



**DEVELOPING AIR LINKAGE TO SUSTAIN TOURISM AMONG  
THE OIC MEMBER STATES,  
TURKISH EXPERIENCE**

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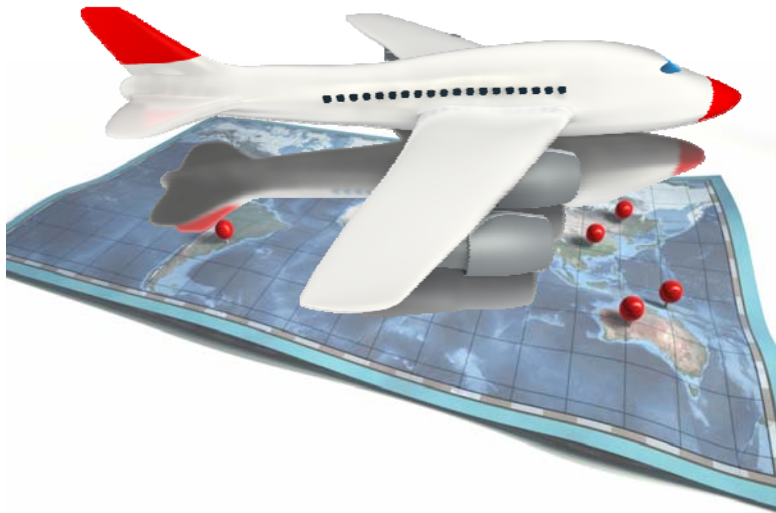









**WELCOME TO ANKARA**



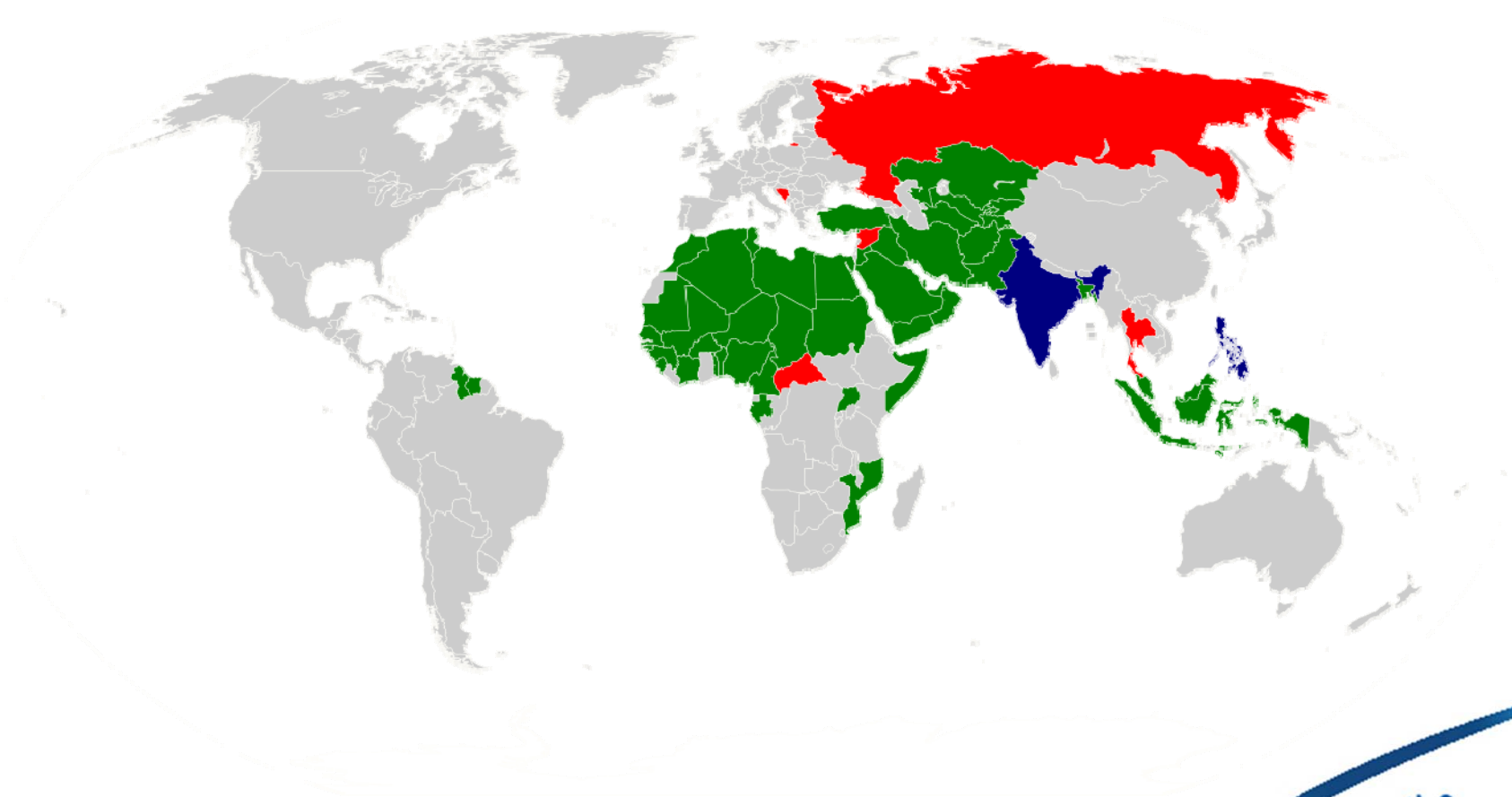
# CONTENT



-  BIG WORLD and OIC
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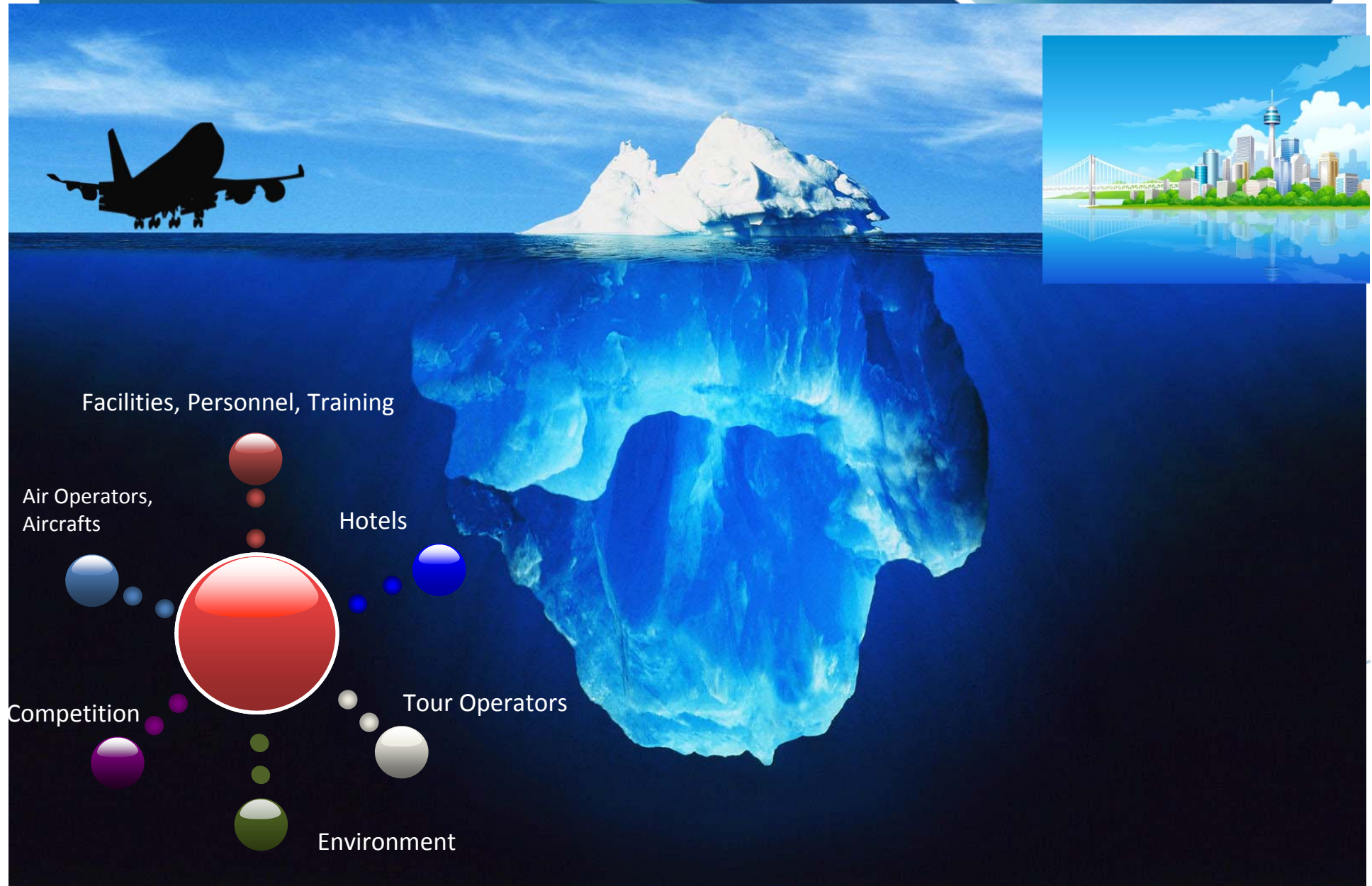


# OIC WORLD





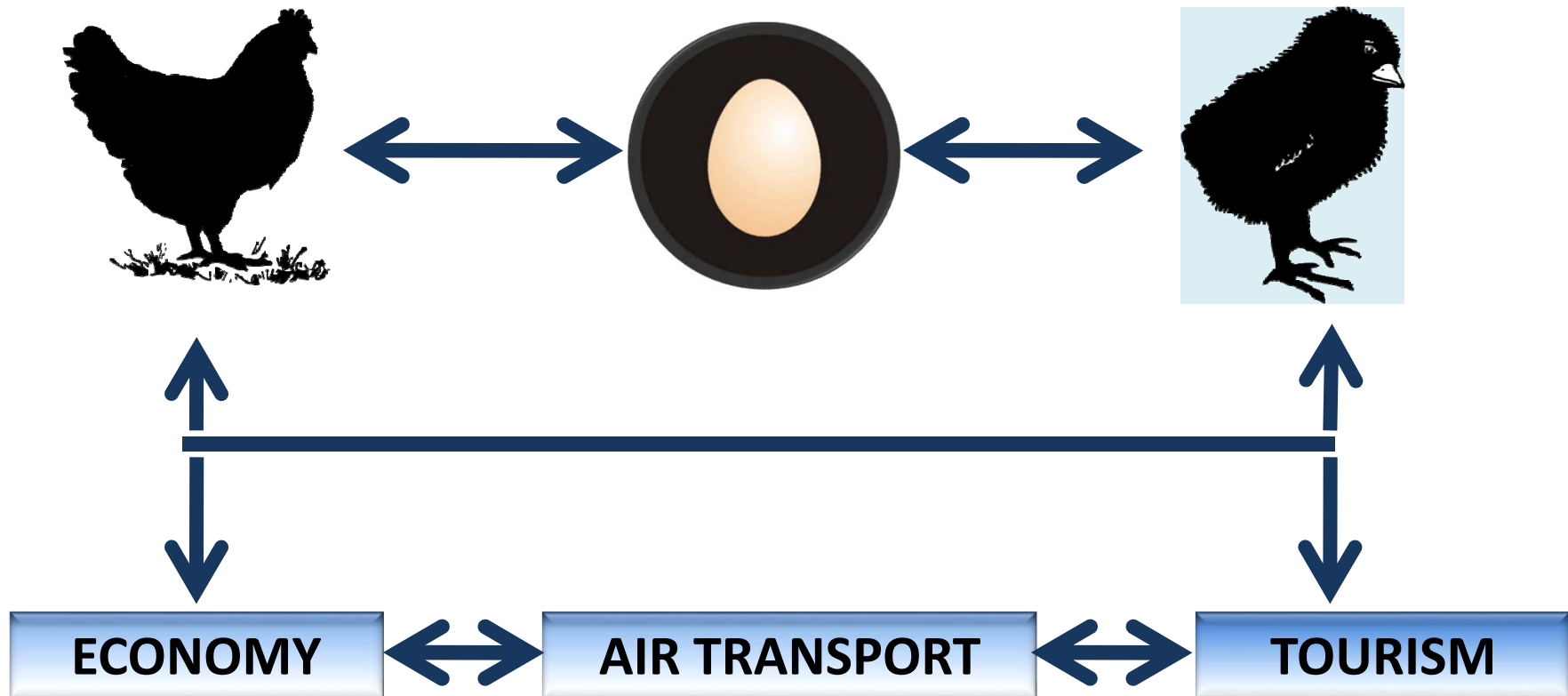
# Iceberg





# AIR TRANSPORT AND TOURISM

WHAT COMES FIRST?



AIR TRANSPORT VERSUS TOURISM VERSUS ECONOMY

# Big World of OIC States

- ✈ 57 MEMBER STATES OUT OF 193 STATES,
- ✈ 1.67 BILLION POPULATION OUT OF 7.1 BILLION (%24),
- ✈ 10 TRILLION USD OUT OF 85 TRILLION GDP (%12),
- ✈ STATIC IN ECONOMY,
- ✈ DYNAMIC IN CONFLICT,
- ✈ AWAKENING WORLD,



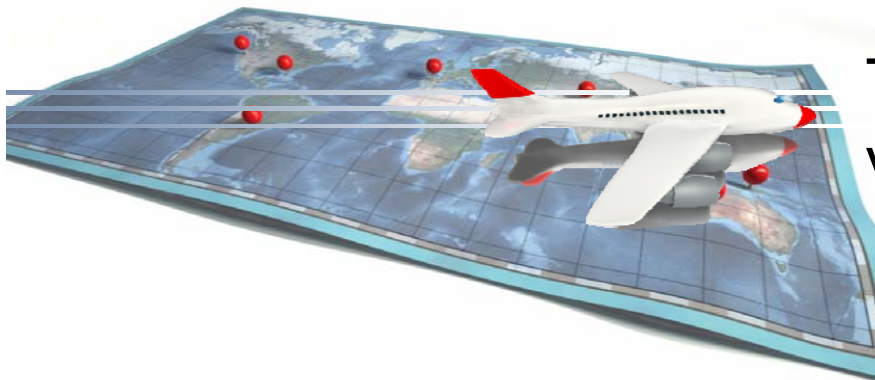
# COMCEC AND OIC

## COMCEC'S VISION

- To address the economic challenges of the Islamic Ummah ....
- To produce and disseminate knowledge, .....
- To serve as the central forum for .....
- To study all possible means of strengthening economic and commercial ....
- To draw up programs and ...
- To ensure the overall coordination.....

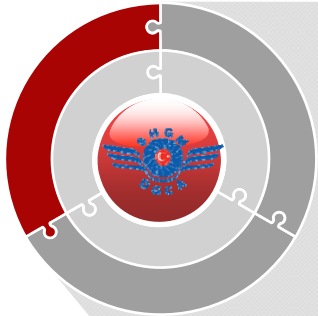
## OIC'S CHARTER

To be guided by the noble islamic values of unity and fraternity





# COMCEC'S STRATEGY



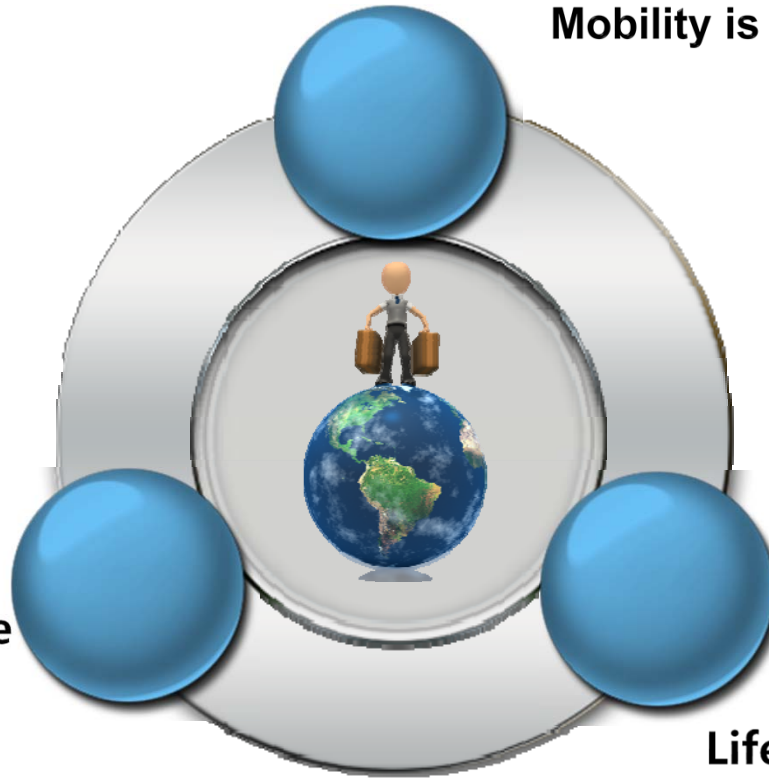
## CORE PRINCIPLES;

- ✓ **Enhancing mobility,**
- ✓ Strengthening solidarity,
- ✓ Improve governance,
- ✓ **Improve prosperity of life quality**



## ENHANCING MOBILITY

**Mobility is key word for life**



**If there is a mobility, there  
is abundancy**

**Life is itself mobility**



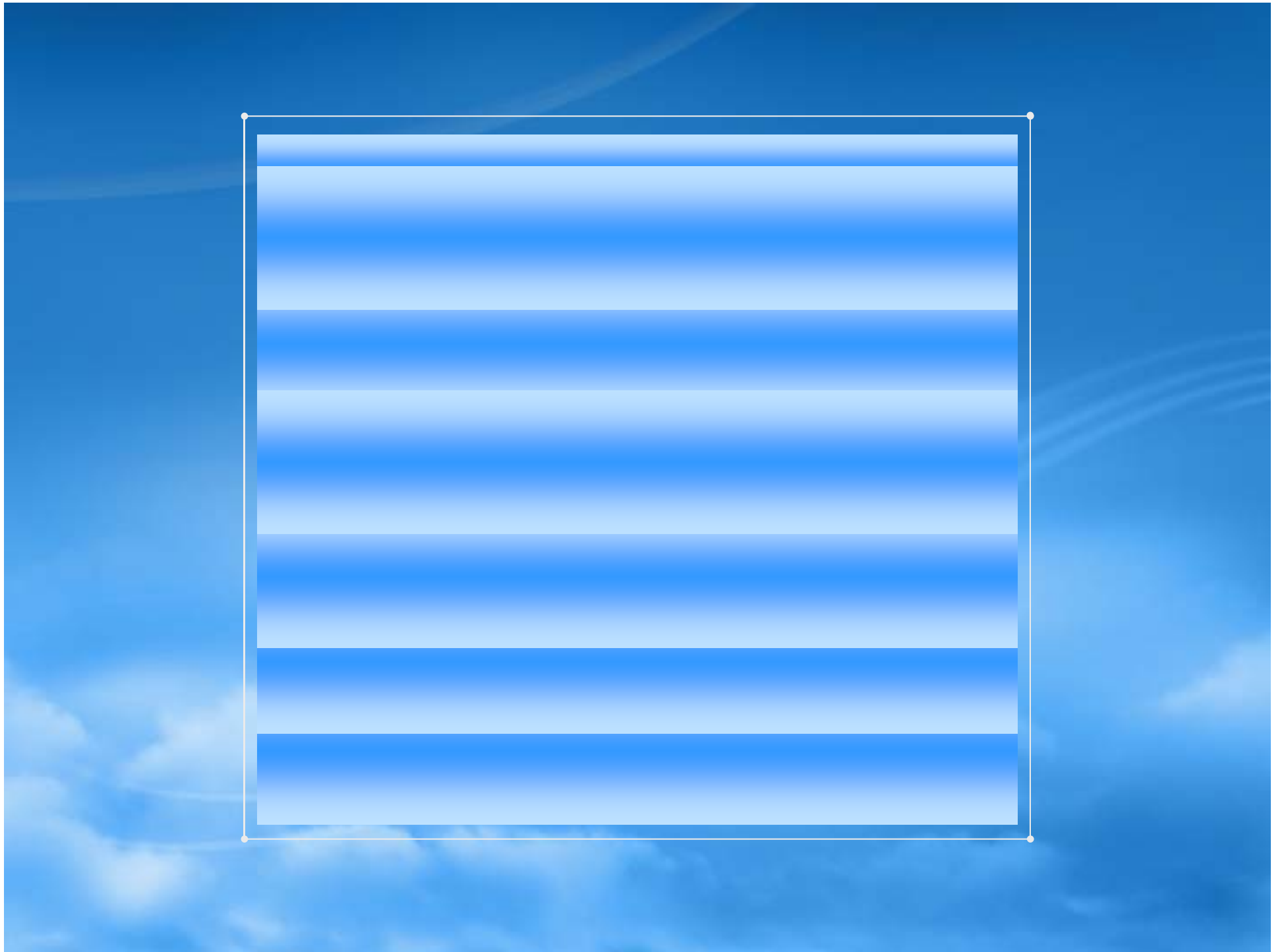
## IMPROVE PROSPERITY & LIVING QUALITY

**Human deserves prosperity and life quality**

**Wealth is not everything but health is very dependent on wealth**

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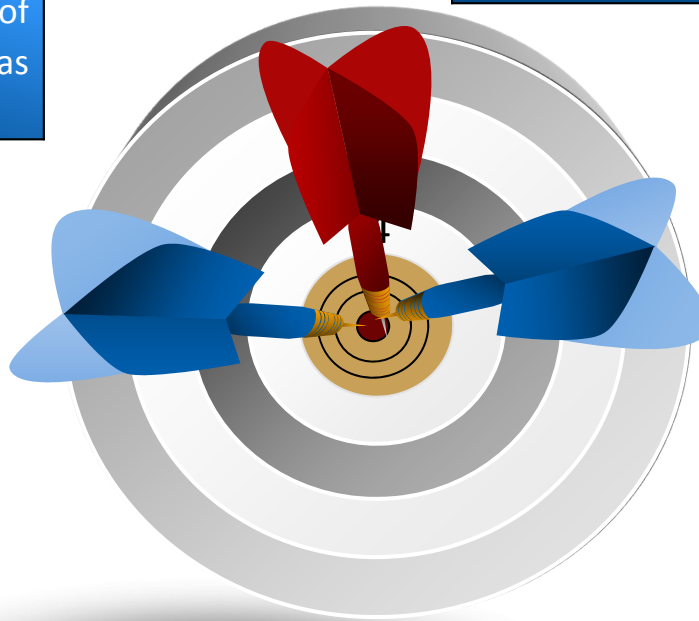




## Value of Air Transport

Air transport industry is engine of global economy in larger context as well as wings for tourism industry

Air transport makes the possibility of meeting people

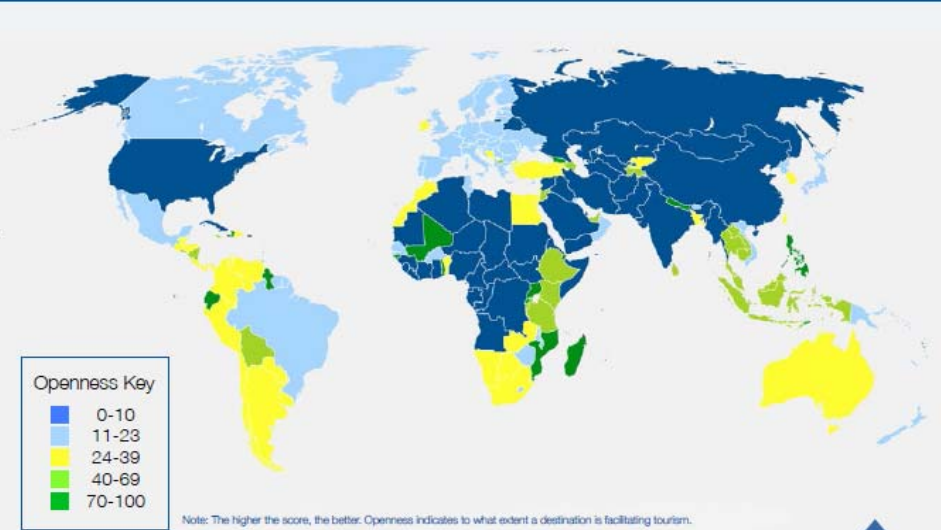


**AVIATION INDUSTRY MEANS;**  
More Tourism,  
More Employment,  
Contribution to Global Economy



# Joint Statement on Aviation and Tourism

Tourism visa openness index by region, 2013



The 2013 UNWTO Tourism Visa Openness Report shows that between 2010 and 2013, the percentage of the population requiring a traditional visa to travel decreased from 77% in 2008 to 64% in 2013. South-East Asian, East African, Caribbean and Oceania destinations are among the most open while Central African, North African and North American destinations are the most restrictive regions.



## UNWTO and ICAO join hands in linking aviation and tourism goals

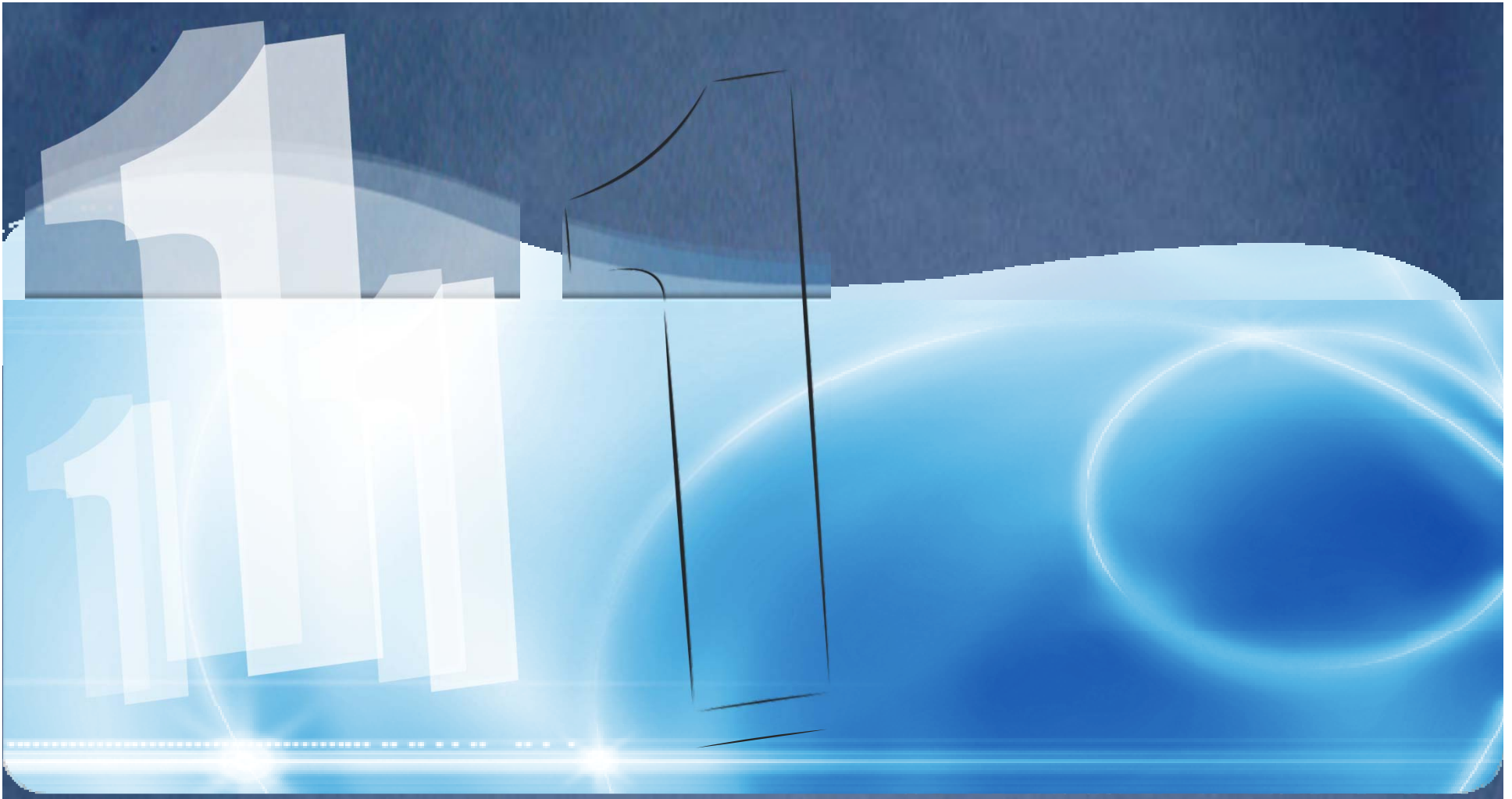
In 2013, UNWTO and ICAO signed a Joint Statement on Aviation and Tourism, **Highlighted as key areas**

- Visa facilitation,
- Taxation,
- The modernization of aviation regulations and the development of convergent rules for the travelers,
- Enterprise protection for improved collaboration.

collaboration

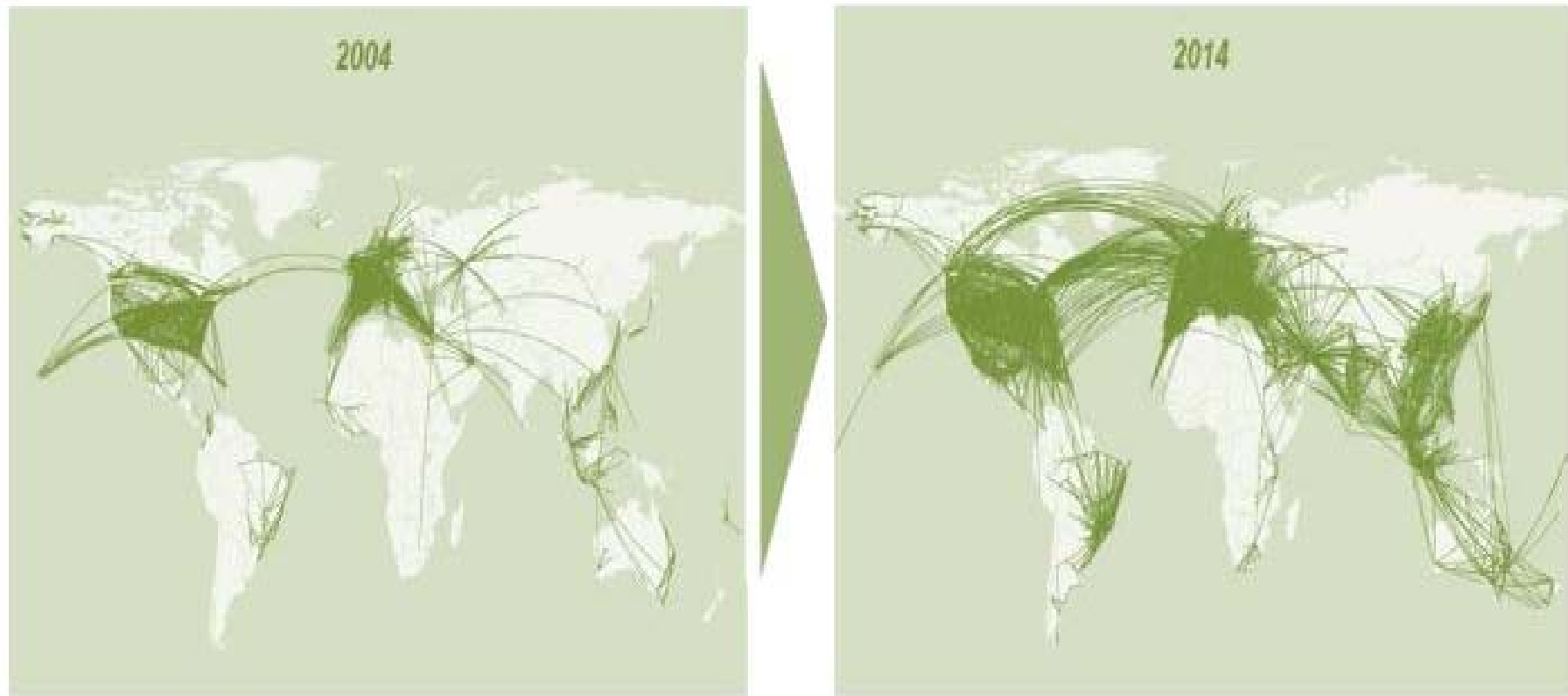
➤ Enterprise protection for improved  
convergent rules for the travelers





**SOME STATISTICS TO BE CONSIDERED**

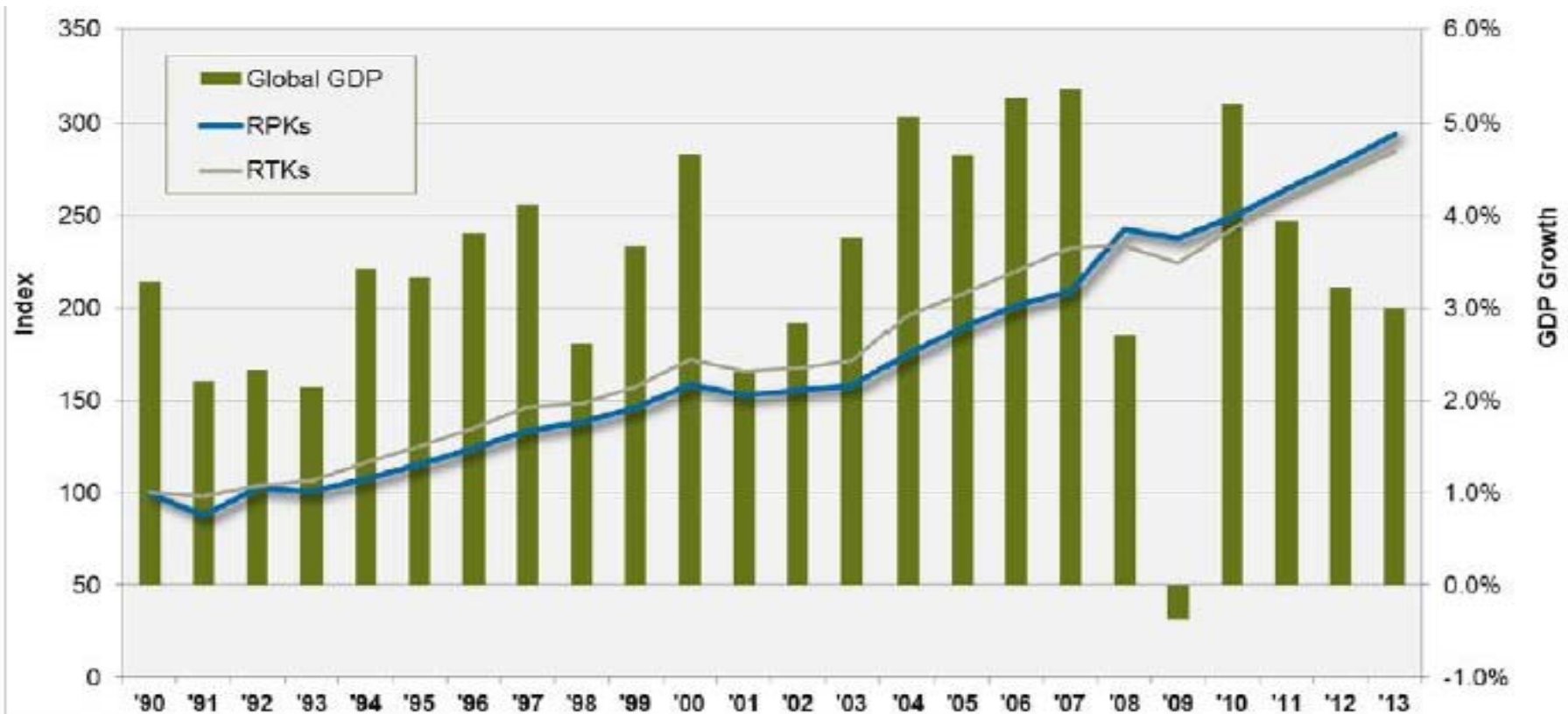
## LCC Routes and contribution in 2004 and 2014



Source: PaxIS, OAG, ICF Analysis



# Growth in Global GDP and Air Travel



Note: RTK=Revenue Tonne Kilometre, RPK=Revenue Passenger Kilometre

Source: ICAO for 1980-2008 data, IATA Financial Monitor 2009-2012, International Monetary Fund, World Economic Outlook Database, April 2014





# Global Employment and GDP Generated by Air Travel

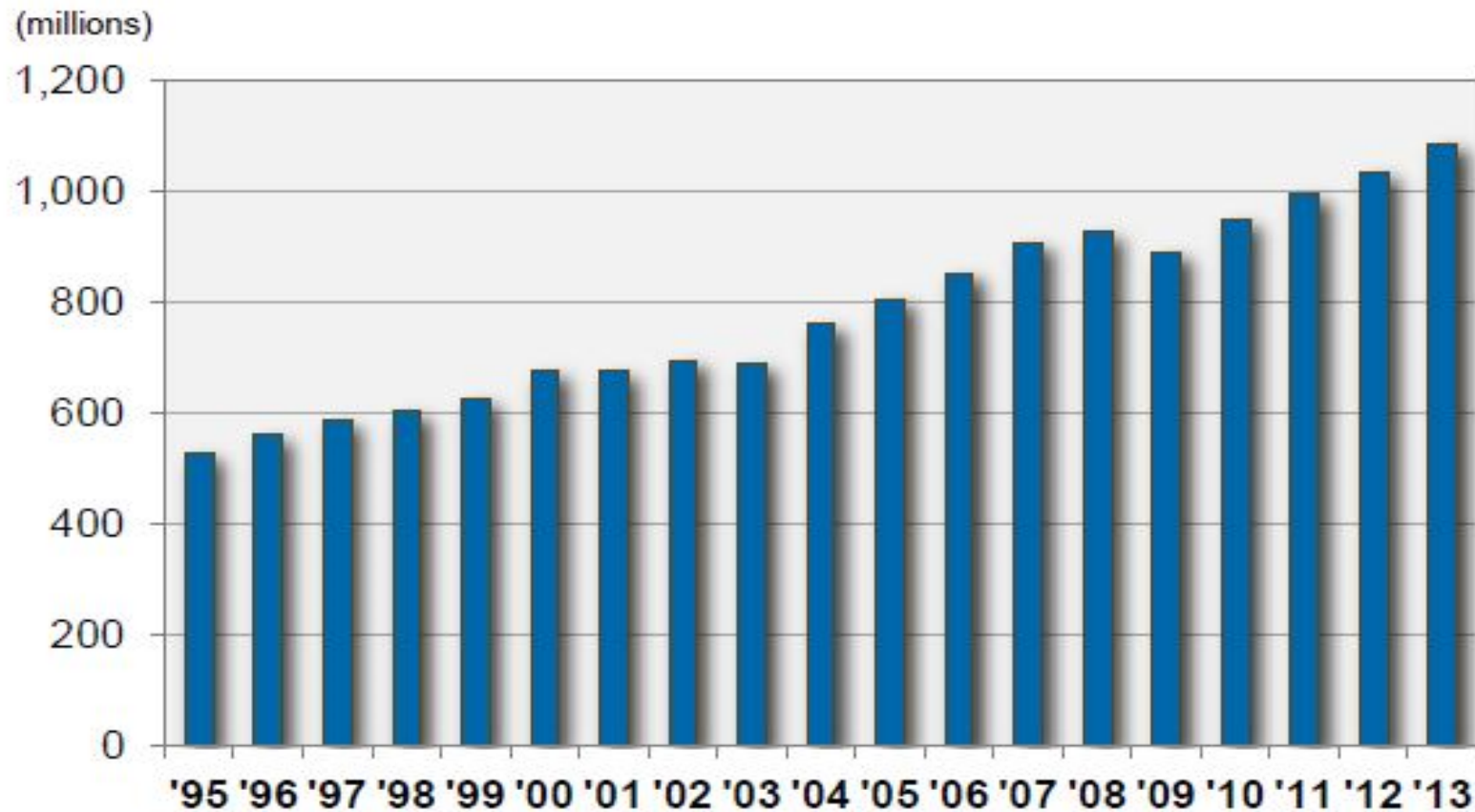
Impact	Areas of Impact	Employment Generated (millions)	GDP Generated (USD billion)
Direct	On-site airport (retail, car rental, customs and immigration, etc.), airlines, air navigation on-site airport work, airlines, air navigation	8.7	\$606
Indirect	Suppliers to the industry; examples: aviation fuel suppliers; construction companies that build airport facilities; suppliers of sub-components used in aircraft; manufacturers of goods sold in airport retail outlets	9.8	\$796
Induced	Activity supported through employees in the industry (whether direct or indirect) that use their income to buy goods and services for private consumption	4.6	\$324
Tourism	Hotels, Restaurants, Cultural Institutions, etc.	35.0	\$807

Source: Air Transport Action Group, "Aviation Benefits Beyond Borders, April 2014 Report"

SHARE	AVIATION (%)	TOURISM (%)
EMPLOYMENT	39,8	60,2
GDP CREATED	68,1	31,9



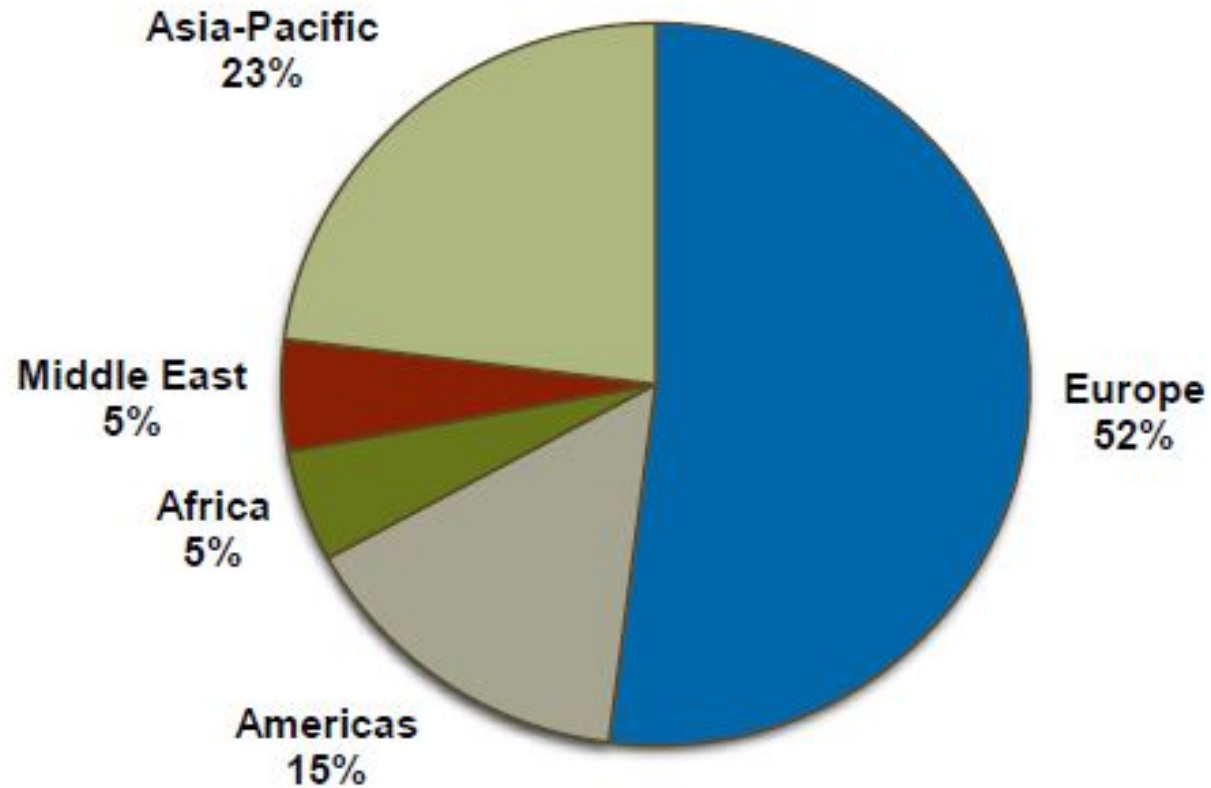
## Worldwide International Tourist Arrivals (1995-2013)



Source: United Nations World Tourism Organization



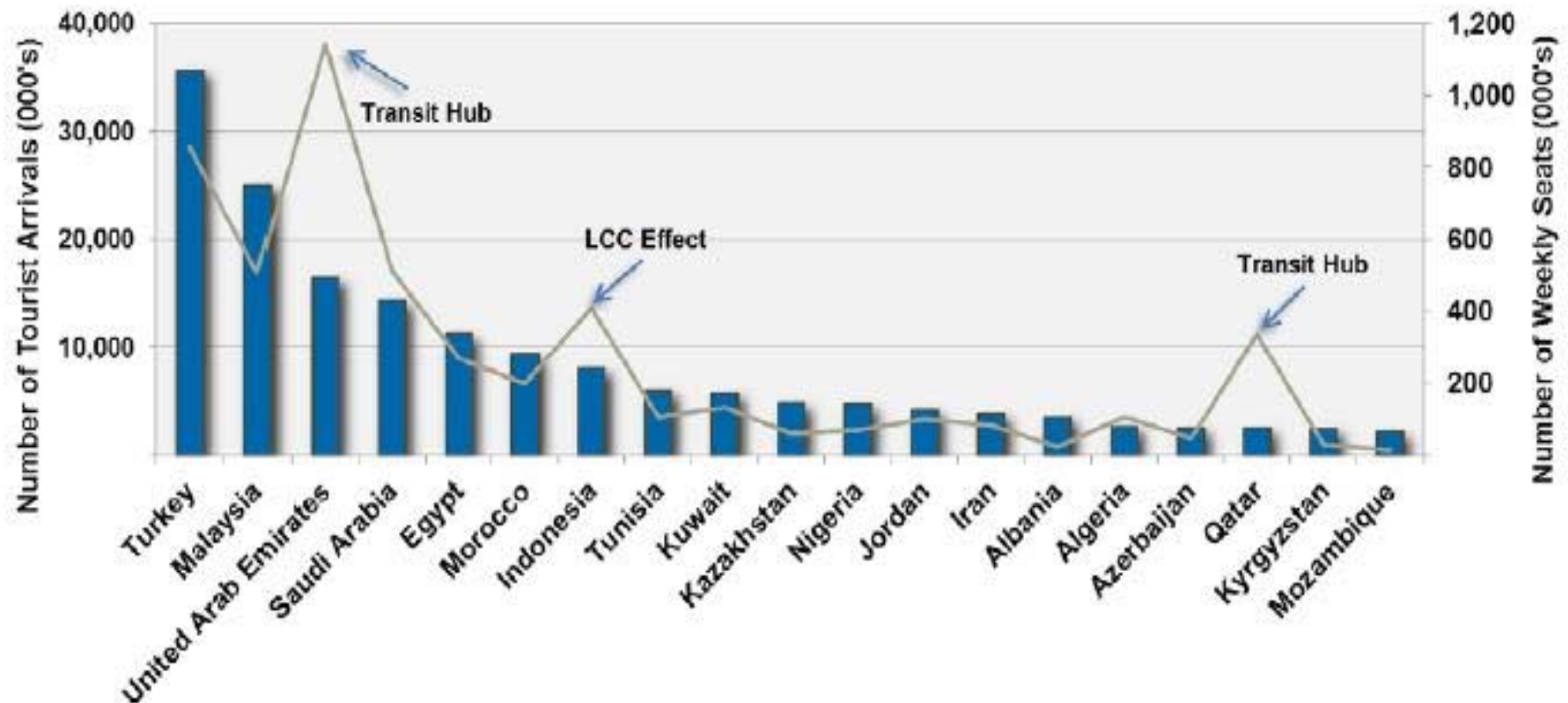
# Distribution of 2013 International Tourist Arrivals



Source: United Nations World Tourism Organization



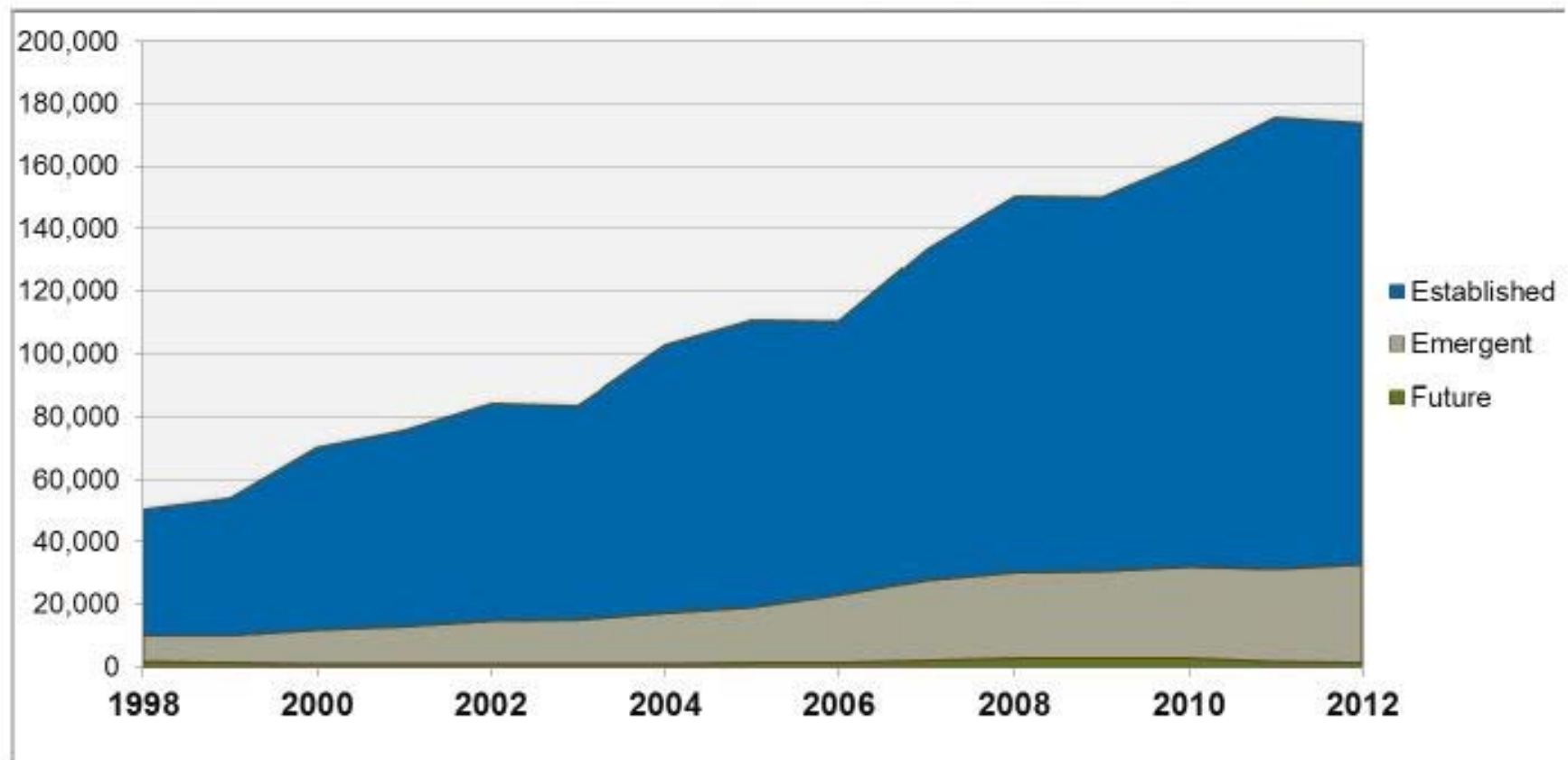
## Annual Tourist Arrivals and Weekly Seats in OIC, 2012



Source: SESRIC, OAG Schedules



## Evolution of International Tourist Arrivals in the OIC Member States (2012)

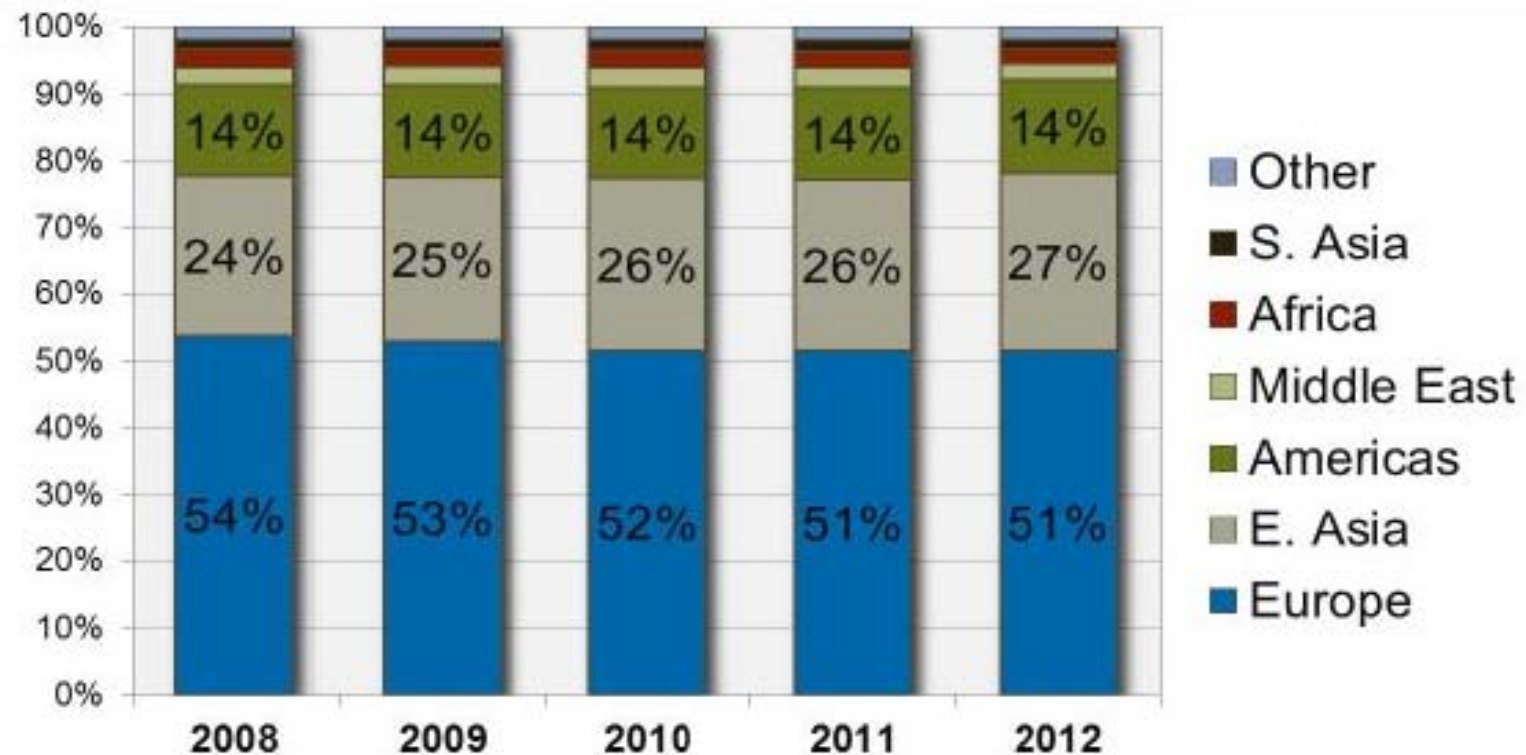


Source: ICF SH&E Analysis, SESRIC





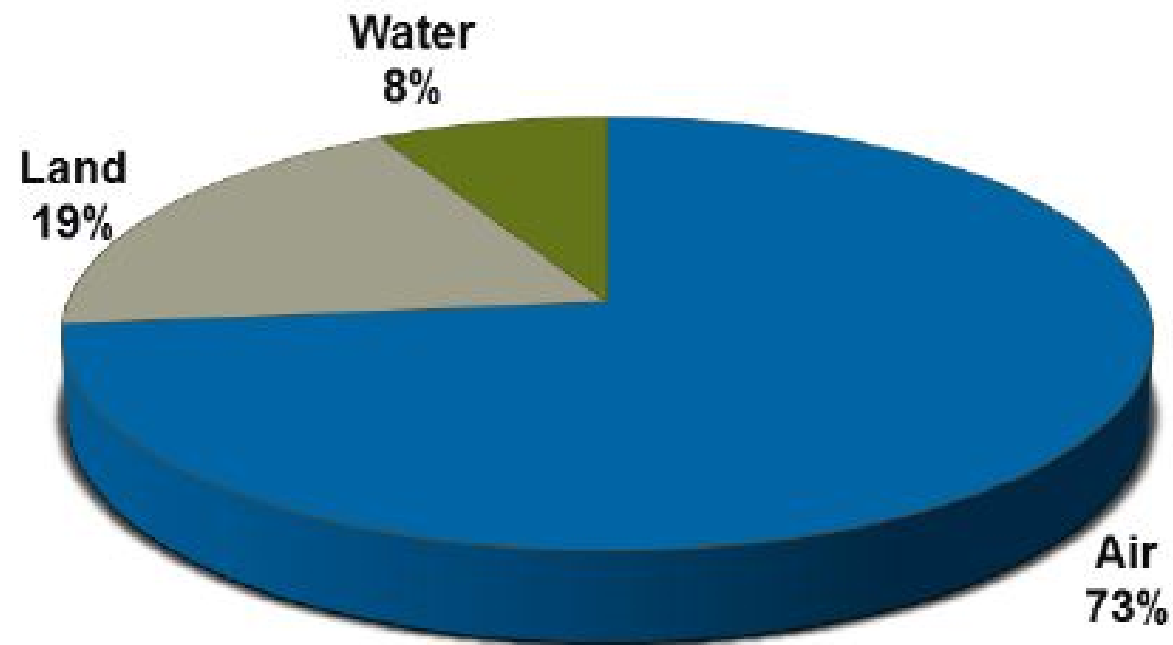
## Tourist Arrivals to the OIC Member States by World Region



Source: UNWTO, ICF SH&E



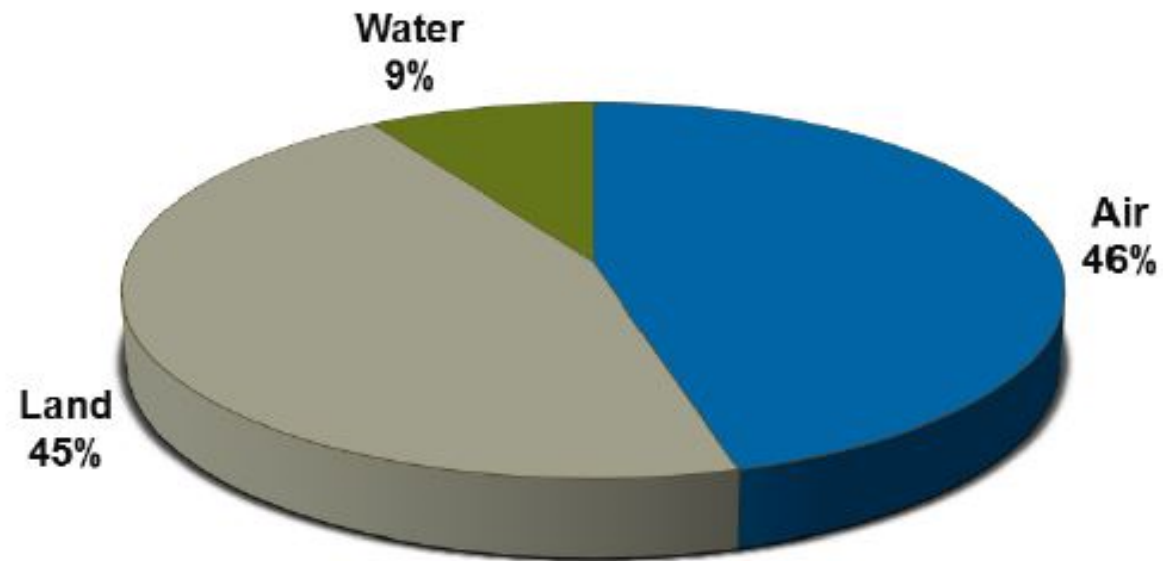
## Methods of Transportation – Established Tourism Group (OIC)



Source: UNTWO



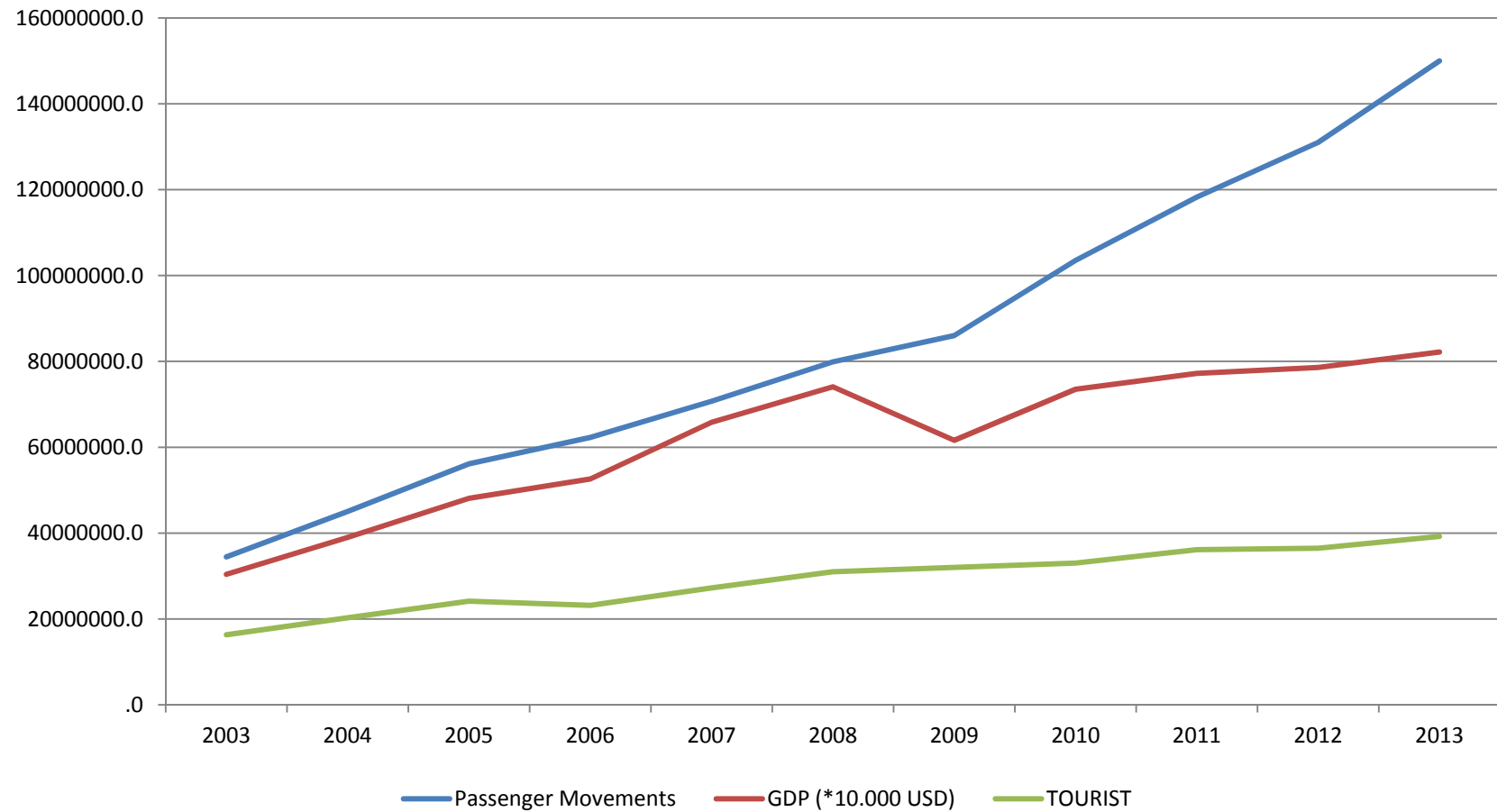
## Methods of Transportation – Future Tourism Group (OIC)



Source: UNTWO



# TURKISH CIVIL AVIATION, GDP AND TOURIST CORRELATION







# Key factors behind Turkish Air Transport Successful Experiences

● Political Stability and Trust

● Law & Regulations

● Political Will

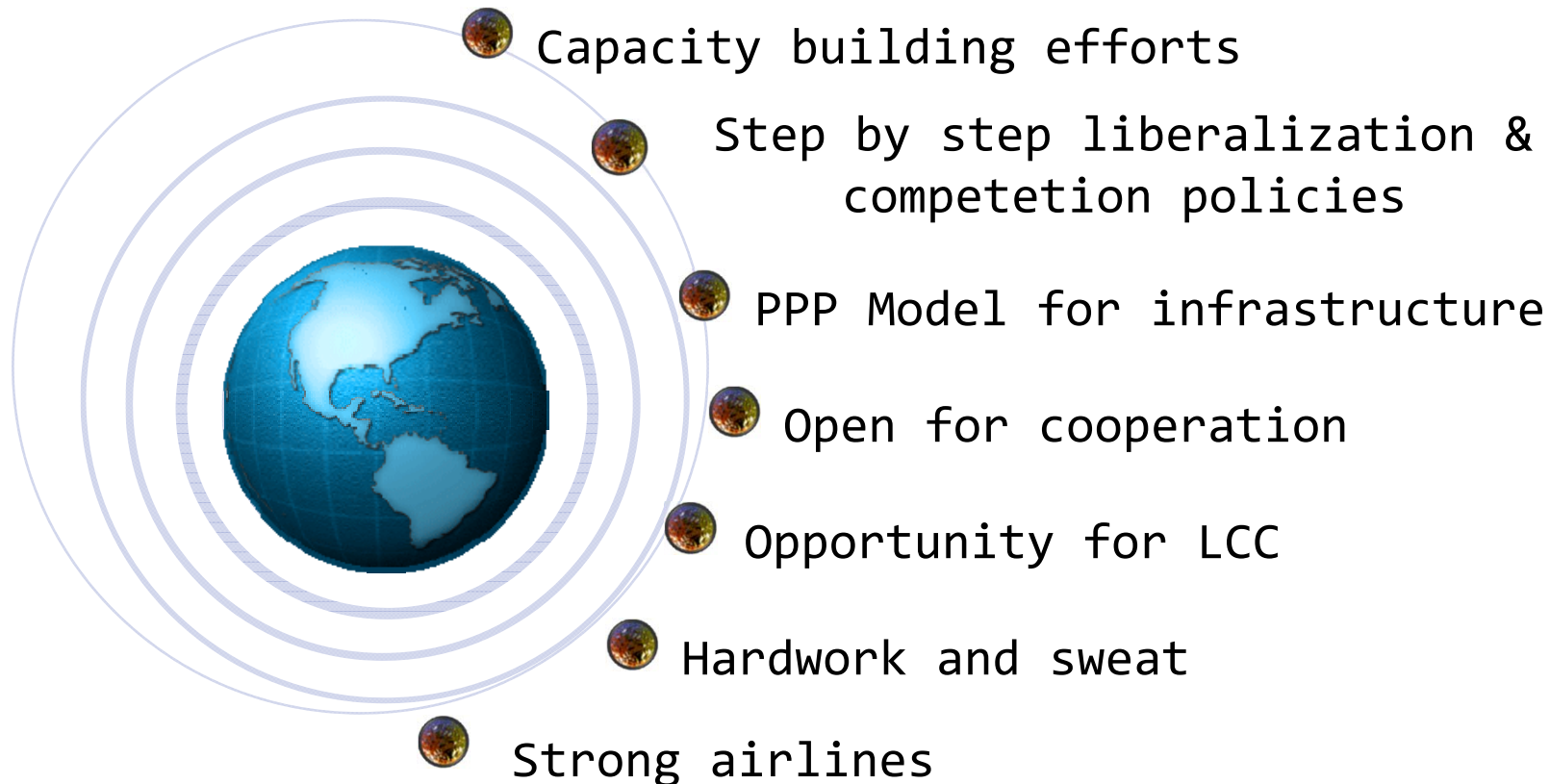
● Civil Aviation Authority's (CAA)  
Organizational Structure

● Private Budget

● Regional & international relations



# Key factors behind Turkish Air Transport Successful Experiences



# Main Barriers in front of Aviation and Tourism



Safety and Security measures



Aviation and tourism Infrastructure



Visa regimes and procedures



Fares, taxation, airport rates and charges



Un fair competition  
practicices



Protective policies



Restrictive traffic rights



# ICAN CONCEPT 2014 AND 2015

**Turkey will be hosting ICAN 2015 which will be organized under a new format, enabling for valuable participation of UNWTO and other major aviation stakeholders.**



# ROLE OF ICAO

- ICAO IS HIGHEST REGULATORY BODY FOR CIVIL AVIATION,
- ALL CIVIL AVIATION REGULATIONS CREATED BY ICAO,
- PRESIDENT, COUNCIL, SECRETARY GENERAL AND TECHNICAL STAFF KEY PLAYER FOR ALL COUNTRIES,
- OIC MEMBERS INVOLMENT IN ICAO IS VERY IMPORTANT,
- TURKEY IS CANDIDATE IN 2016 COUNCIL ELECTION AND WILL WORK FOR ALL OIC MEMBERS IF ELECTED BY YOUR SUPPORT



## Recommendations

- Remove restrictive and unfair air transport policies,
- Consider more open and liberal bilateral agreements,
- Open air transport market for competition,
- Coordinate tourism and air transport,
- Consider incentives to airlines and tourism,
- Government funding for aviation infrastructure,
- Easing visa regime and cost,



## Recommendations

- Encourage private sector investment in air transport and tourism,
- Reduce tax, charge and any other cost on air transport and tourism,
- Provide some marketing support,
- Give priority to human capacity building,
- Develop common project in OIC,
- Work hard but be patient.



