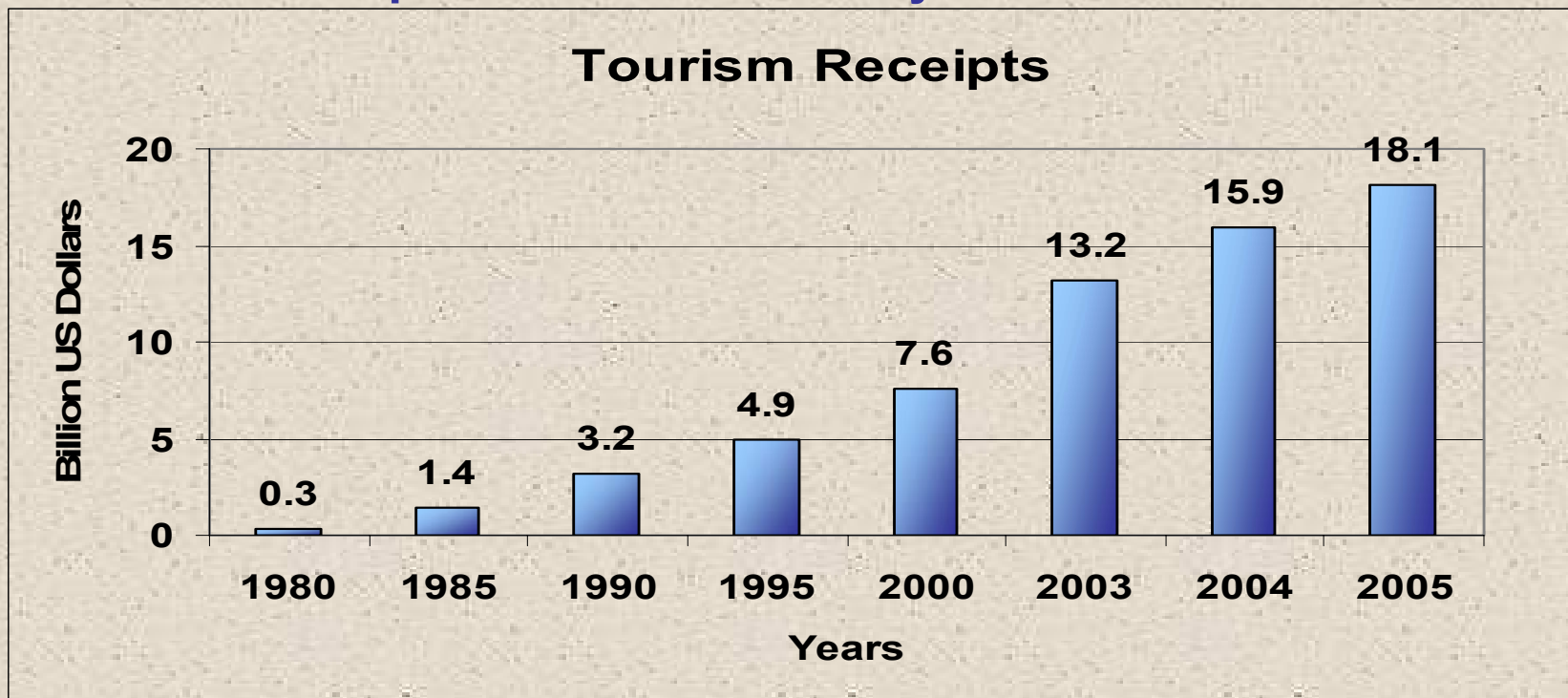


Source: MoCT



## Overview (CONT'D)

### Tourism Development Trend in Turkey



Source: Central Bank



## Overview (CONT'D)

### Expected Growth Rate

According to World Travel and Tourism Council (WTTC) estimations (2002-2012), Turkey will be the *fastest growing country* with an annual growth rate of 10.2% in tourism demand.





## Policy Documents

### 8<sup>th</sup> Five Year Development Plan (2001-2005)

- To extend tourism season throughout the year by creating new areas of tourism based on the changing consumer preferences and to the regions with potential but not yet fully explored,
- To ensure that all investments in tourism sector are planned with an approach protecting and developing natural, historical and social environment,
- To improve the qualifications of the labour force and harmonisation with international standards in tourism enterprises.

### Annual Programme (2006)

- Geographical and seasonal diversification of tourism activities,
- Planning, directing and implementing investments within the concept of sustainability,
- Increasing the share of Turkish tourism in the international market.



## Policy Documents (CONT'D)

In line with the policy documents, Ministry of Culture and Tourism (MoCT) gives particular attention to following issues and programmes;

- Sustainability
- Long-term Consumer Satisfaction
- Competitiveness
- Destination Based Tourism Development



## Tools of Implementation for Sustainability

- Tourism Diversity: Enhanced Seasonal and Geographical Distribution of Tourism Activities
- New Destination Development Projects
- Integration of Environmental Measures
- Main Projects Related to Cultural Heritage
- Tourism For All



## Tools of Implementation for Sustainability (CONT'D)

### Tourism Diversity

- Health, Wellness and Thermal Tourism  
(34 Thermal Tourism Centers in 21 Provinces)
- Winter Sports Tourism  
(19 Winter Sports Tourism Centers)
- Highland Tourism  
(25 Highland Tourism Centers in 10 Provinces)
- Other Tourism Alternatives  
(Faith, Congress, Golf, Yachting, Air Sports, Mountaineering, etc.)





## Tourism Diversity (CONT'D)



Provinces with high capacity
  Highland Tourism
  Thermal Tourism
  Winter Tourism
  Other Types of Tourism (culture, faith, etc.)





## Tools of Implementation for Sustainability (CONT'D)

### New Destination Development Projects

- 8 Destination Development Workshops, 2005

Comprising 9 provinces and 54 districts

Participants: Public Institutions, Local Authorities and Municipalities, NGOs, Private Sector Representatives, Universities

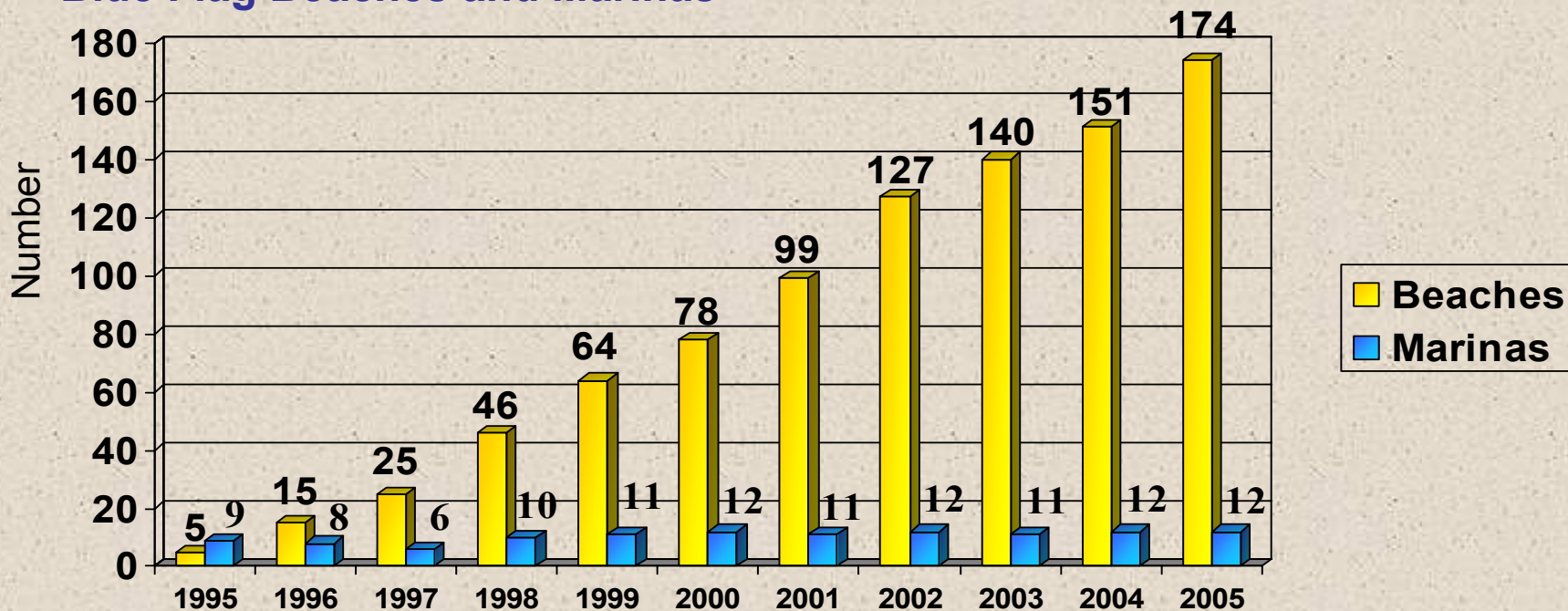
- Workshop Outcome: Destination Action Plan
  - ✓ Infrastructure, Environment
  - ✓ Protection and Evaluation of Cultural Assets
  - ✓ Marketing and Promotion of Tourist Products



## Tools of Implementation for Sustainability (CONT'D)

### Integration of Environmental Measures

#### Blue Flag Beaches and Marinas





## Tools of Implementation for Sustainability (CONT'D)

### Integration of Environmental Measures

MoCT evaluates and issues,

- Environment-friendly Enterprise Certification (Eco-labeling),
  - ✓ Accommodation,
  - ✓ Yachting,
  - ✓ Marinas and others.
- Tourism investments are subject to Environmental Impact Assessment (EIA),
- Supporting infrastructure investments of the municipalities annually.



# Tools of Implementation for Sustainability (CONT'D)

## Major Projects Related to Cultural Heritage

- Euromed Heritage I Projects
  - ✓ **CORPUS**
  - ✓ **Expo 2000**
- Unimed Cultural Heritage II
- Istanbul, Fener-Balat Rehabilitation Project (UNESCO)
- Istanbul, Zeyrek “Save Our Roofs” Project (UNESCO)
- Community Development and Cultural Heritage Projects (Mardin and Pamukkale)



# Tools of Implementation for Sustainability (CONT'D)

## TOURISM FOR ALL

### Facilities for Disabled

Certain standards and arrangements are regulated in legislation regarding disabled persons (number of rooms, entrance of the establishments, toilette rooms, etc. with special signs)

(By-law on the Certification and Qualification of Tourism Establishments (Official Gazette 25849/2005-Art. 18 )

### Youth Tourism

- Youth Discount Cards and Reduced Tariffs
- Summer Programmes and Camping Activities
- Cooperation with International Youth Organisations





## Promotion and Major Events

- Dynamic Promotion Strategies
- Destination Based Promotion Strategy  
(Destination Portal of Turkey: <http://www.goturkey.com>)
- Major Events that had Impact on Tourism
  - ✓ HABITAT II (1996)
  - ✓ OSCE Summit (1999)
  - ✓ NATO Summit (2004)
  - ✓ EUROVISION Song Contest (2004)
  - ✓ FORMULA 1 Istanbul Grand Prix (2005)
  - ✓ UEFA Champions League Final, Istanbul (2005)
  - ✓ UNIVERSIADE IZMIR (2005)



## Legal Framework

- Law on Duties And Institutional Structure of the Ministry of Culture and Tourism No 4848 (Official Gazette 2003/25093)
- Tourism Encouragement Law No 2634 (Official Gazette 1982/17635) amended by Law No 4957 (Official Gazette 2003/25186)
- Law on Travel Agencies and the Association of Travel Agencies No1618 (Official Gazette 1972/14320)
- Law on Conservation of Cultural and Natural Heritage No 2863 (Official Gazette 1983/18113)



## Legal Framework (CONT'D)

### Tourism Encouragement Law (Article 7, 8)

- Land Development Model
- New Model for Land Allocation
- Destination Oriented Planning and Management System



## Legal Framework (CONT'D)

### Tourism Encouragement Law (Article 3)

- Culture and Tourism Preservation and Development Regions (CTPDRs), to ensure preservation, utilisation, sectoral development and planned development
  - ✓ Declared by the Council of Ministers upon the proposal of the Ministry of Culture and Tourism
  - ✓ MoCT is the sole authority of planning and endorsing the land-use plans for tourism investments in CTPDRs.



## Institutions Involved

<b>PUBLIC</b>	<b>RESPONSIBILITY</b>
State Planning Organization	Policy making
Ministry of Culture and Tourism	Policy making and implementation

## Non-Exhaustive List of NGOs Operating in Tourism Sector

TURSAB	Association of Turkish Travel Agencies
TUROB	Touristic Hotels and Investors Association
TUREB	Federation of Turkish Tourist Guide Associations
TYD	The Turkish Tourism Investors Association
POYD	The Professional Hotel Managers Association
TOD	Tour Operators Association





## Institutions Involved (CONT'D)

### Non-Exhaustive List of NGOs Operating in Tourism Sector

#### **TUROFED**

TUROB

ATID

AKTOB

ALTID

BODER

CUKTOB

ETIK

GETOB

GUMTOB

KAPTID

KODER

FETOB

#### **Turkish Hotels Federation**

Tourism Hotels and Investors Association

Anatolian Tourism Managers Association

Mediterranean Tourist Hoteliers and Managers Association

Alanya Tourism Managers Association

Bodrum Hoteliers and Managers Association

Cukurova Tourism Hoteliers Association

Aegean Tourism Managers Association

South Aegean Tourism Hoteliers and Managers Association

South Marmara Hoteliers and Managers Association

Kapadokya Hoteliers and Managers Association

Kusadasi Hoteliers and Managers Association

Fethiye Hoteliers Association



## Institutions Involved (CONT'D)

### Non-Exhaustive List of NGOs Operating in Tourism Sector

<b>Ist. Tur. Ot. Der.</b>	Istanbul Tourism Hoteliers and Managers Association
<b>BETUYAP</b>	Belek Tourism Investors Association
<b>BATIB</b>	Balikesir Tourism Hoteliers and Managers Association
<b>CESTOB</b>	Cesme Tourism Hoteliers Association
<b>KON-TID</b>	Konya Tourism Hoteliers and Managers Association



## Consultation Mechanism

- Tourism Industry Council
- Ad-hoc Committee on Tourism
- New Destination Development Workshops



## International Cooperation

### • Membership to International Organisations

- ✓ World Tourism Organisation (UNWTO)
- ✓ OECD Tourism Committee
- ✓ European Travel Commission (ETC)
- ✓ International Bureau of Social Tourism (BITS)
- ✓ International Touring Alliance AIT / FIA

### • Tourism Agreements

- ✓ Turkey has bilateral and multilateral tourism cooperation agreements with some 68 countries of which 16 are EU members



**Thank you for your attention**