

INTERNATIONAL TOURISM IN THE OIC COUNTRIES: PROSPECTS AND CHALLENGES

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1. INTRODUCTION

The substantial growth of the international tourism activity is one of the most remarkable economic and social phenomena of the past century. According to the World Tourism Organisation¹, the number of international tourist arrivals increased from 25 million in 1950 to 760 million in 2004, corresponding to an average annual growth rate of 6.6 percent. The revenues generated by those tourists, i.e. international tourism receipts, grew by 11 percent per annum over the same period (from US\$ 2 billion in 1950 to US\$ 623 billion in 2004). This rate of growth far outstrips that of the world economy as a whole and makes international tourism one of the largest categories of international trade.

International tourism activity is also characterised by a continuing geographical spread and diversification of tourist destinations. Although tourism activity is still concentrated in the developed regions of Europe and the Americas, a substantial proliferation of new tourist-receiving markets is also observed in the developing regions. In 1950, the traditional tourist-receiving regions of Europe and the Americas attracted 96 percent of the world's total tourist arrivals. Yet, by 2004, this figure fell to 71 percent in favour of the developing regions of Asia and the Pacific, the Middle East and Africa.

International tourism has become one of the main economic activities and an important source of foreign exchange earnings and employment in many countries of those regions. It has, therefore, been given much attention in the national development strategies of many developing countries and placed on the agenda of many recent international

¹ World Tourism Organisation, "Tourism Market Trends, 2005 Edition".

conferences on sustainable development. Failing to include tourism in these strategies is to overlook the fact that it presents one of the biggest and, undoubtedly, the most diversified and creative economic activity of all.

Considering their rich and diverse natural, geographical, historical and cultural heritage assets, the OIC countries have vast potential for the development of a sustainable international tourism sector. However, considering the modest share of the OIC region in the world tourism market and the concentration of the tourism activity in only a few OIC countries, it seems that a large part of the tourism potential of the OIC region remains unutilised.

In fact, tourism is a very important sector that could play a significant role in the socio-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 is defined as one of the ten priority areas of cooperation of the OIC Plan of Action to Strengthen Economic and Commercial Cooperation Among the Member Countries. Indeed, tourism cooperation activities have recently assumed greater importance on the agenda of the OIC where four Islamic conferences of ministers of tourism were held during the last five years.

Given this state of affairs, this paper attempts to assess the performance and economic role of the international tourism sector in the OIC member countries. It analyses the traditionally used indicators in measuring international tourism, i.e. international tourist arrivals and international tourism receipts². The analysis is made at the individual country level as well as the OIC regional and sub-regional levels. The paper also sheds light on some issues and problems of tourism development and cooperation in the OIC countries and proposes a set of recommendations to serve as policy guidelines to which the attention of the member countries needs to be drawn.

² For a proper understanding of these two terms, see explanatory note (1) under Tables A.1 and A.2 in the Annex.

2. WORLDWIDE INTERNATIONAL TOURISM: OVERVIEW

International tourism comprises the activities of persons travelling to and staying at places outside their usual permanent places of residence for not more than one consecutive year for leisure, business and other purposes³. Based on this broad definition, the tourism industry includes all the socio-economic activities that are directly and/or indirectly involved in providing goods and 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 the services of the following sectors: transportation and communication, hotels and lodging, food and beverages, cultural and entertainment services, banking and finance, and promotion and publicity services.

Defined by this impressive network of services and 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. International tourism receipts reached US\$ 524 billion in 2003, corresponding approximately to 6 percent of the world's total exports of goods and services. And when commercial service exports are considered exclusively, the share of tourism receipts increases to 29 percent (Table 1).

Table 1: World Exports of Merchandise and Commercial Services

	US\$ Billion	Share (%)	Share (%)
Total	9089	100	
Merchandise Exports	7294	80.3	
Agriculture products	674	7.4	
Mining Products	960	10.6	
Manufactures	5437	59.8	
Other	223	2.5	
Commercial services	1795	19.7	100
Transportation	406	4.5	22.6
Travel (Tourism)	524	5.8	29.2
Other	865	9.5	48.2

Source: World Tourism Organisation, <http://www.world-tourism.org>, "Facts & Figures, Tourism and the World Economy".

³ World Tourism Organisation, "Recommendations on Tourism Statistics and Concepts, Definitions and Classifications for Tourism Statistics".

Indeed, international tourism has recently shown sustained growth in both revenues and number of tourists, and has left broad economic, social, cultural and environmental footprints reaching almost every part of the world. The tourism activity generates significant economic benefits to both host countries and tourists' home countries alike. Especially in the developing and least-developed countries, one of the primary motivations for a country to promote itself as a tourist destination is the expected economic improvement, mainly through foreign exchange earnings and the generation of employment and business opportunities.

Over the last decade, the number of international tourist arrivals worldwide increased from 441 million in 1990 to 680.6 million in 2000, corresponding to an average annual growth rate of 4.4 percent. While all the regions of the world hosted more tourists in 2000, Europe and the Americas remained the main tourist-receiving regions. They attracted, respectively, 384 and 128 million tourist arrivals, corresponding to 56.4 and 18.8 percent of the world tourism market (Table 2). However, since international tourism is characterised by a growing tendency for tourists to visit new destinations, and together with the tourism product diversification and increasing competition, new destinations are steadily growing at a faster pace and increasing their share in the world market.

The average growth rate of international tourist arrivals in the period 1990-2000 was above the world average in the Middle East (9.7 percent), Asia and the Pacific (7.1 percent) and Africa (6.4 percent). In contrast, this rate was below the world average in the more traditional tourist-receiving regions of Europe (3.8 percent) and the Americas (3.3 percent). Consequently, the share of these two regions together in the world tourism market narrowed substantially from 81.2 percent in 1990 to 71.1 percent in 2004 with market shares increasing for the other regions (Table 2).

International tourist flows declined slightly in 2001, affected negatively by the global economic slowdown, particularly in the North American, European and Asian economies (major tourism generating markets) and the impact of the events of 11 September of that year. Yet, not every destination was equally affected by the fall in world

tourist arrivals in 2001. Most affected were the Americas (a drop of 4.8 percent), the Middle East (-0.8 percent) and Europe (-0.1 percent).

Table 2: International Tourist Arrivals by Region

	Europe	Americas	Asia/ Pacific	Africa	Middle East	World Total
Tourist Arrivals (million)						
1990	265.3	92.8	57.7	15.2	10	441
2000	384.1	128.2	114.9	28.2	25.2	680.6
2001	383.8	122.1	120.7	28.9	25	680.4
2002	394	116.6	131.1	29.5	29.2	700.4
2003	396.6	113.1	119.3	30.8	30	689.7
2004	416.4	125.8	152.5	33.2	35.4	763.2
Market Share (%)						
1990	60.2	21.0	13.1	3.4	2.3	100.0
2000	56.4	18.8	16.9	4.1	3.7	100.0
2001	56.4	17.9	17.7	4.2	3.7	100.0
2002	56.3	16.6	18.7	4.2	4.2	100.0
2003	57.5	16.4	17.3	4.5	4.3	100.0
2004	54.6	16.5	20.0	4.4	4.6	100.0
Growth Rate (%)						
1990-2000	3.8	3.3	7.1	6.4	9.7	4.4
2000-2004	2.0	-0.5	7.3	4.2	8.9	2.9
2000-2001	-0.1	-4.8	5.0	2.5	-0.8	0.0
2001-2002	2.7	-4.5	8.6	2.1	16.8	2.9
2002-2003	0.7	-3.0	-9.0	4.4	2.7	-1.5
2003-2004	5.0	11.2	27.8	7.8	18.0	10.7

Source: World Tourism Organisation, "Tourism Market Trends, 2005 Edition".

Although 2002 was certainly not an easy year, international tourism held up fairly well in that year where the number of international tourist arrivals grew by 2.9 percent. Indeed, the 700.4 million international tourist arrivals recorded in the said year surpassed the previous record year of 2000. However, the recovery in 2002 shows a substantial change in the world tourism map: while Europe remained firmly in the first place, Asia and the Pacific claimed the second place from the Americas (Table 2).

In 2003, international tourism faced another considerably difficult year when three negative factors came together: the war in Iraq, the SARS panic in Asia/Pacific and the world's weak economic conditions. Therefore, the number of international tourist arrivals worldwide slid back by 1.5 percent to 689.7 million. This result was closely linked to the drop of 11.5 million arrivals (-9 percent) suffered

by the Asia/Pacific region. The Americas also recorded a decrease of 3 percent, while Europe just hardly consolidated its 2002 figures (0.7 percent). However, Africa and the Middle East were not much affected by those adverse conditions where they recorded relatively significant increases in international tourist arrivals of 4.4 and 2.7 percent, respectively.

In contrast, 2004 was unquestionably better than 2003 where international tourist arrivals reached a record of 763.2 million, corresponding to an increase by 10.7 percent. The recovery of the world economy, in particular the economies of the major tourism-generating regions of the Americas and Europe, together with the strengthening of the Asian economies, strongly contributed to the very good results of tourism in 2004. Growth was common to all regions, but was particularly strong in Asia and the Pacific (27.8 percent) and in the Middle East (18 percent). A significant growth was also registered in the Americas (11.2 percent), while Africa (7.8 percent) and Europe (5 percent) performed below the world average (Table 2).

However, just before the end of 2004, the world was shocked by the sad news of the seaquake and the following tsunami in the Indian Ocean affecting the northern provinces of the Indonesian island of Sumatra, the Maldives, the eastern coast of Sri Lanka and India, the Andaman and Nicobar islands, the west coast of Thailand and, to a lesser extent, Malaysia, Myanmar, Bangladesh, Somalia, Tanzania, Kenya and Seychelles. In addition to natural disasters, the tourism industry in 2005 faced some other negative factors such as terrorism, health scares, oil price increases, exchange rate fluctuations and economic and political uncertainties.

Yet, for tourism, a sudden crisis does not necessarily translate into a long-term recession. Experience shows that tourism has always managed to recover from past crises with remarkable speed and strong growth levels. Therefore, according to the latest available data of the World Tourism Organisation, international tourist arrivals worldwide beat all

expectations in 2005, exceeding 800 million and achieving an all-time record⁴.

On the other hand, the figures in Table 3 show that international tourism receipts, at current US dollar prices, recorded an average annual growth rate of almost 6 percent in the period 1990-2000. In 2000, international tourism activity generated US\$ 479.2 billion, corresponding to US\$ 1.3 billion per day or US\$ 704 per tourist arrival.

Table 3: International Tourism Receipts by Region

	Europe	Americas	Asia/ Pacific	Middle East	Africa	World Total
Tourism Receipts (\$ billion)						
1990	145.6	69.3	46.7	5.1	6.4	273.2
2000	231.6	131	90.4	15.6	10.6	479.2
2001	226.7	119.8	93.5	15.5	11.5	467
2002	241.2	113.7	99.1	15.7	11.8	481.6
2003	282.9	114.1	94.9	16.8	15.5	524.2
2004	326.7	131.7	125	21	18.3	622.7
Market Share (%)						
1990	53.3	25.4	17.1	1.9	2.3	100.0
2000	48.3	27.3	18.9	3.3	2.2	100.0
2001	48.5	25.7	20.0	3.3	2.5	100.0
2002	50.1	23.6	20.6	3.3	2.5	100.0
2003	54.0	21.8	18.1	3.2	3.0	100.0
2004	52.5	21.1	20.1	3.4	2.9	100.0
Growth Rate (%)						
1990-2000	4.8	6.6	6.8	11.8	5.2	5.8
2000-2004	9.0	0.1	8.4	7.7	14.6	6.8
2000-2001	-2.1	-8.5	3.4	-0.6	8.5	-2.5
2001-2002	6.4	-5.1	6.0	1.3	2.6	3.1
2002-2003	17.3	0.4	-4.2	7.0	31.4	8.8
2003-2004	15.5	15.4	31.7	25.0	18.1	18.8

Source: World Tourism Organisation, "Tourism Market Trends, 2005 Edition".

Yet, due to the slight decline in international tourist arrivals in 2001, international tourism receipts decreased to US\$ 467 billion. However, it is observed that those receipts decreased at a rate (-2.5 percent) higher

⁴ World Tourism Organisation, "WTO World Tourism Barometer", Vol. 4, No. 1, January 2006.

than that of tourist arrivals. This could be explained, in part, by the fact that in economically hard times, tourists typically react not so much by refraining from travel but by trading down, i.e. choosing, for instance, shorter stays in less expensive destinations closer to home, with travel and accommodation in lower categories.

Therefore, not every destination was equally affected by the fall in international tourism receipts in 2001. Most affected was the Americas (-8.5 percent) followed by Europe (-2.1 percent) and the Middle East (-0.6 percent). In contrast, an increase in international tourism receipts was recorded in Africa (8.5 percent) and Asia/Pacific (3.4 percent). Although international tourism receipts grew worldwide by 3.1 percent in 2002, the Americas suffered a decrease of 5.1 percent while Africa and the Middle East just hardly consolidated their 2001 figures. In contrast, a substantial increase was recorded in Europe (6.4 percent) and Asia/Pacific (6 percent).

It is observed that while tourist arrivals dropped slightly by 1.5 percent in 2003, tourism receipts, in US dollar terms, increased by 8.8 percent to reach US\$ 524.2 billion. However, it should be noted that this substantial increase is, above all, the reflection of the strong depreciation of the US dollar versus many other currencies in the said year, particularly the euro. As a result, receipts earned in euro-area destinations will seem larger in terms of dollars, even if receipts in euro terms were constant or decreased. The same is true, to a greater or lesser extent, for many destinations in Asia/Pacific as well as Canada and South Africa. Therefore, expressing worldwide tourism receipts in other currencies changes the picture completely. For example, computed in euros, tourism receipts decreased by some 45 billion, from 508 billion in 2002 to 463 billion in 2003⁵.

It is also observed that while the trends in regional market shares in world tourism receipts followed in general similar patterns to those in tourist arrivals, the average growth rates of tourism receipts were somewhat different. For example, Europe was the top tourism earner in 2000 with a 48.3 percent share in the world tourism receipts,

⁵ World Tourism Organisation, "WTO World Tourism Barometer", Vol. 3, No. 1, January 2005.

followed by the Americas with 27.3 percent and Asia/Pacific with 18.9 percent. However, when the average growth rates of tourism receipts in the period 1990-2000 are considered, the picture becomes completely different. The Middle East comes at the top with 11.8 percent, followed by Asia/Pacific with 6.8 percent, the Americas with 6.6 percent, Africa with 5.2 percent and Europe at the bottom of the list with 4.8 percent.

This is mainly due to the fact that receipts per arrival vary as each region has its own tourism characteristics in terms of the length of stay of tourists, purpose of visit, geographical distance, etc. In this context, the world average tourism receipts per arrival in 2004 amounted to US\$ 816, the highest being in the Americas (US\$ 1047), followed by Asia/Pacific (US\$ 820) and Europe (US\$ 785) (calculated using the data in Tables 2 and 3).

3. INTERNATIONAL TOURISM IN THE OIC COUNTRIES

In the light of the above overview of the trends in world international tourism, this section attempts to assess the performance and economic role of the international tourism sector in the OIC countries. In particular, the trends in the two traditionally used indicators in measuring international tourism, i.e. *International Tourist Arrivals* and *International Tourism Receipts*, are examined. The analysis is made at the individual member country level as well as the OIC regional and sub-regional levels.

3.1. International Tourist Arrivals

The number of international tourist arrivals in the OIC countries, for which the data are available, increased from 34.8 million in 1990 to 67.8 million in 2000, corresponding to an average annual growth rate of 6.9 percent (Table 4). This rate was higher than the world average and the averages of the traditional tourist-receiving regions of Europe and the Americas during the same period (Table 2). However, the relative share of the OIC countries in the world tourism market accounted for only 10 percent in 2000, an increase by 2.1 percentage points over their share in 1990 (Table A.1 in the Annex).

Unlike other regions, the number of international tourist arrivals in the OIC region increased by 7.9 percent in 2001 where the 73.2 million arrivals surpassed the previous record year of 2000. Except for the OIC sub-regions of the Americas and the Middle East, which just hardly consolidated their 2000 levels, the other OIC destinations recorded increases in the number of tourist arrivals in 2001. The highest rate of growth was recorded in the OIC countries in the Europe and Central Asia region (16.4 percent) followed by those in the Asia/Pacific region (13.5 percent) and Africa (6.2 percent). Consequently, the relative share of the OIC region in the world tourism market accounted for 10.7 percent in 2001 (Table A.1 in the Annex).

In 2002, the number of international tourist arrivals in the OIC countries, for which the data are available, amounted to 81.8 million, corresponding to an increase by 11.8 percent over the previous year and an 11.7 percent share in the world tourism market. In contrast, it seems that international tourism in the OIC region was affected in 2003 by the negative factors of the war in Iraq, the SARS panic in Asia/Pacific and the world weak economic conditions. Consequently, the number of international tourist arrivals in the OIC region slid back by 2.9 percent to 79.4 million. This was mainly due to the drop of 3.3 million arrivals (-15.1 percent) recorded in the OIC Asia/Pacific sub-region (Table 4).

Though the data available do not allow for a sound comparison for the year 2004, it is to be expected that the growth rate of tourist arrivals in the OIC region was higher than that in 2003. This could be observed in Table A.1 in the Annex where almost all the 26 OIC countries, for which the data are available, recorded significant positive growth rates in 2004 compared to those of 2003.

In terms of the shares of the OIC sub-regions in the total OIC international tourism market, the OIC Middle East comes at the top in the four-year period of 2000-2003 followed by the OIC Asia/Pacific. In the said period, these two sub-regions together accounted for more than 60 percent of the total tourist arrivals in the OIC region. However, in terms of the average growth rates of tourist arrivals, the OIC Europe/Central Asia sub-region recorded the highest rates of 10.1 percent in the period 1990-2000 and 16.4 percent in the period 2000-2004 (Table 4).

Table 4: International Tourist Arrivals in OIC Sub-Regions

	Africa	Americas	Asia/ Pacific	Europe/ C. Asia	Middle East	OIC Total
Tourist Arrivals (million)						
1990	9.7	0.1	10.9	4.8	9.3	34.8
2000	12.7	0.2	18.8	12.7	23.4	67.8
2001	13.5	0.2	21.3	14.8	23.4	73.2
2002	13.7	0.2	21.9	17.0	29.0	81.8
2003	13.1	0.2	18.6	17.3	30.2	79.4
2004	13.9	0.3	24.2	21.3	15.8	75.5
Share in OIC Market (%)						
1990	27.9	0.3	31.3	13.8	26.7	100.0
2000	18.7	0.3	27.7	18.7	34.5	100.0
2001	18.4	0.3	29.1	20.2	32.0	100.0
2002	16.7	0.2	26.8	20.8	35.5	100.0
2003	16.5	0.3	23.4	21.8	38.0	100.0
2004	18.4	0.4	32.1	28.2	20.9	100.0
Growth Rate (%)						
1990-2000	2.8	4.0	5.6	10.1	9.7	6.9
2000-2004	2.2	12.4	6.5	13.7	-9.3	2.7
2000-2001	6.2	-6.1	13.5	16.4	-0.2	7.9
2001-2002	1.8	7.2	2.6	14.6	24.2	11.8
2002-2003	-4.5	5.5	-15.1	2.2	3.9	-2.9
2003-2004	5.7	50.3	30.3	22.7	-47.5	-4.9

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

At the individual country level, international tourist arrivals in the OIC region are still concentrated in a few countries. In descending order, Turkey, Malaysia, Saudi Arabia, U.A.E., Tunisia, Egypt, Morocco, Indonesia, Bahrain and Syria are found to be the main OIC international tourist destinations (Table 5). Together, they hosted more than 54 million international tourist arrivals in 2000, corresponding to almost 80 percent share of the total OIC tourism market. Excluding U.A.E., Egypt and Bahrain, for which the data are not available for 2004, the remaining 7 countries hosted 61 million tourists in that year, corresponding to 80.7 percent of the total OIC tourism market.

**Table 5: Main OIC Tourism Destinations: Tourist Arrivals
(Thousand)**

	1990	2000	2002	2003	2004
Turkey	4799	10172	12790	13343	16826
Malaysia	7446	10222	13292	10577	15703
Saudi Arabia	2209	6585	7511	7332	8580
U. A.E	973	3907	5445	5871	
Tunisia	3204	5058	5064	5114	5998
Egypt	2411	5116	4906	4906	
Morocco	4024	4278	4453	4761	5501
Indonesia	2178	5064	5033	4467	5321
Bahrain	1376	2420	3167	3167	
Syria	562	1416	2870	2788	3032
Total	29182	54238	64531	62326	60961
OIC Total	34858	67849	81824	79419	75508
% of OIC Total	83.7	79.9	78.9	78.5	80.7

Source: Table A.1 in the Annex.

3.2. International Tourism Receipts

The figures in Table 6 show that, in absolute terms, the trends in international tourism receipts in the OIC sub-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\$ 37.6 billion compared to US\$ 15 billion in 1990, corresponding to an average annual growth rate of 9.6 percent. This rate was higher than the world average and the averages of the other regions during the same period (Table 3). Yet, the share of the OIC countries in the world total international tourism receipts accounted for only 7.9 percent in 2000, an increase by 2.4 percentage points over their share in 1990.

In 2001, the 73.2 million international tourist arrivals hosted by the OIC countries generated US\$ 42.5 billion as tourism receipts, corresponding to an increase by 12.9 percent. Except for the OIC sub-regions of the Americas and Middle East, all the OIC destinations recorded increases in their international tourism receipts in 2001, the highest being by the OIC sub-region of Europe and Central Asia (30.3 percent). The share of the OIC region in the world international tourism receipts, therefore, slightly increased by 1.2 percentage points over the year 2000 (Table A.2 in the Annex).

In 2002, international tourism receipts in the OIC countries, for which the data are available, amounted to US\$ 48.6 billion, corresponding to an increase by 14.5 percent over 2001 and 10.1 percent share in the world total international tourism receipts. While the OIC region in 2003 just hardly consolidated its 2002 tourism receipts figures, only 24 OIC countries for which the data are available in 2004 earned US\$ 48.6 billion as international tourism receipts, corresponding to an increase by 19.2 percent over 2003 and 9.3 percent share in the world's total tourism receipts (Table A.2 in the Annex).

Table 6: International Tourism Receipts in OIC Sub-Regions

	Africa	Americas	Asia/ Pacific	Europe/ C. Asia	Middle East	OIC Total
Tourism Receipts (\$ billion)						
1990	2.9	0.04	4.1	3.5	4.5	15.0
2000	4.7	0.1	11.7	8.5	12.6	37.6
2001	5.4	0.1	13.6	11.1	12.3	42.5
2002	5.5	0.1	14.2	13.2	15.6	48.6
2003	5.8	0.04	11.6	14.4	16.8	48.6
2004	6.0		14.8	17.4	19.8	58.0
Share in OIC Market (%)						
1990	19.3	0.3	27.3	23.3	30.0	100.0
2000	12.5	0.3	31.1	22.6	33.5	100.0
2001	12.7	0.2	32.0	26.1	28.9	100.0
2002	11.3	0.2	29.2	27.2	32.1	100.0
2003	11.9	0.1	23.9	29.6	34.6	100.0
2004	10.3		25.5	30.0	34.1	100.0
Growth Rate (%)						
1990-2000	5.1	9.1	11.0	9.4	10.7	9.6
2000-2004	6.1		6.1	19.5	11.9	11.4
2000-2001	15.1	-17.6	16.6	30.3	-2.8	12.9
2001-2002	1.0	-30.7	4.7	18.6	27.8	14.5
2002-2003	5.3	-17.3	-19.0	9.7	7.1	-0.1
2003-2004	3.4		28.1	20.4	17.8	19.2

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

Except in 2001, the OIC Middle East sub-region recorded the largest share of more than 30 percent in the total OIC international tourism receipts during the period under consideration. However, in terms of the average growth rate of international tourism receipts, the OIC Europe/Central Asia sub-region performed in general quite better than the other OIC sub-regions (Table 6).

While, in absolute terms, the trends in international tourism receipts were generally similar to those in international tourist arrivals, the shares of OIC sub-regions and individual countries in the total OIC international tourism receipts as well as the average growth rates of those receipts were somewhat different. This is due to the fact that receipts per arrival vary as each region and country has its own tourism characteristics in terms of length of stay, purpose of visit, geographical distance, types of shopping, etc. For example, the OIC average tourism receipts per arrival in 2002 amounted to US\$ 594. In the same year, the highest receipts per tourist arrival were recorded in the OIC sub-region of Europe/Central Asia (US\$ 776), followed by the OIC Asia/Pacific (US\$ 648), OIC Middle East (US\$ 537), OIC Americas (US\$ 500), and OIC Africa (US\$ 401) (calculated using the data in Tables 4 and 6).

Table 7: Main OIC Tourism Earners: Tourism Receipts (US\$ Million)

	1990	2000	2002	2003	2004
Turkey	3225	7636	11901	13203	15888
Malaysia	1667	5011	7118	5901	8198
Saudi Arabia	1884	3312	5794	5661	6542
Egypt	1100	4345	3764	4584	6125
Indonesia	2105	5749	5285	4037	4798
Morocco	1259	2036	2646	3238	3921
Syria	320	1082	1424	1408	2220
Tunisia	948	1682	1523	1583	1910
U.A.E	315	1012	1332	1439	1593
Lebanon		742	956	1016	1278
Total	12823	32607	41743	42070	52473
OIC Total	15029	37622	48634	48609	57956
% of OIC Total	85.3	86.7	85.8	86.5	90.5

Source: Table A.2 in the Annex.

As is the case with international tourist arrivals, the figures in Table 7 indicate that international tourism receipts in the OIC countries are also concentrated in a few countries, almost the same countries as the main OIC tourist destinations. In descending order, the main OIC international tourism earners are Turkey, Malaysia, Saudi Arabia, Egypt, Indonesia, Morocco, Syria, Tunisia, U.A.E. and Lebanon. This group of OIC countries earned almost US\$ 58 billion as international tourism receipts in 2004, corresponding to a 90.5 percent share in the OIC total.

3.3. Balance of International Tourism

In this section, an attempt is made to assess the economic role of the international tourism sector in the OIC countries. This is made by calculating the balance of international tourism for each individual country for which the relevant data are available in the five-year period of 1999-2003, i.e. by deducting the *International Tourism Expenditure*⁶ from the *International Tourism Receipts*. The net contribution of the international tourism sector to the economies of those countries is then evaluated by relating the balance of international tourism as a percentage of the GNP of each country. The sector is also evaluated as a source of foreign exchange earnings by relating the international tourism receipts in each country, as a percentage, to its total exports in the same period.

Table 8 displays the top 10 OIC countries in terms of their balance of international tourism in millions of US dollars. When compared with Tables 5 and 7 above, it is obvious that most of those countries constitute the main OIC international tourism destinations and earners. However, on examining the economic role of the international tourism sector in the OIC countries in terms of its net contribution to the GNP of each country, the picture, as shown in Table 9, reflects a widely different situation.

Table 8: Top 10 OIC Countries with Respect to their Balance of International Tourism (Million US\$)

	1999	2000	2001	2002	2003
Turkey	3732	5925	8329	10021	11090
Egypt	2825	3272	2668	2486	3257
Malaysia	1567	2487	3760	4167	2757
Morocco	1491	1610	2140	1806	2692
Tunisia	1588	1419	1478	1263	1283
Indonesia	2357	1600	3048	1360	841
Jordan	440	335	280	370	438
Bahrain	306	349	380	363	413
Maldives	312	318.5	324	315	385
Syria	401	413	480	210	

Source: Table A.3 in the Annex.

⁶ For a proper understanding of this term, see explanatory note (2) under Table A.2 in the Annex.

Table 9 lists the OIC countries, for which the relevant data are available, in descending order according to their balance of international tourism as an average percentage of their GNP in the period 1999-2003. This is classified into 4 ranges, the highest of which includes records of 5 percent and above, and the lowest includes sub-zero records. The information in the table indicates that, in general, the economic role of the international tourism sector in the OIC countries is neither a function of the size nor of the level of affluence of the economy. International tourism is found to be the main economic activity in the Maldives, the only country with more than a 50 percent contribution of international tourism to GNP.

Table 9: Balance of International Tourism as a Percentage of GNP (Average 1999-2003)

(%)	Countries
5 +	Maldives (55.7%), Tunisia (7%), Morocco (5%)
1 - 4.9	Bahrain (4.9%), Jordan (4.3%), Turkey (4.2%), Malaysia, Albania, Egypt, Benin, Senegal, Syria, Guyana, Indonesia, Mali (1.4%)
0.1 - 0.9	Kyrgyz Rep. (0.9%), Niger, Togo, Uganda (0.3%)
(-) - 0.0	Guinea, Algeria, Sudan, Yemen, Suriname, Pakistan, Kazakhstan, Sierra Leone, Iran, Bangladesh, Libya, Azerbaijan, Côte d'Ivoire, Nigeria, Oman, Mozambique, Gabon, Palestine, Kuwait (-6.57)

Source: Table A.4 in the Annex.

In addition, the information in Table 9 indicates that the international tourism activity plays a relatively important role compared to the size of the economy in some OIC countries for which the balance of international tourism accounts, on average, for 1 to almost 7 percent of their GNP. This group includes most of the OIC main tourism destination and earner countries (e.g. Tunisia, Morocco, Bahrain, Jordan, Malaysia, Syria, Egypt and Indonesia). In contrast, international tourism activity is found to have a negligible or even negative role in the economies of many OIC countries for which the data are available where 21 countries recorded, on average, a deficit in their balance of international tourism during the period 1999-2003 (Table A.4 in the Annex).

Table 10: International Tourism Receipts as a Percentage of Exports (Average 1999-2003)

(%)	Countries
50 +	Maldives (406.1%), Albania (128%), Egypt (76.1%), Lebanon (63.1%), Sierra Leone (50.3%)
25 - 49.9	Mali (41.8%), Jordan (41.4%), Comoros, Benin, Uganda, Morocco (31%)
10 - 24.9	Mozambique (21.1%), Syria (20.9%), Chad, Senegal, Turkey, Tunisia, Niger, Burkina Faso, Guyana (11.3%)
5 - 9.9	Indonesia (8.5%), Bahrain, Palestine, Malaysia, Kyrgyz Rep., Kazakhstan (5.2%)
0.1 - 4.9	Saudi Arabia (4.9%), Uzbekistan, Iran, Azerbaijan, Sudan, Guinea, Togo, U.A.E., Oman, Yemen, Suriname, Côte d'Ivoire, Nigeria, Bangladesh, Pakistan, Libya, Kuwait, Algeria, Gabon, Tajikistan (0.2%)

Source: Table A.5 in the Annex.

However, the information in Table 10, which lists the OIC countries in descending order according to their international tourism receipts as a percentage of their exports, indicates that international tourism activity in those countries plays a more significant role as a source of foreign exchange earnings. During the period 1999-2003, the said activity generated, on average, foreign exchange earnings 4 times more than those generated by exports in the Maldives and almost 1.3 times the value of exports in Albania.

In the same period, international tourism receipts accounted, on average, for 76.1 percent of the total exports of Egypt, 63.1 percent of those of Lebanon and 50.3 percent of those of Sierra Leone. Moreover, those receipts accounted for between 25 and 49.9 percent of the value of the exports of 6 countries, between 10 and 24.9 percent of that of 9 countries, and between 5 and 9.9 percent of that of 6 others. Yet, international tourism still plays a limited role in generating foreign exchange earnings in 20 OIC countries, i.e. those in which international tourism receipts accounted for less than 5 percent of their exports (Table 10).

4. TOURISM DEVELOPMENT AND COOPERATION IN THE OIC COUNTRIES

4.1. Problems of Tourism Development in the OIC Countries

International tourism activity has recently made a substantial contribution to the economies of many developing countries, including some OIC members. In many of those countries, tourism has appeared as a highly labour-intensive activity that opens up opportunities for the different businesses that are engaged in or provide products and services to the tourism industry. Therefore, tourism constitutes a substantial ground for private initiative that creates jobs in small and medium-sized enterprises as well as work for the self-employed. In particular, international tourism activity has become the main source of foreign exchange revenues for many least-developed countries around the world, including some OIC members like Maldives.

Over the past decade, some OIC countries experienced strong growth in their international tourism receipts, which demonstrates the existence of a competitive advantage in their favour. In particular, the international tourism receipts of the OIC least-developed countries almost doubled between 1990 and 2000. In many of those countries, international tourism serves as a foothold from which the local market can expand and flourish. It creates jobs for the poor, for unskilled as well as highly skilled workers, and for women and indigenous communities in isolated rural areas, particularly in handicrafts and ecotourism. International tourism has, therefore, become one of the main components of those countries' GDP or, in some cases (e.g. Maldives), the largest one.

In some of these countries, tourism development represents one of the few options they have to diversify their economy and replace a declining traditional agriculture. In this context, a crucial contribution of tourism-generated foreign exchange revenues to the balance of payments has been observed in many OIC countries. Such revenues, particularly in the OIC least-developed countries, reduce the country's foreign debt and dependence on a single export sector (in most cases primary commodities with low and fluctuating international prices). It is, therefore, possible to substantially build on the result that tourism can play a major role in improving the standards of living of people in those countries and help them lift themselves above the poverty threshold.

This was the conclusion of the 3rd UN Conference on the LDCs, held in Brussels in May 2001, which considered tourism as an instrument for poverty alleviation.

Given their significant and diverse natural, geographical, historical and cultural heritage assets, the OIC countries have, in fact, a vast potential for the development of a sustainable international tourism sector. However, considering their modest share in the world tourism market and the concentration of tourism activity in a few of them, it seems that a large part of this inherent tourism potential remains unutilised. The desirable levels of tourism development in many OIC countries, and in the OIC region as a whole, have not yet been achieved. Therefore, the potential of inherent natural tourism resources, albeit a crucial factor, cannot, unless properly planned and managed, by itself make a successful tourism industry.

The problems facing tourism and the development of a sustainable international tourism sector in the OIC countries are diverse as each country has its own tourism features, level of development and national development priorities and policies. Yet, in the case of many OIC countries, as, to a certain extent, the data in Table A.6 in the Annex indicate, these problems can be summarised, *inter alia*, as follows:

- *Lack of technical know-how and weak promotional activity.* Despite the fundamental awareness and basic cognisance of the economic importance of tourism as an industry and its positive impact as a potential source of foreign exchange earnings and employment, in many cases there is generally a lack of tourism knowledge and professionals. This is often accompanied by the absence or weak publicity promotion and mass media exposure due, in many cases, to the limited communication systems and technological services.
- *Lack of tourism-related infrastructures.* Many OIC countries lack the sufficient infrastructures necessary for the development of a sustainable tourism industry. Primary amongst these are hotels and lodging services, transportation and communication and tourism information services. This makes it difficult to provide the international 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, is often regarded in most developing countries as a high-risk task. Accordingly, though they may have a natural tourism potential, it is very difficult for many poor and least-developed OIC countries to gain access to reasonable financing for their tourism 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 reaching 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 the effective administration, regulation and institutional frameworks of the tourism activity.
- *Lack of tourism diversification.* Modern international tourism 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 international tourists. In a highly competitive international tourism market, and considering the emergence of new tourism destinations, improving the conditions that foster modern tourism development is not an easy process.
- *Lack of tourism safety.* The safety of tourists is a primary factor for any successful tourism industry and should, therefore, be one of the basic objectives of tourism planning and management. Safety-related tourism problems, whether real or perceived, exert a negative impact on the reputation of the host countries. In this regard, negative perceptions and political instability appear to play a detrimental role in the prospects of tourism in many OIC countries.

However, in spite of these problems and the modest share of the OIC countries in the world tourism market, there still is a wide scope for the development of a sustainable international tourism industry in those countries. Overall, this necessitates the adoption of articulate long-term strategies as well as medium to short-term plans and programmes at the

national level that would be accompanied by a process of creating a supportive OIC cooperation environment at the regional level.

4.2. OIC Cooperation in the Field of Tourism

International tourism is a very important sector that could, if properly planned and managed, play a significant role in the economic development of the OIC countries. This is due not only to their existing and potential tourism resources, but also to the fact that their citizens travel in large numbers around the world for business, leisure and other purposes. It is for this reason that tourism has been identified as one of the ten priority areas of cooperation in the Plan of Action to Strengthen Economic and Commercial Cooperation among the Member Countries of the OIC. This Plan was adopted at the 10th Session of the Standing Committee for Economic and Commercial Cooperation (COMCEC) in October 1994 and subsequently endorsed by the 7th Islamic Summit, held in Casablanca in December 1994. The Summit also endorsed a Mechanism of Follow-up and Implementation as an integral part of the Plan.

As major 'Objectives' of cooperation in the area of tourism, the OIC Plan of Action seeks to promote, develop and expand tourism activities in the OIC countries through supporting and developing joint action at the bilateral and multilateral levels. It also aims to establish new facilities and activities in the member countries in order to attain globally competitive standards in terms of the quality of the services and the diversity of the tourism activities. In addition, the Plan encourages and promotes extensive private sector involvement in tourism through joint ventures in the area of improvement and enhancement of physical capacities and quality service.

In order to achieve those broad objectives, the Plan identifies, in a general manner, some indicative activities under the heading "Programmes of Action". Together with the above-mentioned 'Objectives', the 'Programmes of Action' serve as a source of a wide range of means and modalities to strengthen cooperation among the member countries in this important field. They include the following broad actions:

- 1- Increasing public awareness in the OIC countries of the existing tourist resources and facilities.
- 2- Establishing direct contacts among the relevant parties concerned with tourism.
- 3- Creating the appropriate legal, institutional and administrative conditions in support of an expanded tourism activity among the member countries.
- 4- Encouraging and facilitating joint tourism ventures and other investments in the member countries by the private sector.
- 5- Encouraging and supporting the development of the necessary human capital in the area of tourism to ensure the availability of international standards.

The issue of tourism cooperation was first referred to during the 7th Islamic Summit, held in Casablanca in 1994, which stressed the importance of intra-Islamic cooperation in the field of tourism. The 23rd Islamic Conference of Foreign Ministers (ICFM), held in Conakry in 1995, invited the Member States to cooperate in different areas in the field of tourism such as exchanging publicity and advertising materials and group travel, tourism investments and projects, the establishment of a data network and the electronic exchange of information on tourism, etc. While those areas of cooperation were reiterated in all the resolutions adopted on tourism by the succeeding ICFMs, tourism has recently assumed a greater importance on the agenda of the OIC, considering that four ministerial conferences on tourism were held within the period 2000-2005.

The 1st Islamic Conference of Ministers of Tourism was held in Isfahan in October 2000. The Conference adopted the "Isfahan Declaration" in which member countries decided, among other things, to boost cooperation in tourism through the promotion of public awareness, education, training, investment opportunities and the involvement of the private sectors. The 2nd Conference was held in Kuala Lumpur in October 2001. It adopted a Resolution on Tourism Development and the Kuala Lumpur Program of Action for the Development and Promotion of Tourism among the OIC

Member States. The Program identifies three possible areas of cooperation in tourism, namely *Tourism Facilitation*, *Tourism Marketing* and *Research and Training*. The 3rd Conference, which was held in Riyadh in October 2002, adopted a Resolution on Tourism Development and the Riyadh Declaration. Similarly, the 4th Conference, which was held in Dakar in March 2005, adopted a Resolution on Tourism Development and the Dakar Declaration. These two documents include a set of actions aiming at developing the tourism sector in the OIC countries and enhancing their cooperation in this vital field of economic and social activity.

4.3. Cooperation with the International Organisations

International development institutions and organisations play a crucial role in the global and regional development policies. In order to achieve their goals of promoting sustainable development in their member countries, they usually support those countries' development efforts through providing them, particularly the developing and the least-developed members, with technical and financial services in different fields and sectors through certain specialised programmes and foundations.

With 150 member states, 49 of which are OIC members, the World Tourism Organisation is a specialised agency of the United Nations and the leading international organisation in the field of tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. It plays a central and decisive role in promoting the development of responsible, sustainable and universally accessible tourism, with the aim of contributing to economic development, international understanding, peace and universal prosperity. In pursuing this aim, the Organisation pays particular attention to the interests of its developing and least-developed members.

Taking this into account and recalling the conclusion of a Memorandum of Understanding on Cooperation between the World Tourism Organisation and the OIC in 2002, it is recommended to call upon the OIC member countries, particularly those with high tourism potential, to take advantage of the World Tourism Organisation's technical and financing programmes that have been developed over time to help and

support its member countries in meeting their tourism development needs.

In this context, it is worth drawing the attention of the member countries to the following two major technical and financial support facilities of the World Tourism Organisation:

1- Technical Cooperation Service

The aim of the Technical Cooperation Service of the World Tourism Organisation is to meet the specific needs of the member countries and to support them in their efforts to develop the tourism industry as an engine to foster socio-economic improvement in a manner that is economically beneficial and environmentally sustainable. Acting on requests from member countries, the Technical Cooperation Service carries out a wide range of tourism development projects, both long and short-term, aimed at the promotion and development of tourism in developing member countries. These projects are implemented through funding obtained from a variety of major donor agencies such as the UNDP, the World Bank, the European Union and the Asian Development Bank.

The Technical Cooperation Service of the World Tourism Organisation deploys the world's leading experts and firms to implement technical cooperation missions and projects in the member countries. The technical assistance of the Organisation covers many tourism-related areas of interest and concern to those countries, particularly the developing and least-developed ones. These areas include, *inter alia*, the identification and assessment of potential tourism development destinations, preparation of national and regional Tourism Development Master Plans, alleviation of poverty through the development of rural and eco-tourism destinations and human resources, strengthening the institutional capacities of national tourism administrations, etc.

2- Sustainable Tourism-Eliminating Poverty (ST-EP) Foundation

It is an initiative of the World Tourism Organisation, which was launched in collaboration with UNCTAD in 2002 at the Johannesburg World Summit for Sustainable Development as a programme aiming at

developing sustainable tourism as a force for poverty alleviation. It targets the world's poorest countries, particularly in Africa and the developing countries in general and focuses on longstanding work to encourage and finance sustainable tourism projects which specifically aim at alleviating poverty and bringing job opportunities to the poor people and local communities in those countries.

The ST-EP Foundation, which is currently financed by the Republic of Korea, Netherlands and Italy, was officially constituted at the last World Tourism Organisation General Assembly meeting in Dakar, Senegal, in December 2005. The Board of Directors of the Foundation has recently approved a total funding of US\$ 500,000 for the first six tourism development projects in some least-developed and poor countries. These projects will benefit several thousand poor people in those countries through bringing job opportunities to the local people involved in those projects, especially for women and young people.

In this connection, it is worth mentioning that two of these projects will benefit some of the OIC West African member countries. These are: (1) A network of cross-boarder national parks and protected areas in nine countries of West Africa, namely Benin, Gambia, Guinea, Guinea Bissau, Mali, Mauritania, Niger, Senegal and Sierra Leone, and (2) An eco-tourism training programme for people living in the Sangareah Bay area of Guinea.

In addition to the World Tourism Organisation, the OIC member countries can also seek other external technical and financial resources provided by other international organisations for their tourism development projects. In this connection, it is worth drawing the attention of the member countries to the tourism funding and instruments provided by the International Finance Cooperation (IFC), which is the private sector arm of the World Bank Group. The mission of the IFC is to promote sustainable private sector investment in the developing countries, through providing loans, equity, structured finance and advisory services, with the aim of helping to reduce poverty and improving people's lives in those countries. The Tourism Programme of the ICF focuses on small and medium-sized enterprises operating in the tourism sector, but it will roll out two new initiatives—a traveller

feedback system to improve customer service, and a rating system to recognise sustainable practices.

Another target that could be sought for technical support for tourism development projects is the European Union (EU) through its various specialised programmes. The EU Internet Guide, called “EU Support for Tourism Enterprises and Tourist Destinations”, contains information on various EU programmes, schemes, funds, initiatives and actions of interest to the tourism sector. It provides the tourism sector, particularly the small and medium-sized enterprises, with a comprehensive and structured overview of the opportunities the EU offers to help the development of sustainable tourism. The Guide is classified into specific fields of interest such as training and support for employment creation, business support and cooperation between regions, research and technological development, etc.

These and other external technical and financial resources would, doubtlessly, help the OIC countries in identifying, planning and funding their tourism activities and projects at both the national and regional levels.

5. CONCLUSION AND POLICY RECOMMENDATIONS

The strong and sustainable expansion of the international tourism activity is one of the most remarkable socio-economic phenomena of our time. Tourism is now one of the world’s largest industries comprising all the socio-economic activities that are directly or indirectly involved in providing services to tourists. The revenues generated by the international tourism activity have grown by an average annual rate of 11 percent over the past five decades. This rate of growth far outstrips that of the world economy as a whole and makes tourism one of the largest categories of international trade.

Although recent trends in international tourism indicate that the tourism activity is still concentrated in the developed regions of Europe and the Americas, a substantial proliferation of new tourism destinations is also observed in the developing regions. Particularly, the market share in world international tourism has been increasing for Asia and the Pacific, the Middle East and Africa. For many countries in those regions,

international tourism is now considered an important source of foreign exchange earnings and employment. Therefore, tourism has been given much attention in the national development strategies of many developing countries and recently placed on the agenda of many international conferences on sustainable development.

Considering their rich and diverse natural, geographical, historical and cultural heritage assets, the OIC countries have, in fact, a high potential for the development of a sustainable international tourism sector. Yet, considering their modest share in the world tourism market and the concentration of their international tourism activity in a small number of countries, it seems that a large part of their inherent tourism potential remains unutilised. The desirable levels of tourism development in many OIC countries, and in the OIC region as a whole, have not yet been achieved. Therefore, albeit a crucial factor, the potential of inherent natural tourism resources cannot, unless properly planned and managed, by itself make a successful tourism industry.

The problems facing tourism and the development of a sustainable international tourism sector in the OIC countries are diverse as each country has its own tourism features, level of development and national priorities and policies. In the case of many OIC countries, those problems range from the lack of technical know-how and weak promotional and public awareness to insufficient tourism-related infrastructures and investments and the lack of tourism diversification and safety. However, in spite of those problems, it is believed that there still is a wide scope for the development of a sustainable international tourism industry in the OIC countries. Overall, this requires the adoption of long-term strategies as well as medium to short-term plans and programmes at both the national and regional levels along with a process of creating a supportive OIC cooperation and coordination environment.

In this context, a set of recommendations can be proposed to serve as policy guidelines to which the attention of the member countries needs to be drawn. These recommendations can be suggested at both the national and the OIC-regional cooperation levels as follows:

(1) At the National Level

- Objectives and programmes of action for sustainable tourism development are to be outlined specifically in the national development plans and strategies and formulated in consultation with the relevant private sector stakeholders. Those objectives and programmes should be focused on the promotion of the economic, social, cultural and environmental incentives of tourism.
- The focus of the sustainable development and management of tourism should be on strengthening the national capacity building, particularly tourism administrations, through developing new resources and facilities as well as raising public awareness of the country's inherent natural and cultural tourism resources.
- Based on international standards, efforts should be made towards sustainable physical planning and the strengthening of tourism destinations, in general, and ecotourism products, in particular, in order to preserve the environmental and cultural quality of those destinations.
- Improving the quality and efficiency of the basic tourism-related infrastructures and services such as hotels, roads, public amenities, transportation and communication, tourism information and visa regulations to provide world-class services to visitors and tourists. In this context, efforts should be made to promote synergies between transport and tourism policies, with particular reference to air transport.
- As an activity that symbolises free movement, international tourism has everything to gain from the greatest possible liberalisation of trade in the services related to it. In this context, efforts should be made to secure greater facilitation of border movements for visitors and increase national capacities to use the relevant elements of the multilateral trade framework.
- 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 context, endeavours should be made to strengthen public-private sector

cooperation with a view to establishing policies, strategies and regulations relative to sustainable tourism development.

- Diversifying tourism products by the inclusion of socio-cultural programmes and traditional activities involving local communities. In this context, efforts should be made to improve the 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 the conservation of the natural environment.
- 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 therein. 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 programmes on different aspects of tourism, particularly to the people and personnel directly engaged in tourism 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 and the local and national flora and fauna, etc.
- To facilitate those programmes, actions must be taken to provide local communities with financial and technical backing and develop entrepreneurial capacities and managerial skills, especially in small and medium-sized enterprises, in order to improve the competitiveness of the tourism products and services.

(2) At the OIC Cooperation Level

In the light of the resolutions and declarations so far adopted by the official OIC meetings on tourism, and to elaborate on the broad objectives and programmes of action defined under the chapter of ‘Tourism’ in the OIC Plan of Action, some means/modalities for

strengthening cooperation among the member countries in this important field can be proposed as follows:

- Producing joint programmes and promotional materials on tourism such as TV programmes, brochures, posters and guidebooks and making them available to the member countries as well as other countries around the world in order to promote the cultural heritage, diversity and landmarks of the OIC countries at the regional and international levels.
- Developing and applying scientific methods of joint tourism marketing and advertisement supported by tools that have a major impact on consumers such as the Internet. In this context, efforts should be made to facilitate the establishment of a data network on tourism and related services in the OIC countries.
- Developing an OIC Internet Guide for Tourism with a view to providing all actors in the tourism sector with a comprehensive and updated information on tourism opportunities in the OIC member countries to help the development of sustainable tourism and increasing intra-OIC tourism activities. In so doing, the experience of the EU Internet Guide “EU Support for Tourism Enterprises and Tourist Destinations” could be a useful example.
- Encouraging the establishment of alliances between tourism stakeholders in the OIC countries, particularly the official tourism promotion bodies, with a view to strengthening tourism marketing and promoting cooperation efforts at the sub-regional level as well as at the level of the OIC region as a whole.
- 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. In this context, efforts should be made to establish 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.
- Easing entry and movement of tourists among the OIC countries and enhancing intra-OIC tourism through, inter alia, simplifying visa and

other legal and administrative travel procedures. In this context, efforts should be made to establish a legal framework towards concluding an agreement on visa arrangements among the OIC countries, including the possibility of issuing an electronic or joint visa.

- Encouraging public and private joint venture investments in tourism projects through providing special facilities and preferential treatments for investors from the OIC countries. This could also include the joint dissemination and exchange of information on tourism investment opportunities through, for example, the joint production of handbooks and/or guidelines on investment in the OIC countries.
- Holding joint training/vocational courses, workshops, seminars and conferences on the tourism industry by the relevant training institutes and establishing linkages or networks among tourism training institutions in the OIC countries and facilitating the exchange of experts and research on tourism development.
- Calling upon the OIC member countries, particularly those with high tourism potential but low technical know-how, to take advantage of the various technical and financial programmes of the relative international organisations, mainly those of the World Tourism Organisation and the International Finance Corporation (IFC) of the World Bank, which would help them in identifying, planning and funding their tourism activities at both the national and regional levels.

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ANNEX

TABLE A.1: INTERNATIONAL TOURIST ARRIVALS IN OIC REGIONS AND COUNTRIES

	Tourist Arrivals (Thousand)						Growth Rate (Annual % Change)					
	1990	2000	2001	2002	2003	2004	1990/00	2000/04	2000/01	2001/02	2002/03	2003/04
Africa	9701	12734	13529	13766	13149	13893	2.8	2.2	6.2	1.8	-4.5	5.7
Algeria	1137	866	901	988	1166	1234	-2.7	9.3	4.0	9.7	18.0	5.8
Benin	110	96	88	72			-1.4		-8.3	-18.2		
Burkina Faso	74	126	128	150	163		5.5		1.6	17.2	8.7	
Cameroon	89	277	220	227	188		12.0		-20.6	3.2	-17.2	
Chad	9	43	57	32	21		16.9		32.6	-43.9	-34.4	
Comoros	8	24	19	19			11.6		-20.8	0.0		
Djibouti	33	20	21	23	23		-4.9		5.0	9.5	0.0	
Gabon	109	155	169	208	222		3.6		9.0	23.1	6.7	
Gambia	100	79	57	81	73		-2.3		-27.8	42.1	-9.9	
Guinea		33	38	43	44	45		8.1	15.2	13.2	2.3	2.3
Mali	44	86	89	96	70	113	6.9	7.1	3.5	7.9	-27.1	61.4
Morocco	4024	4278	4380	4453	4761	5501	0.6	6.5	2.4	1.7	6.9	15.5
Mozambique			323	541	441					67.5	-18.5	
Niger	21	50	53	57	55		9.1		6.0	7.5	-3.5	
Nigeria	190	813	850	887			15.6		4.6	4.4		
Senegal	246	389	396	427	354	363	4.7	-1.7	1.8	7.8	-17.1	2.5
Sierra Leone	98	16	24	28	37	44	-16.6	28.8	50.0	16.7	32.1	18.9
Sudan	103	72	74	58	51		-3.5		2.8	-21.6	-12.1	
Togo	33	60	50	58	61	83	6.2	8.5	-16.7	16.0	5.2	36.1
Tunisia	3204	5058	5387	5064	5114	5998	4.7	4.4	6.5	-6.0	1.0	17.3
Uganda	69	193	205	254	305	512	10.8	27.6	6.2	23.9	20.1	67.9
Americas	110	163	153	164	173	260	4.0	12.4	-6.1	7.2	5.5	50.3
Guyana	64	105	99	104	101	122	5.1	3.8	-5.7	5.1	-2.9	20.8
Suriname	46	58	54	60	72	138	2.3	24.2	-6.9	11.1	20.0	91.7

TABLE A.1: INTERNATIONAL TOURIST ARRIVALS IN OIC REGIONS AND COUNTRIES (continued)

	Tourist Arrivals (Thousand)						Growth Rate (Annual % Change)					
	1990	2000	2001	2002	2003	2004	1990/00	2000/04	2000/01	2001/02	2002/03	2003/04
Asia/Pacific	10889	18799	21339	21890	18583	24219	5.6	6.5	13.5	2.6	-15.1	30.3
Bangladesh	115	199	207	207	244	271	5.6	8.0	4.0	0.0	17.9	11.1
Brunei	377	948	840	790	685		9.7		-11.4	-6.0	-13.3	
Indonesia	2178	5064	5154	5033	4467	5321	8.8	1.2	1.8	-2.3	-11.2	19.1
Iran	154	1342	1402	1585	1546	1659	24.2	5.4	4.5	13.1	-2.5	7.3
Malaysia	7446	10222	12775	13292	10577	15703	3.2	11.3	25.0	4.0	-20.4	48.5
Maldives	195	467	461	485	563	617	9.1	7.2	-1.3	5.2	16.1	9.6
Pakistan	424	557	500	498	501	648	2.8	3.9	-10.2	-0.4	0.6	29.3
Europe/C. Asia	4859	12725	14812	16981	17354	21302	10.1	13.7	16.4	14.6	2.2	22.7
Albania	30	32	35	47	56	57	0.6	15.5	9.4	34.3	19.1	1.8
Azerbaijan		681	767	834	1066	1349		18.6	12.6	8.7	27.8	26.5
Kazakhstan		1471	1845	2832	2410	3070		20.2	25.4	53.5	-14.9	27.4
Kyrgyz Rep.		59	99	140	248				67.8	41.4	77.1	
Tajikistan		8	5	6					-37.5	20.0		
Turkey	4799	10172	11446	12790	13343	16826	7.8	13.4	12.5	11.7	4.3	26.1
Uzbekistan	30	302	305	332	231		26.0	-100.0	1.0	8.9	-30.4	
Middle East	9299	23428	23370	29023	30160	15834	9.7	-9.3	-0.2	24.2	3.9	-47.5
Bahrain	1376	2420	2788	3167	2955		5.8		15.2	13.6	-6.7	
Egypt	2411	5116	4357	4906	5746		7.8		-14.8	12.6	17.1	
Iraq	748	196	127				-12.5		-35.2			
Jordan	572	1427	1478	2384	2353	2853	9.6	18.9	3.6	61.3	-1.3	21.2
Kuwait	15	87	85	96	94	91	19.2	1.1	-2.3	12.9	-2.1	-3.2
Lebanon		742	837	956	1016	1278		14.6	12.8	14.2	6.3	25.8
Libya	96	174	169	135	142		6.1		-2.9	-20.1	5.2	
Oman	149	571	829	817	1095		14.4		45.2	-1.4	34.0	
Palestine		336	60	51	63				-82.1	-15.0	23.5	

TABLE A.1: INTERNATIONAL TOURIST ARRIVALS IN OIC REGIONS AND COUNTRIES (continued)

	Tourist Arrivals (Thousand)						Growth Rate (Annual % Change)					
	1990	2000	2001	2002	2003	2004	1990/00	2000/04	2000/01	2001/02	2002/03	2003/04
Qatar	136	378	376	587	557		10.8		-0.5	56.1	-5.1	
Saudi Arabia	2209	6585	6736	7511	7332	8580	11.5	6.8	2.3	11.5	-2.4	17.0
Syria	562	1416	1318	2870	2788	3032	9.7	21.0	-6.9	117.8	-2.9	8.8
U.A.E.	973	3907	4134	5445	5871		14.9		5.8	31.7	7.8	
Yemen	52	73	76	98	148		3.5		4.1	28.9	51.0	
OIC Total	34858	67849	73203	81824	79419	75508	6.9	2.7	7.9	11.8	-2.9	-4.9
World Total	441000	680600	680400	700400	689700	763200	4.4	2.9	0.0	2.9	-1.5	10.7
% of World	7.9	10.0	10.7	11.7	11.5	9.9						

Sources: (1) SESRTCIC, BASEIND Database. (2) World Tourism Organisation, Compendium of Tourism Statistics, 2005 Edition, and Tourism Market Trends, 2005 Edition.

Notes:

(1) *International Tourist Arrivals*: For a proper understanding of this term, two considerations should be taken into account: first, a *tourist* means a visitor who stays for 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.

TABLE A.2: INTERNATIONAL TOURISM RECEIPTS IN OIC REGIONS AND COUNTRIES

	Tourism Receipts (US \$ Million)						Growth Rate (Annual % Change)					
	1990	2000	2001	2002	2003	2004	1990/00	2000/04	2000/01	2001/02	2002/03	2003/04
Africa	2862	4718	5430	5487	5780	5977	5.1	6.1	15.1	1.0	5.3	3.4
Algeria	64	102	100	111	112		4.8		-2.0	11.0	0.9	
Benin	28	77	73	60			10.6		-5.2	-17.8		
Burkina Faso	11	29	35	39			10.2		20.7	11.4		
Cameroon	53	39					-3.0					
Chad	8	14	23	25			5.8		64.3	8.7		
Comoros	2	15	9	11			22.3		-40.0	22.2		
Côte d'Ivoire	51	49	48	51	84		-0.4		-2.0	6.3	64.7	
Gabon	3	17	17				18.9		0.0			
Guinea	30	12	14	43	31	30	-8.8	25.7	16.7	207.1	-27.9	-3.2
Mali	47	40	88	104			-1.6		120.0	18.2		
Morocco	1259	2036	2526	2646	3238	3921	4.9	17.8	24.1	4.8	22.4	21.1
Mozambique		74	64	63	98	95		6.4	-13.5	-1.6	55.6	-3.1
Niger	17	28	32	28	34		5.1		14.3	-12.5	21.4	
Nigeria	25	200	232	263	49	21	23.1	-43.1	16.0	13.4	-81.4	-57.1
Senegal	167	144	174	190	184		-1.5		20.8	9.2	-3.2	
Sierra Leone	19	10	14	38	60		-6.2		40.0	171.4	57.9	
Sudan	21	30	56	108	118		3.6		86.7	92.9	9.3	
Togo	58	7	11	13			-19.1		57.1	18.2		
Tunisia	948	1682	1751	1523	1583	1910	5.9	3.2	4.1	-13.0	3.9	20.7
Uganda	10	113	163	171	189		27.4		44.2	4.9	10.5	
Americas	38	91	75	52	43		9.1		-17.6	-30.7	-17.3	
Guyana	27	75	61	49	39		10.8		-18.7	-19.7	-20.4	
Suriname	11	16	14	3	4		3.8		-12.5	-78.6	33.3	

TABLE A.2: INTERNATIONAL TOURISM RECEIPTS IN OIC REGIONS AND COUNTRIES (continued)

	Tourism Receipts (US \$ Million)						Growth Rate (Annual % Change)					
	1990	2000	2001	2002	2003	2004	1990/00	2000/04	2000/01	2001/02	2002/03	2003/04
Asia/Pacific	4124	11682	13617	14259	11552	14802	11.0	6.1	16.6	4.7	-19.0	28.1
Bangladesh	11	50	48	57	57	67	16.3	7.6	-4.0	18.8	0.0	17.5
Indonesia	2105	5749	5396	5285	4037	4798	10.6	-4.4	-6.1	-2.1	-23.6	18.9
Iran	61	467	891	1357	1033	1074	22.6	23.1	90.8	52.3	-23.9	4.0
Malaysia	1667	5011	6863	7118	5901	8198	11.6	13.1	37.0	3.7	-17.1	38.9
Maldives	89	321	327	337	388	479	13.7	10.5	1.9	3.1	15.1	23.5
Pakistan	156	84	92	105	136	186	-6.0	22.0	9.5	14.1	29.5	36.8
Europe/C. Asia	3457	8523.2	11104.8	13167	14445	17397	9.4	19.5	30.3	18.6	9.7	20.4
Albania	4	389	446	487	522	735	58.0	17.2	14.7	9.2	7.2	40.8
Azerbaijan	228	63	43	51	58	66	-12.1	1.2	-31.7	18.6	13.7	13.8
Kazakhstan		356	452	622	564	708		18.8	27.0	37.6	-9.3	25.5
Kyrgyz Rep.		15	24	36	48				60.0	50.0	33.3	
Tajikistan		1.2	0.8	2	2				-33.3	150.0	0.0	
Turkey	3225	7636	10067	11901	13203	15888	9.0	20.1	31.8	18.2	10.9	20.3
Uzbekistan		63	72	68	48				14.3	-5.6	-29.4	
Middle East	4548	12608	12259	15669	16789	19780	10.7	11.9	-2.8	27.8	7.1	17.8
Bahrain	135	573	630	741	740		15.6		9.9	17.6	-0.1	
Egypt	1100	4345	3800	3764	4584	6125	14.7	9.0	-12.5	-0.9	21.8	33.6
Iraq	55	102		45			6.4					
Jordan	512	722	700	786	848	826	3.5	3.4	-3.0	12.3	7.9	-2.6
Kuwait	132	98	104	119	117	180	-2.9	16.4	6.1	14.4	-1.7	53.8
Lebanon		742	837	956	1016	1278		14.6	12.8	14.2	6.3	25.8
Libya	6	97	94	75	79		32.1		-3.1	-20.2	5.3	
Oman	69	221	144	302	385	518	12.3	23.7	-34.8	109.7	27.5	34.5
Palestine		101	11	8	4				-89.1	-27.3	-50.0	
Qatar		128	272	285	369	498		40.4	112.5	4.8	29.5	35.0

TABLE A.2: INTERNATIONAL TOURISM RECEIPTS IN OIC REGIONS AND COUNTRIES (continued)

	Tourism Receipts (US \$ Million)						Growth Rate (Annual % Change)					
	1990	2000	2001	2002	2003	2004	1990/00	2000/04	2000/01	2001/02	2002/03	
Saudi Arabia	1884	3312	3415	5794	5661	6542	5.8	18.6	3.1	69.7	-2.3	15.6
Syria	320	1082	1150	1424	1408	2220	13.0	19.7	6.3	23.8	-1.1	57.7
U.A.E.	315	1012	1064	1332	1439	1593	12.4	12.0	5.1	25.2	8.0	10.7
Yemen	20	73	38	38	139		13.8		-47.9	0.0	265.8	
OIC Total	15029	37622.2	42485.8	48634	48609	57956	9.6	11.4	12.9	14.5	-0.1	19.2
World Total	273200	479200	467000	481600	524200	622700	5.8	6.8	-2.5	3.1	8.8	18.8
as % of World	5.5	7.9	9.1	10.1	9.3	9.3						

Sources: (1) SESRTCIC, BASEIND Database. (2) World Tourism Organisation, Compendium of Tourism Statistics, 2005 Edition, and Tourism Market Trends, 2005 Edition.

Notes:

(1) *International Tourism Receipts*: 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 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), which are classified under a separate category called *International Fare Receipts*.

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

TABLE A.3: BALANCE OF INTERNATIONAL TOURISM (Million US\$)

	1999	2000	2001	2002	2003
Albania	199	117	188	121	33
Algeria	-170	-91	-94	-137	-143
Azerbaijan	-58	-69	-66	-55	-53
Bahrain	306	349	380	363	413
Bangladesh	-162	-251	-118	-145	-108
Benin	68	65	63	53	
Burkina Faso		9	13		
Chad		-42	-33	-55	
Côte d'Ivoire	-122	-140	-144		
Egypt	2825	3272	2668	2486	3257
Gabon	-76	-57	-100		
Guinea	-17	3	-1	12	
Guyana	31	6	6	11	8
Indonesia	2357	1600	3048	1360	841
Iran	-228	-201	183	-2393	-2413
Jordan	440	335	280	370	438
Kazakhstan	-31	-52	-221	-134	-105
Kuwait	-2178	-2396	-2739	-2902	-3232
Kyrgyz Rep.	3	-1	12	26	31
Libya	-122	-98	-203	-473	
Malaysia	1567	2487	3760	4167	2757
Maldives	312	318.5	324	315	385
Mali	33	0	52	68	
Morocco	1491	1610	2140	1806	2692
Mozambique	-187	-34	-50	-50	-42
Niger	9	12	15	12	13
Nigeria	-449	-530	-608	-687	
Oman	-222	-249	-372	-323	-358
Pakistan	-104	-168	-163	-74	-744
Palestine	-94	-190	-431	-412	
Qatar		-179	-94	-138	-102
Senegal	112	97	131	147	
Sierra Leone	4	-22	-28	-1	23
Sudan	-13	-25	-18	-29	-1
Suriname	-4	-7	-9	7	-2
Syria	401	413	480	210	
Togo	6	5	6	8	
Tunisia	1588	1419	1478	1263	1283
Turkey	3732	5925	8329	10021	11090
Uganda	7	-1	50		
U.A.E.		-2007	-2257	-2326	-2520
Yemen	-75	3	-41	-40	62

Source: Calculated based on the data available in the sources mentioned under Table A.2 above.

TABLE A.4: BALANCE OF INTERNATIONAL TOURISM AS % OF GNP

	1999	2000	2001	2002	2003	1999-2003
Albania	5.8	3.2	4.6	2.7	0.5	3.4
Algeria	-0.4	-0.2	-0.2	-0.3	-0.2	-0.2
Azerbaijan	-1.3	-1.4	-1.2	-0.9	-0.8	-1.1
Bahrain	4.9	5.0	5.2	4.6	4.9	4.9
Bangladesh	-0.3	-0.5	-0.2	-0.3	-3.1	-0.9
Benin	2.9	2.7	2.6	2.1		2.6
Burkina Faso		0.3	0.5			0.4
Chad		-3.0	-2.0	-2.7		-2.6
Côte d'Ivoire	-1.2	-1.3	-1.3			-1.3
Egypt	3.3	3.4	2.7	2.5	3.8	3.1
Gabon	-1.9	-1.5	-2.5			-2.0
Guinea	-0.5	0.1	0.0	0.4		0.0
Guyana	4.7	0.9	0.9	1.7	1.1	1.9
Indonesia	1.6	1.3	2.2	0.8	0.4	1.3
Iran	-0.2	-0.2	0.2	-2.1	-2.1	-0.9
Jordan	5.7	4.0	3.2	4.1	4.4	4.3
Kazakhstan	-0.2	-0.3	-1.1	-0.6	-0.4	-0.5
Kuwait	-6.2	-5.5	-7.0	-7.5	-7.1	-6.7
Kyrgyz Rep.	0.2	-0.1	0.9	1.8	1.8	0.9
Libya	-0.4	-0.3	-0.7	-2.4		-0.9
Malaysia	2.0	3.2	4.6	4.8	2.7	3.5
Maldives	56.8	54.4	54.5	52.7	60.3	55.7
Mali	1.2	0.0	2.1	2.5		1.4
Morocco	4.1	4.6	6.0	4.6	5.7	5.0
Mozambique	-4.9	-0.9	-1.3	-1.3	-1.0	-1.9
Niger	0.5	0.7	0.9	0.7	0.7	0.7
Nigeria	-1.4	-1.5	-1.6	-1.8		-1.6
Oman	-1.5	-1.5	-1.9	-1.6	-1.7	-1.7
Pakistan	-0.2	-0.3	-0.3	-0.1	-1.2	-0.4
Palestine	-1.6	-3.5	-8.9	-9.0		-5.8
Qatar		-1.0	-0.5	-0.8	-0.5	-0.6
Senegal	2.4	2.1	2.8	3.1		2.6
Sierra Leone	0.6	-3.5	-4.0	-0.1	2.9	-0.8
Sudan	-0.1	-0.3	-0.2	-0.3	0.0	-0.2
Suriname	-0.5	-0.8	-1.2	0.8	-0.2	-0.4
Syria	2.8	2.7	2.8	1.1		2.3
Togo	0.4	0.4	0.5	0.6		0.4
Tunisia	8.0	7.7	7.7	6.3	5.4	7.0
Turkey	2.0	2.9	5.8	5.5	4.7	4.2
Uganda	0.1	0.0	0.8			0.3
U.A.E.		-2.9	-3.2	-3.2	-3.1	-3.1
Yemen	-1.1	0.0	-0.5	-0.4	0.5	-0.3

Source: Calculated based on the data available in the sources mentioned under Table A.2 above.

TABLE A.5: INTERNATIONAL TOURISM RECEIPTS AS % OF EXPORTS

	1999	2000	2001	2002	2003	1999-2003
Albania	76.7	152.5	146.2	147.6	116.8	128.0
Algeria	0.6	0.4	0.5	0.6	0.4	0.5
Azerbaijan	8.7	3.6	1.9	2.4	2.2	3.8
Bahrain	7.9	7.5	7.7	8.8	7.1	7.8
Bangladesh	1.1	0.9	0.8	1.0	0.9	1.0
Benin	45.4	36.7	38.8	30.2		37.8
Burkina Faso	0.0	17.5	20.2	22.8		15.1
Chad	0.0	16.1	29.1	37.9		20.8
Comoros	0.0	93.8	24.3	39.3		39.3
Côte d'Ivoire	2.4	1.3	1.3			1.7
Egypt	110.4	69.0	91.8	54.0	55.2	76.1
Gabon	0.4	0.4	0.5			0.5
Guinea	1.4	1.9	2.6	4.9		2.7
Guyana	17.3	12.6	10.6	8.9	6.8	11.3
Indonesia	9.7	9.3	9.6	7.5	6.6	8.5
Iran	1.9	1.8	3.9	6.0	5.7	3.9
Jordan	64.3	56.2	30.5	29.4	26.5	41.4
Kazakhstan	6.5	3.6	5.0	6.4	4.4	5.2
Kuwait	0.8	0.5	0.6	0.8	0.6	0.6
Kyrgyz Rep.	3.1	3.0	5.0	7.4	8.2	5.4
Lebanon	0.0	103.9	85.4			63.1
Libya	0.4	0.8	0.8	0.8		0.7
Malaysia	3.8	4.6	7.2	7.3	5.3	5.7
Maldives	490.6	422.4	424.7	349.5	343.4	406.1
Mali	30.6	17.0	57.1	62.7		41.8
Morocco	26.0	27.5	36.2	28.6	36.7	31.0
Mozambique	57.6	20.3	9.1	9.2	9.3	21.1
Niger	12.1	14.3	20.9	13.7	20.5	16.3
Nigeria	1.3	0.9	1.2	1.6		1.2
Oman	1.5	2.3	1.6	2.4	2.1	2.0
Pakistan	0.9	0.9	1.0	1.1	1.3	1.0
Palestine	15.6	11.4	1.8	1.4		7.6
Qatar		1.1	2.5	2.5	2.8	1.8
Saudi Arabia	5.0	4.5	5.0	5.1		4.9
Senegal	20.3	20.8	22.2	20.0	16.3	19.9
Sierra Leone	133.3	8.1	26.9	38.4	44.8	50.3
Sudan	3.1	1.8	3.0	3.3	4.5	3.1
Suriname	1.5	3.2	2.7	0.6	0.7	1.7
Syria	29.8	22.8	18.8	15.0	18.3	20.9
Tajikistan	0.1	0.2	0.1	0.3		0.2
Togo	2.3	1.9	3.1	3.1		2.6
Tunisia	20.7	19.4	19.0	17.3	14.5	18.2
Turkey	12.8	14.0	24.0	23.4	19.2	18.7
Uganda	18.6	25.7	40.0	38.8	48.4	34.3
U.A.E.	2.4	2.0	2.2	2.5	2.1	2.3
Uzbekistan	5.2	3.0	3.6	4.0		3.9
Yemen	2.5	1.0	1.1	1.2	3.1	1.8

Source: Calculated based on the data available in the sources mentioned under Table A.2 above.

TABLE A.6: ACCOMMODATION AND TOURISM-RELATED SERVICES AND FACILITIES IN 2003

	Number of Hotels	Occupancy Rate (1)	Tourism Information Centres	Tourism Agencies (2)	Car Rental Agencies	Sporting/ Recreation Centres (3)	Museums	Fairs/ Exhibitions/ Festivals (4)	Restaurants
Albania	199	45	6	51		2		2	853
Algeria	1042			591		67	11		164
Azerbaijan	96			74		8	17	7	
Bahrain									
Bangladesh	16	42.3	2	500		10	13	4	
Benin	23		2	53	11	11	2	2	147
Brunei									
Burkina Faso	185	59		27	11		5	8	
Cameroon									
Chad									
Comoros									
Côte d'Ivoire									
Djibouti									
Egypt	1152	59	28	856	177	13	62	11	
Gabon									
Gambia	33		5	37	2	2	4	6	59
Guinea	318	69.8	1	40	4	2	5	3	
Guinea-Bissau									
Guyana									
Indonesia	10435	43.2	30	2269	392	94	262	5	
Iran									
Iraq	894			74					
Jordan	458	33.7	12	426	232		6	7	

TABLE A.6: ACCOMMODATION AND TOURISM-RELATED SERVICES AND FACILITIES IN 2003 (continued)

	Number of Hotels	Occupancy Rate (1)	Tourism Information Centres	Tourism Agencies (2)	Car Rental Agencies	Sporting/ Recreation Centres (3)	Museums	Fairs/ Exhibitions/ Festivals (4)	Restaurants
Kazakhstan	206			713			143	3	
Kuwait	38						4	1	
Kyrgyz Rep.									
Lebanon	338		10	59	90	1	9	7	
Libya									
Malaysia									
Maldives	95	77.2	1				1	-	
Mali	244	40	9	90	4		10	3	
Mauritania									
Morocco	632	39		720				12	
Mozambique									
Niger	61	44	2	74	3	3	3	5	
Nigeria									
Oman	134	39	5	73				2	
Pakistan	1551	55	18	1682			14	2	188
Palestine	75	11.7	4	125	37		17		2472
Qatar									
Saudi Arabia	850			1097	349		63	2	
Senegal	289	37.7							
Sierra Leone									
Sudan									
Suriname									
Syria	518			801			26	2	

TABLE A.6: ACCOMMODATION AND TOURISM-RELATED SERVICES AND FACILITIES IN 2003 (continued)

	Number of Hotels	Occupancy Rate (1)	Tourism Information Centres	Tourism Agencies (2)	Car Rental Agencies	Sporting/ Recreation Centres (3)	Museums	Fairs/ Exhibitions/ Festivals (4)	Restaurants
Tajikistan	12	60		18			50		
Togo	260	10.7	2	22	5	3	5	5	60
Tunisia	790	42	25	407		60	45	33	331
Turkey	1801	45.7	146	3389	61	363	187	129	572
Turkmenistan									
Uganda	143		13	42		10	1	1	
U.A.E.	366	68		49	382		22	7	
Uzbekistan									
Yemen	424		1	310					

Source: Responses to the "Questionnaire for the Collection of Data on the Tourism Sector in the OIC Member Countries" circulated by the Ankara Centre (SESRTCIC) to all member countries in December 2004.

Notes:

- (1) This corresponds to the relationship between available capacity and the extent to which it is used. This rate may refer either to use of rooms or beds and is based on the number of nights of both domestic and international tourists.
- (2) Including travel and tour operators.
- (3) Number of units such as golf courses, diving sites, surfing, ski, kayak, canoes, river/lake fishing, thermal locations, etc.
- (4) International and/or regional.