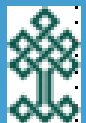


AN OVERLOOK INTO TURKISH TOURISM WITH REFERENCE TO PPP

Dr. Elçin BARIN
Culture and Tourism Expert
September, 2014



MINISTRY OF CULTURE AND TOURISM
General Directorate of Investment and Establishments





Combination of contemporary and traditional...



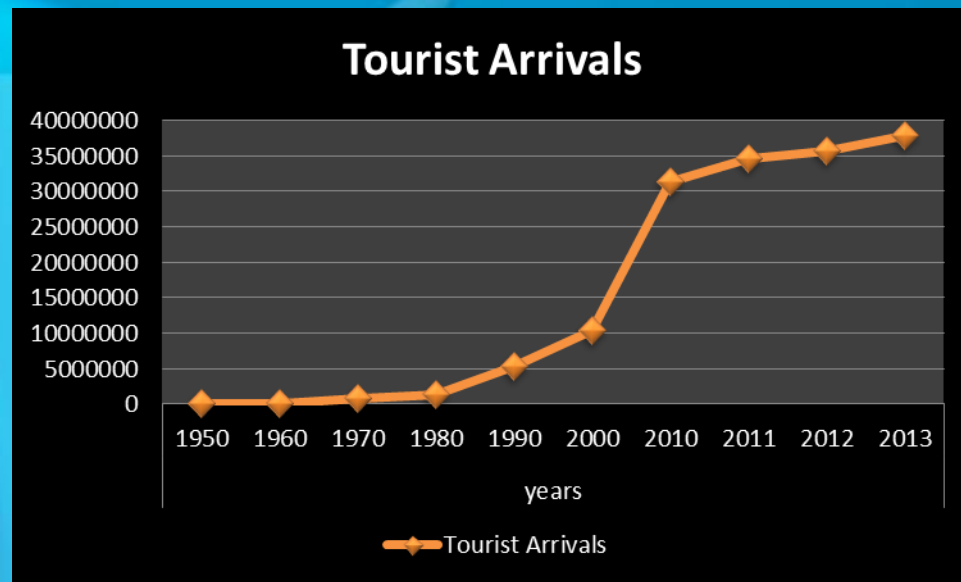
TOURISM FIGURES

DEVELOPMENT OF TURKISH TOURISM SECTOR

TOURIST ARRIVALS

YEARS	Tourist Arrivals (World) (Million)	Tourist Arrivals (Turkey)
1950	25.3	28.625
1960	69.3	94.077
1970	165.8	724.784
1980	278.1	1.288.060
1990	435	5.389.308
2000	673	10.428.153
2010	948	31.364.004
2011	995	34.653.876
2012	1.037	35.697.900
2013	1.087	37.794.908

Source: UNWTO, MCT

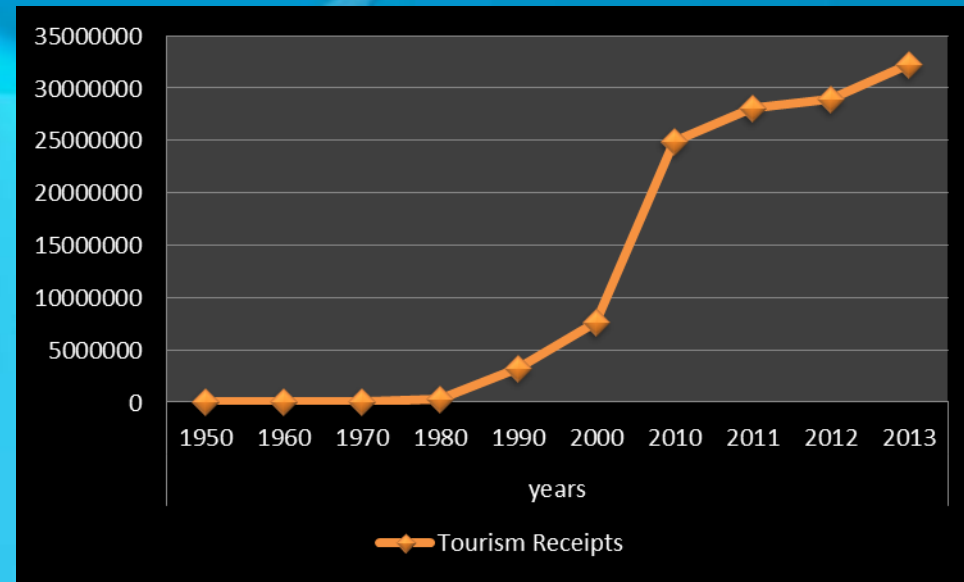


Tourist Arrivals Turkey

DEVELOPMENT OF TURKISH TOURISM SECTOR

TOURISM RECEIPTS

YEAR	TOURISM RECEIPTS (WORLD) (US\$ Billion)	TOURISM RECEIPTS (TURKEY) (US \$ 1000)
1950	2.1	1.000
1960	6.9	5.460
1970	17.9	51.597
1980	104.4	326.654
1990	270	3.225.000
2000	493	7.636.000
2010	965	24.930.996
2011	1.079	28.115.694
2012	1.115	29.007.003
2013	1.195	32.308.991



Tourism Receipts Turkey

SUCCESS STORY OF DEVELOPMENT/ TURKISH TOURISM

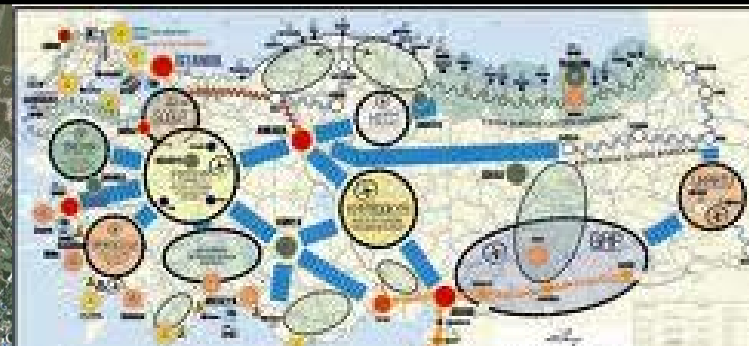
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DEVELOPMENT OF TURKISH TOURISM SECTOR

1st PERIOD (1963-1982) State-Led Tourism Policies

2nd PERIOD (1982-2003) Private Sector Oriented Intervention on Tourism Development

3rd PERIOD (2004-Today) Tourism Diversification Period



DEVELOPMENT OF TURKISH TOURISM SECTOR

1st PERIOD (1963-1982) State-Led Tourism Policies

- **INDULGE IN PIONEERING PROJECTS FOR TOURISM DEVELOPMENT (SOUTH ANTALYA TOURISM DEVELOPMENT PROJECT, SIDE ETC.)**
- **STANDARDIZATION OF TOURISM ESTABLISHMENTS**
- **CERTIFICATION OF ACCOMODATION AND DAILY CATERING FACILITIES**

DEVELOPMENT OF TURKISH TOURISM SECTOR

2nd PERIOD (1982-2003) Private Sector Oriented
Intervention on Tourism Development

- TOURISM ENCOURAGEMENT LAW #2634
- AUTHORIZATION IN TOURISM LAND USE PLANNING ONLY FOR 1/1000 IMPLEMENTATION PLAN
- DECLARATION OF TOURISM ZONES (TOURISM CENTERS)
- ALLOCATION OF PUBLIC LAND TO TOURISM INVESTORS
- INFRASTRUCTURE INVESTMENTS
- DIVERSIFICATION , STANDARDIZATION AND CONTROL OF TOURISTIC ESTABLISHMENTS
- EDUCATING QUALIFIED TOURISM STAFF

DEVELOPMENT OF TURKISH TOURISM SECTOR

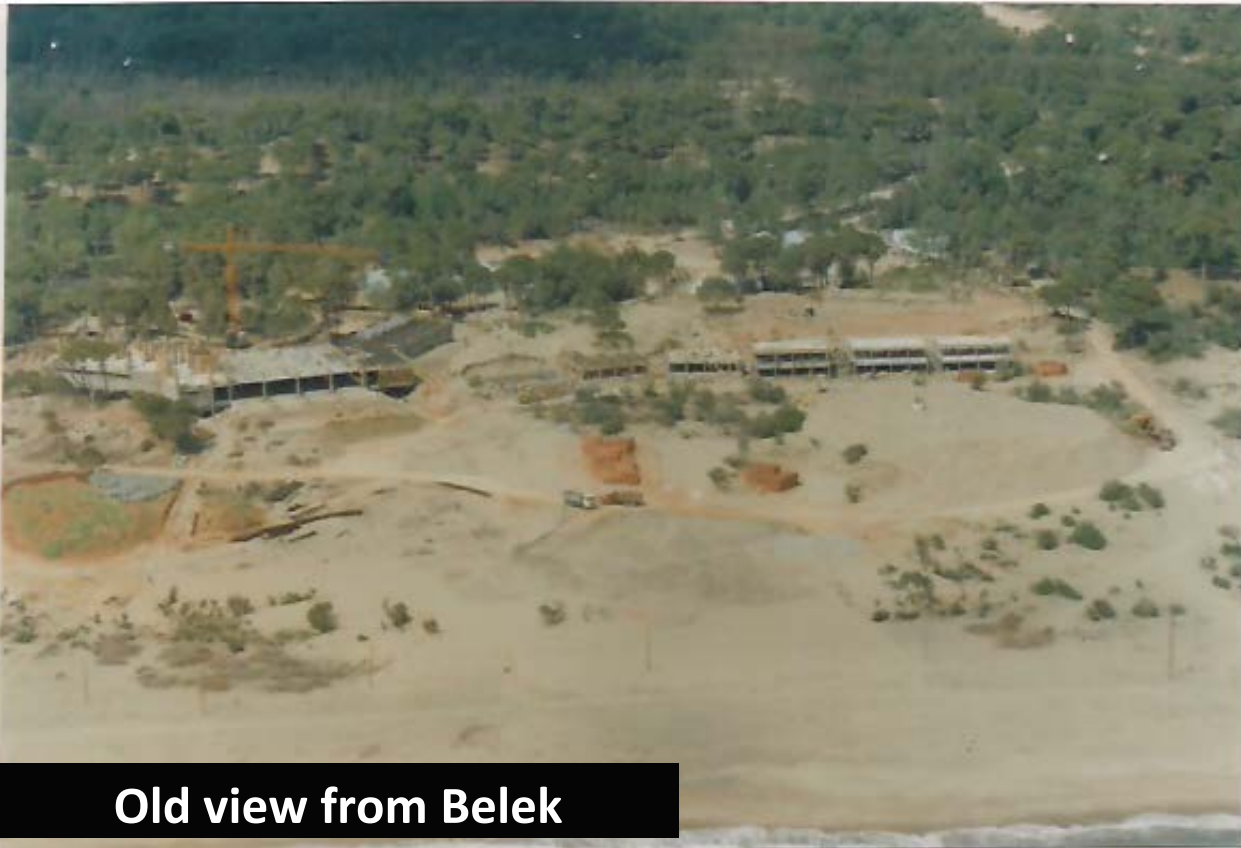
3rd PERIOD (2004-Today) Tourism Diversification Period

- AMENDMENTS IN TOURISM ENCOURAGEMENT LAW
- AUTHORIZATION IN TOURISM PLANNING INCLUDING ALL SCALES 1/25.000, 1/5000 & 1/1000
- DIVERSIFICATION OF TOURISM PRODUCTS (GOLF, THERMAL...)
- DEFINING NEW INVESTMENT AREAS IN FAVOR OF DIVERSIFIED TOURISM ACTIVITIES
- BRAND CREATION
- ECOLOGICAL AND ECONOMIC PRODUCTIVITY
- SUSTAINABLE TOURISM

Tourism Encouragement Law provides 2 integrated tools for strengthening Public Private Partnership

PLANNING + LAND ALLOCATION

1. **CONCEPTS:** Culture & Tourism Protection & Development Region (CTPDR) and Tourism Center (TCs)
2. **PLANNING:** authorizes the Ministry to approve the plan at any scale for CTPDR and TCs
3. **LAND ALLOCATION:** provides the Ministry to allocate Treasury Land and Forest Land to private investors



Old view from Belek



BELEK TOURISM CENTER

How Planning & Land Allocation Tools Works?

How combines public and private sectors?

Cooperative Alliances between Public and Private Sectors

DECLARATION OF TOURISM CENTER (TC)



GATHERING PHYSICAL INFORMATION FROM PUBLIC INSTITUTIONS



PREPARING ANALYSIS & SYTNESIS MAPS



DETERMINING PLAN DECISIONS & PLAN NOTES



APPROVING OF THE PLAN BY THE MINISTRY



DISTRIBUTION OF THE PLAN TO THE LOCAL AUTHORITIES



PUBLIC LAND ALLOCATION TO INVESTORS



INVESTMENT STARTS

DECLARATION PROCESS

Public and Private sectors

can propose a place to be declared as TC. Tourism centers mean priority zones determined for tourism development

PLANNING PROCESS

Public sector

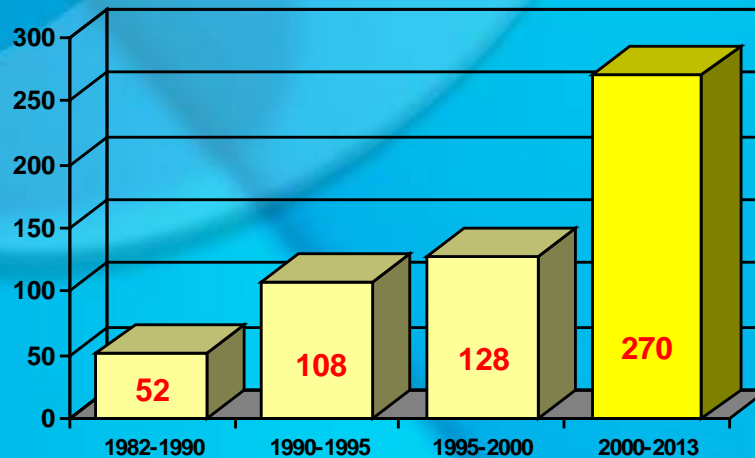
Dominate the process because of the Tourism Encouragement Law authorized the Ministry to make plans. Public sector determines areas for development of tourism establishments.

LAND ALLOCATION PROCESS

Public and Private sectors

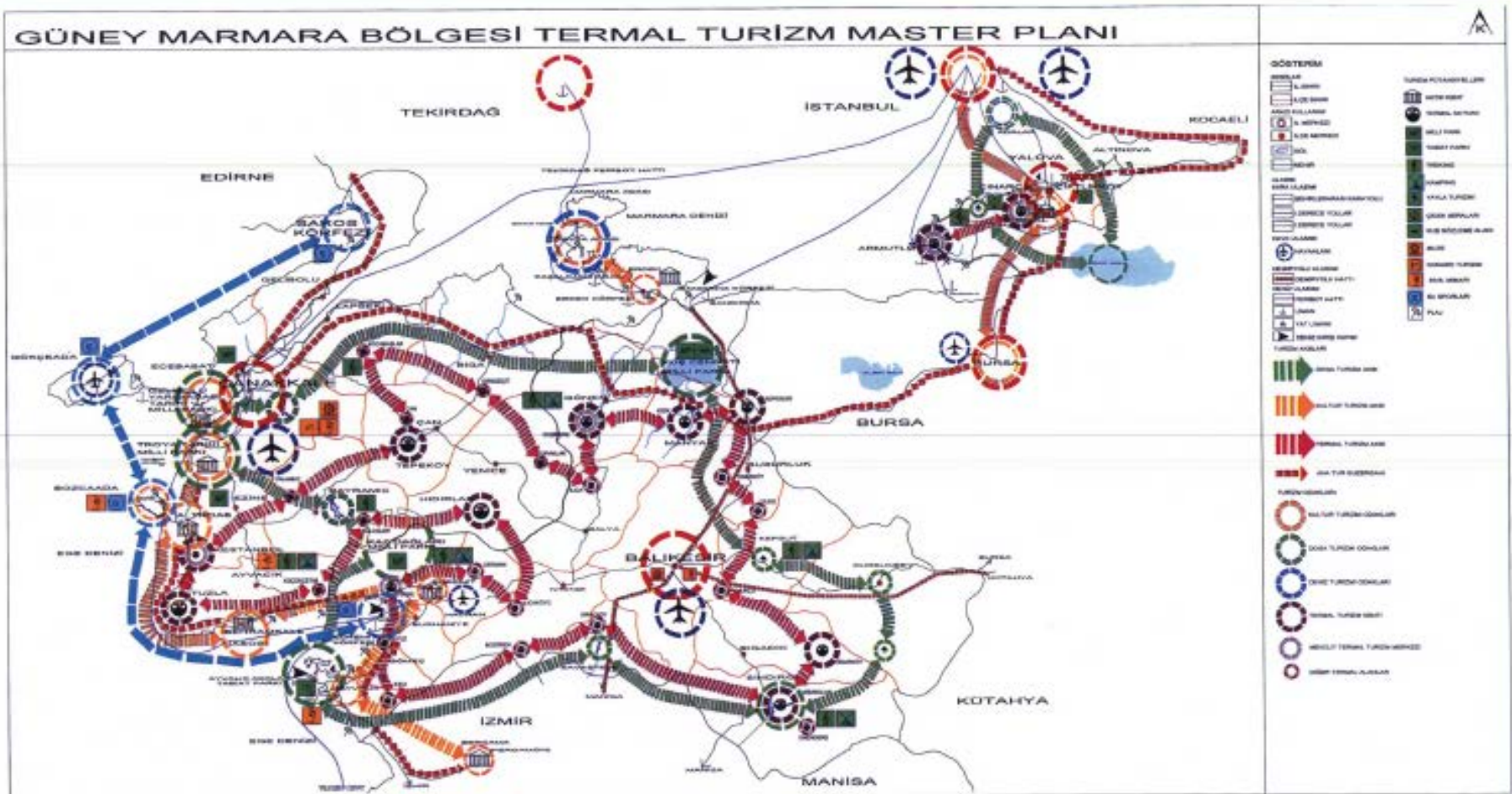
land allocation instrument which is the method for tourism investors to acquire land use rights from the government.

DECLARED AREAS FOR TOURISM



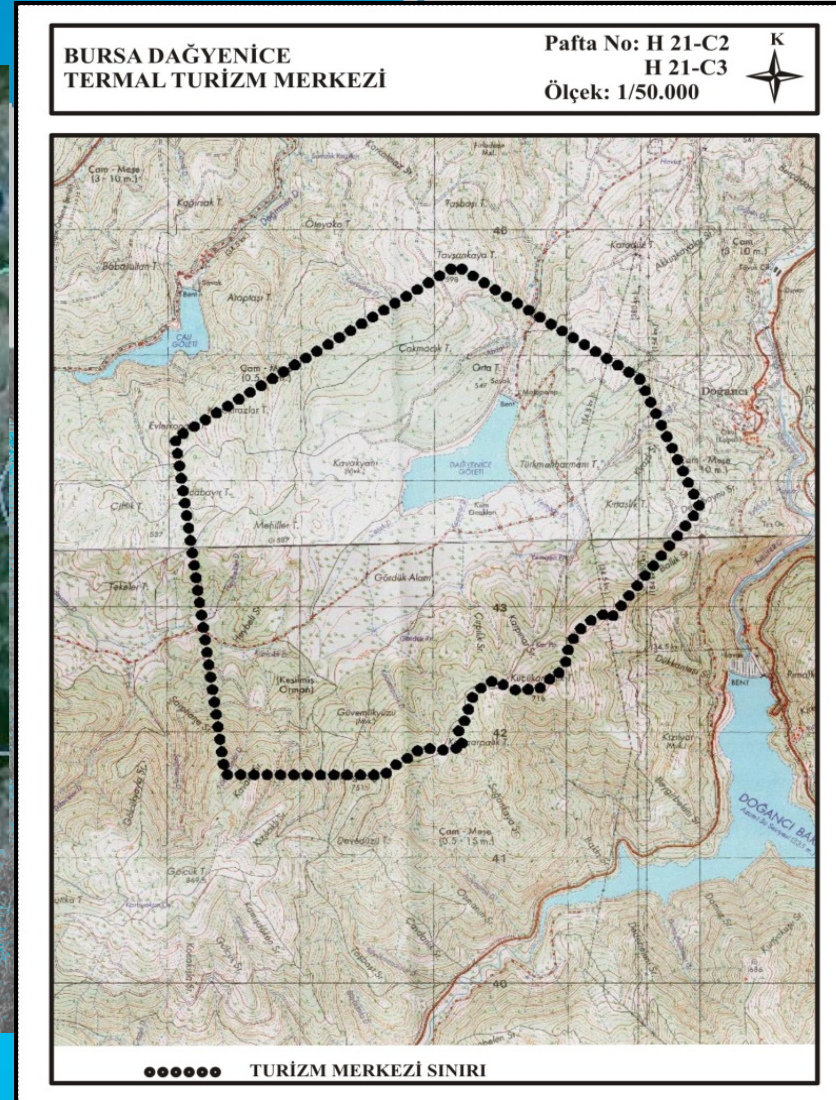
PLANNING PROCESS

1st STEP: MASTER PLAN



PLANNING PROCESS

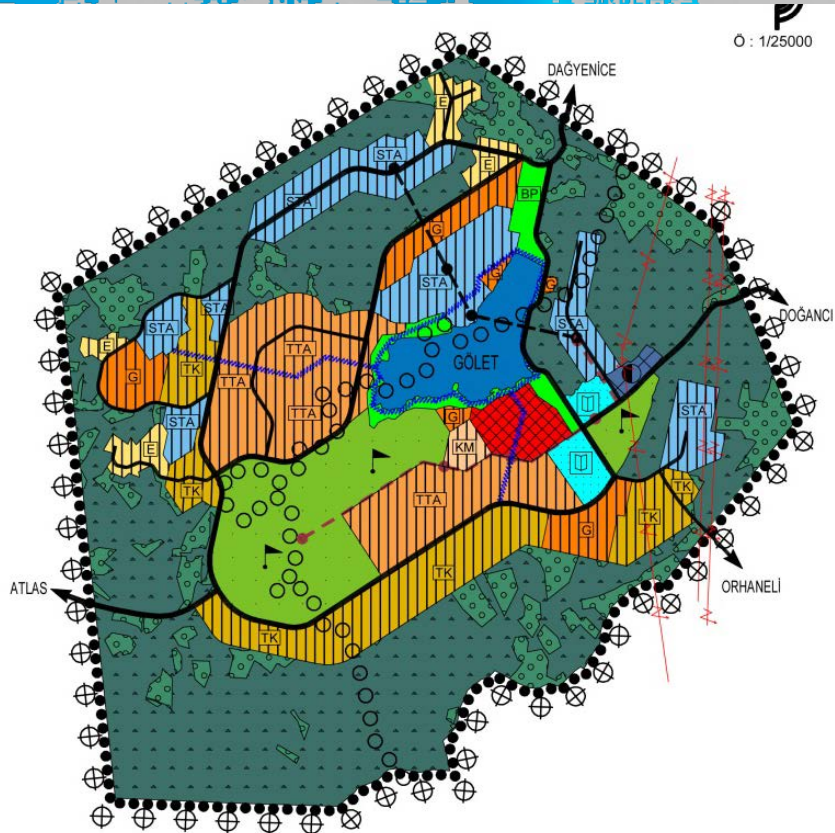
2nd STEP: DECLARATION AS TOURISM CENTER



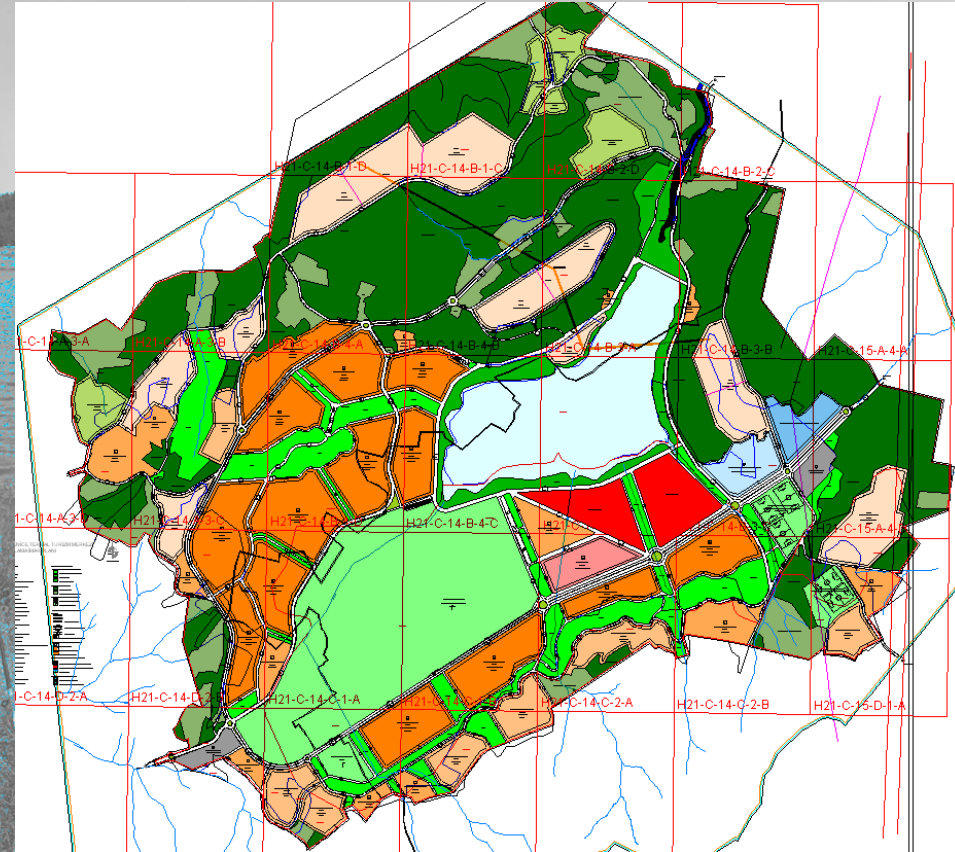
PLANNING PROCESS

3rd STEP: PLANNING PROCESS

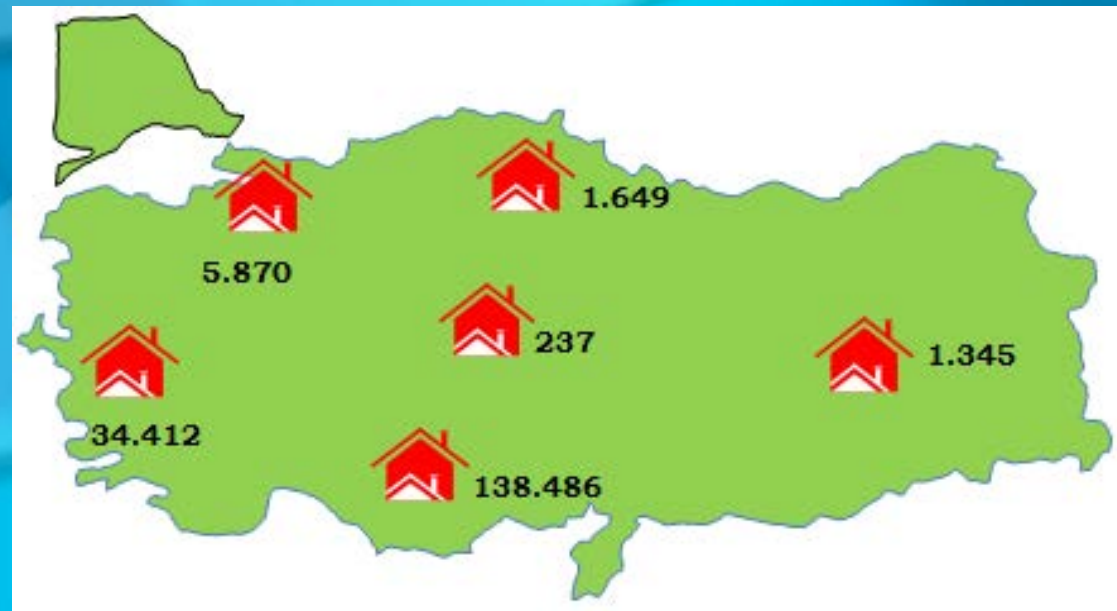
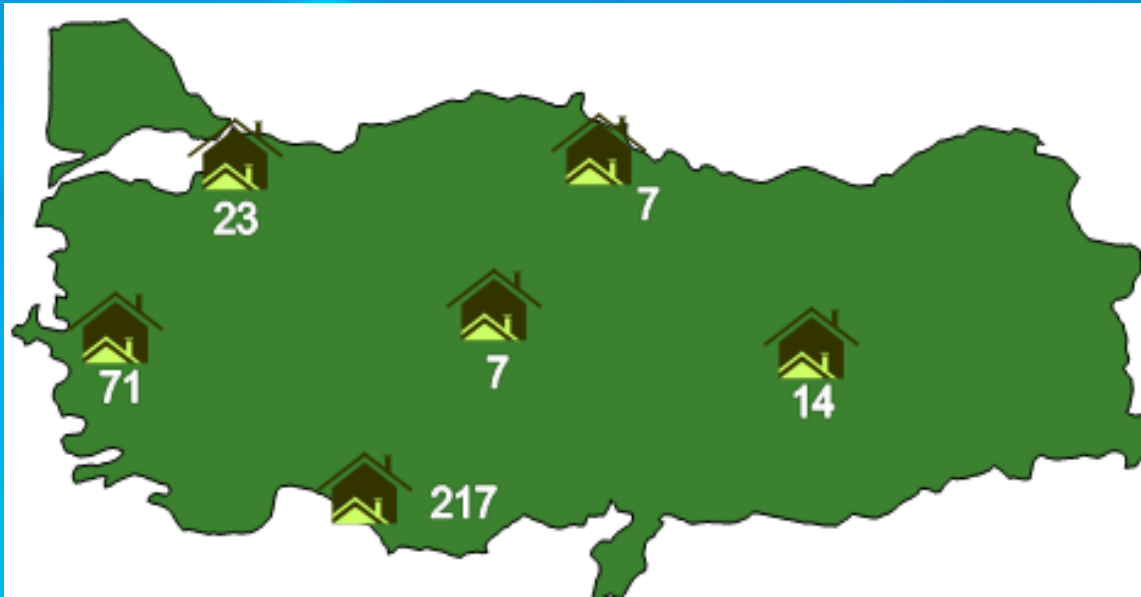
1/25.000 SCALE
LAND USE PLAN



1/1000 SCALE
IMPLEMENTATION PLAN



PUBLIC LAND ALLOCATION FOR TOURISM DEVELOPMENT



OTHER ISSUES RELATED TO PPP

TOURISM
LICENSING

TRAVEL
AGENTS

MARKETING
&
PROMOTION

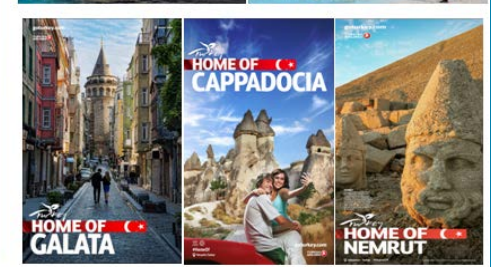
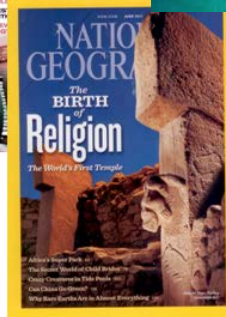
Main Organizations which the Ministry is in cooperative alliance with in tourism licensing, travel agents, marketing and promotion areas of intervention

Turkish Hoteliers Federation/Türkiye Otelciler Federasyonu (TÜROFED)

Association of Turkish Travel Agencies/Türkiye Seyahat Acentaları Birliği (TÜRSAB)

Turkish Tourism Investors Association/Türkiye Turizm Yatırımcıları Derneği (TYD)

Touristic Hotels&Investors Association/Turistik Otelciler Birliği (TUROB)



*Thank you for your kind
attention*



**FOR MORE INFORMATION PLEASE CONTACT WITH:
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Thank you...

**MINISTRY OF CULTURE AND TOURISM
General Directorate of Investment and Establishments**

