



**Standing Committee
for Economic and Commercial Cooperation
of the Organization of Islamic Cooperation (COMCEC)**

**Proceedings of the 7th Meeting of the
COMCEC Tourism Working Group**

**“Muslim Friendly Tourism:
Understanding the Demand and Supply Sides
In the OIC Member Countries”**



**COMCEC COORDINATION OFFICE
February 2016**



**Standing Committee
for Economic and Commercial Cooperation
of the Organization of Islamic Cooperation (COMCEC)**

**PROCEEDINGS OF THE 7TH MEETING OF THE
COMCEC TOURISM WORKING GROUP
ON**

**“MUSLIM FRIENDLY TOURISM:
UNDERSTANDING THE DEMAND AND SUPPLY SIDES
IN THE OIC MEMBER COUNTRIES”**

(February 4th, 2016, Ankara, Turkey)

COMCEC COORDINATION OFFICE

February 2016

For further information please contact:

Mr. Gökten DAMAR
Expert

Mr. Mustafa Adil SAYAR
Expert

COMCEC Coordination Office
Necatibey Caddesi No: 110/A
06100 Yüce-tepe
Ankara/TURKEY
Phone : 90 312 294 57 10
Fax : 90 312 294 57 77
Web : www.comcec.org
e-mail : comcec@comcec.org
gdamar@comcec.org
msayar@comcec.org

TABLE OF CONTENTS

Introduction	1
1. Opening Session	2
2. The COMCEC Tourism Outlook	3
3. Understanding the Concept of Muslim Friendly Tourism (MFT)	6
4. Demand and Supply Side of MFT in the OIC Member Countries: Current Situation, Main Challenges, Recommendations and Prospects	9
5. Success Stories of the Member States	12
5.1. Afghanistan.....	13
5.2. Indonesia.....	13
5.3. Iraq.....	14
5.4. Malaysia.....	15
5.5. Turkey.....	16
6. Policy Options for Developing Muslim Friendly Tourism in the Member Countries	17
7. Private Sector Efforts in Muslim Friendly Tourism	18
7.1. HalalTrip.com.....	18
7.2. Halal Voyage.....	18
8. Utilizing the COMCEC Project Funding	20
9. Closing Remarks	22
Annex 1: Agenda of the Meeting	23
Annex 2: Program of the Meeting	24
Annex 3: The Policy Recommendations	26
Annex 4: List of Participants	26

Introduction

The 7th Meeting of the COMCEC Tourism Working Group was held on February 4th, 2016 in Ankara, Turkey with the theme of "Muslim Friendly Tourism: Understanding the Demand and Supply Sides in the OIC Member Countries." The Meeting was attended by the representatives of 14 Member States, which have notified their focal points for the Tourism Working Group namely, Afghanistan, Azerbaijan, Gambia, Indonesia, Iraq, Kyrgyz Republic, Malaysia, Mali, Mozambique, Palestine, Senegal, Sudan, Tunisia and Turkey. Representatives of COMCEC Coordination Office, SESRIC, SMIIC, Crescentrating, Halal Trip and Halal Voyage have also attended the Meeting.¹

At the outset, the representative of the COMCEC Coordination Office informed the participants about the tourism outlook of the Member Countries. The participants also considered demand and supply sides of Muslim-friendly tourism (MFT) of the Member Countries through focusing on the Analytical Study titled "Muslim Friendly Tourism: Understanding the Demand and Supply Sides in the OIC Member Countries" commissioned by the COMCEC Coordination Office specifically for the Meeting with a view to enriching the discussions.

The Representatives of the Member States have shared their experiences, achievements and challenges regarding Muslim-friendly tourism in their respective countries. The private sector efforts in MFT were also reflected to the discussions. The participants had the chance to discuss the policy options for enhancing the cooperation in this important field. The Room Document based on the findings of the Analytical Study submitted to the Tourism Working Group Meeting and the answers of the Member Countries to the policy questions sent to the Member States by the COMCEC Coordination Office were the main inputs for the discussions during moderation session.

Lastly, the COMCEC Coordination Office presented the COMCEC Project Funding Mechanism, introduced by the COMCEC Strategy, and informed the participants of its details.

¹ The list of participants is attached as Annex 4.



1. Opening Session

In line with the tradition of the Organization of the Islamic Cooperation (OIC), the Meeting started with the recitation from the Holy Quran. At the outset, Mr. M. Metin EKER, Director General of the COMCEC Coordination Office introduced the COMCEC and its activities briefly.

Mr. EKER stated that COMCEC has been the Ministerial level decision making body within the OIC family. COMCEC annually brings together the Ministers responsible for economic affairs with a quite rich agenda ranging from trade, transport, tourism, agriculture to poverty alleviation and financial cooperation. He pointed out that Tourism Working Group Meeting is also a preparation for the Ministerial Meeting and its outputs would be submitted to the Ministers for their consideration.

Mr. EKER highlighted that importance of tourism has been well-addressed in many COMCEC Meetings. Tourism is a major source of income and employment for many Member Countries. In the last three years, many areas in tourism sector has been discussed during the Tourism Working Group Meetings such as: tourism product development and marketing, community based tourism, ICT based marketing strategies etc. For the upcoming three meetings, the tourism working group has been dedicated the theme of Muslim friendly tourism.

Mr. EKER stated that Muslim friendly tourism has been gaining popularity in the world, not only in the OIC Member Countries but also in the non-Muslim world in order to attract the Muslim travelers to their destinations. Growing Muslim population and their disposable income encourage the tourism sector to be more sensitive to the faith based needs of the Muslim population. Mr. EKER concluded his words by giving the important figures from the analytical study, introducing the program and by expressing his wishes for successful deliberations.

Mr. Zulkifly Md. SAID, Director General of the Islamic Tourism Centre from the Ministry of Tourism and Culture of Malaysia was elected as the Chairman of the Meeting. Mr. SAID introduced himself and thanked all the participants for electing him as the Chairman of the Meeting.

2. The COMCEC Tourism Outlook

Ms. Aslı TAŞMAZ DADAKOĞLU, Expert from the COMCEC Coordination Office, presented some of the key developments of tourism sector in the world and in the OIC Member Countries. In her presentation, Ms. DADAKOĞLU provided an overview of tourism sector in the world and in the Member Countries.

At the outset, Ms. DADAKOĞLU stated that tourism has experienced continued growth and become one of the most rapidly developing industries in the world. She shared some figures with a view to demonstrating that a strong tourism sector could contribute in many ways to development and the economy. She reminded that tourism can be a part of the solution to foster socio-economic development and job creation for OIC Member Countries.

She also talked about some key tourism trends from demand and supply sides of tourism. She stressed the role of population over the age of 60 (silver hair tourists), generation Y (millennials) and generation Z (iGen) on tourism demand. She added that growing middle class and emerging destinations will also contribute to reshape the tourism sector. She also mentioned about the supply side tourism trends like usage of internet in tourism, sharing economy and sustainability. She stressed that sharing economy will change traditional tourism market in near future.

Ms. DADAKOĞLU continued her presentation by sharing some figures regarding tourist arrivals and tourism receipts in the world. She stated that international tourist arrivals increased from 678 to 1.184 million in the period of 2000-2015. She expressed that tourism was affected from strong exchange rate fluctuations, the drop in oil prices (which increased disposable income in importing countries but weakened demand in exporters), as well as increased safety and security concerns in 2015. She shared the expectations of the tourism growth for 2016, but she added that the growth will be at a level slightly below of the previous two years. She informed that Europe, Americas and Asia-Pacific recorded 5% growth while Middle East grew by 3%, however, demand for Africa decreased by 3% in 2015.

She expressed that international tourism receipts reached to 1.250 billion \$ in 2014 with the annual growth rate of 3.8% and showed positive growth rates for the last five years. She also gave some information about the positive prospects for the year 2015.

Furthermore, Ms. DADAKOĞLU elaborated on the tourism sector in the Member States. It was highlighted that there was a tendency to increase in the share of Member Countries in both tourist arrivals and tourism receipts. She mentioned that tourist arrivals reached to 174 million and tourism receipts is recorded as 135 billion US \$ in the Member States in 2014. It was also stated in terms of tourist arrivals, top-10 OIC Member States hosted 137.1 million international tourists in 2014. Regarding the tourism receipts, she underlined that Top-10 Member States earned 112 billion US \$ in 2014 and these tourism receipts were concentrated in a few member countries.

Furthermore, Ms. DADAKOĞLU provided some figures on Global Destination Cities Index which was prepared by MasterCard. She stated that there were 3 successful OIC destination cities in the top 10 such as Dubai, İstanbul and Kuala Lumpur. She stressed out that İstanbul showed the strongest growth and moved to fifth from seventh in 2015, as the second fastest growth, Dubai grew by 8 %.

Ms. DADAKOĞLU also provided a brief information on the recent developments in the Member Countries. She stated that despite some positive developments in the OIC Member Countries, some other major destinations like Turkey, Malaysia, Jordan, Tunisia and Morocco faced declines in 2015.

Underlining the great potential in tourism sector among the Member States, Ms. DADAKOĞLU mentioned the following challenges affecting tourism performance in the OIC Member Countries:

- Insufficient Tourism Investments and Infrastructures
- Poor Tourism Planning & Product Development
- Travel Facilitation Problems
- Safety and Security Related Problems
- Low Tourism Service Quality
- Insufficient Marketing and Promotion
- Insufficient Image Building and Branding
- Lack of Tourism Diversification

She underlined that member states also face some challenges affecting tourism performance in the OIC Region like lack of tourism diversification. She underscored that Muslim Friendly Tourism (MFT) can be a new concept to contribute the diversification of tourism. She stated that with an increasing awareness and expanding numbers of Muslim tourists, many tourism industry players have started to offer special products and services to cater the needs and demands of Muslim tourists.

She concluded her presentation by informing the next two Tourism Working Group Meetings will also be related to Muslim Friendly Tourism with the theme of “Developing and Marketing of MFT Products & Services” and “The Regulation, Standardization and Certification for MFT”.

Questions and Comments:

Question: How can we build relationship and develop cooperation among the member countries and what are the possible benefits of this cooperation?

Answer: For developing relationship among the member countries, the working group mechanism can be utilized as a regular platform among the member countries in tourism and other sectors as well. Technical experts from the member countries come to these WG meetings in order to discuss important themes and come up with the policy recommendations as an outcome of these WG meetings. These policy recommendations are submitted to the COMCEC Ministerial Meetings. The implementation of these policy recommendations are followed-up by the CCO, after their adoption during the Ministerial Meetings. For realization of these policy recommendations, COMCEC Project Funding can also be utilized for strengthening the cooperation among the member countries.

Comment/Question: When we discussed the tourism sector, we mainly focus on the product development and marketing issues. However, there is also another important area, which is transportation. Since some member countries are located far away from the others, this area should also be highlighted.

Answer: As you will kindly remember, 5th Meeting of Tourism Sector which was held in February 2015, mainly focused on travel facilitation. Since the importance of transportation area in tourism sector, developing air linkages is highlighted as one of the important policy recommendations of that meeting. Moreover, one of the previous Transportation and Communications Working Group Meeting was dedicated to developing air linkages to sustain tourism among the member countries.

3. Understanding the Concept of Muslim Friendly Tourism (MFT)

Mr. Fazal BAHARDEEN, CEO at CrescentRating delivered a two part presentation on the analytical study titled “Muslim Friendly Tourism (MFT); Understanding the demand and supply sides in the OIC Member Countries”. The 1st part of the presentation encompassed the study methodology, definitions and concepts of MFT, conceptual framework of MFT, faith-based needs of Muslim travelers, demand side themes, Muslim visitor profiles, supply side themes and the global MFT market overview.

Mr. BAHARDEEN started his presentation by elaborating on the study methodology. Both primary and secondary market research was conducted to collect information for the study. The primary market research has been mainly focused on direct interviews with various stakeholders across a number of countries. The research takes into account the demand side key themes and supply side key themes along with the key faith-based needs of Muslim travelers.

He then discussed the definition of Muslim friendly tourism (MFT). He mentioned that Muslim travel market is a relatively new segment, many different terminology and definitions have been used to refer to this market segment by academics, media and other organizations. In this study, he stated that Muslim Friendly Tourist is defined as “Muslim travelers who do not wish to compromise their basic faith-based needs while traveling for a purpose, which is permissible” or it can also be defined as “Halal conscious travelers, traveling for any purpose, which is Halal”.

Mr. BAHARDEEN then described the “Conceptual Framework for MFT” (CFM) which serves to facilitate execution of strategy by OIC member states to develop this segment. The CFM is based on three main components as shown in Figure 1; faith based needs, demand and supply side themes.

Figure 1 - Conceptual Framework for MFT



He described each of the three components starting with the faith based needs. Six faith based needs have been identified in the study. These are halal food, Salaah (Prayer), water usage friendly toilets, Ramadhan services and facilities, facilities with no non-halal activities and recreational facilities with privacy. He also presented the segmentation of the Muslim travelers into three categories based on these needs; strictly practicing, practicing and not practicing. He

described the level of importance of these needs based on the segmentation of the Muslim travelers. He mentioned that the two most important needs are halal food and prayer facilities.

As for Halal food, he stated that a harmonized Halal standard and a uniform certification process across the OIC member states would greatly help accelerate the adoption of Halal certification by food outlets. He mentioned that the Standards and Metrology Institute for Islamic Countries (SMIIC) can play an important role in enabling widespread use of Halal certification. He also stated that providing prayer facilities, especially along highways and airports, is very crucial to meet the faith-based needs of muslim travelers.

Regarding demand side key themes, Mr. BAHARDEEN presented the four main travel reasons that have been identified in the study; religious, leisure, business and medical. Majority of Muslim travel is for leisure (including visiting friends and relatives - VFR) which accounts for around 75 percent of the travel. Religious travel constitutes around 10 percent of the total Muslim visitors and is primarily Hajj and Umrah travel. Business travel is around 9 to 10 percent while travel for medical or healthcare reasons is less than 1 percent of the Muslim travel market in 2014.

Mr. BAHARDEEN then presented the Muslim traveler profile tool. Although Muslim travelers do have strong shared values, especially when it comes to faith-based needs, destinations still need to take into account the rich diversity of Muslims from across the world when targeting this segment. The Muslim Visitor Profile Framework (MVPF), can assist destinations and services to focus certain targeted profiles and reach out to them.

In presenting the supply side key themes, he mentioned that it is important to look at the services across the all value chain in order to enhance the MFT experience of Muslim visitors. This refers to the travel hospitality services and facility comprising of transport terminals, transport services, accommodation services, attraction and activities, travel agents and tour operators, human capital and destinations as whole.

Mr. BAHARDEEN then presented the findings of the Muslim Visitor arrival numbers. Accordingly, in 2010, Muslim visitor arrivals were at around 98 million, whereas; by 2014 this number increased to 116 million. It is expected that over the next five years the growth rate would be 54.5 percent hence by 2020 the Muslim arrivals would reach 180 million.

He then concluded Part 1 of his presentation with the GMTI2015 results and how the OIC member states fared in the Index.

Question and Answers

Question: Which criteria have been used in order to compute the Muslim arrivals in this study? How are these numbers are computed?

Answer: There are several primary metrics used to calculate the Muslim visitor arrivals, i.e. overall visitor arrivals to the destination, percentage of Muslim population of the source markets, income disparity among and the Muslim friendliness of the destination (GMTI score)

Question 2 -How do you prepare GMTI index and which criteria do you use for this index?

Answer - The GMTI 2015 looks at nine criteria that contribute to the overall index score for each destination. They are as follows:

- Suitability as a holiday destination, family friendliness and safety
- Muslim visitor arrivals
- Family friendly holiday destination
- Safe travel environment
- Muslim friendly services and facilities available at the destination
- Dining options and Halal assurance
- Ease of access to prayer places
- Airport services and facilities
- Accommodation options
- Halal awareness and reach out to Muslim travel market by the destination
- Muslim travel market awareness
- Ease of communication

Question 3 - Can you explain the need of recreational facilities with privacy?

Answer – There are a sub-segment of the Muslim travel market who are looking for recreational facilities which provide privacy for males and females. These cover services such as swimming pools, beaches and gyms. This service could be provided by having separate facilities for males and females or by having separate timings for males and females.

Question 4 - How can the countries, which use shariah law and forbid non-halal activities, attract tourists from non-Muslim countries?

Answer: More and more travelers are looking for unique local experiences and each country has unique experiences to offer to visitors. As such, destination should look at beyond the traditional tourism products to attract visitors. Especially those destinations which forbid non-halal activities, need to look at positioning the destination based on the unique local experiences that they can offer.

4. Demand and Supply Side of MFT in the OIC Member Countries: Current Situation, Main Challenges, Recommendations and Prospects

The 2nd part of Mr. BAHARDEEN's presentation covered OIC MFT Market sizing and trends, classification of OIC Member states, case studies, challenges in the Member countries and recommendations.

Mr. BAHARDEEN started the second part of his presentation by highlighting that the MFT market offers a USD 100 billion opportunity to OIC member states by 2020. He then presented an in-depth analysis of Muslim Visitor Arrivals to OIC destinations. Accordingly, in the year 2010, there were 53 million visitors, growing to 64 million by the year 2014. At current growth rates, this is projected to reach 98 million by 2020. He observed that, by implementing the recommendations contained in the analytical study, the member states can expedite this growth to reach higher number of arrivals by 2020.

The percentage of Muslim visitors to OIC member states in 2014 was 33.8 percent of total arrivals to OIC destinations, and this would increase to 39.1 percent by 2020. The GCC countries remain the largest group of Muslim travelers contributing to around 40 percent of the total expenditure. South East Asian countries, such as Indonesia and Malaysia, contributed around 10 percent of the total. Iran and Turkey in total represent 16 percent of global Muslim tourism expenditure. About 37 percent of the Muslim visitor arrivals was from non-OIC countries.

Mr. BAHARDEEN viewed that by 2020 the growth in Muslim tourist arrivals would be the largest for the Arab group. The Asian group will witness a strong growth in Muslim Arrivals. The forecast growth rate of tourist arrivals from 2014 to 2020 would be 41.7 percent. The African group will also witness strong inbound tourist arrivals over the forecast period. However, the growth would be from a relatively low base as compared to the Asian and Arab group.

Mr. BAHARDEEN then described the flow of Muslim Visitor arrivals in 2014. This illustrates that non-OIC Muslim market could be a target segment for OIC countries to increase visitor arrivals.

Mr. BAHARDEEN mentioned that to optimize the development of strategy, a differentiated approach towards different markets will be needed to be adopted. The current positioning of OIC member states in MFT can be categorized in to 4 clusters; Group A: Top three countries, Group B: Best Positioned for Growth, Group C: Potential for Growth and Group D: Need to Develop. He followed that with showing how OIC destinations fared in GMTI2015 ranking.

Mr. BAHARDEEN then talked about the key country developments for the case studies undertaken and summarized them as given below;

- **Malaysia**

Malaysia is recognized as one of the top destinations on GMTI 2015. The key and unique strength of Malaysian success story on MFT is the commitment of the Ministry of Tourism as early as 2009 to identify the Muslim market as a priority market. This shows a government led commitment is required to activate the whole industry to make MFT a priority market for the destination.

- **Indonesia**

Indonesia has a huge potential to develop the MFT market with a wide array of possible tourism products that it can develop. However, according to the analytical study, poor infrastructure remains the biggest obstacle in this country.

In this regard, in promoting MFT a well-designed plan should be developed and communicated to the diverse local groups and communities. This plan should ensure that MFT market and services can co-exist with other traditional tourism markets and services of the destination.

- **Qatar**

Qatar has a good potential in terms of the MFT market. However, it does not offer enough variety and diversity of activities as in the other Gulf countries, such as UAE. Qatar Tourism Authority's aim is to develop the destination with a balance of preserving heritage as well as developing modern experiences.

- **UAE**

UAE is one of the fastest growing destinations for Muslim visitors. Continuous investment by UAE, has made it an attractive destination. Dubai's positioning as the "Islamic economic capital of the world" has also energized many businesses to look at how become more Muslim friendly. Abu Dhabi is also positioning to be the "halal travel" destination of choice.

- **Tunisia**

In Tunisia, tourism products are mainly based on the beach tourism . However, this country has more to offer in terms of culture, ecotourism, health & wellness, and even golf tourism, all of which could target Muslim visitors. Recent incidences at, or close to, tourist hotspots have caused problems to grow the tourism market in general.

- **Singapore**

GMTI 2015 ranks Singapore as the top Muslim friendly destination among the non-OIC countries. With Muslim arrivals constituting around 20 percent of the total arrivals in 2014, it is a good example of how a destination manages the needs of both Muslim and non-Muslim visitors. The key strength of Singapore lies with its local Muslim population. This country also has one of the strongest Halal certification bodies among the non-OIC countries.

- **United Kingdom**

Since the growing local middle class Muslim population, there are many Halal food outlets and Muslim friendly services across the UK. UK has over 2.8 million Muslims people which is a large population for a non-OIC country. It also has a number of Halal Certification bodies with some of them focusing on Halal restaurant certification.

Mr. BAHARDEEN presented eight major challenges facing future growth of MFT in the OIC Member countries. The eight challenges are;

1. **Security concerns**;. Majority of Muslim tourists travel with family and generally want more family-friendly activities such as shopping, sightseeing, theme park, nature reserve or museum. These travelers mostly prefer the safe and secure destinations.

2. **No proper identification of Halal food outlets;** A number of OIC member states have not developed a comprehensive identification process which could correctly inform tourist that the food offered at a particularly dining establishment is Halal.
3. **Limited support and participation from government to promote MFT.** In many OIC member states the government has not yet engaged the travel industry with the development of Muslim friendly tourism. Lack of incentives and motivation by the government to develop the tourism sector will curtail growth of the MFT market.
4. **Increasing competition from non-OIC countries;** Singapore, Japan and S. Korea for example are keenly targeting the Muslim tourist. In addition, Australia and Thailand are also seeking to attract the Muslim traveler. Halal dining establishments are available in many of the major cities of these countries.
5. **Islamophobia driven negative sentiments towards Muslim countries.** The recent incidences have resulted a negative sentiment against Muslims and Muslim countries.
6. **Resistance from some travel stakeholders to develop MFT;** Due to the negative sentiments portrayed by media when it comes to words such as Muslim, Halal, Shariah and Islam, even local travel stakeholders in some Muslim countries are resisting the development of MFT.
7. **Limited availability of attractions including theme parks.** A number of OIC member states does not have high quality tourism infrastructure. This has hampered the growth of not only Muslim tourism but also tourism as a whole.
8. **Low air connectivity.** A number of OIC member states are not on major airline routes to major cities of the world.

Mr. BAHARDEEN concluded his presentation by providing some policy recommendations on how OIC member states can help strengthen MFT environment through the nine key areas:

1. **Setting an overall MFT market goal to encourage growth in the MFT sector in OIC member states.** In order to encourage the member states to make MFT one of the main segments of tourist arrivals to the country, it was recommended to agree on a goal of attracting 100 million Muslim visitor arrivals to OIC destinations in 2020.
2. **Increasing awareness** of the MFT market among the travel industry stakeholders by rolling out guidelines, workshops, training etc.
3. **Implementing and streamlining the basic MFT related services.** Some actions can be taken for meeting the need for provisioning of prayer facilities, Halal food outlets and water friendly toilets at Airports, Highway stops, hotels/resorts, attractions and other travel services. SMIIC could play a role in this. It was suggested that OIC (possibly through SMIIC or COMCEC) take up the issue of “MOML” (Muslim Meal) with IATA.
4. **Maximizing the inherent strengths of OIC member states.** OIC member states have rich Islamic history, Islamic heritage and Islamic elements of providing hospitality. These inherent strengths can be utilized to provide visitors a unique experience.

5. **Capturing opportunities in the niche sub-segment within MFT.** There is a lack of supply for the sub-segment of Muslim visitor who are looking for facilities and services which do not have non-halal activities as well as recreational facilities and services which provide privacy. Some OIC destinations could look at getting a certain percentage of hospitality services catering to this need.
6. **Developing healthcare services and facilities for the Muslim market.** OIC member states could look at identifying strengths of healthcare services among the OIC member states, and develop specialized hubs of healthcare services. This could then lead to a plan to encourage intra-OIC healthcare services.
7. **Developing an MFT alliance.** Travel agents and tour operators are able to play a key role in enabling the growth of the MFT market in OIC destinations. Launching of an alliance of Travel Agents/Tour operators in OIC countries targeting the MFT market was recommended.
8. **Developing an environment for innovation and entrepreneurship on MFT related products and services.** The environment in which tourism companies operate today is rapidly changing and there is generally more volatility, uncertainty and complexity. As such it is necessary to develop an incubation setup to encourage start-ups and entrepreneurs to develop products and services for the MFT market.
9. **Developing unique MFT based destination positioning and marketing.** Currently very limited efforts have been made by OIC member states to reach out to the Muslim travelers with a clear MFT centric destination positioning. This is a broad area and requires the development of a comprehensive plan to position and promote the OIC destinations as the choice destinations for Muslims, especially the leisure travelers.

Questions & Remarks

Question: What is the specific relationship between the healthcare and MFT?

Answer: There are three key elements which makes Muslim friendly healthcare. The first is the services such as availability of Halal food and prayer facilities in the healthcare centers. The second is the ability to cater to some of Muslim patients who are looking to be served by the same gender of doctors and nurses. The third area is the availability, as much as possible, of Halal medications (medications which do not use non-halal ingredients)

5. Success Stories of the Member States

5.1. Afghanistan

On behalf of Afghanistan, Mr. M. Ramin ATIQZADA, Director of Tourism from Ministry of Information and Culture, made a presentation on the tourism sector in Afghanistan.

At the outset, Mr ATIQZADE highlighted the importance of the development and promotion of tourism and international cooperation in this field. According to Mr. ATIQZADE, the establishment of link in the tourism services among the OIC member countries would facilitate the development of the Muslim Friendly Tourism supply chain through providing long term planning including conceptual framework, rationale and strategy and implementation mechanisms for establishment of this multi-national cooperation.

Mr. ATIQZADE also stated that international tourism has become one of the main economic activities and an important source of foreign exchange earnings and employment in many countries. 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 conferences on sustainable development.

Although its great potential, the tourism sector in Afghanistan faces major challenges such as decades of war and other recent terrorist incidents. Mr. ATIQZADE stressed that considering their rich and diverse natural, geographic, historical and cultural heritage assets in Afghanistan and other OIC member countries, they have a high 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, he stated that a large part of the tourism potential of the OIC region remains unutilized. According to him, 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.

To conclude his speech, Mr. ATIQZADE expressed that in order to promote the tourism industry in Islamic countries, it is essential to establish durable communication among the OIC member countries as well as policies and strategies to be adopted in this respect.

5.2. Indonesia

On behalf of Indonesia, Mr. Syamsul LUSSA, Senior Advisor to the Minister from the Ministry of Tourism of the Republic of Indonesia delivered a speech on the success of Indonesia about Muslim Friendly Tourism.

At the outset, Mr. LUSSA mentioned about the role of government for developing MFT. Accordingly, he highlighted that the main roles of the government are to establish rules and regulations and facilitate the development of private sector by addressing the needs and challenges faced in the tourism sector. On the other hand, private sector should develop Muslim friendly products as well as give due regard to promotion of these products.

He also highlighted that Muslim-friendly tourism is not an exclusive type of tourism but rather it is an inclusive type of tourism for Muslims. This segment of tourism should be promoted in different areas of tourism, such as accommodation, travel agencies, SPAs or restaurants. Although particular notice has been given to accommodation or halal food, he stressed that SPA tourism is of particular importance among these areas. Indonesia has a great potential for developing Muslim-friendly SPA tourism in this regard.

In conclusion of his speech, Mr. LUSSA stated that determining a target for tourism development is crucial. By 2019, Indonesia targets 250 million domestic tourists and 20 million international tourist arrivals. With regards to target of Indonesia in tourism expenditure, he stated that the government aims to increase the contribution of tourism sector to 15 percent of GDP by 2019, whereas this number is 9 percent now. Indonesia also aims to rise its position, which was 70th out of 184 countries in 2013, in Tourism Competitiveness Index. By 2019, Indonesia targets to reach 30th place in this index. For reaching these goals, the government applies visa facilitation policies to attract international tourists.

5.3. Iraq

Ms. Nidhal AL MOHAMMEDAWI, Assistant of Chief Translator from Ministry of Culture and Tourism of the Republic of Iraq made a presentation regarding the Muslim-friendly tourism in Iraq.

At the beginning, Ms. MOHAMMEDAWI gave information on the tourism sector in Iraq. With its popular religious sites, especially in the Central and Southern regions, Iraq is one of the prominent tourism destinations for Muslim tourists. Moreover, many tourists visit Iraq for other types of tourism such as archeological, leisure and eco-tourism. In all types of tourism, the public and private sector provides all the requirements of Muslim travelers such as halal food and drink.

Ms. MOHAMMEDAWI also stated that for attracting more Muslim travelers, the government aims

- to encourage investments in Muslim-friendly products and services,
- to find new markets to stimulate the demand and to introduce new innovative marketing concepts to attract new visitors,
- to develop Muslim-friendly tourism workforce.

In conclusion of her presentation, Ms. MOHAMMEDAWI presented some policy advices for developing Muslim-friendly tourism in the OIC Member Countries. Accordingly, she highlighted the importance of strengthening the role of media in promotion of tourism sector and developing quality standards to meet the consumer needs of Muslim travelers. She also stated that enhancing cooperation among the OIC Member States is crucial for promoting tourism sector.

5.4. Malaysia

On behalf of Malaysia, Dr. Azrul ANAZ Mohd Any, Director (Research and Training), Islamic Training Centre (ITC), Ministry of Tourism and Culture Malaysia made a presentation on “Islamic Tourism: Sharing Malaysia’s Success Stories”.

In the presentation, Dr. ANAZ highlighted on the statistics of Muslim tourist arrivals and the significant contribution made by the Muslim travelers on tourist receipts. Malaysia’s efforts in promoting MFT is further manifested by the accolades received by Malaysia as a MFT destination, for instance maintaining the number one destination for Muslim travelers for four consecutive years. Such accolades indicate the recognition rendered to Malaysia’s efforts in promoting MFT for Muslim travelers by independent bodies such as CrescentRating and Mastercard, Thomson Reuters, TripAdvisor and Lonely Planet.

Malaysia’s success in promoting MFT is contributed to the strong role played by the government in ensuring that the tourism industry in general and MFT specifically can flourish by putting in place the necessary infrastructure such as the various standards, regulations, policies and incentives. For instance, the recent Muslim Friendly Hospitality Services-Requirements developed by the Department of Standards Malaysia indicate the importance placed by government to ensure that MFT is guided by a certain standard and that standard could be adopted by the stakeholders on a voluntary basis.

He also highlighted the significant attributes which are in place that contributed to Malaysia’s success in promoting MFT as follows:

- Accessible prayer facilities. Access to prayer facilities such as at airports, shopping complexes, themes parks, hospitals and most public areas are very easy for Muslim travelers to perform their prayers.
- Muslim friendly hotels. A number of hotels in Malaysia has publicly advertised as Muslim friendly whereby separate facilities for men and women are being allocated.
- The Halal factor. The halal certification by the Department of Islamic Development Malaysia is another crucial factor for Muslim travelers to feel confident to consume the food prepared by those certified operators.
- Good air connectivity with Muslim countries. Malaysia’s good air connectivity with Muslim countries is a significant point that contributes to the numbers of Muslim travelers visiting Malaysia. At present a total of 810 weekly flights from OIC countries are serving to Malaysia.

As a conclusion, Dr. ANAZ stated that Malaysia’s vital point of success as a MFT destination is due to its promotion of moderation. As a Muslim majority country, Malaysia’s promotion of moderation ensures the co-existence of the various ethnic and races in its public domain.

5.5. Turkey

On behalf of Turkey, Mrs. Tuba ULU YILMAZ, Controller from the General Directorate of Investment and Establishments, Ministry of Culture and Tourism made a presentation and shared Turkey's experience in "Muslim Friendly Tourism".

Firstly, Mrs. ULU YILMAZ gave a general view of tourism sector in Turkey. According to the data announced by World Tourism Organization, Turkey ranked 6th in tourist arrivals and 12th in tourism receipts in 2014. Additionally, she stated that in OIC Asian Group visitor arrivals, Turkey was the leading country followed by Malaysia in 2014. She also expressed that Turkey welcomed 6.4 million tourists from the OIC member countries in 2015, accounting for 17.7% of all tourists visiting Turkey in the same year. Additionally, Turkey was at the second place with 7.1 million Muslim visitors and with revenue of 6.6 thousand dollars, following the leading country Saudi Arabia. She also gave a brief introduction on "MasterCard-CrescentRating Global Muslim Travel Index (GMTI) 2015," that ranks countries based on a set of criteria assessing the level of satisfaction with services for Muslim travelers in each country. She stated that with its score of 73.8 points, Turkey is in the second place in this index.

Furthermore, Mrs. ULU YILMAZ mentioned the definitions given for Muslim friendly or halal tourism in the relevant literature. She gave examples of the demand and supply side key items for Muslim friendly tourism. She also demonstrated statistical data for the number of accommodation establishments, which is one of most important supply side key items. She highlighted that the certification of tourism enterprises in Turkey were officially given by the Ministry of Culture and Tourism. She added that although there is no certification system specifically for halal tourism or halal touristic facilities, there are hotels in Turkey that promote themselves as "halal hotels". She informed the participants that the Turkish Standard Institution (TSE) started issuing halal food certificates and was also in the process of publishing Halal Service Criteria for Hotels. Regarding the capacity of halal hotels in Turkey, she informed that according to some recent academic researches, 152 hotels use the concept of "halal hotel" in Turkey. As the Muslim friendly hotels made up around 5% of the total bed capacity in Turkey, she highlighted that this figure was very limited considering the totality of the Muslim tourist market. Additionally, she mentioned the guidelines for halal hotels to cater to the "need to have", "good to have" and "nice to have" services.

Mrs. ULU YILMAZ concluded her presentation by indicating the next steps to be undertaken by Turkey. She underlined the need for developing a policy for the niche market of Muslim friendly tourism.

6. Policy Options for Developing Muslim Friendly Tourism in the Member Countries

The session was moderated by Mr. Zulkifly Md. SAID, Director General of the Islamic Tourism Centre from the Ministry of Tourism and Culture of Malaysia. At the outset, Mr. SAID stated that “the Room Document for the Moderation Session of the 7th Meeting of the Tourism Working Group” would serve as the basis for the discussions in the moderation session. This document was prepared by the COMCEC Coordination Office in light of the findings of the analytical study prepared specifically for the Meeting and the answers of the Member Countries to the policy questions which have already been sent by the CCO.

At the beginning of the session, Mr. Mustafa Adil SAYAR, Expert from the COMCEC Coordination Office, made a brief presentation on the responses of the Member Countries to the policy questions on Muslim-Friendly Tourism sent to the Tourism Working Group focal points by the CCO. In his presentation, Mr. SAYAR gave a brief information on policy questions. He stated that the purpose behind these policy questions was to strengthen policy dimension in the discussions of the Tourism Working Group. After presenting the questions and responses of the Member Countries, he introduced the draft policy advices included in the Room Document.

After the presentation, Mr. SAID gave the floor to all delegations asking their opinions and comments for each policy advice as well as the experience of their respective countries in this regard. The participants shared their observations on the policy advices given in the room document and the room document was revised in accordance with the remarks of the participants. The policy advices attached to this report ² will be submitted to the 32nd Session of the COMCEC as an outcome of the 7th Meeting of the Tourism Working Group.

The policy recommendations highlighted by the participants are as follows:

- Developing basic guidelines for improving the basic MFT related services
- Increasing awareness of MFT market among the travel industry stakeholders through standardizing terminology used in MFT, introducing market awareness and customer service training programmes and utilizing, among others, social media for promotion and marketing
- Developing healthcare services and facilities for the MFT market through identifying the different strengths of the OIC Region, building specialization hubs, developing alternative/traditional treatments and wellness programs
- Launching an alliance among the Muslim-friendly travel agents/tour operators targeting MFT market

² The policy recommendations document is attached as Annex 3.

7. Private Sector Efforts in Muslim Friendly Tourism

7.1. HalalTrip.com

Mr. Fahad Moti KHAN, CTO of Halaltrip.com made a presentation on community centric platforms and the experience of Halaltrip.com.

In his presentation, Mr. KHAN stressed that every community faces their unique challenges. The most important issue for a private sector company in one of the Halal sectors is to focus on the core problems, such as different practices of halal in the Ummah. Mr. KHAN stated that some governments try to establish a certification body for different halal markets. However, he underlined that the world is moving towards niche markets and every niche segments have its own problems and the specific challenges of each niche segments should be identified and solved separately.

Mr. KHAN also informed the participants regarding the challenges of private sector in the MFT sector. Accordingly, every faith-based commercial organization faces the credibility challenge. As there is no specific standard for halal sectors, private sector companies need time and reputation to gain credibility from their customers. He also underlined that competing with giant companies, such as tripadvisor and booking.com, is another problem for the private sector companies in MFT sector. Mr. KHAN also stressed that the private sector in halal tourism sector should keep up with the innovation efforts in the market and provide quality for its customers.

For solving these challenges Mr. KHAN came up with some solutions.

- Credibility Solution: private sector can build its of standards with thought leadership and partnering with the other companies.
- The Content & Community Solution: Community based and peer-to-peer platforms
- The Technology Solution: Adapting innovation and new mobile centric products
- New Products: In order to compete with giant companies, companies should create unique products.

Mr. KHAN concluded his presentation by giving some policy recommendations:

- Adoption and promotion of the MFT standards
- Public private cooperation for promoting Muslim friendly tourism
- Creation of a culture of technology innovation and incubation support for new players

7.2. Halal Voyage

Mr. Cüneyt ÇETİN, the CEO of Halal Voyage made a short speech on the success story of Halal Voyage. Mr. ÇETİN informed the participants about their two trademarks, which are Evratur for domestic tourism and Halal Voyage for international tourism.

Mr. ÇETİN expressed that tourism is the fourth biggest industry in the world and halal tourism is a rising star in this sector. As the first halal tour operator in Turkey, Halal Voyage has more than 200 halal hotels in its portfolio. Using online system, Halal Voyage presents the best price

guarantee for its consumers. Other than providing hotel booking services, Halal Voyage also serves as a tour operator, with its 42 tour packages in Turkey and Dubai and gives other services such as Umrah, halal villa, yacht tourism.

Finally, he informed the participants that they will organize the 2nd Halal Tourism Conference in 2016 with the support of Turkish Ministry of Culture and Tourism.

8. Utilizing the COMCEC Project Funding

Mr. Hasan YENİGÜL, Expert at the COMCEC Coordination Office made a presentation on the COMCEC Project Funding introduced by the COMCEC Strategy. At the outset, Mr. YENİGÜL informed the participants about where the COMCEC Project Funding stands in the COMCEC Strategy. Mr. YENİGÜL underlined the basic qualifications of the COMCEC Project Funding as “simple and clearly defined procedures and financial framework”, and mentioned that CCO provided continuous support to the member countries during the all stages of the COMCEC Project Funding Mechanism.

After briefly explained the Project Cycle Management (PCM) concept, Mr. YENİGÜL highlighted the potential project owners. It was emphasized that relevant ministries and other public institutions of the Member Countries and the OIC Institutions operating in the field of economic and commercial cooperation could submit projects. He also underlined that member countries have to be registered to the relevant working groups in order to submit their project proposals.

He continued his presentation by explaining the “Project Selection Criteria” namely, compliance with Strategy’s Principles, and targeting strategic objectives of the Strategy, focusing on output areas and pursuing multilateral cooperation among the OIC Member Countries. Mr. YENİGÜL also emphasized that project proposals submitted by the member countries should be compliant with the sectoral themes stated in the Program Implementation Guidelines.

Mr. YENİGÜL pointed out the importance of the multilateralism for project appraisal and stated that project proposals should focus on common problems of at least two member countries and also should offer joint solutions for these problems.

During the presentation, three key actors and their responsibilities under the COMCEC Project Funding were identified; Project Owner (Project Submission and Implementation); the CCO (Program Management) and the Intermediary Bank (Project Monitoring and Financing). Moreover, steps and roles of these key actors throughout the project application process were defined.

Monitoring of projects was another issue explained in the presentation. Mr. YENİGÜL presented that the Bank would be mainly responsible for financial and technical monitoring of projects while the CCO would oversee the overall implementation of the PCM.

With respect to the financial framework, Mr. YENİGÜL emphasized that the funds are grant in nature and would be provided by the CCO.

Mr. YENİGÜL also gave information on 2014 and 2015 Projects. He stated that member countries and OIC institutions had shown great interest and 209 project proposals were submitted by member countries and OIC institutions in three-year period (2013-2015). He also stated that totally three tourism projects were implemented under the COMCEC Project Funding in 2014 and 2015. They were titled “Improving Statistical Capacities of Tourism Sector in COMCEC Mediterranean and Gulf Region”, “Cities of Common Cultural Heritage” and “Strengthening Community Resilience through eco-tourism” proposed, respectively, by SESRIC, Azerbaijan and the Gambia.

Mr. YENİGÜL shared brief information with participants regarding online project submission system and stated that member countries could submit their project proposals easily by using this user-friendly system.

Lastly, Mr. YENİGÜL reminded the participants that fourth call for project proposals would start as of early September 2016 and project proposals would be submitted to the CCO until 31st September, 2016. He also invited all esteemed countries and OIC institutions to submit their project proposals.



9. Closing Remarks

The Meeting ended with closing remarks of Mr. Zulkifly Md. SAID, Director General of the Islamic Tourism Centre from the Ministry of Tourism and Culture of Malaysia, and the Chairperson of the Meeting and Mr. M. Metin EKER, Director General of the COMCEC Coordination Office.

In his remarks, Mr. SAID thanked all the Member Countries for giving him the opportunity to chair this session. He also thanked all the participants, presenters for their invaluable contributions to the discussions.

Mr. M. Metin EKER also thanked all the participants for their valuable contributions. He underlined that the observations, comments and critiques of the participants on the analytical study prepared specifically for the Tourism Working Group Meetings would be mostly welcomed in order to improve its quality. He stated that the main output of the meeting is the draft policy recommendations and they would be presented to the 32nd Session of the COMCEC for adoption. Mr. EKER also highlighted the importance of COMCEC Project Funding mechanism and invited the Member Countries as well as the relevant OIC Institutions to submit their projects.

Mr. EKER also informed the participants that the next (8th) Meeting of the Tourism Working Group will be held on September 1st, 2016 in Ankara with the theme of “Muslim Friendly Tourism (MFT): Developing and Marketing MFT Products and Services in the OIC Member Countries.”

Before concluding, Mr. EKER thanked again all the participants and wished them a safe trip back home.

Annex 1: Agenda of the Meeting



7th MEETING OF THE COMCEC TOURISM WORKING GROUP

(February 4th, 2016, Ankara)

“MUSLİM FRIENDLY TOURISM (MFT): UNDERSTANDING THE DEMAND AND SUPPLY SIDE IN THE OIC MEMBER COUNTRIES”

AGENDA

Opening Remarks

1. The COMCEC Tourism Outlook
2. Understanding the Concept of Muslim Friendly Tourism (MFT)
 - a. Conceptual Framework
 - b. Components/Principles of MFT
 - c. Global Trends in Supply and Demand Side of MFT
3. The Demand and Supply Side of MFT in the OIC Member Countries: Current Situation, Main Challenges, Recommendations and Prospects
 - a. The Usage and Diffusion of MFT in the Member Countries /MFT Outlook of the Member Countries
 - b. Government Policies and Strategies for Developing the Demand and Supply Side of MFT
 - c. Selected Case Studies
4. Success Stories of the Member States
5. Policy Options for Developing Muslim Friendly Tourism in the Member Countries
6. Private Sector Efforts for the Supply Side of MFT
7. Utilizing the COMCEC Project Funding

Closing Remarks



Annex 2: Program of the Meeting



7th MEETING OF THE COMCEC TOURISM WORKING GROUP

(February 4th, 2016, Ankara)

“MUSLIM FRIENDLY TOURISM (MFT): UNDERSTANDING THE DEMAND AND SUPPLY SIDE IN THE OIC MEMBER COUNTRIES”

PROGRAMME

08.30-09.00 **Registration**

09.00-09.15 **Opening Remarks**

The COMCEC Tourism Outlook

09.15-09.35 - *Presentation: Ms. Aslı TAŞMAZ DADAKOĞLU*
Expert
COMCEC Coordination Office (CCO)

09.35-09.45 - *Discussion*

Understanding the Concept of Muslim Friendly Tourism (MFT)

09.45-10.10 - *Presentation: Mr. Fazal BAHARDEEN*
CEO
CrescentRating

10.10-10.45 - *Discussion*

10.45-11.00 *Coffee Break*

Demand and Supply Side of MFT in the OIC Member Countries: Current Situation, Main Challenges, Recommendations and Prospects

11.00-11.40 - *Presentation: Mr. Fazal BAHARDEEN*
CEO
CrescentRating

11.40-12.30 - *Discussion*

12.30-14.00 *Lunch*

14.00-15.30 **Success Stories of the Member States**

- *Presentation(s)*
- *Discussion*

15.30-15.45 *Coffee Break*

Policy Options for Developing Muslim Friendly Tourism in the Member Countries

There was be a moderation session under this agenda item. The participants deliberated on the policy options/advices for developing Muslim-friendly tourism in the Member Countries. The Room Document was prepared by the CCO, in light of the findings of the analytical study prepared specifically for the Meeting and the answers of the Member Countries to the policy questions which have already been sent by the CCO. This Document was shared with the Tourism Working Group focal points before the Meeting with a view to enriching the discussions during the Session and coming up with concrete policy advices for the policy approximation among the Member Countries in this important field. At the beginning of the session, CCO made a short presentation introducing the responses of the Member Countries to the policy questions as well as the Room Document.

- 15.45-16.00 - Presentation: “Responses of the Member Countries to the Policy Questions on Muslim Friendly Tourism”
Mr. Mustafa Adil SAYAR
Expert
COMCEC Coordination Office

- 16.00-17.15 - *Discussion*

Private Sector Efforts in Muslim Friendly Tourism

- 17.15-17.25 - *Presentation: Mr. Fahad Moti KHAN*
Chief Technology Officer
Halaltrip.com

- 17.25-17.35 - *Presentation: Mr. Cüneyt ÇETİN*
CEO
Halal Voyage

- 17.35-17.45 - *Discussion*

Utilizing the COMCEC Project Funding

- 17.45-17.55 - *Presentation: Mr. Hasan YENİGÜL*
Expert
COMCEC Coordination Office (CCO)

- 17.55-18.05 - *Discussion*

18.05-18.15 *Closing Remarks*

Annex 3: The Policy Recommendations

THE POLICY RECOMMENDATIONS HIGHLIGHTED BY THE 7TH MEETING OF THE TOURISM WORKING GROUP

Distinguished Members of the COMCEC Tourism Working Group,

The COMCEC Tourism Working Group (TWG) has successfully held its 7th Meeting on February 4th, 2016 in Ankara, Turkey with the theme of “Muslim Friendly Tourism (MFT): Understanding the Demand and Supply Sides in the OIC Member Countries.” During the Meeting, Tourism Working Group made deliberations for policy approximation among the Member Countries regarding MFT. The Room Document, prepared in accordance with the main findings of the analytical study conducted for the 7th Meeting of TWG and the answers of the Member Countries to the policy questions, was the main input for the discussions. During the Meeting, the participants discussed the policy recommendations given below.

Policy Advice 1. Developing basic guidelines for improving the basic MFT related services

Rationale:

The Muslim population is growing rapidly and is expected to be around 26 % of the world’s population by 2030. Growing Muslim population and its increasing disposable income would lead to millions to increasingly take up travel for leisure, adventure and exploration. With the increasing number of Muslim tourists, simultaneously there will be a huge demand for halal/Muslim friendly products and services. Many Muslim travelers recently are more halal conscious, who prefer halal foods or Muslim-friendly services while staying in hotels or having vacation in certain places.

Nonetheless, according to *the Analytical Study*, one of the main challenges faced by Muslim tourists is the lack of common understanding on the basic principles for the Muslim-friendly services. This challenge also increases the costs of companies, since they have to follow different practices in this field. In addition, Muslim tourists also face with different practices of companies regarding MFT services. Therefore, developing basic MFT guidelines will greatly help companies to provide MFT services with better quality and to meet the needs of the Muslim travelers.

Policy Advice 2. Increasing awareness of MFT market among the travel industry stakeholders through standardizing terminology used in MFT, introducing market awareness and customer service training programmes and utilizing social media for promotion and marketing.

Rationale:

Despite being a relatively new concept within tourism sector, understanding the MFT market and its key components is critical for the OIC member states. In recent years, there are some improvements to increase the awareness about MFT such as, halal travel indicator was developed, more airports have been adding halal certified restaurants and prayer spaces and some airlines started offering Halal Food on board at their flights. Moreover, travel agencies and digital marketing platforms have also been evolving according to growing needs of Muslims such as the Singapore-based company, HalalTrip.com, rates hotels and resorts in terms of their Halal-friendliness since December 2013 and HalalBooking.com provides Muslim-Friendly holidays to travelers etc. Furthermore, some travel agencies have recently launched Luxury Halal Travel focusing on ‘curating’ premium travel experiences like Halal Tour of China and Hong Kong. In addition to these, several conferences have been held on Halal or Muslim Friendly Tourism to enhance awareness in this field.

Despite the existing efforts, except few countries, the awareness of MFT market is still very weak in the OIC Region. Moreover, there is an inconsistency in the use of terminology and definitions related to different aspects of MFT. Therefore, there is a need to

- standardize the terminology used in the MFT,
- introduce roll out market awareness and customer service training programs for the travel and hospitality professionals for the all aspects of MFT.
- Utilize social media and other media tools to provide a significant communication platform for marketing MFT products and services to a wider audience.

Policy Advice 3. Developing healthcare services and facilities for the MFT market through identifying the different strengths of the OIC Region, building specialization hubs, developing alternative/traditional treatments and wellness programs

Rationale:

Medical tourism is one of the growing markets in tourism sector. It refers to traveling to another country for the aim of obtaining medical treatment or aged care. In order to attract Muslim patients, many countries have begun to provide Muslim-friendly services, such as halal food, halal pharmaceuticals, prayer facilities etc. According to the analytical study, OIC has a vast unexploited potential for Muslim-friendly medical tourism with relatively more affordable costs. However, there is a lack of awareness about the Muslim-friendly healthcare sector in the member countries. In this respect, Muslim-friendly healthcare market in the member countries may be promoted for attracting Muslim healthcare visitors through identifying the different strengths of the OIC Region, building specialization hubs, developing alternative/traditional treatments and wellness programs based on the strengths of the OIC Region.

Policy Advice 4. Launching an alliance among the Muslim-friendly travel agents/tour operators targeting MFT market

Rationale:

Travel agents and tour operators are the key players for growing Muslim friendly tourism market in the member countries. For catering to Muslim clients properly, travel agents and tour operators should be aware of the preferences and needs of Muslim travelers. However, according to the analytical study, only few SMEs focus on Muslim-friendly tourism and they cannot compete with the global players when they enter the MFT market. In order to strengthen these key players, the member countries may launch an alliance of travel agents and tour operators targeting specifically MFT market.

Instruments to Realize the Policy Advices:

- ***COMCEC Tourism Working Group:*** In its subsequent two meetings, the COMCEC Working Group will elaborate on the above mentioned policy areas and the sub-areas in a more detailed manner. 8th and 9th Meetings of the Tourism Working Group will be held with the themes of “Muslim Friendly Tourism (MFT): Developing and Marketing MFT Products and Services in the OIC Member States” and “Muslim Friendly Tourism (MFT): Regulation, Standardization and Certification”, respectively.
- ***COMCEC Project Funding:*** Under the COMCEC Project Funding, the COMCEC Coordination Office calls for project each year. With the COMCEC Project Funding, the Member Countries participating in the Working Groups can submit multilateral cooperation projects to be financed through grants by the COMCEC Coordination Office. For the above mentioned policy areas and their sub-areas, the Member Countries can

utilize the COMCEC Project Funding and the COMCEC Coordination Office may finance the successful projects in this regard. The projects may include seminars, training programs, study visits, exchange of experts, workshops and preparing analytical studies, needs assessments and training materials/documents, etc.

- ***OIC/COMCEC Private Sector Tourism Forum:*** In its meetings, the OIC/COMCEC Private Sector Tourism Forum may elaborate on the above mentioned policy areas and the sub-areas from the private sector perspective. In this respect, 4th Meeting of the Forum has been held on 14-15 January 2016, with the theme of “Promoting Muslim Friendly Tourism Products and Services in the OIC Member Countries.”
- ***SMIIC:*** SMIIC’s Technical Committee on Tourism and Related Services can be benefited for developing/harmonizing Muslim-friendly tourism standards in the member countries.

Annex 4: List of Participants

LIST OF PARTICIPANTS OF 7th MEETING OF THE COMCEC TOURISM WORKING GROUP (FEBRUARY 4th 2016, ANKARA)

A. INVITED STATES

ISLAMIC REPUBLIC OF AFGHANISTAN

- Mr. M.RAMIN ATIQZADA
Director of Tourism, Ministry of Information and Culture

- Mr. HAMIDULLAH ABDUL
Director of Policy & Plan, Ministry of Information and Culture

THE REPUBLIC OF AZERBAIJAN

- Mr. VASIF ALIYEV
First Secretary, Embassy of the Republic of Azerbaijan

THE REPUBLIC OF GAMBIA

- Mr. ALAGIE LAYE
Investment Manager, Gambia Tourism Board

- Mr. YA AWA NYASSI
Planner, Ministry of Tourism and Culture

THE REPUBLIC OF INDONESIA

- Mr. SYAMSUL LUSSA
Senior Advisor to the Minister

- Ms. SURANA SURANA
Deputy Director, Ministry of Tourism

THE REPUBLIC OF IRAQ

- Ms. NIDHAL AL MOHAMMEDAWI
Assistant of Translator Chief, Ministry of Culture and Tourism

- Ms. RANA AL MINSHIDAWI
Assistant of Translator, Ministry of Culture and Tourism

THE KYRGYZ REPUBLIC

- Mr. AZAMAT ZHAMANKULOV
Deputy Minister, Ministry of Culture, Information and Tourism

- Mr. MEDER ABAKIROV
Counsellor, Embassy of the Kyrgyz Republic

MALAYSIA

- Mr. ZULKIFLY MD. SAID
Director General, Ministry of Tourism and Culture

- Mr. MUHAMMAD AIMAN ZAKARIA
Ministry of Tourism and Culture



- Mr. AZRUL ANAZ MOHD ANY
Ministry of Tourism and Culture

REPUBLIC OF MALI

- Mr. BIRAMA DIAKON
Technical Advisor, Ministry of Culture, Craft and Tourism
- Mr. SIDY KEITA
Director, Mali National Tourism and Hospitality Board

THE REPUBLIC OF MOZAMBIQUE

- Mr. JOSE FARIA
Head of Department, Ministry of Culture and Tourism
- Mr. LEILA NANVERESSA
Technician, Ministry of Culture and Tourism

STATE OF PALESTINE

- Mr. AZMI ABU GHAZALEH
Undersecretary, Embassy of Palestine in Ankara

REPUBLIC OF SENEGAL

- Ms. FATIMATA ZAHRA RASSOUL THIAM
Technical Advisor, Ministry of Tourism and Air Transports

REPUBLIC OF SUDAN

- Mr. BADRELDIN ABBAS ELBASHIR ELAMAS
Director, Ministry of Tourism, Antiquities and Wildlife
- Mr. MOHAMED MUDATHIR ABBAS ELAMIN
Director, Ministry of Tourism, Antiquities and Wildlife

REPUBLIC OF TUNISIA

- Mr. CHERIF CHARNI
Tunisian National Tourism Office

REPUBLIC OF TURKEY

- Mr. RAMAZAN ÇOKÇEVİK
Deputy Director General, Ministry of Culture and Tourism
- Ms. ESEN NEFTÇİ ÖZTÜRK
Head of Department, Ministry of Culture and Tourism
- Mr. SEDAT GÖNÜLLÜOĞLU
Head of Department, Ministry of Culture and Tourism
- Mr. MUSTAFA ÖZSOY
Expert, Ministry of Culture and Tourism
- Ms. AYTEN YILDIZ
Coordinator

- Ms. TUBA ULUYILMAZ
Coordinator
- Mr. BAHADIR KARA
Coordinator

B. INVITED INSTITUTIONS

CRESCENTRATING

- Mr. FAZAL BAHARDEEN
CEO, CrescentRating Pte. Ltd.

HALALTRIP

- Mr. FAHAD KHAN
CTO

HALAL VOYAGE

- Mr. CÜNEYT ÇETİN
General Manager
- Mr. MUZAFFER ONUR DAĞHAN
Ceo Assistant, Private Tourism Sector

**STATISTICAL, ECONOMIC AND SOCIAL RESEARCH AND TRAINING CENTER FOR
ISLAMIC COUNTRIES (SESRIC)**

- Ms. MAEDEH BON
Researcher, Tourism Planning and Management

SMIIC

- Mr. İHSAN ÖVÜT
Secretary General
- Mr. LOTFI BEN SAID
Assistant Secretary General

C. COMCEC COORDINATION OFFICE

**General Directorate of Foreign Economic Relations,
State Planning Organization of the Republic of Turkey**

- Mr. METİN EKER
Director General, Head of COMCEC Coordination Office
- Mr. MUSTAFA TEKİN
Head of Department
- Mr. SELÇUK KOÇ
Head of Department
- Ms. ASLI TAŞMAZ
Expert



- Mr. GÖKTEN DAMAR
Expert
- Mr. MUSTAFA ADİL SAYAR
Assistant Exper
- Mr. MEHMET C. AKTAŞ
Assistant Expert, PCM
- Mr. OKAN POLAT
Protocol Relations
- Mr. NAZIM GÜMÜŞ
Protocol Relations
- Ms. ÖZGÜL YÜKSEL
Coordinator of Organization
- Ms. HANDE ÖZDEMİR
Coordinator of Registration Office
- Ms. HAVVA KÖSEOĞLU
Assistant of Registration Office
- Mr. EMİNE DEMİREL
Coordinator of Documentation Centre
- Mr. KEMAL ARSLAN
Coordinator of Meeting Rooms
- Mr. ALİ VURAL
Assistant of Meeting Rooms
- Mr. ERCAN İBİK
Coordinator of Transportation
- Ms. NAZİFE GÜLGEN
Coordination of Social Programme