



REPUBLIC OF TURKEY
MINISTRY OF CULTURE
AND TOURISM

4
1
0
2

**ROLE OF
PUBLIC-PRIVATE
PARTNERSHIP
FOR
THE DEVELOPMENT
OF TOURISM SECTOR**

**REPUBLIC OF TURKEY
MINISTRY OF CULTURE AND TOURISM**

**ROLE OF
PUBLIC-PRIVATE PARTNERSHIP
FOR
THE DEVELOPMENT
OF TOURISM SECTOR**

NOVEMBER 2014



FOREWORD

Growing steadily, the world tourism is one of the important industries that offer solutions to economic problems and support development of countries, besides its positive social and cultural impacts. According to the data released by the World Tourism Organization, the total number of tourists across the world rose to 1.087 billion people in 2013. It is estimated that the number will reach 1.8 billion people by 2030.

With a breakthrough in 1980s and a stability achieved in recent years, Turkey has reinforced her place in the world tourism. Having unique natural beauties, a deep-rooted history, rich cultural values and world-famous destinations such as İstanbul and Antalya, Turkey has become one of the key players of the world tourism and an international brand with her qualified labor force and high quality facilities and services.

As a result of the tourism investments supported by comprehensive incentive system developed for the tourism sector and through public-private partnerships, Turkey has accomplished a development in the tourism area which evokes admiration all around the world. Regarding this breakthrough, Turkey rose from the 17th rank in term of the number of visiting tourists in 2002 to the 6th rank with 37.8 million tourist arrivals in 2013. Tourism revenues of Turkey also rapidly increased in parallel with the number of visitors recently and rose from 12.4 billion US dollars in 2002 to 32.3 billion dollars in 2013.

As a consequence of investments, improved legislation and strategic projects, the number of travel agencies, one of the key components of the tourism sector, rose from 4.344 in 2002 to 7.949 in October 2014. Similarly, capacity of quality accommodation facilities and beds has

increased substantially during the same period. The number of beds in accommodation facilities with Tourism Operation License rose from 396.148 in 2002 to 749.299 in 2013; while the number of beds in accommodation facilities with Tourism investment certificate rose from 222.876 in 2002 to 301.862 in 2013.

Throughout the development in tourism achieved by the help of implemented incentive policies and the investments in infrastructure, the Ministry has always considered the balance of conservation and usage. As a result of the efforts, the number of Blue Flag beaches, an important indicator of the environmental management and the sensitivity, increased remarkably. The number of Blue Flag beaches rose from 127 in 2002 to 397 in 2014, and Turkey has taken her place among the leading countries in the world in terms of the number of Blue Flags. Additionally, the Green Star Project introduced in 2008 targets to raise the awareness of hospitality industry on environmental responsibility and sustainable tourism. Within the scope of the project, which draws great interest from the tourism sector, 160 facilities were entitled to receive the Environmentally-Friendly Accommodation Facilities Certificate as of October 2014.

The Ministry has given prior importance to create qualified labor force, which is one of the most important components of the tourism, and contributed to vocational training through comprehensive and tailor-made programs in line with the requirements and needs of the sector. As a result of the tourist guide vocational training programs held by Turkish Union of Tourist Guides Chambers (TUREB) under supervision of the Ministry the number of tourist guides rose from 8.483 in 2002 to 9.739 in 2014.

Turkey has gained great experience in recent years in the preservation and management of the World Heritage Sites. The number of cultural and mixed (cultural and natural) properties of Turkey in the UNESCO World Heritage List rose to 13 with the addition of Bursa and Cumalıkızık: the Birth of the Ottoman Empire (Bursa), and Pergamon and its Multi-Layered Cultural Landscape in 2014.

With vision to sustain successful results achieved in tourism and furthering it to higher levels, the Ministry has accelerated its promotional and publicity projects with an approach covering the public relations activities and the experimental media practices. In the new promotion strategy of the Ministry, a particular importance is given to the social media where there are no

time and space limits and more people come day by day to interact with each other depending on technological and social developments of the day.

The theme for the 30th session of the Standing Committee for Economic and Commercial Cooperation of the Organization of Islamic Cooperation (COMCEC) to be held this year has been determined as “Role of Public Private Partnerships for the Development of Tourism Sector in OIC Member States”. This “Country Report” is an important document that exhibits the achievements Turkey has attained in tourism and provides up-to-date information about the activities of the Ministry of Culture and Tourism. Owing to these features, I hope that it will prove a useful source for the policies to be developed by the member countries of the Organization of Islamic Cooperation in tourism sector.

Ömer ÇELİK

Minister of Culture and Tourism

TABLE OF CONTENT

INTRODUCTION.....	1
1.INSTITUTIONAL DEVELOPMENT OF TOURISM.....	3
1.1. Beginning of the Planning Period in Tourism.....	3
1.2. Period of Physical Planning in Tourism.....	5
1.3. Law for the Encouragement of Tourism and Fifth Development Plan Period.....	6
1.4. Project-Based Development Period in Tourism.....	7
1.5. Rise of Sustainable Tourism.....	9
2. SECTORAL PLANNING, AUDIT AND INCENTIVES.....	13
2.1. General Directorate of Investment and Establishments (GDIE).....	13
2.2. Tourism Planning.....	16
2.3. Allocation of Public Land.....	24
2.4. Licensing and Inspection.....	30
2.5. Incentives.....	37
3. MARKETING AND PROMOTION.....	38
3.1. General Directorate of Promotion.....	38
3.2. Promotion Strategy.....	39
3.3. Overseas Organization.....	40
3.4. Advertising Activities.....	40
3.5. Projects and Fairs.....	44
3.6. Hosting Activities.....	46
3.7. Support for Cultural and Artistic Projects.....	48
3.8. Destination Projects.....	49
4.TOURISM AND EDUCATION ACTIVITIES.....	49
4.1. Tourist Guiding and Professional Organizations.....	50
4.2. Nonformal Tourism Training Programs.....	51
5. TOURISM STATISTICS.....	52
5.1. Institutions and Organizations Collaborated for Publication of Data.....	52
5.2. Tourism in Turkey and in the World.....	53
5.3. Tourism with COMCEC Countries.....	55
OBJECTIVES.....	60

INDEX OF FIGURE

Figure 1- Activity Areas of the General Directorate of Investments and Establishments.....	13
--	----

INDEX OF TABLES¹

Table 1 - Tourism Centers and Culture and Tourism Protection and Development Areas Declared by Years.....	22
Table 2 - Number of Plans Approved by Plan Examination and Evaluation Committee.....	23
Table 3 - Accommodation Facilities Licensed by the Ministry and Number of Beds.....	33
Table 4 - Maritime Tourism Facilities.....	35
Table 5 - Number of Travel Agencies by Year.....	36
Table 6 - Large-Scale Tourism Fairs Attended by the Ministry in 2014.....	45
Table 7 - Tourism Revenues in the World and Turkey (1950-2013).....	54
Table 8 - Number of Visitors to Turkey from COMCEC Countries (2010-2013).....	56
Table 9 - Number of Overnight Stays of Visitors from COMCEC Countries (2010-2013).....	58

TABLES OF GRAPHICS²

Graphic 1 - Number of Blue Flags by Years.....	8
Graphic 2 - Number of Tourists Visiting Turkey by Year.....	54
Graphic 3 - Tourism Revenues of Turkey by Years (\$ 1,000).....	55

TABLES OF PICTURES

Picture 1- Earlier State of Belek Tourism Center.....	17
Picture 2 - Present State of Belek Tourism Center.....	18
Picture 3 - Number of Allocated Facilities by Region.....	27
Picture 4 - Number of Beds in Allocated Facilities by Region.....	27
Picture 5 –Flow Chart for Public Lands Allocation.....	28
Picture 6 – Promotion Logo 2014.....	41
Picture 7 – Sample Images 2014.....	41
Picture 8 – 2013, Turkish Culture Year in China.....	42
Picture 9 – Images from the Fairs.....	46
Picture 10 – Eskişehir, Cultural Capital of Turkish World in 2013 Events.....	47

¹Statistics published by the Ministry of Culture and Tourism were used, unless stated otherwise.

²Statistics published by the Ministry of Culture and Tourism were used, unless stated otherwise.

INTRODUCTION

Policies aimed at increasing the public-private partnerships play an important role in the strengthening of the tourism sector, which is an indispensable element of the sustainable development. These policies adopt a holistic approach and governance principle for the development of tourism and thus define the powers and responsibilities of all stakeholders in the sector in a democratic way. Increased competitiveness, strategic planning and development, ability to keep pace with global trends, disburden of state of its tasks owing to improved participation and creativity of the sector are the indicators of this partnership in tourism.

Powerful and civil initiatives must actively lead the tourism sector, which has economic and social dimensions. Global developments force the sectors into close cooperation and make the involvement of national, regional and local stakeholders into the decision-making mechanisms compulsory. At this stage; the duty of the government is to establish an environment of encouragement, direction and dialogue that will ensure establishment of such partnerships.

As noted in the “AdHoc Commission Report on Tourism” for the Tenth Development Plan, the weight of the state in tourism events has shifted to the private sector and non-governmental organizations from 1963 to today. For example, actors such as Association of Turkish Travel Agencies (TÜRSAB), Turkish Hoteliers Federation (TUROFED), Touristic Hotels & Investors Association of Turkey (TÜROB), Foundation for Tourism Development and Education (TUGEV), Association of Tourism Investors (TYD) have appeared on the stage. Duties and responsibilities of the public and the private sectors regarding infrastructure, publicity, vocational education and environment have been redefined.

With a view to encourage the tourism sector in Turkey, various instruments have been developed such as allocation of public lands, the tourism development fund, advantageous tourism loans, work permits for foreign employees, exemption from customs duties, incentive loans, tax reductions, financing funds and premiums, etc. For example, the Law for the Encouragement of Tourism (No. 2634) aims encouragement and planning of tourism investments, regulates the processes of declaration and allocation of tourism land and centers, and establishes measures for classification of tourism facilities. Some of such instruments were abandoned and replaced with different support mechanisms which respond to sectoral and regional needs over the time.

Since 2000, with a view to overcoming the regional development differences, an incentive system which adopts the clustering and competitive advantage approach and encouraging the innovation has been developed. Such mechanisms seeking to diversify tourism and meet the infrastructure/superstructure needs are now established together with national and local administrations, NGOs and all stakeholders with a participatory vision.

The support provided by the public sector to encourage tourism investments in Turkey are summarized in the “AdHoc Commission Report on Tourism” for The Tenth Development Plan as follows:

- 1985-1991, the Period of Resource Utilization Support Fund ,
- 1991-1992, the Period of Loans from the Resource Utilization Support Fund,
- 1992-1994, the Period of Loans Financed by Fund,
- 1995-2009, the Period of General Incentive System,
- 2009-2011, the Period consisting of three main components as the Regional-Sectoral Incentive System, the Large-Size Project Incentive System, and the General Incentive System,
- From 2011 till today, provision of various supports to tourism investments in six regions identified according to their development ranking under the so-called “Province-Based Regional Incentive” system consisting of four main constituents as the Regional-Sectoral Incentive System, the Large-Size Project Investment System, the General Incentive System, and the Encouragement of Strategic Investments.

Seeking to provide concise information about the role of public-private partnerships in the development of tourism sector, this study first presents the structure of public sector regarding tourism in Turkey chronologically. The first chapter of the report deals with the role of public-private partnerships in the operation of the tourism sector and explains the transformation of this role throughout the history by examples. The second chapter addresses the practices aimed at supporting investment and enterprises in particular and testifies that the public-private partnerships have become stronger for the mutual benefit of the parties thanks to such practices. The third chapter focuses on the issue of publicity and branding where the public-private partnerships are carried out actively and intensively. The fourth chapter evaluates the duties of and the activities carried out by the public sector in the cultivation of qualified labor force which is needed by the sector. In the last chapter statistical data on tourism movements between COMCEC states and Turkey is presented and the report ends with a list of objectives of Turkey regarding tourism sector.

1.INSTITUTIONAL DEVELOPMENT OF TOURISM

1.1. Beginning of the Planning Period in Tourism

1.1.1. Ministry of Tourism and Promotion

Institutional development of tourism in Turkey started with the establishment of the Ministry of Tourism and Promotion in 1963. Concurrently with the representation of the tourism at the level of Ministry, the state assumed the duty of directing, supporting and coordinating the tourism sector. The duty of the Ministry of Tourism and Promotion, which was established in 1963, was defined in the Law No. 265 as follows:

“The Ministry shall use all sources of the country which are convenient for tourism in order to make the tourism a productive sector of the national economy. The Ministry shall carry out or conduct, organize, encourage, coordinate and audit such works related with tourism. It shall provide such services that serve to promote the country and the nation.”

In order to develop the tourism, priority was given to areas such as transportation, accommodation, provision of entertainment spaces, development of tourism regulations, and publicity and education.

During this period characterized by the government policies, the other important duties of the government were to establish the standards for tourism facilities and to provide guidance to the sector via pilot tourism projects.

During the First Five-Year Development Plan period introduced in 1963, the first steps in tourism were begun to be taken in a planned system. In this connection, the “Regulation on the Qualifications of Tourism Facilities” which enacted the certification system was issued in 1965 and also by decrees of the Council of Ministers loans were started to be extended for the “Prioritized Tourism Regions”. Additionally, with the establishment of the ‘Inter-Ministries Tourism Coordination Board’ under the initiative of the Ministry of Tourism and Promotion in 1964, an important step which enabled collaboration of the public institutions was taken. In 1967,

the year was declared as ‘International Tourism Year’, special events and publications, which brought Turkish tourism forward in the international arena were realized.

1.1.2. Accomodation Facilities of The Period and The Turkish Pension Fund

In 1950s, The Turkish Pension Fund and Emek Construction Company Hotels were among the pioneering and important public investments. Having entered the tourism business with the building of Hilton, which is considered to be the first modern hotel of the country, Emekli Sandığı [Turkish Pension Fund] built a series of high capacity hotels and also operated majority of them during 1960s through its company, Emek İnşaat ve İşletme (Emek Construction and Management Company) which was established by the end of 1950s. Tens of hotels and holiday resorts were worked into a chain under the name of Emek Hotels, in particular Büyük Tarabya and Maçka in İstanbul; Büyük Efes in İzmir; and Marmara and Stad in Ankara. Emek Hotels made the history as one of the robust cornerstones of the tourism in Turkey.

1.1.3. Tourism Bank (TURBAN)

Although its foundation dates back to roughly 1955, the Tourism Bank began to operate in 1962. The Bank carried out continuously the business of ‘building and operating exemplary accommodation facilities’ as one of its basic functions since the very date of its establishment. It began to fulfill its banking function which involved encouragement and direction of investments to be made in tourism sector after financial means were provided. In later years, the Bank transferred its hotel management activities to Turban Turizm Co. Inc. (Turban Turizm A.Ş.). Starting with Kilyos Facilities in 1956, the number of the hotels and facilities reached 20 in 1980s. By the resolution of the High Planning Council of 1989, the Tourism Bank was transferred to the Turkish Development Bank.

1.2. Period of Physical Planning in Tourism

1.2.1. Tourism Priority Regions

Economic recession and oil crisis in 1970s limited the tourist mobility and touristic activities in Turkey as in the world. Despite these negative situations, significant steps were taken in tourism and 1970s are recognized in the first instance as a period when physical planning commenced. In the regions designated as the “Tourism Priority Regions”, tourism development plans were prepared by the Ministry. A highlight of these works was the “Southern Antalya Tourism Development Project” completed in 1976.

1.2.2. Travel Agencies and TÜRSAB

In 1972, the Law concerning “Travel Agencies and Association of Travel Agencies” was enacted and the Law (No: 1618) defined the travel agencies as “commercial enterprises providing transportation, accommodation, excursion, sports and entertainment facilities as well as information about tourism and every kind of service in connection with tourism to tourists for a profit and thus contributing to the economy of tourism in particular and the balance of payments in general.” Following the introduction of the Regulation on the Association of Turkish Travel Agencies in 1973, TÜRSAB was established. By this regulation the travel agencies are required to be a member of the association in order to be able to engage in travel agency business. Started with around 200 members, TÜRSAB has over 7.949 members today. Travel agencies are still considered as one of the main drivers of tourism in Turkey.

Among the responsibilities of TÜRSAB, international relations and publicity activities falling into the scope of its function take an important place. TÜRSAB is a member of important international organizations such as the World Tourism Organization (UNWTO), the Universal Federation of Travel Agency Association (UFTAA), the Group of National Travel Agents’ and Tour Operators’ Associations within the European Union (ECTAA).

TÜRSAB also conducts activities for development of bilateral and multi-lateral relations with equivalent organizations such as tour operators’ and travel agents’ associations and federations in other countries.

1.3. Law for the Encouragement of Tourism and Fifth Development Plan Period

1.3.1. Ministry of Culture and Tourism

Throughout 1980s, Turkey progressed significantly in tourism and achieved great success in terms of capacity of facilities, revenues in foreign exchange and number of foreign tourists in a couple of years. With the introduction of the “Law for the Encouragement of Tourism” (No. 2634) in 1982, which significantly increased the competence of the Ministry, it was facilitated to make investments and to open new facilities. Furthermore, investment and operation of yacht marinas were also encouraged. In 1983, the Ministry of Tourism and Promotion and the Ministry of Culture were merged as the Ministry of Culture and Tourism. Subsequently, dialogue was established between the tourism sector and the public sector, and serious steps were taken toward the formation of a common tourism policy. The “Law on the Conservation of Cultural and Natural Property”, the “National Parks Law” and the “Environment Law” were enacted during this period.

1.3.2. Law for the Encouragement of Tourism (No. 2634)

The Law for the Encouragement of Tourism (No. 2634) enacted in 1982, which establishes the first legal framework toward development of tourism in Turkey, introduced the concepts such as tourism regions, areas and centers and ensured approval of implementation zoning plans for tourism by the Ministry and carrying out of planning, land allocation and inspection stages of tourism investments under the supervision of the Ministry. Under the Law, a significant amount of public land were allocated to public companies and private investors for touristic purposes and as of today, 175.279 beds were provided for the benefit of the tourism sector of the country through 332 allocations. The most important driver for the increase in the bed capacity is the allocation of public land for tourism sector. Additionally, the yacht tourism, which started with Turban Bodrum (1976) and Turban Kuşadası (1978) Yacht Marinas acquired a legal framework in terms of number and quality through the practices under the Law. During the Fifth Development Plan period (1985-1989), the targets were exceeded for the first time throughout the history of tourism in Turkey.

1.3.3. Accommodation Facilities and Classification System

The problem of lack of quantity of accommodation facilities which impeded the development of tourism in Turkey began to be solved after 1960s. The targets, which were set to increase the number of beds during the plan period were exceeded in 1980s. While the number of accommodation facilities with tourism license was 593 in 1970, it rose to 4.038 in 2013. Moreover, institutionalization of the hotel operators started with the establishment of the “Association of Marmara Region Touristic Hotel Operators” in 1971. Later, the association was renamed as Touristic Hotels & Investors Association (TÜROB) in 1983. Moreover, Turkish Hoteliers Federation (TÜROFED), which brought together the associations in 12 regions, was established in 2005. These organizations bringing majority of the hotels together contribute to the developments services offered by them and provide the coordination between the Ministry and the private sector.

The accommodation facilities which are among the most important components of tourism, were started to be inspected by inspectors of the General Directorate of Tourism after 1985. The classes and types of the facilities which were granted license by the Ministry were determined as “luxury class, 1st class, 2nd class touristic hotel, etc.” until 1985. From 1985 on, stars were assigned to all hotels in accordance with international standards and the name of the license was changed to the “Tourism Establishment Certificate”

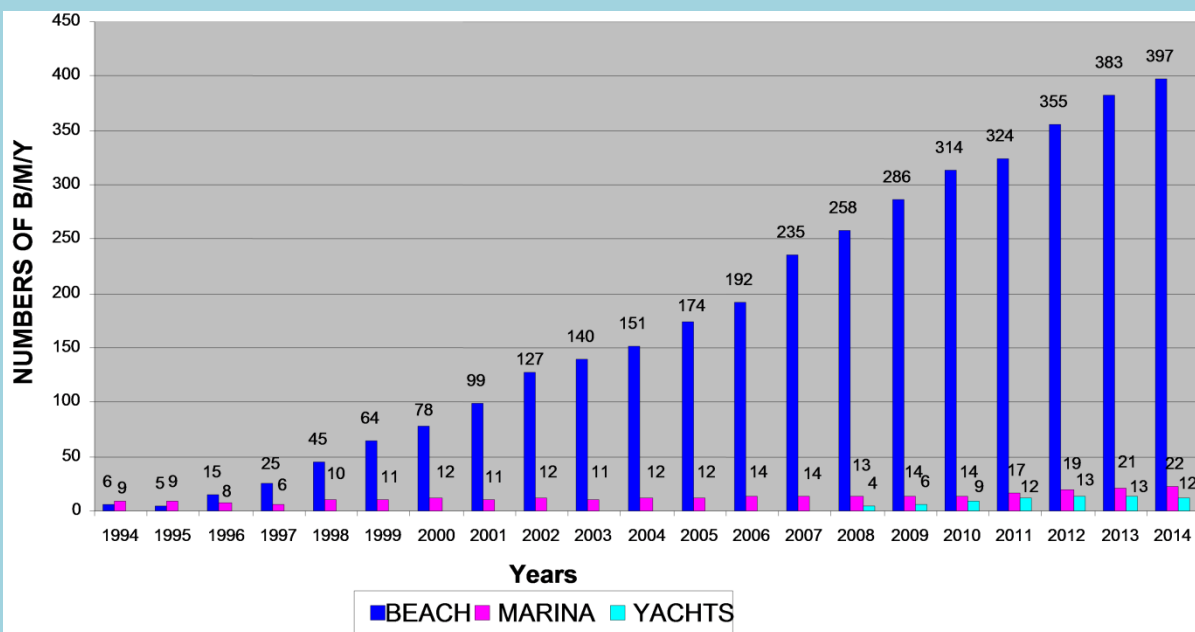
1.4. Project-Based Development Period in Tourism

1.4.1. ATAŞ and Blue Flag

In 1989, the tourism affairs were separated from the Ministry of Culture and Tourism and the Ministry of Tourism was established. ATAŞ (Mediterranean-Aegean Tourism Infrastructure and Coastline Management Project) was one of the infrastructure projects which the Ministry gave importance during 1990s. Aimed to build infrastructure systems such as drinking water, sewerage, waste water treatment and solid waste disposal facilities at more than 100 tourism-intensive settlement areas along the coastline of Aegean and Mediterranean seas for the purposes of protection of the environment, the project ATAŞ was a very important step toward realization

of modern tourism in Turkey. Turkey participated in the Blue Flag campaign launched by the European Community during the same period, and the blue flag was granted first time ever to 8 marinas and 15 beaches in 1996. The number of facilities with blue flag increased rapidly to 22 marinas, 12 yachts and 397 beaches in 2014. Both the ATAK and the Blue Flag projects are still ongoing and expanding.

Graphic 1 - Number of Blue Flags by Years



1.4.2. Diversification of Tourism

During 1990s, the Ministry of Tourism carried out a series of works designated as the “Projects for Diversification of Tourism”, aiming at diversifying tourism and extend it to whole year and across the country. Under the “Winter Tourism Development Project”, 12 regions were declared as winter tourism centers. Similarly, within the scope “Project for Utilization of Natural and Cultural Property for Purposes of Tourism”, contributions were made to restorations of a number of historical buildings and heritage sites. The other projects covered by the project for diversification of tourism were “Development of Plateau Tourism”, “Yacht Tourism Project”, “Development of Healthcare and Thermal Tourism”, “Religion Tourism Project”, and “Silk Road Project”.

1.5. Rise of Sustainable Tourism

1.5.1. Turkey's Tourism Strategy

Since 2000 the state assumed a regulating and guiding role in tourism. In 2003, the Ministries of Culture and Tourism were re-merged and in this period, the government collaborated with the private sector to overcome difficulties that prevent development of tourism. In this respect, the “Law Amending the Law for the Encouragement of Tourism” (No. 4957) was enacted in 2003 with the aim of facilitating tourism investments and enterprises. The Law provided significant achievements especially in the planning of tourism sites and the allocation of public land for tourism in Turkey.

With this amendment, the Ministry of Culture and Tourism became the exclusive authority in the tourism regions declared. The reasons for this structural change are summarized as follows: To ensure the planned and controlled development of the tourism sector; to control the Tourism Centers; to adopt a holistic approach to the conservation of the environment; to support protection of the biological diversity; to ensure sustainable utilization of natural resources; to generate income for local people by tourism; to ensure realization of vital urban services and infrastructure investments in such tourism areas; and to facilitate the investment incentives.

During this period, the projects and efforts for diversification of tourism were carried out under approximately 20 different titles. As a result of the projects such as “Silk Road”, “Hittite”, “In the Arms of River Asi”, “Three Cities, Three Rivers, Three Seas”, “Frig Valley”, “Roots of Great Sycamore”, “City of Stone and Faith: Mardin”, “City of Sultans’ Sons: Amasya”, a significant increase in the number of tour programs to these areas was observed. Tourism investors were encouraged to make investments in these new centers as well. The Ministry of Culture and Tourism announced its targets in the field of tourism under the heading of “Tourism Strategy of Turkey 2023” and began to implement the strategy in 2007. The vision of this strategy is stated as “With the adoption of sustainable tourism approach, tourism and travel sector will be brought to a leading position for leveraging rates of employment and regional development and it will be ensured that Turkey becomes a world brand in tourism and a major destination in the list of the top five countries receiving the highest number of tourist and highest tourism revenues by 2023.”

Tourism Strategy of Turkey was prepared with the participation of all stakeholders with the idea of participatory planning and aimed at strengthening the public-private partnership in the tourism sector.

Additionally, the Ministry developed and put into operation “Green Star Project” for the purposes of classification and encouragement of accommodation facilities which take environmentally-friendly measures.

Addressing the development of the tourism in Turkey in a holistic way, Tourism Strategy of Turkey 2023 and the Action Plan 2013 aim at sustaining the balance between preservation and use of natural, cultural, historical and geographical assets and values of the country and to develop alternative tourism. The spatial development strategies regarding these targets have been building tourism corridors, tourism and eco-tourism regions and cities along the development axes instead of planning particular points and localities with health, thermal, plateau, winter, mountain sports, and cultural tourism potential.

1.5.2 Tourism and Cultural Heritage

Within the context of diversification of tourism, culture tourism is one of the areas given priority by the Ministry. Particularly, use of museums and rich cultural heritage within the context of tourism and publicity both strengthens the influence of the country in the world tourism league and ensures transmission of these assets to next generations.

Today there are total 392 museums in the country, of which 194 are affiliated to the Ministry of Culture and Tourism and 198 are private museums under the supervision of the Ministry. The number of museum visitors reached 7.400.000 in 2002 and, with a fourfold increase, 29.500.000 in 2013. During the first eight months of 2014, the number passed 20.000.000. In order to raise the interest of the public in museums and archeological heritage sites, within the framework of the social responsibility project, in 2008, the Ministry introduced Müzekart [Museum Card], which offers free of charge entrance for one year to more than 300 museums and heritage sites owned by the Ministry and also provides various advantages in museum shops. Transfer of the operation of souvenir shops and dining facilities at museums and archeological sites to the private

sector resulted with a significant increase in tourism revenues and provided that the tourists spend much longer and qualified time. This practice is considered as a good example of public-private partnership in the field of culture and tourism.

On February 14, 1983, Turkey became a party to the “Convention Concerning the Protection of the World Cultural and Natural Heritage” which was adopted by UNESCO in 1972. As of 2014, there are a total of 1007 properties, of which 779 are cultural, 197 natural and 31 mixed (cultural/natural), across the world in the World Heritage List. Turkey has 13 properties inscribed on the World Heritage List of UNESCO as of 2014. These sites are Historic Areas of İstanbul; City of Safranbolu; Hattusha: the Hittite Capital; Great Mosque and Hospital of Divriği; Mount Nemrut; Xanthos-Letoon; Archaeological Site of Troy; Selimiye Mosque and the Social Complex; Neolithic Site of Çatalhöyük; Bursa and Cumalıkızık: the Birth of the Ottoman Empire; and Pergamon and its Multi-Layered Cultural Landscape as cultural properties; and Göreme National Park and the Rock Sites of Cappadocia; and Hierapolis as mixed (cultural and natural) properties.

The intangible cultural heritage provides resource to a number of sectors such as cultural heritage sector, culture industry, tourism sector, motion-picture sector, entertainment and souvenir sector, etc. Turkey has been carrying out her intangible cultural heritage projects with a perspective accordingly with her sustainable development goals.

The Ministry of Culture and Tourism emphasizes that individuals, communities and non-governmental organizations together with the public entities contribute in national and international activities carried out by the Ministry in the field of intangible cultural heritage, and in this way enabling cultural area more democratic and more civil with the participation of stakeholders. The project “*Bir Usta Bin Usta*” [One Master, One Thousand Masters] realized through a public-private partnership was an example of the best practice highlighting the relationship between the intangible cultural heritage and the sustainable development within the context of transmission between generations, value building, raising awareness and employment. The aim of the project is to draw the interest of the public to traditional hand crafts and local values which are on the verge of extinction, to ensure revival of those, to create new jobs and to carry the experience of the craft masters to the future.

1.5.3. Promotion and Marketing Activities

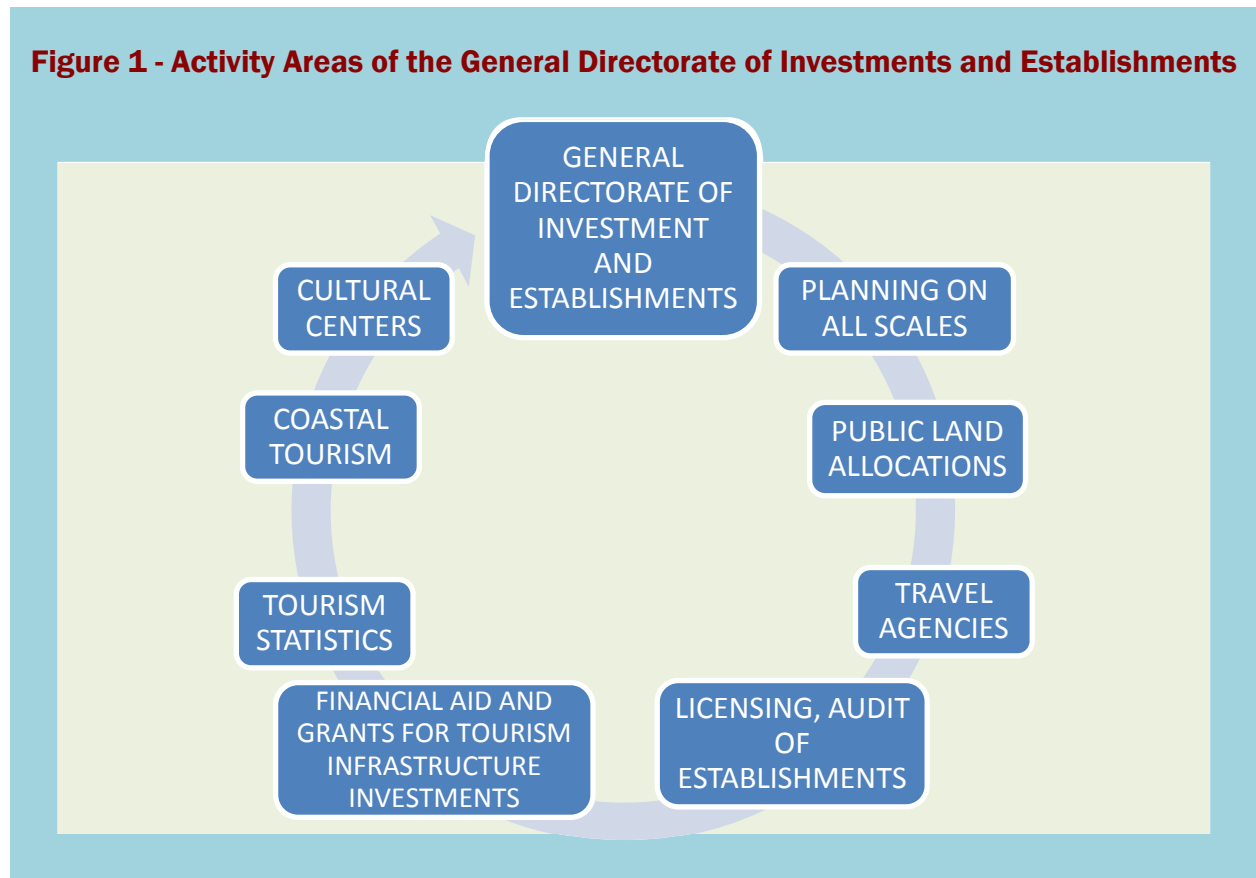
The General Directorate of Promotion of the Ministry of Culture and Tourism has been continuing to work with the aim of promoting the natural, cultural and historical values of Turkey at home and abroad. These efforts target to enhance the image of Turkey in the world tourism market and promote Turkey as a brand in the international arena as well as to raise awareness of the community about cultural and touristic values of the country in Turkey. To achieve this aim, strengths of Turkey are highlighted and breathtaking cultural and tourism diversity of Turkey is emphasized in the promotion campaigns that are carried out in abroad with nearly 50 promotion offices across the world, Turkey ranks first among the competitive countries. Promotion activities in abroad are carried out by these offices. A large number of fairs are attended and over 2000 journalists are hosted every year. Awards that the Ministry had in recent years prove this success. In 2012 the Ministry of Culture and Tourism received the “Europe’s Best Tourism Organization” award from the World Travel Awards, regarded as the ‘Oscars of Tourism’.

2. SECTORAL PLANNING, AUDIT AND INCENTIVES

2.1. General Directorate of Investment and Establishments (GDIE)

Activities of tourism planning, investment and licensing in tourism centers and culture and tourism protection and development areas where priority is given to development of tourism in Turkey are carried out by the General Directorate of Investments and Establishments of the Ministry of Culture and Tourism. The Directorate's tasks and responsibilities are defined by the "Law on the Organization and Duties of the Ministry of Culture and Tourism" (No. 4848).

Figure 1 - Activity Areas of the General Directorate of Investments and Establishments



The GDIE has been carrying out its activities through public-private partnerships. In the examination of duties assigned to the GDIE by the Law No. 4848, it is deemed important that the GDIE develops policies in cooperation with the sector, audits establishments, provides useful and guiding information to the sector, collaborates with it at national and international level, etc.

Duties of GDIE are as follows:

- a) To research resources of the country which can be allocated to tourism; to determine the priorities; to conduct works involving conservation and utilization of natural resources that can be used by the tourism sector; to cooperate with other public entities and organizations as well as private entities in this regard;
- b) To conduct and cause to be conducted every kind of research and to compile and analyze statistical data and provide them to the sector, which can be used for development of tourism policies compatible with any change and development in the demand for and types of tourism and for direction of investments;
- c) To carry out the duties and use the authority given to the Ministry by the Law for the Encouragement of Tourism (No. 2634) regarding determination, declaration and planning of tourism regions, areas and centers;
- d) To establish culture and tourism protection and development areas whereof boundaries are established by the Council of Ministers for the purposes of development of historical, cultural and touristic potentials and making use of them for the growth of the sector; to make and cause to be made plans on every scale in order to ensure planned development within these boundaries; give direction to and make investments in culture and tourism development areas;
- e) To carry out the procedures for expropriation, making available and allocation of real properties offered for the benefit of the sector to investors;
- f) To provide guidance to local and foreign investors in the field of culture and tourism;
- g) To guide infrastructure and superstructure investments of public entities and organizations as well as private sector which invest in culture and tourism sector in accordance with the identified priorities and requirements of the sector; to prepare annual investment programs; to implement or cause to be implemented of the ones which are deemed necessary;

- h) To establish a documentation center for the purposes of evaluation of the information about the matters related with the duties of the General Directorate and making available of such information to concerned organizations and units;
- i) To ensure more productive operation of touristic investments and establishments by using every means of incentive according to the priorities and requirements of the sector and to ensure rising of the quality of the existing ones;
- j) To carry out the procedures for licensing of tourism investments and establishments;
- k) To carry out the procedures for regulation and endorsement of the prices to be offered by tourism enterprises in accordance with the policies and principles established by the Ministry by taking into account the requirements of the world tourism market;
- l) To inspect the operations of tourism establishments, and professional tourism organizations and to carry out the procedures for rewarding or penalizing of such businesses, organizations and persons according to the audit results;
- m) To develop the necessary collaborations with public entities, local administrations, professional tourism organizations, universities, public economic enterprises and organizations and their establishments and subsidiaries for the purposes of rendering of the services set out in this article;
- n) To make and cause to be made investigations regarding any problems encountered by tourists at locations and facilities which do not have license from the Ministry; to request for assistance from relevant institutions in this regard
- o) To organize meetings, exhibitions, trainings, shows, competitions and audio-visual programs at culture centers for the purposes of publicizing the national culture; to conduct efforts to develop reading habit and intellectual activities; to open hologram and local ethnography galleries and to make cooperation with private entities and organizations at national and international level to this end.

On the other hand, the Law for the Encouragement of Tourism (No. 2634) has been designed on the main activity axes as follows:

- Establishment of the boundaries of Tourism Centers, and Culture and Tourism Protection and Development Areas;
- Preparation of master plans in all scale within such boundaries;
- Determination and allocation of areas within the master plans for tourism investments;
- Licensing and inspection of such facilities and establishments.

The General Directorate of Investments and Establishments, the principal unit responsible for the said main activity areas, has been carrying out its duties in collaboration with the private sector for the development of the tourism in Turkey under the main areas such as findings on demand for tourism (provision and production of statistical data), tourism planning, allocation of public land, licensing, inspection, and incentives and supports.

2.2. Tourism Planning

2.2.1. A Brief History

In the decade of 1960, the Western Turkey Tourism Study was prepared. Within the area lying to the west of Sinop-Hatay line, which covers almost half of the territories of the country, tourism inventory was prepared, priorities of development areas were identified, thematic maps of 1/1.850.000 scale, explanation reports and statistics were compiled in a book, reproduced and distributed to concerned administrations.

In 1969, an international architecture-urban planning competition was held for the “Side Tourism Development Project” and as a result of the produced master plans, Side Titreyengöl and Kumköy Regions continued their development in accordance with these plans.

During 1970s, the Planning Department was established and the “Western Turkey Tourism Study” was aimed to be extended to the whole country. Notable inventories and statistical data relevant with tourism were compiled and analyzed, but the work could not be completed.

Subsequently, the Planning Department conducted the 1/200.000 and 1/250.000-scale Regional Sectoral Inventory and Development Perspectives and the 1/25.000-scale regional tourism development physical studies in the Southern Anatolia and Cappadocia Regions. The Cappadocia Environmental Arrangement Plan was completed and approved in 1971.

In 1971, with the introduction of the Government Decree no. 6/12209, the entire coastlines from the boundaries of the Provinces of Çanakkale and Balıkesir up to the Province of Mersin were declared as Tourism Development Region at a certain depth. The areas of Pamukkale (Hierapolis) and Cappadocia were also included in this region. The duty of completing, detailing and implementing the Eastern Antalya (Belek) and Southern Antalya (Kemer) Tourism Development Plans, which were started by the State Planning Organization based on their duty of preparing the Regional Development Plans, was assigned to the Ministry of Tourism and Promotion.

Picture 1 - Earlier State of Belek Tourism Center



Picture 2 - Present State of Belek Tourism Center



During 1972-1982, with the loans utilized from the World Bank, the Southern Antalya Plans prepared by the State Planning Organization (the physical plans of 1/25.000-scale prepared by a Scandinavian Consortium) and the Olympos-Beydağları National Park plans prepared by the Ministry of Forestry were optimized and the Southern Antalya Tourism Development Plan and Project was completed and put into implementation. In this connection, a 1/25.000-scale Environmental Arrangement Plan and 1/5.000-scale Master Zoning Plans as well as 1/1.000-scale Implementation Zoning Plans were prepared, a regulation was issued, and technical infrastructure designs were developed.

The planning efforts carried out by the Planning Department which was established within the organization of the General Directorate of Investments in 1983 were diversified based on the principle of expansion of tourism to whole country and year. Works for planning of Winter Sports Tourism Centers and Thermal Tourism Centers were commenced during this period. Pursuant to the Law for the Encouragement of Tourism, works for declaration of Tourism Regions, Areas and Centers were expanded and implementation of incentives such as land allocation and technical infrastructure support through or by coordination of the General Directorate of Investments gained impetus and tourism capacities increased.

During 1993-2003, as a result of the decision to prepare Tourism Inventories and tourism development plans of provinces, allowances were paid and planners were recommended to Governorships, and Provincial Tourism Inventories were obtained in a number of provinces through tenders designated by Governorships.

In 2003 and later, as a result of re-merger of the Ministry of Culture and Tourism, with an amendment to the Law for the Encouragement of Tourism, the Ministry of Culture and Tourism was granted the authority in connection with planning to prepare and approve plans of all scales in the Culture and Tourism Protection and Development Areas, and the Tourism Centers.

During this period the tourism planning was based on the Tourism Strategy of Turkey which was put into implementation in 2007. The Tourism Strategy of Turkey brings the collaboration between the public and private sectors in accordance with the principle of governance to the agenda and aims that strategic planning works ensure expansion of management and implementation of the strategic plan.

With the Tourism Strategy of Turkey and the Action Plan, which was developed with the idea of participatory planning, the principal aim was defined as putting a road map and giving direction to the sector in the production, management and implementation processes. This approach, which lies in the foundation of the Tourism Strategy of Turkey 2023, makes it possible to develop within a framework which is not specific to a location but regional, is not imperative but directive, and is not static but dynamic. In this way, it will be possible to plan not only the coastline but also the inner areas and even the settlements as a whole and to improve and transform the existing settlements. These policies are important in ensuring of sustainability of the tourism sector.

2.2.2. Declaration of Tourism Centers (TC) and Cultural and Tourism Protection and Development Regions and Afterward

Planning should be considered as a process which emerges as a requirement for development of sustainable tourism within a balance of preservation and use of resources of the tourism sector.

In the planning of the “Tourism Centers” and the “Culture and Tourism Protection and Development Areas,” operations are carried out in accordance with the provisions of the Law for the Encouragement of Tourism (No. 2634), the Regulation on the Determination and Declaration of Tourism Centers and Culture and Tourism Protection and Development Regions, and the Regulation on the Preparation and Approval of Master Plans in the Tourism Centers and the Culture and Tourism Protection and Development Areas.

The boundaries of Culture and Tourism Protection and Development Areas, are determined and declared by a decree of the Council of Ministers upon the recommendation of the Ministry. The aims of the declaration are to sustain conservation and use of those lands where historical and cultural assets exist intensively and/or where tourism potential is considerably high, to ensure sectoral growth and planned development and to offer large-scale planning and alternative management and operation models.

In the determination of the said regions, wide areas where extensive tourism activities can be developed are preferred, solutions are offered for issues such as ownership, infrastructure and environment, and a systematic structuring process is ensured. The process involved not only

with physical and spatial issues, but also it is a matter of planning and allocation of the lands accordingly with prespecified principles and targets.

Treatment of every component (cultural, social, natural environment, etc.) of the sectoral development within a sustainable and holistic approach in accordance with the tourism planning policies of the Ministry has been adopted as a principle.

In the determination of the Culture and Tourism Protection and Development Areas and the Tourism Centers, the natural, historical, archeological and social-culture tourism properties of Turkey and the potential for winter, hunting and water sports as well as healthcare tourism and for other types of tourism are taken into account. To ensure the sectoral growth and the planned development in the areas having a certain potential by maintaining the balance of conservation and usage as specified in the definition of the Culture and Tourism Protection and Development Areas in accordance with the Law for the Encouragement of Tourism (No. 2634) is the principal objective.

After the amendment to the Law for the Encouragement of Tourism (No. 2634) in 2003, the Ministry has undertaken a new mission in the tourism regions. Accordingly, the tourism areas are dealt with not on a sectoral basis but in a manner to cover all sectors and to observe the protection principles with a new planning approach.

Culture and Tourism Protection and Development Areas are divided into main and sub-regions and planned accordingly and investors are expected to develop their own projects. By means of the plan and active role taken by the main investor leading the project to be implemented in the region, the government is disburdened, and besides with the opportunity given to the main investor to find sub investors the creativity has been enhanced.

In the determination of the Culture and Tourism Protection and Development Areas and the Tourism Centers, the works conducted by the Ministry and/or the insights provided by the tourism master plans developed under the auspices of the Ministry, as well as the requests received from Offices of Governor and Municipalities and recommendations from investors in the sector are taken into account.

For the requests made for declaration of an area apart from the efforts conducted by the Ministry, a preliminary evaluation report must be prepared and application must be made with this report to the Ministry by the interested parties. Based on the preliminary evaluation report, opinions are received from responsible institutions in the area proposed.

After the opinions were received from institutions, if there is no opposing remarks, the issue is evaluated first by a Commission formed within the Ministry. Proposals deemed appropriate by the Ministry are evaluated by an Inter-Ministry Commission, decided and recorded into a report which is signed by the members of the Commission. The approved proposals are submitted to the Prime Ministry for taking of a resolution by the Council of Ministers and publication of it in the Official Gazette.

**Table 1 - Tourism Centers and Culture and Tourism Protection and Development Areas
Declared by Years**

Number of Culture and Tourism Protection and Development Areas(CTPDA) and Tourism Centers (TC) Declared by Years					
YEAR	TC	CTPDA	TA	TR	TOTAL
Before 2003	104	-	5	2	111
2004	3	3	-	-	6
2005	14	6	-	-	20
2006	44	7	-	-	51
2007	16	1	-	-	17
2008	8	3	1	-	12
2009	7	2	-	-	9
2010	8	2	-	-	10
2011	13	5	-	-	18
2012	6	-	-	-	6
2013	5	5	-	-	10
TOTAL	228	34	6	2	270
TA : Tourism Area					
TR : Tourism Region					

2.2.3. Approval of Plans

Plans proposed by municipalities, public entities and persons for implementation within the boundaries of the Tourism Centers and the Culture and Tourism Protection and Development Areas are submitted to the Ministry for evaluation and approval pursuant to the Law for the Encouragement of Tourism (No. 2634).

Technical staff prepares a technical report elucidating all technical aspects of the proposed plans for discussion by the Plan Examination and Evaluation Committee (PEEC). Any missing information and documents discovered during the preparation stage are requested from the party who made the proposal and then the issue is submitted to the PEEC for discussion. Necessary action is taken in line with the decision of the PEEC regarding the plan (approval, rejection or revision of the plan) and the applicant is informed of the result. After an area has been declared as a CTPDA or a TC, allocation process is commenced.

Table 2 - Number of Plans Approved by Plan Examination and Evaluation Committee

Plan Examination and Evaluation Commission			
Year	Number of Meetings	Number of Discussed Issues	Number of Approved Plans
2011	23	355	160
2012	27	383	112
2013	21	296	159

2.3. Allocation of Public Land

2.3.1. A Brief History

Between the years 1982-1985, allocations were made in accordance with the principle decisions awarded by the commission formed by the Ministry in order to encourage tourism investors. Today, as a result of 32 declarations and 332 allocations, number of beds reached 175.279.

Duties, authority and responsibilities of the Department of Land Allocation which fulfilled the aforesaid transactions are as follows:

- To determine the areas reserved on the zoning plans for use of tourism purposes within the Culture and Tourism Protection and Development Areas and the Tourism Centers or in other regions where there is potential for development of tourism;
- To make available such real properties for use by the tourism sector;
- To transfer the right of use of these real properties to the Ministry;
- To build partnerships with other public and private entities and organizations regarding allocation of real properties to the tourism sector;
- To prepare an advertisement package containing the public notice, information, charts, specifications, etc. pertaining to the allocation of public land at the disposal of the Ministry and to carry out the advertisement procedures;
- To obtain a decision from the Land Allocation Commission for allocation by preliminary permission of such land of which allocation by a public notice has been deemed appropriate and/or has been made and to obtain the approval of the decision by the Authority;
- To carry out the procedures for allocation of land to public entities without public notice;

- To monitor the preliminary permission, definitive allocation, the period, price, termination of rights, transfer of shares and/or companies, commencement of construction, commissioning actions and the allocation statuses involving such actions and to identify any problems and submit them to the Land Allocation Commission for their solution if it is necessary to work in coordination with other units or public entities for their solution and to carry out the secretariat and rapporteur services of the Land Allocation Commission;
- To carry out the formalities for additional area requests of the companies to which allocation has been made;
- To monitor the allocation, the period and the status of the investors to whom allocation has been made and to compile the statistics, documents and information related with the allocations and to prepare the publications.

2.3.2. Allocation Process

The Ministry gives direction to local and foreign investors in the field of culture and tourism and encourages the sector by means of allocations for development of alternative tourism types along with the tourism facilities serving to mass tourism.

The General Directorate of Investments and Establishments identifies the public and forest lands which can be allocated for tourism purposes for making available to the use by the tourism sector by taking into account the requests from the sector as well and makes a research of the ownership status of such land and takes the right of disposition of the lands which are deemed fit upon the Ministry, including expropriation when necessary, and carries out the procedures for allocation of such lands to investors.

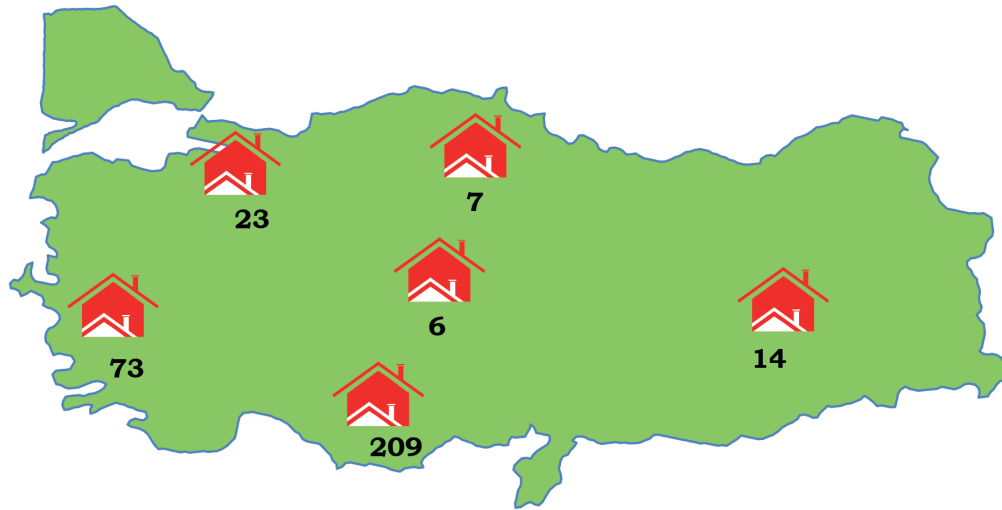
The General Directorate of Investments and Establishments identifies the areas reserved by zoning plans for use of tourism purposes and such areas indicated by investors' requests within the Culture and Tourism Protection and Development Areas and the Tourism Centers or in other regions where there is potential for tourism and makes a research of the ownership status of such lands and prepares the lands of which right of disposal has been taken upon the Ministry for notice.

“Specifications for Allocation” established for the lands planned to be allocated to local and foreign entrepreneurs to make investments for tourism purposes in accordance with the provisions of the “Regulation on the Allocation of Public Lands for Tourism Investments”, which was issued based on the Law for the Encouragement of Tourism (No. 2634), are published in the Official Gazette, three national newspapers with high circulation and on the web site of the Ministry and announced to the public.

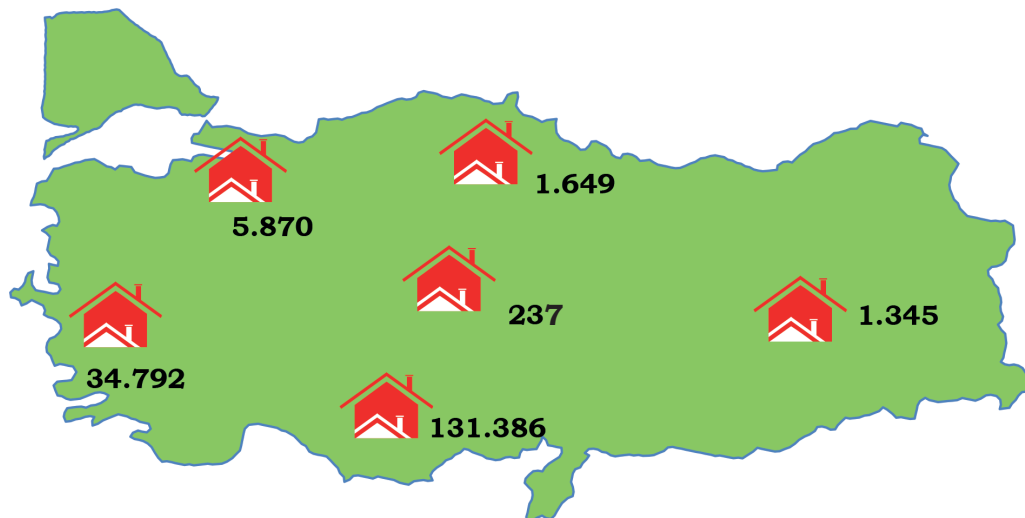
Applications submitted to the Ministry with the information and documents as required by the “Specifications for Allocation of Public Land to Tourism Investors” within the specified time are evaluated in terms of both financial qualification and experience in the sector in accordance with the criteria set out in Article 11 of the Regulation and the Specifications for Allocation.

With the entrepreneurs who are qualified for parcels for which more than one application has been received, negotiations are held for the purposes of contribution to the social and technical infrastructure. The parcels for which only one application has been submitted are evaluated and concluded by the Land Allocation Commission.

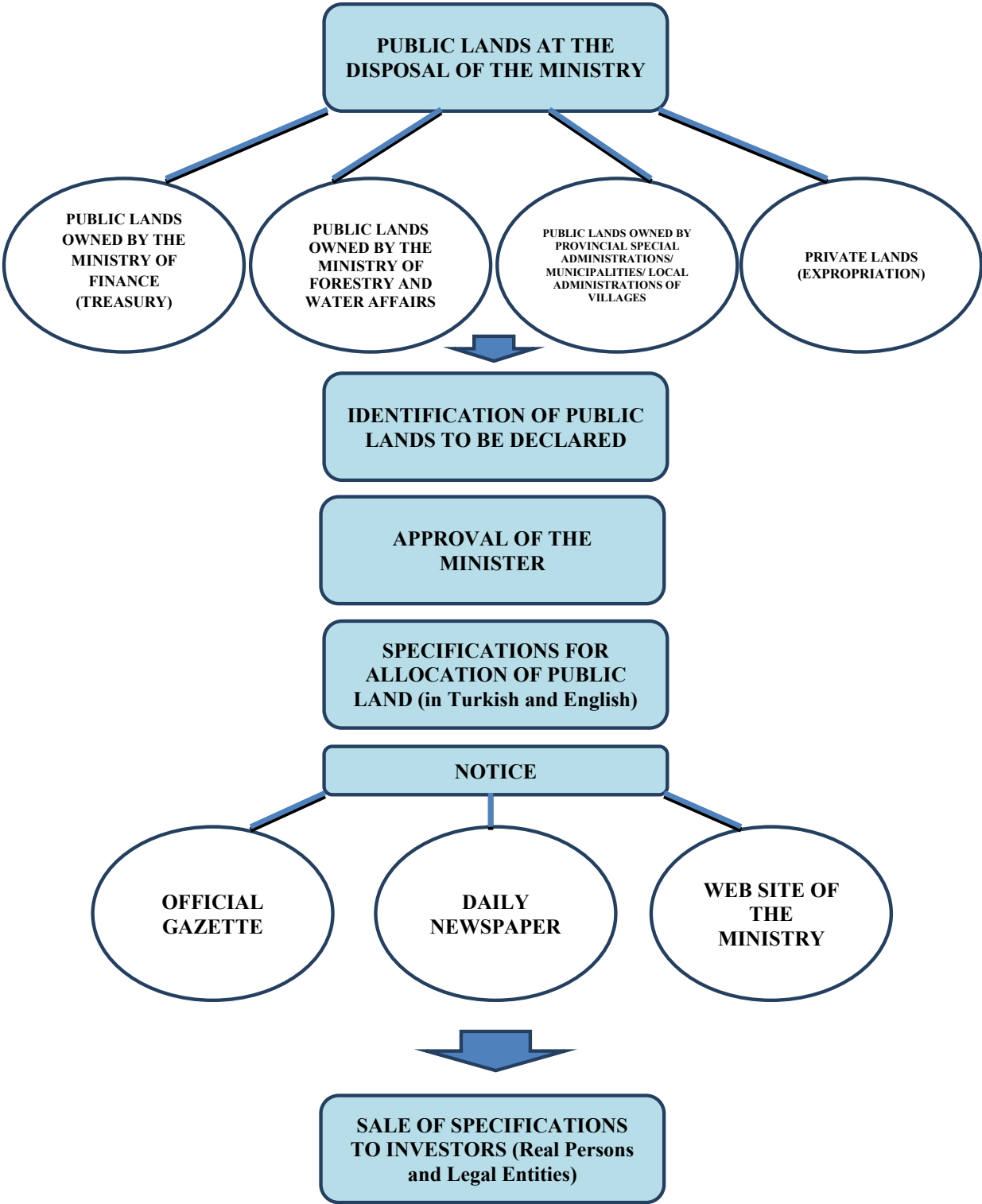
Picture 3 - Number of Allocated Facilities by Region

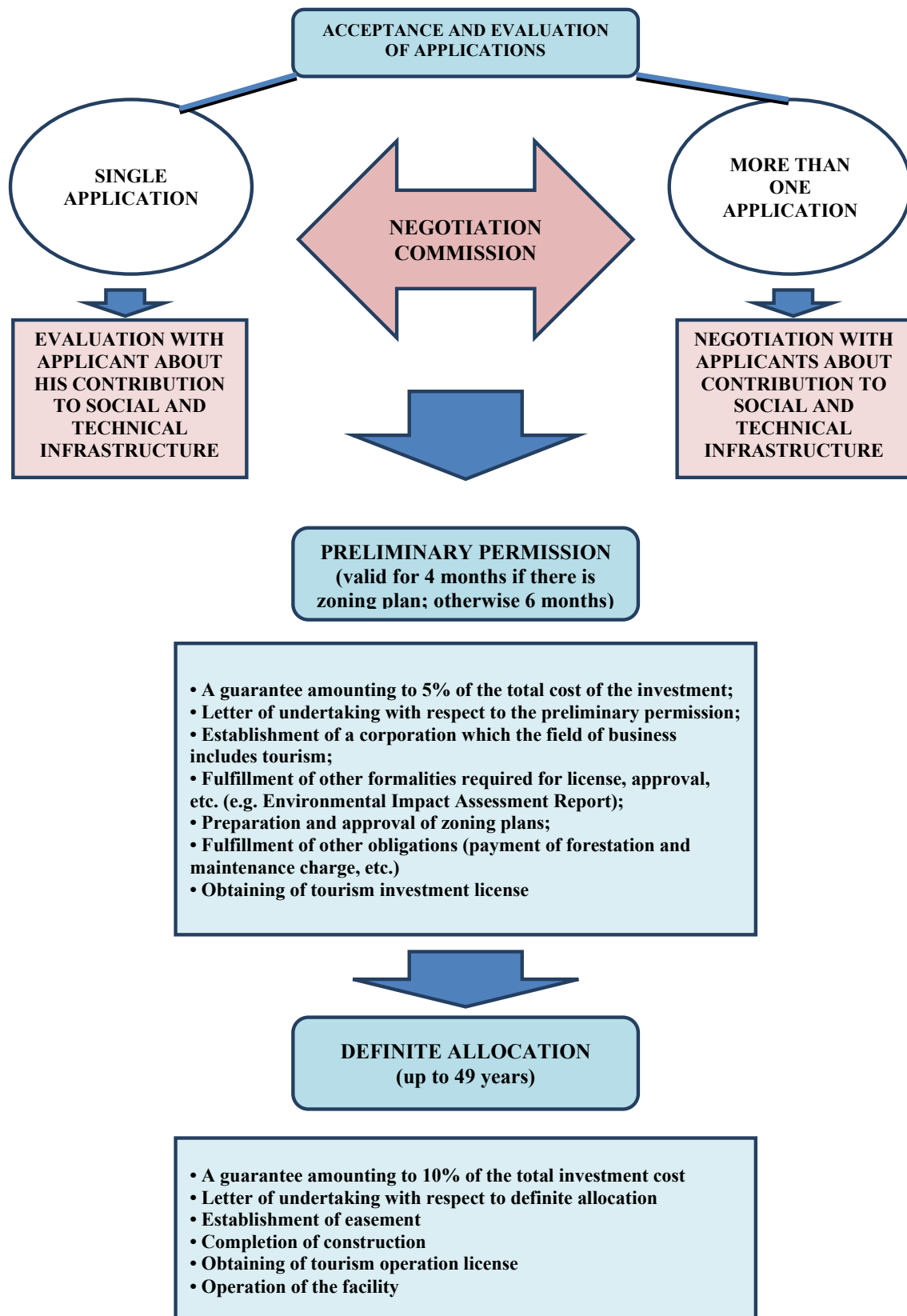


Picture 4 - Number of Beds in Allocated Facilities by Region



Picture 5 – Flow Chart for Public Lands Allocation





2.4. Licensing and Inspection

2.4.1. A Brief History

A “Specialist Auditors Group” was established within the organization of the General Directorate of Investments and Establishments, which reported to the General Directorate of Tourism, and commenced the auditing works first time ever in 1966. Afterward, the name of the unit was changed to the “Department of the Board of Controllers” by the Law for the Encouragement of Tourism which was enacted in 1984 and by the relevant regulation.

The first change made in this field was to abolish the “Class” titles which were used in the indication of the quality of hotels and to replace them with the “Star” system. With the Regulation Concerning the Licensing and Qualification of Tourism Facilities issued based on the Law for the Encouragement of Tourism in this regard, the “Classification Forms” were drawn up by using the samples from other countries which used the same system in order to establish the criteria based on which stars will be assigned to facilities. In the preparation of the said forms, joint works were carried out with the representatives of the tourism sector. As a result of this, in the applications of the classification form for determination of the star of the facilities with tourism license, the delegate hasn’t been formed only with the controllers of the Ministry, ensuring that representatives of the private sector were assigned to the classification delegate, and the classifications began to be applied by a delegate of three persons, two of whom were the controllers of the Ministry and one was a representative of the private sector, to all facilities with tourism license across Turkey, so that our facilities have been made conforming to international standards and brought to levels that they can compete with competitive countries.

Later on, along with the assignment of stars to facilities, assignments such as “Pine”, “Anchor”, “Dolphin”, etc. were introduced. Today, these assignments are continued under the name of “Green Star”. As of early October 2014, 160 accommodation facilities have obtained this certificate.

2.4.2. Licensing and Audit Process

For the reason that the tourism sector has been recognized as one of the main industries for economic development of Turkey, great importance is given by the Ministry to monitoring of the basic dynamics constituting the tourism sector both at home and in the world very diligently and to increase the number of quality facilities, which have internalized the domestic and international demand factors and the fundamental tourism dynamics of the country and manifesting the high quality component in conjunction with the idea of sustainability and on that sense have high competitive power in the international tourism arena.

Carrying out of the procedures for granting of the licenses per basic types and classes as requested by tourism investments and enterprises from the Ministry and after granting of the license, carrying out of every kind of audit in order to establish if they maintain the basic qualities required for the license; handling of complaints about tourism facilities and minimizing client complaints received by the Ministry through audits are among the Department's basic duties.

Audit is an administrative process that serves to determining of the basic qualities of the facilities in accordance with the standards established within the context of the legislation as well as maintaining of such basic qualities. To this end, establishment of a dynamic audit function is an indispensable requirement in order to be able to ensure a sustainable quality standard and thus attain a stable sectoral development trend.

The General Directorate has been carrying out the licensing and auditing of tourism investments and enterprises which request license per types and classes as established in the tourism legislation from the Ministry.

- Allowing development of new tourism facility types;
- Defining minimum qualifications of tourism facilities and ensuring unity of standard among them;
- Improving the quality of tourism facilities and ensuring the continuity of quality service;
- Giving direction to tourism investments and entrepreneurs in accordance with the general policies of the Ministry as part of the “Guidance and Direction” mission;

- Guiding all sectoral actors within the framework of the policies established by the Ministry through guidance, consultancy and audit, and improving the standards of tourism services
- Examining the applications for license and carrying out the licensing process in a most robust and speedy manner after the audit process;

These are the basic principles observed by the General Directorate when performing its audit and licensing duties.

Both in the establishment of the legal regulations which establish the audit standards and in the conduct of all subsequent audits and works, the General Directorate is working always in contact with the professional organizations of the sectoral actors.

The Regulation Concerning the Certification and Qualities of Tourism Facilities defines the “Classification” as the “process of evaluation of the standards such as minimum qualifications, capacity, physical properties, standard of the materials used, operation and service quality and qualifications and education level of the staff of facilities with tourism license and of determination of the type and class of tourism facilities by the classification commissions” and provides that the “Classification Commission shall be formed by two controllers of the Ministry and one representative of the society or the association established by facilities with tourism license.”

As it is seen, the Ministry includes the representatives of the sectoral establishments in the audit and classification process by accepting representatives from the sector in the works for determination of the standards of facilities with tourism license.

Again, in the conduct of the audits by the Ministry of the professional activities of the Professional Tour Guides licensed by the Ministry in the field, one representative from each of the Association of Travel Agencies of Turkey and the Guide Associations so as to ensure that the audit process has a wider base and provides direction.

Table 3 - Accommodation Facilities Licensed by the Ministry and Number of Beds

YEAR	LICENSED FOR TOURISM INVESTMENT		LICENSED FOR TOURISM ESTABLISHMENT		LICENSED BY THE MINISTRY IN TOTAL		LICENSED BY MUNICIPALITY		LICENSED BY THE MINISTRY AND MUNICIPALITY IN TOTAL	
	Number of Facilities	Number of Beds	Number of Facilities	Number of Beds	Number of Facilities	Number of Beds	Number of Facilities	Number of Beds	Number of Facilities	Number of Beds
2010	877	252.984	2.647	629.465	3.524	882.449	9.185	527.712	12.709	1.410.161
2011	922	267.900	2.783	668.829	3.705	936.729	8.893	504.877	12.598	1.441.606
2012	960	273.877	2.870	706.019	3.830	979.896	8.988	512.462	12.818	1.492.358
2013	1.056	301.862	2.982	749.299	4.038	1.051.161	9.196	497.728	13.234	1.548.889
2014 October*	1.101	311.970	3.126	801.612	4.227	1.113.582				
(*) Temporary Data										

2.4.3. Maritime Tourism Licensing Process

As part of its duty to develop and encourage investment in and operation of sea tourism facilities and equipment in terms of maritime and tourism services; to ensure using of the same in a safe manner; to establish the quality and standards of such businesses in a manner to make them beneficial for the economy and tourism of the country; to establish the minimum rules that must be observed by investors and operators, public officials and persons using such facilities and equipment; and thus to raise the quality and the competitive power of the sea tourism sector in the international arena, the Ministry ensures coordination of the public and private sectors and the non-governmental organizations in line with the needs and requests of the sector.

The Ministry issues “Maritime Tourism Facility Tourism Investment/Enterprise License” and Maritime Tourism Intermediary Tourism Investment/Enterprise License in accordance with the Law for the Encouragement of Tourism and the Maritime Tourism Regulation issued based on the said law.

The maritime tourism enterprises which are operating under the regulation submit their opinions about tourism evaluations in a report every year. The issues contained in the operating reports received from the sector are evaluated by the Ministry and necessary actions are taken with the concerned public entities and organizations in line with the received requests.

In this connection, necessary efforts were carried out in conjunction with

- The General Directorate of Migration Administration of the Interior Ministry for the purposes of providing the necessary facilities for visa and residence formalities of foreigners who visit Turkey by their yachts;
- The General Directorate of Environmental Management of the Ministry of Environment and Urban Planning regarding the problems experienced in the blue card practice in the receipt of waste from the sea tourism craft;
- The General Directorate of Security of the Ministry of Interior for giving priority to evaluation of the facilities which are granted Sea Tourism Facility Tourism Investment/Enterprise License from the Ministry regarding the requests for declaration of Ports as Border Gates;
- The Chambers of Shipping regarding printing and distribution of navigation licenses until the commissioning of the system for monitoring of the navigation licenses of sea tourism craft in electronic medium;
- The Environmental Education Foundation of Turkey regarding granting to Blue Flag to 397 beaches and 22 marinas within the scope of Blue Flag practices as of 2014.

Table 4 - Maritime Tourism Facilities

	Number of Facilities	Yacht Capacity at Sea	Yacht Capacity on Shore	Total Yacht Capacity
Yacht Marinas with Tourism establishment certificate	22	6.762	2.317	9.079
Yacht Boatyards with Tourism establishment certificate	8	40	2.019	2.059
Yacht Port and Piers-Jetties with Tourism investment certificate	11	3.277	733	4.010
Yacht Boatyards with Tourism investment certificate	3	-	1.070	1.070
Total Number of Maritime Tourism Facilities	44	10.079	6.139	16.218

2.4.4. Travel Agencies Licensing Process

Activities of travel agencies are one of the most successful examples of public-private partnerships in the country. Activities of travel agencies are carried out in accordance with the Travel Agencies and Association of Travel Agencies Law (No. 1618) which was enacted in 1972. The Association of Travel Agencies of Turkey which represents the travel agencies has been established under the same Law. All activities of travel agencies are carried out through cooperation between the Ministry and the Association of Travel Agencies of Turkey (TÜRSAB).

In this connection,

- Travel agencies submit the information and documents required by the law for their establishment and subsequent change of address, name, etc. to TÜRSAB in the first instance. TÜRSAB makes the necessary examination and evaluation on the documents and sends them as a file to the Ministry. Contents of the file are examined by the Ministry once again and if there isn't any missing document, a travel agency operation certificate is issued.

- Travel agencies are audited by both the Ministry and TÜRSAB at any time. In addition, if the Ministry deems necessary, the Ministry requests from TÜRSAB to audit a travel agency and send the audit results to the Ministry, and necessary action is taken about the travel agency according to the result of the audit.
- Any flaw, deficiency, etc. posed by the legislation concerning the travel agencies, mainly the Law (No. 1618) and the Travel Agencies Regulation, over the time are evaluated in conjunction with TÜRSAB and new regulations are made in the legislation in accordance with the mutual agreement with TÜRSAB.
- Meetings are held with the Association at any time in order to solve any problem encountered in practice and seminars and workshops are held when necessary in order to ensure more productive and regular operation of the sector.

Table 5 - Number of Travel Agencies by Year

YEAR	NUMBER OF LICENSED TRAVEL AGENCIES
2002	4.344
2003	4.515
2004	4.643
2005	4.825
2006	5.050
2007	5.268
2008	5.519
2009	5.787
2010	6.045
2011	6.366
2012	6.877
2013	7.337
October2014	7.949

2.5. Incentives

Increasing the number of quality tourists and of the tourism revenues through activities aiming at giving direction for raising the number and qualifications of touristic investments and enterprises as well as of all sectoral actors besides periodic audits is important in terms of sustainability of the success in the tourism sector.

Another issue which is as much important as “audit” as being “indispensible” conditions precedent for development of the tourism sector is “sectoral incentives and supports”.

Enacted in 1982, at the beginning of a period during which the priorities of the tourism sector were established, the Law for the Encouragement of Tourism has played an important role in the encouragement of tourism investments and enterprises and in the development of the Tourism of Turkey since the very date of its coming into effect.

Instruments of support to the tourism sector such as

- Utilization of Real Properties for Tourism Purposes;
- Support for Trade Fairs;
- Reduction in the Prices for Electricity, Natural Gas and Water;
- Support for Staffing;
- Sales of Alcoholic Beverages;
- Working Hours;
- Communication Facilities

have provided significant incentives to the tourism sector since the day the Law came into effect.

Apart from the Law, direct or indirect incentives, exemptions and supports provided by other institutions to the tourism sector are:

- Incentives and Supports Implemented under the Decree of the Cabinet on the Government Aids for Investments;
- Supports and Services Provided by KOSGEB (Small and Medium Enterprises Development Organization);

- Supports Provided within the framework IPARD Program;
- Exemption Provided in the Estate Tax Law (No. 1319);
- Exemption Provided in the Municipal Revenues Law (No. 2464);
- Loan Facilities Made Available by EXIMBANK of Turkey;
- Encouragement of Foreign Capital Investments.

In order to keep the tourism investors and enterprises informed of such incentives and supports, the General Directorate holds “sectoral information meetings” attended by the relevant associations and societies and ensures continuous information exchange between the tourism sector and the Ministry and in this way makes contribution to the development of the Tourism of Turkey as its fundamental principle.

3. MARKETING AND PROMOTION

3.1. General Directorate of Promotion

Authority, duties and responsibilities of the General Directorate of Promotion are regulated in article 14 of the Law (No. 4848) on the “Organization and Duties of the Ministry of Culture and Tourism” as follows:

- a) To promote and cause to be promoted of national, moral, historical, cultural, artistic and touristic values of Turkey at home and abroad by using every kind of means; to hold seminars, symposiums, colloquiums, congresses, trade fairs, exhibitions, festivals, competitions, shows and similar activities or attend the same held by others at home and abroad to this end; to support and give direction to, and ensure the necessary cooperation between, local or foreign public or private institutions, organizations, communities and persons which and who are carrying out activities to this end; to encourage conduct of such activities in the country and give awards;
- b) To develop joint projects with and assist activities of local and foreign travel business entities at home and abroad with a view to directing the world travel business to Turkey;
- c) In order to facilitate and develop the aforesaid activities, to be in close relationship with mass

communication or transportation entities which are engaged in and direct such activities and to host such persons and representatives of institutions, organizations and societies who and which are in a position to influence public opinion in foreign countries;

d) To prepare and cause to be prepared, purchase and distribute publications, documents and materials necessary for promotion at home and abroad;

e) To conduct and cause to be conducted of every kind of study and research at home and abroad with the aim of evaluating the tourism demand for Turkey and establishment of policies in line therewith and to compile the statistical data;

f) To purchase goods and services related to promotional activities, such as press, broadcasting, etc. in abroad in order to increase the tourism demand for Turkey;

g) To carry out the similar duties assigned by the Ministry.

3.2. Promotion Strategy

The principles of the promotion strategy for which the General Directorate of Promotion has been authorized and made responsible can be listed as follows:

- Carry out destination-focused promotion;
- Focus on travel motivations such as culture, sports, youth, healthcare, yachting, congress, etc. as well besides the sea-beach-sun element and thus emphasize the range of products of Turkey;
- Convey the life style and travel experience offered by Turkey through messages appealing to emotions;
- Conduct works for promotion of international sportive, cultural and artistic events held in Turkey;
- Use scenes from actual life and human element in visual materials;
- Focus digital promotion.

3.3. Overseas Organization

The General Directorate of Promotion has been carrying out its overseas promotion activities in many countries through the Culture and Promotion Offices listed below:

New York, Washington, Los Angeles, London, Moscow, Kiev, Belgrade, Skopje, Sarajevo, Sofia, Paris, Madrid, Roma, Brussels, Beijing, Kuala Lumpur, Tokyo, Asthana, Ashgabat, Baku, Tashkent, Tehran, Dubai, Tel Aviv, Cairo, Damascus, New Delhi, Riyadh, Berlin, Frankfurt, Wien, Hague, Zurich, Warsaw, Stockholm, Copenhagen, Helsinki, Sidney, Toronto, Tunisia, Athens, Shanghai, Sao Paulo, St. Petersburg.

3.4. Advertising Activities

Within the scope of the overseas promotion activities carried out in order to boost visitor traffic more, to contribute to maintenance of the positive image enjoyed in foreign target markets in the long term, as well as to elevate the competitive power of the tourism products in international market and to increase the foreign exchange inflow by taking more share from tourism revenues, advertisement campaigns were conducted through outdoor (large LED screens, billboards, taxi/bus advertising), the Internet, TV/Radio, press (magazines and newspapers) media with an expenditure of TL 87.100.000 in 2013.

Recently digital media campaigns have been developed and campaigns conducted through most circulated newspapers and magazines, most watched TV channels and national channels, most listened radio channels, taxi and bus advertising, shopping malls, airports and other outdoor media, inflight magazines and TV screens of national airline companies, etc. The advertisement budget set aside for 2014 reached \$50m. In the promotion campaigns of this year, the word “Home” has been established as the main theme and a number of slogans and visual materials have been developed in this context.

Picture 6 – Promotion Logo 2014



Picture 7 – Sample Images 2014



3.4.3. Co-Advertising, Joint Events and Projects

Activities such as advertisements, co-hosting, workshops, roadshows, etc. were carried out jointly with overseas tour operators who have operations in Turkey and have a significant place in their own markets.

Co-advertising activities are carried out in conjunction with tour operators, travel agencies, associations of travel agencies, tourism unions and associations located within the responsibility areas of the Culture and Promotion Offices of Turkey, which are organizing tours to Turkey, as well as airline companies based within the responsibility areas of the Culture and Promotion Offices of Turkey which are carrying passengers with “scheduled” and/or “charter” flights to Turkey.

In 2013, in order to increase the demand for Turkey and to contribute to marketing activities of tour operators involving Turkey, co-advertising activities amounting to TL 21.000.000 were carried out with tour operators in Germany, Russian Federation, Ukraine, Italy, the UK, Switzerland, the Netherlands, Austria, Poland, Denmark, Finland, Sweden, Norway, Serbia, Bulgaria, China, Uzbekistan and Belgium.

Picture 8 – 2013, Turkish Culture Year in China



In 2013, in order to raise interest in the official opening ceremony of the Turkish Culture Year in China and to announce to the Chinese people, advertisement and PR campaigns were carried out through press, outdoor advertising and the Internet and in addition official opening premieres were held in Beijing on 21 March 2013 and in Shanghai on 25 March 2013 as part of the cultural promotion activities. Fire of Anatolia Dance Company attended a television coverage featuring the Chinese New Year Premiere and performed various shows at the National Performance Arts Center.

Organized by the Turkish Golf Federation, the European Tour Final Series, “Turkish Airlines Open” was held with the attendance of Tiger WOODS, the number 1 player in the ranking, and 77 players in European ranking at Maxx Royal in Belek, Antalya during November 7-10, 2013.

In 2014, advertisement activities were carried out in conjunction with Calypso Travel and Vip DAVR in Uzbekistan, Era Stype Tours in Azerbaijan, and Travel System, Tez Tour and Kaz Tour in Kazakhstan.

Through cooperation between the West Mediterranean Development Agency (BAKA) which is operating in the provinces of Antalya, Burdur and Isparta and Air Arabia, an airline company headquartered in the UAE, and the Ministry, a Roadshow where the representatives of the gulf countries and the representatives of the tourism sector of Turkey met was held.

3.4.4. Early Booking and Visa Facilities

The “Early Booking” campaign, which is one of the greatest partnerships built between the Ministry of Culture and Tourism and the private sector, started in 2010 and gave very great impetus to the domestic tourism from the start. Many firms in the sector participated in the project, which was also actively supported by professional tourism organizations, making substantial discounts and enabling local tourists enjoy a cheaper holiday. Thanks to the campaign, local tourists booked places for high season well in advance for cheaper prices and thus gained benefits while accommodation facilities found the opportunity to see the volume of guests they would host in the high season and to receive some of the revenues beforehand. The campaign proved advantageous for both the service providers and the service users.

While the sector was kept energetic through such campaigns in the domestic tourism, positive steps were taken in the visa regime, one of the factors that directly affects the visitor inflow, besides the marketing and advertisements campaigns toward foreign tourism. As a result of giving the opportunity to obtaining visa at border gates to the citizens of 89 countries besides application of reciprocal visa exemption for short visits with a number of countries and provision of the convenience of e-visa to the citizens of nearly 100 countries, the number of incoming foreign visitors increased substantially.

3.5. Projects and Fairs

The “Regulation on the Supports from the Ministry of Culture and Tourism to Projects of Local Administrations, Association and Foundations” was enacted in 2007. In accordance with the Regulation, support is provided to projects involving local, national and international events such as festivities, festivals, memorial days, concerts, exhibitions, shows, congresses, symposiums, seminars, panels, fine arts, fairs, etc. which keep alive, propagate, support, enhance and promote our cultural, artistic and touristic values and properties.

In accordance with the Communiqué no. 2010/9 on the Supporting of Attendance in Overseas Tourism Trade Fairs and of Tourism Promotion and Marketing Activities which aims to raise attendance in tourism trade fairs in abroad and to ensure provision of the necessary support to promotional and marketing activities in abroad, the Ministry provides financial support to enterprises attending individually or as a group under the auspices of a professional union or association of the tourism sector such tourism trade fairs supported or attended by the Ministry through the Overseas Culture and Promotion Offices in order to promote the region for their attendance expenses and special project expenses within the scope of promotional and marketing activities carried out in abroad.

Table 6 - Large-Scale Tourism Fairs Attended by the Ministry in 2014

LARGE-SCALE FAIRS ATTENDED BY THE MINISTRY IN 2014						
THROUGH PUBLIC-PRIVATE PARTNERSHIPS						
NO	NAME OF FAIR	M²	COUNTRY	CITY	DATE OF FAIR	OFFICE
1	UTRECH TOURISM FAIR	738	HOLLAND	UTRECH	JANUARY 14 -19, 2014	Culture and Promotion Office in Hague
2	FITUR TOURISM FAIR	645	SPAIN	MADRID	JANUARY 22 - 26, 2014	Culture and Promotion Office in Madrid
3	BIT MILAN TOURISM FAIR	300	ITALY	MILAN	FEBRUARY 13 - 15, 2014	Culture and Promotion Office in Roma
4	ITB BERLIN TOURISM FAIR	3.079	GERMANY	BERLIN	MARCH 05 - 09, 2014	Culture and Promotion Office in Berlin
5	MITT MOSCOW	1.254	RUSSIA	MOSCOW	MARCH 19 - 22, 2014	Culture and Promotion Office in Moscow
6	ARABIAN TRAVEL MARKET	610	UAE	DUBAI	MAY 05 - 08, 2014	Culture and Promotion Office in Dubai
7	WORLD TRAVEL MARKET	966	THE UK	LONDON	NOVEMBER 03 - 06, 2014	Culture and Promotion Office in London

The Ministry attends international travel fairs which give direction to the world tourism sector and meets tourism professionals and consumers. In 2014, the Ministry attended a total of 125 tourism fairs in 56 countries, of which 7 are large-scale, 101 were attended through public-private partnerships and 24 were attended via Culture and Promotion Offices of Turkey. Stands used in the fairs are decorated with visual materials featuring the “Home of...” campaign.

The Ministry cooperates with governorships, municipalities, Provincial Culture and Tourism Directorates, Tourism and Travel Agencies, and airline companies such as Turkish Airlines in the course of fairs, providing them stands, whether paid for or free of charge, and makes contributions to tourism and travel agencies, hotels and tour operators attending such fairs individually for rents, stand construction, decorations, etc., providing them with opportunity to make promotions and bilateral talks with representatives of the travel sector. Fair spaces are used efficiently and focus is given on the location of the attendants within the fair hall and to the impression created by them on professionals.

Picture 9 – Images from the Fairs



The Ministry supported Travel Turkey Fair in İzmir, Van Tourism Fair, EMITT Eastern Mediterranean International Tourism and Travel Fair, ANFAX HETEX Fair, one of the important fairs in the field of health tourism, Ordu Black Sea Tourism Fair, Ordu Black Sea Book Fair and İzmir International Fair.

3.6. Hosting Activities

Representatives of the world's most prominent travel agencies and media enterprises are hosted in Turkey. As a result of the hosting activities, news stories about Turkey appear in many publications circulating across the world.

Members of the press and broadcasting companies and artists from the responsibility regions of the overseas Culture and Promotion Offices of Turkey are hosted to show them cultural, natural and historical sites at prominent destinations of Turkey in accordance with a hosting schedule in order that they tell their positive impressions on Turkey in the media they work for as part of the efforts to raise the market share of Turkey in the world tourism. Hosting activities are sometimes carried out toward alternative tourism areas such as health tourism, thermal tourism or winter tourism in an effort to raise the interest in such areas.

In this context, the overseas Culture and Promotion Offices hosted 605 journalists, press members and opinion leaders, and additional 67 persons were hosted through collaboration with the tourism sector in 2013.

On the occasion of declaration of the province of Eskişehir as the Cultural Capital of Turkish World in 2013, editors and executives of prominent newspapers and magazines in Turkic Republics and in the target/potential tourism markets of Eskişehir were hosted by the General Directorate of Promotion in Eskişehir on March 20-24, 2013.

Picture 10 – Eskişehir, Cultural Capital of Turkish World in 2013 Events



In 2014, in total 1666 guests were hosted, which of 656 of them were hosted by The Ministry and sector. In addition to those, the Ministry hosted 1010 journalists and public opinion leaders as well. To illustrate; in 2014, 12 representatives of the tourism sector of Uzbekistan were hosted through collaboration with Fado Travel Agency in İstanbul and Antalya.

3.7. Support for Cultural and Artistic Projects

The “Regulation on the Supports from the Ministry of Culture and Tourism to Projects of Local Administrations, Societies and Foundations” was enacted in 2007. In accordance with this Regulation, support is provided to projects involving local, national and international events such as festivities, festivals, memorial days, concerts, exhibitions, shows, congresses, symposiums, seminars, panels, fine arts, trade fairs, etc. which keep alive, propagate, support, enhance and promote our cultural, artistic and touristic values and properties. Some illustrative supports given are as follows:

- Turkish Pavilion at 55th Venice Art Biennale held in Venice, Italy during June 1-November 24, 2013 was realized by the contributions of the Ministry.
- The Ministry supported the Paris Project section of the International Paris Film Festival which brought together the professionals of the motion picture industry. Our official logo was on all materials (posters, brochures, programs, etc.) promoting the Festival. The Ministry also hosted an opening cocktail party for 180 persons, which was thrown for the French and other foreign professional attendants.
- The Turkish Youth Philharmonic Orchestra performed seven concerts in the cities of Ravello, Tormina, Roma, Floransa, Bologna, Padova and Verona in Italy during September 7-17, 2013 with the contributions of the Ministry.
- Fire of Anatolia Dance Company, which performed shows in over 90 countries to over 20 million spectators so far, performed the “TROY” show at “Palats UKRAINE”, the National Culture Palace of Kiev, on April 13, 2013.
- The opening fashion show of Bora AKSU, a Turkish designer living in London, in an event held in London during September 13-17, 2013, which was followed with interest by the media members across the world, was supported by the Ministry.
- The Ministry supported the Association of European Youth Parliament and covered the venue

expenses and organized the gala dinner for II. International Ankara Youth Forum, held in 20-24 February 2014.

3.8. Destination Projects

In order to increase the collaboration with the tourism sector, to accelerate the destination branding in line with the new trends in tourism, to bring all actors of tourism together with the aim of finding solutions to the problems of the region related with tourism, and to raise the efficiency of the promotion activities, the General Directorate of Promotion commenced the Destination Projects in Alanya and Bodrum in 2009. Between the years 2010-2012, the destination works in Cappadocia, İzmir, Çeşme, Mardin and Gaziantep were completed. The destination work involving Fethiye and Denizli, which was commenced in 2012, is still in progress.

A team assigned to the destination works holds talks with all actors (office of governor, municipality, hotel operators, travel agencies, guides, development agency, etc.) at the destination and the result reports of these talks are evaluated in a meeting attended by the representatives of the tourism sector and the top executives of the Ministry.

4.TOURISM AND EDUCATION ACTIVITIES

After the establishment of the Ministry of Tourism and Promotion in 1963, serious works on the tourism education were commenced. In 1967, the first Hotel Management and Tourism Education Center (OTEM) was established in İstanbul by taking the hotel management in Italy as an example. This was followed by İzmir in 1968, Ankara in 1970 and Antalya in 1974. The number of education centers, which was renamed as Tourism Education Center (TUREM) in 1981, reached 12 in 1998. 20.805 students were graduated from the courses held during 1967-2006 and employed. Besides educating new employees for the sector through the TUREM model, the Ministry continues to provide On-Job Training Courses to the employees in the sector. In the courses delivered by the instructors of the Ministry free of charge, training was provided to 76.847 employees in the sector between 1967-2014 November. Total 9.784 persons attended the “Seminars on Creating Awareness for Tourism” which were held during 2006-2009 with the aim of raising the awareness for tourism and creating awareness in the society for tourism. Guide services

were rendered by interpreter guides in the organization of the General Directorate of Press and Broadcasting until 1963, and after the establishment of the Ministry of Tourism and Promotion in the same year, the guide courses began to be organized by the Ministry. Besides the courses opened by the Ministry so far, tourist guides were also cultivated by two-year degree and undergraduate programs of universities. Currently there are 9.739 tourist guides who were conferred license through coordination between The Union of Tourist Guides Chambers (TUREB) and the Ministry as of October 2014.

4.1. Tourist Guiding and Professional Organizations

Providing that it is not in the nature of travel agency activity, the activity of introducing and showing the cultural, touristic, historical, environmental, natural, social or similar values and properties of Turkey to local or foreign tourists visiting individually or as a group in the language selected by them in line with the culture and tourism policies or of carrying out of tour and excursion programs established by travel agencies as described in the written documents of and sold by travel agencies to consumers and management of the same on behalf of travel agencies is called “Tourist Guiding Service”. A person who is entitled and authorized to provide tourist guiding service is called “Tourist Guide”.

4.1.1. Collaboration in Certificate Programs, Opening of Courses and Specializing in Tourist Guiding

Collaboration was built between the Ministry of Culture and Tourism and the chambers of tourist guides and The Union of Tourist Guides Chambers (TUREB) which were established under the Profession of Tourist Guiding Law (no. 6326).

Paragraph (c) of Article 3, titled ‘Accepting into Profession’, of the Profession of Tourist Guiding Law no. 6326, provides that “In order to be accepted into the profession of tourist guiding, one must have been graduated either from a two-year, undergraduate or postgraduate program of the tourist guiding department of a university or from minimum undergraduate program of a department other than the tourist guiding department of a university and successfully completed the nationwide or regional tourist guiding certificate program held by the associations under the

supervision and control of the Ministry in accordance with the regulatory procedures and principles applicable to courses and exams in such languages and in such regions as determined by taking into account the needs of the tourism sector upon the joint proposal of the associations and the Association of Travel Agencies of Turkey and the approval of the Ministry.”

Paragraph (ç) of the same article provides that “In order to be accepted into the profession of tourist guiding, one must have successfully passed the foreign language exam held by the Ministry or by a public institution or organization specialized in this field as designated by the Ministry under the supervision and control of the Ministry or has one of the foreign language proficiency certificates as specified in the regulation in one of the foreign languages as determined upon the joint proposal of the Associations and the Association of Travel Agencies of Turkey and the approval of the Ministry and in the paragraph (d) it also stated that “Candidates are required to attend to participate study visit organized by the Union under supervision of the Ministry and shall be successfull in the following exam..”

4.2. Nonformal Tourism Training Programs

The General Directorate of Research and Training of the Ministry holds various tourism education programs for the employees of tourism enterprises. These programs are

- On-Job Training Courses: Front Office, Food & Beverage Serving, Housekeeping, and Food Making as well as Education of Managers as Instructors
- Personal Development Seminar.

The objective of these programs is to improve the qualifications of the persons working at accommodation and dining facilities serving to the tourism sector as well as the quality of the services.

A facility which requests holding of a course or a seminar fill in a “Training Request Form” obtained from a concerned non-governmental organization or the local administration or the Internet site of the Ministry and sends it, as attached to a cover letter, directly or through the Provincial Directorate to the General Directorate. Requests are evaluated by the concerned Department and the courses and seminars included in the program are held by the approval of the General Directorate.

Employees to attend a course in any of the Front Office, Food & Beverage Serving, Housekeeping, and Food Making branches must be working in the department relevant with the course as of the date when the course is held. Employees to attend the Education of Managers as Instructor Course must be working as a department manager, assistant manager, department chief, or in any other managerial position at the respective facility. The Personal Development Seminar can be attended by all employees working in any department and at any level of the facility. These programs are delivered free of charge by master instructors working as tied to the Ministry.

Trainees who successfully passed the theoretical and practical final exam held at the end of the On-Job Training Courses are conferred a “Certificate of Accomplishment” issued to their names.

For the purposes of exchanging knowledge and experience and of enhancing the friendship and relations between the countries, international tourism education programs are held in accordance with bilateral and multi-lateral agreements.

It is held with the aim of raising the motivation of the employees in the tourism sector and informing them about the principles and techniques of communication. Duration of this seminar is two days, three hours per day. Attendants of the seminar are given a “Certificate of Attendance” at the end of the seminar.

5. TOURISM STATISTICS

5.1. Institutions and Organizations Collaborated for Publication of Data

The Ministry has been publishing the data and information relevant with the tourism movements and conducting important works in the following areas with national and international institutions since 1972. In this connection, the Ministry has been conducting joint works with the Turkish National Police, the Turkish Statistical Institute and the Central Bank. The Ministry also collaborates with a number of institutions within the World Tourism Organization, the Organization for Economic Cooperation and Development (OECD) and the European Union regarding the tourism statistics.

In addition, the Ministry creates new publications for release and compilation of the data by taking into account the comments received from enterprises in the tourism sector.

As a result of the decisions taken in the meetings and workshops held on the issues of updating of the method of calculation of the tourism revenues and of inclusion of the Turkish citizens living in abroad in the number of visitors and hence the calculation of the tourism revenues as raised by the roof organizations of the tourism sector such as the Hoteliers Federation of Turkey(TÜROFED), the Association of Travel Agencies of Turkey (TÜRSAB), the Touristic Hotels & Investors Association of Turkey(TÜROB), the Association of Tourism Investors of Turkey (TYD), etc. especially in recent years, new regulations have been enacted, tourism revenue has begun to be calculated in its real value, and requirement of international standards regarding the number of visitors has been fulfilled.

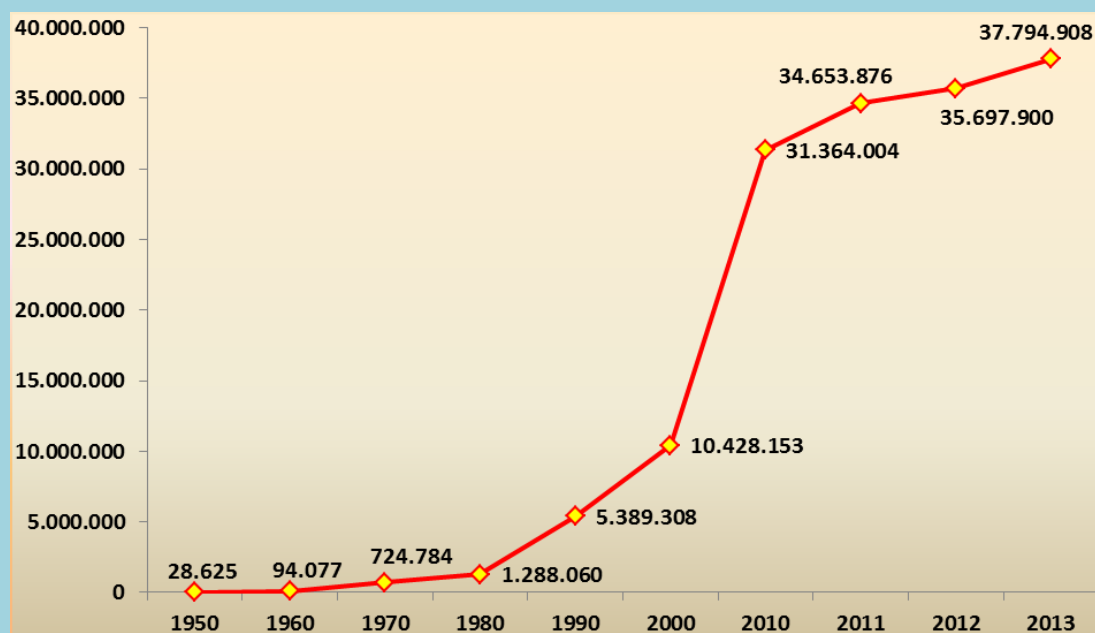
5.2. Tourism in Turkey and in the World

Turkey has attained a remarkable place in the tourism sector which has been rapidly growing since 1950s.

The world figures show that the number of tourists rose from 25.3 million in 1950 to 278.1 million in 1980, 673 million in 2000, 948 million in 2010 and 1 billion 87 million in 2013.

In Turkey, the number of tourists rose from 28,625 in 1950 to 1.2 million in 1980, 10.4 million in 2000, 31.1 million in 2010 and 37.8 million in 2013. The number of tourists in the world increased by roughly 43 times during 1950-2013, while in Turkey by roughly 1,320 times. The United Nations World Tourism Organization ranked Turkey 6th in the World and 4th in Europe among the “Most Tourist Attracting Countries” in 2013.

Graphic 2 - Number of Tourists Visiting Turkey by Year



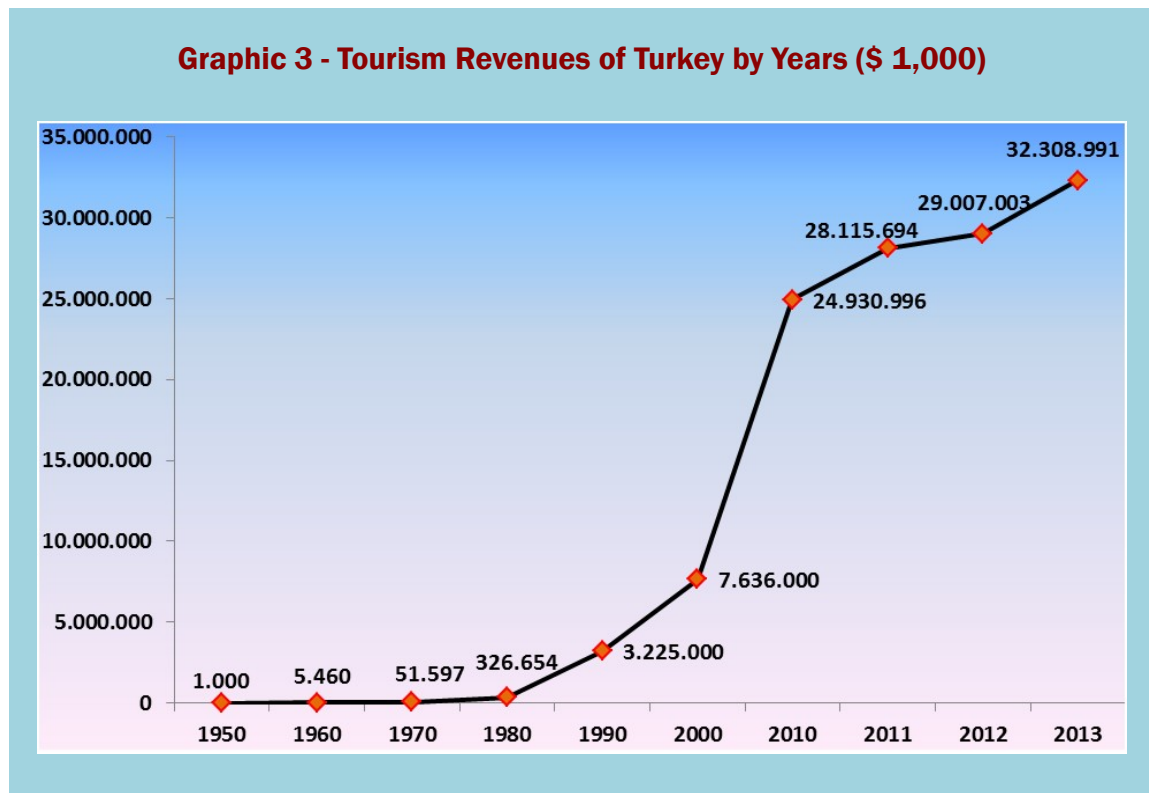
The tourism revenue figures in the world show that the tourism revenues rose from 2.1 billion US dollars in 1950 to 104.4 billion dollars in 1980, 493 billion dollars in 2000, 965 billion dollars in 2010 and 1 trillion 195 billion in 2013.

Table 7 - Tourism Revenues in the World and Turkey (1950-2013)

YEAR	TOURISM REVENUES IN THE WORLD (US\$ 1 billion)	TOURISM REVENUES IN TURKEY (US\$ 1 thousand)
1950	2,1	1.000
1960	6,9	5.460
1970	17,9	51.597
1980	104,4	326.654
1990	262	3.225.000
2000	493	7.636.000
2010	965	24.930.996
2011	1079	28.115.694
2012	1151	29.007.003
2013	1195	32.308.991

In Turkey, the tourism revenues rose from 1 million US dollars in 1950 to 326.6 million dollars in 1980, 7.6 billion dollars in 2000, 24.9 billion dollars in 2010 and 32.3 billion dollars in 2013.

With tourism revenues of 32.3 billion US dollars, Turkey is ranked by the United Nations World Tourism Organization 10th in the World and 6th in Europe among the “Countries Earning Most from Tourism”.



5.3. Tourism with COMCEC Countries

5.3.1. Number of Visitors to Turkey from COMCEC Countries

The number of visitors from COMCEC countries to Turkey accounts for roughly 14% of all visitors.

Among the top five most tourist sending COMCEC countries in 2013, Iran ranked first with 1.196.801 visitors, followed by Iraq with 730.639 visitors, Azerbaijan with 630.754 visitors, Kazakhstan with 425.773 visitors and Libya with 264.266 visitors.

Table 8 - Number of Visitors to Turkey from COMCEC Countries (2010-2013)

No	COUNTRY	2010	2011	2012	2013
1	Iran	1 885 097	1 879 304	1 186 343	1 196 801
2	Iraq	280 328	369 033	533 149	730 639
3	Azerbaijan	486 381	578 685	593 238	630 754
4	Kazakhstan	247 784	315 907	380 046	425 773
5	Libya	60 917	53 562	213 890	264 266
6	Saudi Arabia	84 934	116 711	175 467	234 220
7	Turkmenistan	114 390	137 476	135 168	148 709
8	Lebanon	134 554	137 110	144 491	143 629
9	Uzbekistan	68 124	85 011	105 976	129 292
10	Algeria	67 954	84 844	104 489	118 189
11	Egypt	61 560	79 665	112 025	107 437
12	Jordan	96 562	94 914	102 154	102 871
13	Tunisia	57 855	63 176	86 595	91 683
14	Kuwait	27 281	41 617	65 167	88 238
15	Morocco	57 447	68 645	77 884	82 579
16	Albania	49 954	53 141	59 565	65 113
17	Kyrgyzstan	35 665	41 197	42 866	64 905
18	Indonesia	24 349	40 282	56 113	57 385
19	Malaysia	32 458	36 222	41 169	55 139
20	U.A.E.	30 480	35 579	48 071	52 424
21	Pakistan	22 540	26 735	28 394	34 170
22	Tajikistan	17 737	16 822	22 823	27 174
23	Nigeria	9 172	14 564	19 897	22 869
24	Afghanistan	12 511	16 395	15 373	19 704
25	Qatar	6 043	7 661	13 971	18 630
26	Yemen	6 344	8 066	11 826	17 354
27	Bahrain	9 375	9 712	13 342	16 230
28	Sudan	6 634	7 458	8 161	9 319
29	Oman	5 408	5 998	7 959	8 956
30	Bangladesh	2 190	6 168	6 652	8 856
31	Palestine	4 685	5 447	6 327	7 971
32	Cameroon	1 381	1 609	2 411	5 775

33	Senegal	4 755	5 579	5 650	4 811
34	Somali	850	1 608	3 501	3 357
35	Uganda	785	1 445	1 895	2 914
36	Ivory Coast	755	1 280	1 847	2 407
37	Gabon	161	268	473	1 902
38	Mauritania	682	833	1 333	1 600
39	Benin	155	288	339	1 577
40	Burkina Faso	413	506	621	1 563
41	Mali	573	834	880	1 439
42	Niger	159	342	510	1 338
43	Comoro Islands	459	1 020	783	989
44	Guinea	723	645	601	666
45	Djibouti	105	186	281	646
46	Brunei	315	19 504	552	634
47	Gambia	188	350	389	528
48	Mozambique	163	311	386	485
49	Togo	135	258	314	463
50	Chad	106	150	147	417
51	Maldives	156	167	262	404
52	Surinam	264	180	196	271
53	Sierra Leone	317	213	253	242
54	Guinea-Bissau	70	112	135	161
55	Guyana	47	68	134	60
	TOTAL COMCEC COUNTRIES	4 020 430	4 474 863	4 442 484	5 015 928
	TOTAL VISITORS TO TURKEY	28 632 204	31 456 076	31 782 832	34 910 098
	SHARE OF COMCEC COUNTRIES IN TOTAL (%)	14,04	14,23	13,98	14,37

5.3.2. Number of Overnight Stays of Visitors from COMCEC Countries

The number of overnight stays of visitors from COMCEC countries accounted for 8% of the total number of overnight stays of visitors to Turkey in 2010, rising to 11% as of the end of 2013.

Among the top five countries in overnight stays of visitors from COMCEC countries in 2013, Iran ranked first with 374,783 visitors, followed by Iraq with 286,501 visitors, Saudi Arabia with 271,855 visitors, Kazakhstan with 262,638 visitors and Azerbaijan with 149,007 visitors.

Table 9 - Number of Overnight Stays of Visitors from COMCEC Countries (2010-2013)

No	COUNTRY	2010	2011	2012	2013
1	Iran	383 660	411 647	433 254	374 783
2	Iraq	130 081	166 398	274 159	286 501
3	Saudi Arabia	136 810	175 356	248 060	271 855
4	Kazakhstan	145 863	172 460	255 250	262 638
5	Azerbaijan	85 829	111 835	129 481	149 007
6	Libya	26 896	32 537	203 845	145 783
7	Lebanon	85 888	81 600	102 309	102 278
8	Kuwait	27 492	39 552	63 763	83 566
9	UAE	48 331	49 604	67 210	74 453
10	Jordan	58 040	58 109	81 658	71 030
11	Egypt	51 100	64 019	93 328	70 628
12	Malaysia	37 383	38 406	50 171	59 739
13	Tunisia	26 042	24 490	40 411	46 552
14	Algeria	18 917	31 404	41 446	44 063
15	Indonesia	10 780	19 487	37 198	43 446
16	Uzbekistan	19 733	25 265	31 332	40 552
17	Morocco	23 668	35 569	33 598	38 602
18	Albania	28 896	23 654	28 274	33 862
19	Turkmenistan	21 931	22 712	28 760	30 913
20	Pakistan	17 658	21 959	17 106	23 497
21	Qatar	6 703	7 196	17 591	22 815
22	Bahrain	8 632	9 921	13 311	17 282
23	Kyrgyzstan	10 994	14 056	12 873	15 599
24	Yemen	4 582	4 638	7 863	13 708
25	Nigeria	3 697	4 630	5 540	12 063
26	Oman	4 151	3 386	5 005	9 038
27	Afghanistan	4 640	5 942	3 831	7 599
28	Tajikistan	4 014	13 635	8 457	6 587
29	Sudan	3 166	5 750	4 910	4 982
30	Bangladesh	1 560	2 949	2 887	3 995
31	Palestine	1 270	1 593	2 100	3 668
32	Senegal	668	1 599	857	1 824
33	Uganda	425	322	337	1 301
34	Mali	226	240	574	1 274
35	Cameroon	454	469	295	986
36	Surinam	440	218	461	958
37	Somali	264	163	3 659	792

38	Mauritania	72	119	380	348
39	Niger	358	250	215	348
40	Gabon	145	150	109	329
41	Sierra Leone	183	642	149	268
42	Maldives	70	26	111	244
43	Mozambique	11	46	119	243
44	Ivory Coasts	138	39	143	222
45	Burkina Faso	60	54	36	214
46	Comoro Islands	18	27	60	193
47	Guinea	28	151	66	189
48	Brunei	72	80	78	160
49	Benin	153	85	245	148
50	Togo	19	40	28	91
51	Djibouti	97	15	11	79
52	Gambia	11	27	41	72
53	Chad	754	276	106	68
54	Guinea-Bissau	10	339	-	39
55	Guyana	23	44	5	6
TOTAL OVERNIGHT STAYS OF VISITORS FROM COMCEC COUNTRIES		1 443 106	1 685 180	2 353 066	2 381 480
TOTAL OVERNIGHT STAYS OF FOREIGN VISITORS IN TURKEY		17 415 364	19 264 058	20 481 308	21 181 668
SHARE OF VISITORS FROM COMCEC COUNTRIES IN TOTAL OVERNIGHT STAYS(%)		8,29	8,75	11,49	11,24

OBJECTIVES

Through partnerships between the Ministry of Culture and Tourism and the private sector, it is targeted for the next period;

- 1- To raise the market share of the domestic and international tourism and to be one of the top five countries in terms of the world tourism with 50 million tourists and tourism revenue of 50 billion US dollars by 2023;
- 2- To develop innovative practices and tools that will increase the competitiveness and productivity in the tourism marketing;
- 3- To improve the existing tourism areas in terms of infrastructure and superstructure components;
- 4- To develop alternative tourism products apart from mass and coastline tourism;
- 5- To use the tourism as a powerful instrument for regional development by conducting development, promotion and marketing works with a regional, provincial and thematic focus in areas designated as Tourism Development Areas, corridors, destinations and tourism towns;
- 6- To examine the large-scale tourism investments by taking into account all the criteria related with geological / biological / social / transportation, etc. aspects and to establish a management structure that will ensure coordination between the concerned ministries and between the public and the private sectors;
- 7- To strengthen the professional organizations in the sector and to establish professional standards;
- 8- To develop products and instruments to increase the benefits of disadvantaged groups from tourism;
- 9- To promote public-private partnerships in the application of ethical principles.

