



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

**Proceedings of the 11th Meeting of the
COMCEC Tourism Working Group**

**“Destination Development and Institutionalization
Strategies in the OIC Member Countries”**



**COMCEC COORDINATION OFFICE
February 2018**



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**PROCEEDINGS OF THE 11TH MEETING OF THE
COMCEC TOURISM WORKING GROUP
ON
“Destination Development and Institutionalization Strategies in
the OIC Member Countries”
(February 15th, 2018, Ankara, Turkey)**

**COMCEC COORDINATION OFFICE
February 2018**

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Introduction

The 11th Meeting of the COMCEC Tourism Working Group was held on February 15th, 2018 in Ankara, Turkey with the theme of “Destination Development and Institutionalization Strategies in the OIC Member Countries.” The Meeting was attended by the representatives of 7 Member States, which have notified their focal points for the Tourism Working Group namely Azerbaijan, Egypt, Gambia, Guinea, Malaysia, Saudi Arabia and Turkey. Representatives of the COMCEC Coordination Office, SESRIC, UNWTO, Dinar Standart and Kayseri Erciyes Corp. have also attended the Meeting.¹

At the outset, the representative of the COMCEC Coordination Office informed the participants about the tourism outlook of the Member Countries. The participants considered destination development and institutionalization strategies in tourism sector through focusing on the Analytical Study titled “Destination Development and Institutionalization Strategies in the OIC Member Countries” prepared for the Meeting with a view to enriching the discussions.

The participants had the chance to discuss the policy options for enhancing the cooperation in this important field during the policy debate session. The Room Document based on the findings of the Analytical Study submitted to the Tourism Working Group Meeting and the answers of the Member Countries to the policy questions sent to the Member States by the COMCEC Coordination Office were the main inputs for the discussions during moderation session.

COMCEC Coordination Office also presented the COMCEC Project Funding Mechanism and informed the participants of its details.

The Representatives of the Member States have shared their experiences, achievements and challenges regarding destination development and institutionalization strategies in tourism sector in their respective countries.

Lastly, the international institutions’ perspectives and private sector efforts were also reflected to the discussions.

¹ The list of participants is attached as Annex 4.



1. Opening Session

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

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

2. The COMCEC Tourism Outlook

Dr. Gurel CETIN, consultant from the COMCEC Coordination Office and scholar at Istanbul University, has presented some of the key developments of tourism industry in the World and in the OIC Member Countries. In his presentation, Dr. CETIN provided an overview of the importance of tourism as a socio-economic phenomena and the current state of the industry in the World and in the OIC Region.

He highlighted the importance of tourism particularly for developing economies and expressed that tourism has experienced continued growth over the past eight years and become one of the most rapidly developing industries in the world. He shared various figures demonstrating that a strong tourism sector could contribute in many ways to development and the economy.

Various key tourism trends were also mentioned by Dr. Cetin such as demographic (ageing population, growing middle class and millennials) and behavioral changes (quest for authenticity and novelty, emerging destinations), advancements in technology (internet, distribution channels, sharing economy), crises and risk management (types and impacts of crises) and sustainability implications for tourism (best practices)..

He then shared some figures about the current state of tourism industry in the World through displaying World arrivals and receipts between 2000 and 2016. Dr. Cetin stated that global tourism arrivals have grown from 678 million in 2000 to 1.2 billion in 2016 and expected to be more than 1,3 billion in 2017. Dr. Cetin also provided tourism market shares of different regions related to tourism arrivals and receipts and stated Africa, Middle East and Asia Pacific regions are growing at a larger pace than most established destinations in Europe and Americas.

He also compared contribution of tourism sector to the OIC member countries with those of the World averages. The OIC Member Countries have recorded 138 billion USD receipts from 178 million arrivals in 2016. Dr. Cetin also pointed out the low per tourist spending in the OIC Region. He stated that currently OIC is earning 750 USD per arrival whereas the World average is around 1000 USD. Hence he suggested that the OIC Member Countries need to focus on improving per tourist spending besides the volume in arrivals in order to increase the total value created from tourism. Top 10 destinations among the OIC member states concerning arrivals and receipts were also displayed during his presentation.

Dr. Cetin then mentioned about the current state of tourism in some member countries such as Turkey, Malaysia, Indonesia, Tunisia, Morocco, Qatar, Lebanon, Oman, Saudi Arabia and Egypt. Finally, Dr. Cetin shared various strengths of the OIC member countries (natural, cultural and human resources, authentic experiences, competitive prices, and dynamic economies) as well as various challenges the member countries face concerning destination planning (infrastructure, visa facilitation, safety and security, investments) and marketing (product development and diversification, promotion and image building, service quality).

Questions & Remarks

Question: What can be done to improve resilience of OIC tourism industry against crises?

Answer: COMCEC has already explored Crises and Risk Management Strategies under the previous Analytical Study published in September 2017. The study suggests that there are different courses of action that can be taken during different phases of crises. During pre-crisis countries should identify risks of different crises and take preventative measures, during the actual crises immediate recovery measures and public relations efforts should be put into action to minimize the negative impacts and during post-crisis countries should self-reflect and create a stronger tourism industry. Moreover some market segments are more resilient to crises than others (e.g. cultural tourism), market diversification might also create a stronger tourism industry..

Question: How can OIC Member countries increase per tourist spending?

Answer: Countries and DMOs should focus on planning and managing tourism supply at a point where it meets with projected demand at optimum prices. If there is more bed supply than actual demand; prices decrease. Offering a wide range of activities and services might also increase average length of stay which consequently results in a higher per tourist spending. Targeting more price inelastic markets (e.g. MICE) would also be suggested as a viable strategy.

Comment: Regarding product diversification in tourism, the potential resources in the destination and competitive advantages against other destinations need to be considered. Otherwise, diversification strategies would fail.

3. Destination Development and Institutionalization Strategies: Global Trends and Success Factors

Ms. Reem El Shafaki, Senior Associate at DinarStandard, delivered a presentation based on the analytical study titled “Destination Development and Institutionalization Strategies in the OIC Member Countries”. Ms. El Shafaki started her presentation by reviewing the study methodology. This included primary research in the form of 27 in-depth interviews, 31 online structured interviews, and eight case studies, four of which were field visit case studies and four were desk based. Four of the case studies were on the OIC countries and the other four were on the non-OIC countries. Secondary research included a comprehensive literature review comprising academic journal articles, global tourism industry reports, academic research papers, trade and sector reports, government data, and publications of international organizations such as the UNWTO, UNESCO, WTTC, the World Bank, and OECD.

Next Ms. El Shafaki described the typical destination lifecycle stages of destinations from discovery, then involvement, to development, consolidation, stagnation, and then either rejuvenation or decline. Ms. El Shafaki then went on to describe the features of potential tourism destinations. In terms of resources, core resources include natural and cultural resources; supporting resources include activities, linkages, accessibility, tourism supra-structure, and infrastructure; and the supporting environment involves community support and facilitating resources and services. In terms of the impact of tourism, the economic impact is for the most part positive, while the environmental and socio-cultural is mixed.

Ms. El Shafaki then went on to describe DMO characteristics. In terms of legal form, DMOs are either public, private or public-private partnerships. In terms of geographic scope, DMOs are either national, regional or local. DMO governance models range from high centralization, which is most common in new destinations, to low centralization, which is more suitable for developed destinations. DMO stakeholders include professional associations, global tour operators, educational institutions, the local tourism industry, public tourism institutions, government bodies, tourists, and the local community. In terms of levels of the DMOs engagement with stakeholders, they start from inform, then consult, then involve, and finally collaborate. DMO activities can be divided into marketing related activities, which involve product development, pricing guidance, distribution support, and destination promotion; operational activities which involve visitor experience management, stakeholder coordination, and industry support; and strategic activities, which involve resource stewardship, monitoring and evaluation, and crisis management. DMO funding is either from public sources, such as hotel room taxes, the tourism business tax, national taxes, state or province taxes, city/county taxes, and sales tax. Private funding sources include advertising revenue, membership revenue, partnership revenue, sponsorship revenue, visitor information centers, commercial activities, and tourism development districts (TIDs).

Next, Ms. El Shafaki discussed DMO accountability and shared key performance indicators (KPIs) for DMOs. The KPI categories include visitor metrics, marketing communications, consumer-based brand equity, organizational effectiveness and stakeholder satisfaction.

Ms. El Shafaki then went on to discuss the product development process which involves identifying tourism resources, assessing and developing infrastructure, assessing and

developing a robust supporting environment across the value chain, engaging with the community, and activating product development.

Questions & Remarks

Question: Is there a model for the countries which have relatively small geographic scope?

Answer:

The levels of DMOs depend on the nature of the country, how big it is and how distinct the regions are. For countries having small geographic scope, it makes sense to have two levels. In some countries like Australia and Italy there are 4 levels, but in small countries it can be 2 levels..

Comment: UNWTO representative MS. Esencan TERZİBAŞOĞLU made a Comment that UNWTO has a Competitiveness Committee, which identified some definitions like; destination, DMO's, tourism product and value chain. This Committee made 21 definitions, official and normative the member countries may utilize these definitions.

4. Destination Development and Institutionalization Strategies: Selected Case Studies, Main Challenges, Recommendations and Prospects

In this session, Ms. Reem El Shafaki, Senior Associate at DinarStandard, continued presenting the findings of the analytical study “Destination Development and Institutionalization Strategies in the OIC Member Countries”, focusing on the case study findings and policy recommendations.

The first case study was on Azerbaijan where, the Ministry of Culture and Tourism acts as the NTO (national tourism organization). There are no regional or local DMOs. A Tourism Council was established in 2016, whose main objective is to coordinate tourism development issues among related government agencies. In terms of destination development, the Planning and Development Division of the Department of Tourism lays out the regional tourism development plans for various regions of the country and creates new tourism products, such as skiing and rural tourism. In terms of marketing, the Ministry of Culture and Tourism provides information booklets, brochures, and flyers which are distributed through hotels, information desks and tourism information centers. The Ministry also participates in international tourism fairs, and features the booths of various travel agencies and hotels from Azerbaijan in its wing at those fairs. The Ministry also sponsors familiarization trips for foreign companies and MICE agencies. In terms of stakeholder engagement, the Ministry engages with stakeholders through its Industry Relations division. It holds general public-private sector meetings and monthly community meetings. In terms of funding sources, since the Ministry is a government entity, it receives public funding. However, the new tourism law will introduce new funding channels for public-private organizations like the convention bureau. KPIs include tourist arrivals, tourism contribution to GDP, and tourist satisfaction, through airport exit surveys. Recommendations include de-centralizing tourism management and developing regional and local public-private DMOs, as well as Increasing activities around natural and cultural sites.

The second case study, also a site visit, was on Spain. Tourespana is the NTO, responsible for tourism on a national level. There are regional and city-level DMOs. The DMOs featured in the case study are Barcelona Activa, which is responsible for tourism management along with the Barcelona City Council; Barcelona Turisme Consortium which is a public-private entity responsible for product development, promotion and interfacing with tourists; and Patronato Provincial de Turismo de Granada which is a government regional DMO. In terms of destination development, Barcelona Turisme Consortium develops products which it makes available through its members such as the Barcelona Card, the Barcelona Touristic Bus, and various walking tours. In terms of marketing, because of overtourism Barcelona Activa’s focus is on resource management rather than promotion. In fact, the Barcelona Mayor established regulation that forbids new hotels from opening in the center of the city and places strict regulation on home sharing platforms such as Airbnb. The Mayor also restricted access to tourism activities, such as Segway tours, in some parts of the city. On the other hand, the Granada DMO conducts advertising campaigns, tourism fairs, outdoor advertising, and other promotional activities. In terms of stakeholders, in Barcelona, the local community, private companies and the local government have plenary sessions to discuss issues and defend their interests. Meanwhile, the Granada DMO lobbies for stakeholder interest. In terms of funding, the Barcelona Turisme Consortium is 91% funded by its own activities (membership fees, as well as from selling products and services), the rest is from local government contribution and

contributions from the Chamber of Commerce. Lessons learned from Spain's case study include planning for overtourism before the problem occurs, protecting resources and creating a welcoming and tourist-friendly atmosphere is a key resource of a destination; private-public engagement is crucial for the successful development of the industry; and if well designed, a DMO can fund itself.

In Dubai, a field visit case study, the Department of Tourism and Commerce Marketing (DTCM) which is also referred to as Dubai Tourism is the principal authority for the planning, supervision, development and marketing of tourism in Dubai. It has several divisions that focus on specific aspects of the tourism industry, including tourism marketing, events, festivals and retail, as well as strategy and investments. In terms of destination development, Dubai encourages the private and public sectors to develop facilities needed for tourists. As for shopping festivals, they are being run as a public-private partnership where the private sector provides funding which is then pooled and utilized to promote the festival. In terms of marketing, 90% of the budget is spent on online promotions, which are tailored to source country preferences. In terms of stakeholders, Dubai Tourism studies the needs of tourists in collaboration with stakeholders and disseminates findings to the stakeholders. In terms of funding, since it's a government agency, it receives funds from the government. As for KPIs, they include achieving a target of 20 million tourists by 2020, length of stay, tourist spend, and sentiment on social media. Lessons learned from the Dubai case study include listening to tourists through surveys and social media monitoring, and prioritizing what they want, interacting with stakeholders and telling them what tourists want, incentivizing stakeholders to build what tourists desire, continuing to add new attractions that appeal to different demographics. Additional learnings are that DMOs should start promoting their destination even if the full infrastructure is not in place (Dubai started as a shopping destination), identifying or creating an iconic "bucket list" attraction (such as Burj al Arab or Burj Khalifa in Dubai).

For Turkey, which was the fourth field visit case study, Ms. El Shafaki shared a chart that shows the different types of entities responsible for tourism that are overseen by the Ministry of Tourism. There are national organizations in the form of Directorates of Culture in 81 provinces, in the form of promotional offices in 43 countries, public-private DMOs, and private DMOs. The three DMOs that are featured in the case study include the Istanbul Convention and Visitors Bureau (ICVB), which is a city level DMO; Belek Tourism Investors Union (BETUYAB), which is a regional private DMO; and Alanya Touristic Hoteliers Associations (ALTID), which is also a private DMO. In terms of destination development, ICVB provides incentives to tourism investors, which include renting public land for up to 49 years, low cost loans for 20 years, and permits for foreign workers. In terms of marketing, ICVB promotes Istanbul as a MICE destination. It regularly bids on behalf of its members on the International Congress and Convention Association's (ICCA) portal, which is an online platform that matches event planners with hosts. With regards to stakeholders, ICVB conducts educational seminars, annual meetings, and sends email updates. It also conducts matchmaking of local stakeholders with international players. In terms of funding sources, ICVB receives direct contribution and physical office space from the Istanbul Chamber of Commerce, and membership fees from the other 42 private and non-profit members. As for lessons learned, they include focusing on high earning revenue business models, such as in the case of ICVB, which focuses on the MICE market, as it is more profitable than leisure tourism; having a long-term perspective - the

Belek DMO (BETUYAB) started 30 years ago from scratch and is now a worldwide destination hosting 2 million international tourists every year. A recommendation is that tourism taxes should be levied as an additional source of funding for DMOs. Unlike other destinations, the Turkish government doesn't levy tourism taxes, however, this would serve as an additional source of revenue for DMOs.

The first desk based case study was Australia. Tourism Australia is the NTO and focuses on international marketing. There are state-wide regional DMO's, as well as city-level DMOs. The featured DMO in this case study is Destination New South Wales (NSW), which is a regional DMO. In terms of destination development, NSW funds regional events and offers incubator event funding for new events. It also offers fund matching for product development in areas of accommodation, and development of new attractions. In terms of marketing, NSW conducts digital, social media as well as newspaper and magazine inserts. It also creates joint promotions campaigns with industry players. In terms of stakeholders, it provides product development consultation, resources such as the Tourism Business Toolkit, as well as partnership programs and training sessions. In terms of funding, it receives recurrent government grants, and contributions from the industry. In terms of KPIs, it monitors growth in total visitor nights, growth in total overnight expenditure, media exposure, and consumer response to promotional activities. In terms of lessons learned, Australia's decentralized DMO structure has been successful by creating a unique position for each destination, NSW releases annual reports that can be used as an example for DMOs on how to set clear key performance indicators and metrics to ensure they remain on target and increase their efficiency, DMO partnership with various tourism industry players - such as airlines and tour operators - is instrumental in promoting the destination, having both members from government bodies and private industry players at the helm of the destination management organizations helps in ensuring efficiency and guarantees high levels of support for the tourism industry, leading to enhanced abilities in terms of product development and funding.

Next, Ms. El Shafaki presented the findings from the desk based Italy case study.. The National Agency for Tourism is the NTO and reports to the Ministry of Tourism. It is responsible for branding and promoting the destination as a whole. Provincially, tourism organizations exist on three levels: the level of the province, the regional level, and the local level. The focus of the case study is Naturno and Val Passiri. Destination Development in Naturno was led by the private sector and was supported by the DMO. After a period of stagnation local hoteliers created the hotel consortium Dolce Vita Hotels with the aim of providing quality accommodation offerings and rebranding the destination from budget to a quality destination by introducing the "alpine wellness" theme. The hotel consortium managed to get the "alpine wellness" certification and eventually the destination itself became certified. In terms of marketing, in Val Passiria the DMO performed joint marketing activities with a sports and wellness resort that helped brand the destination. In terms of stakeholders, local tourism industry players are members of the DMOs to ensure their interests are represented and feedback is taken into consideration. Funding is through lodging tax, membership dues, and the contribution of the hotels consortium. In terms of lessons learned, the private sector can play a role in destination development as in the case of the Dolce Vita Hotels Consortium. An "entrepreneurial core" can succeed in transforming a destination, the "leading firm" governance model can benefit a destination as long as the interests of other players are considered.

In Nigeria, which is another desk based case study, on a national level tourism falls under the responsibility of the Ministry of Information and Culture, which develops tourism strategy and plans. The Nigeria Tourism Development Corporation is then responsible for executing the plans. Cross River Tourism Bureau is the most prominent DMO in Nigeria and is the core focus of this case study. In terms of destination development, the Cross River Tourism Bureau developed flag ship events in the state. It also developed new resorts in addition to animal sanctuaries. In terms of marketing, it conducts video promotions, TV documentaries, as well as online and offline promotions. Tourism stakeholders are represented through associations such as the hotel association, travel agency association, and tourism investor association. Funding is through government grants, taxes on tourism businesses and sponsorship revenue. However, the government announced it will stop its grants, and the bureau is seeking alternative funding sources in the form of international grants related to the environment. As for KPIs they were to achieve a target of one million visitors by the end of 2017, achieve a 7% increase in visitors annually, and add one additional attraction that can bring 200-500 additional visitors every year. In terms of recommendations, it is advised that the government provide further support to boost tourism as part of the national agenda in its strategic plans for the future, and to boost investment and entrepreneurship in the country. Other recommendations include conducting international tourism roadshows, DMOs to allocate more resources towards maintenance of parks and resorts before the start of the tourist season, developing new tourist packages on a regular basis to attract more tourists both locally and internationally, and the government to provide incentives for states to allow tourism to take center stage and attract tourism revenue to the state.

The final desk based case study was on the United States. On the national level, there are three main entities that are responsible for tourism, each with a distinct area of responsibility. Brand USA leads the country's global marketing efforts. The US Department of Commerce's National Travel and Tourism Office (NTTO) is responsible for the development of tourism policy. The US Travel Association advocates for the US travel industry in terms of establishing pro-travel policies and removing travel barriers. It also provides research and networking opportunities for the industry. In this case study, the focus is on two DMOs: Travel Oregon which is a state-wide DMO and Go Great Lakes Bay, which is a regional DMO. In terms of destination development, given that tourism infrastructure in the United States is well developed, product development strategies often focus on enhancing public spaces so they are more exciting to visitors as well as for local businesses, developing a signature event or building a new attraction. In terms of marketing, Travel Oregon conducts demographic and psychographic/behavioral segmentation. It uses the following channels: social media, e-newsletters, and website marketing. It participates in international and domestic travel trade and consumer shows. In terms of content development, it provides a visitor guide, digital featured stories, videos, itineraries, and works with influencers to both produce as well as promote content. In terms of stakeholders, Travel Oregon conducts surveys on stakeholders' tourism priorities; shares tourism intelligence, newsletters, and conducts training. Go Great Lakes Bay engages with the local government and invites officials to serve on board. Funding sources are mainly from the lodging tax. In terms of KPIs, they are room nights and room tax and assessment revenue.

After presenting the case study findings, Ms. El Shafaki shared the current challenges facing the OIC destinations, which can be summarized as: centralization of destination management, DMOs focusing primarily on destination promotion and not enough on product development, lack of guaranteed funding, the need to strengthen and formalize stakeholder engagement, and the need to strengthen resource stewardship.

Next Ms. El Shafaki presented the policy recommendations for the OIC member countries based on the study findings. Before deciding on the appropriate destination product development strategy, each destination should determine where it stands in three key areas: destination life cycle stage, tourism resources, and tourism budget. Destinations that have low natural and cultural resources should focus on developing activities, which can be in the form of events, festivals or experiential activities. Also, when a country is low in cultural and natural resources, it is important to focus on the living culture and the lifestyle of the local community, with a special focus for example on gastronomy, modern design, cultural events, etc. Destinations that have a high level of natural and cultural resources should focus on improving facilities and amenities, and taking measures to protect resources. As for countries with a high level of natural and cultural resources, they should develop activities around those resource, which can be in the form of events or festivals or experiential activities.

In countries with low linkages, DMOs can encourage immigrants to visit their home country by developing relevant tour packages for visitors and their families and promoting them through social media. This will allow locals to reach out to their immigrant family and friends to encourage them to visit. In case of high levels of visitation from immigrants who come back to visit family and friends, destinations can offer attractions at discounted rates if visiting with a local. This will encourage the locals to take their visitors to the attractions since they are at a low to them. A country, that receives business travelers, such as Nigeria, where 90% of hotel stays in Lagos are related to business trips, can offer short tour packages so the rest of the industry benefits from the visit. As for superstructures such as accommodation facilities, transportation facilities and attractions are elements that destination managers can control, however they require investments. In a country like Nigeria where transportation facilities and attractions are low due to lack of funding, it is recommended to focus on adventure travel and attract that segment of travelers who are interested in going to new undiscovered places.

Next, Ms. El Shafaki shared recommendations for developing DMO excellence. In terms of legal form, the most common legal structure in developed destinations is public-private. As for governance models, in developed destinations some aspects of de-centralization may be considered, with stakeholders having some decision-making power. In terms of stakeholders, DMOs should coordinate collaborations among stakeholders that benefit the destination. To achieve that, they should create platforms that facilitate engagement, such as stakeholder meetings and seminars, and a digital portal. They should also allocate staff to manage stakeholder relations. It's important that DMOs balance addressing the needs of different stakeholders, and avoid favoring one group over the rest.

As for recommendations for strategic alliances, they include joint promotions, cross promotion and strategic alliances with stakeholders. In terms of joint promotions, destinations that offer complementary experiences can join efforts and connect stakeholders. For example, European countries, through which the Alps mountain ranges run, can offer a combined package in

which they promote a skiing trip that includes multiple destinations. Similarly, the OIC countries that offer mountain climbing or desert safari can offer a combined package. In terms of cross marketing, an example is NYC & Company, which is the DMO for New York City. It has cross marketing partnerships with South Africa, Toronto, Canada and Milan. In terms of strategic alliances with airlines, examples include Tourism Malaysia forming an alliance with Etihad Airways to boost inbound tourism to Malaysia by conducting joint marketing activities targeting Malaysia's leading inbound markets. Also, the Dubai Department of Tourism and Commerce Marketing formed a strategic alliance with Emirates Airlines to promote the destination.

Questions & Remarks

Comment: Malaysian representative mentioned about Malaysia's experiences on the effectiveness of coordination between NTO's and DMO's in one particular country. For instance in Malaysia, eco-tourism is very strong. In NTO level Malaysia is trying how to plan eco-tourism. With a new plan including private sector, NGO's as well as DMO's in state and provincial level, they have been engaged and as a result Malaysia has a new eco-tourism strategic plan for 2016-2025. This strategic plan can be implemented to develop eco-tourism in clusters across the country. But it is a big challenge for the NTO's to work with DMO's to work forward based on this plan. 1 year has passed and there is still small progress. DMO's and also the private sector might go in different directions if you don't have a national strategy.

Question: How to roll out the national programs with DMO's and NTO's?

Answer: There is a challenge for DMO's to focus and engage. Perhaps a strategy to focus on the DMO's will be good to achieve a successful result/model. A successful model can be an example for other destinations to replicable.

5. Success Stories of the Member States

5.1. Malaysia

On behalf of Malaysia, Mr. Mohd Daud Mohd Arif, Undersecretary of Tourism Policy and International Affairs Division, Ministry of Tourism and Culture Malaysia made a presentation and shared best practices and challenges regarding DMO's strive for Tourism Quality Assurance.

At the beginning of his presentation, he explained the concept of Malaysia Tourism Quality Assurance or also known as MyTQA. He stated that The Ministry has commenced a quality assurance certification program called Malaysia Tourism Quality Assurance or also known as MyTQA. which is an initiative taken by the Ministry of Tourism and Culture Malaysia to enhance the service and quality of tourism products.

He also shared information on the main objectives of this program as the following:

- To classify tourism products and raise the standards for tourists' satisfaction
- To improve tourists' trust and confidence towards Malaysian tourism products certified by MyTQA.
- To prioritise product quality within the tourism operators and industry players.
- To enhance the quality of tourism products and services.

Mr. Arif underlined this certification program is a voluntary one which can be utilized by any destination management organization and can be evaluated according to 10 different tourism product themes including, culture and heritage, nature and adventure, sport and recreational, islands and beaches, shopping, and others. In addition, every nominated product will be evaluated thoroughly in terms of the quality in service delivery and product condition. The evaluation process is done by the Ministry's officials and related NGOs. Moreover, the certified tourism products have the priority in joining national's campaign in international tourism fairs and for tourism development funds.

Lastly he shared some figures on this certification program. He expressed that there are 25 tourism products in Malaysia that have been certified under this programme. This certification program enables the relevant stakeholders to involve in the efforts for improving profile of destinations and attracting tourists there..

5.2. Turkey

Mrs. Zeynep Aslan, expert from Ministry of Culture and Tourism of Turkey made a presentation on the principles of destination management in the Turkish Tourism Strategy.

In her presentation, it was pointed out that under the aim of the diversification of tourism activities and expanding tourism season to twelve months; the vision of Tourism Strategy is to make tourism a heading sector for increasing employment and regional development and to make Turkey an international brand among the first 5 countries in the global tourism market according to tourist numbers and tourism revenue until 2023.

She continued to explain the main principles of destination management as;

- To achieve institutionalization through councils to be established at national, regional, provincial and local level within the context of «Good Governance»
- To ensure full and active participation of tourism sector as well as all related public and private entities and Non-Governmental Organizations (NGOs) in relevant decision making process.

According to these principles, the current formations of destination management organizations in Turkey can be sorted as Tourism Consultation Councils, Public and Private Partnerships, Non-Governmental Organizations and Non-Profit Organizations. She continued her presentation with giving several examples of destination management organizations.

Lastly she concluded her presentation by emphasizing 3rd Tourism Summit that has been organized with the participation of private and public sector, academic community, and NGO's with the targets to evaluate the present conditions of tourism sector and to create new policies aiming the future. The most important decision taken in terms of tourism planning was to support the studies on destination planning and destination management.

6. Policy Options for Destination Development and Institutionalization Strategies in the Member Countries

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

At the beginning of the session, Mr. Selçuk KOÇ, made a brief presentation on the responses of the Member Countries to the policy questions on destination development and institutionalization strategies. After presenting the questions and responses of the Member Countries, he introduced the Room Document including draft policy advices.

After the presentation, Mr. SAID gave the floor to all delegations asking their opinions and comments for each policy advices as well as the experience of their respective countries in this regard. Based on intensive deliberations, the participants agreed on the policy advices given in the attached room document to be submitted to the 34th Session of the COMCEC as an outcome of the 11th Meeting of the Tourism Working Group.

The policy recommendations highlighted by the participants are as follows:

- Encouraging the establishment of/Strengthening local and regional public-private Destination Management Organizations (DMOs) with the assignment of responsibilities related to destination planning, development, marketing and management.
- Planning supply and demand as well as identifying and monitoring KPIs for ensuring sustainable tourism development at the destination.
- Encouraging self-funding of DMOs and improving efficiency as well as transparency in utilization and management of resources.
- Promoting destinations through forming OIC country alliances and the alliances with external stakeholders.

7. International Institutions' / Private Sector's Perspective

7.1. UN World Tourism Organization (UNWTO)

"Destination Development, Governance and Management"

Ms. Esencan TERZİBAŞOĞLU, Senior Advisor to UNWTO Secretary General made a presentation about "Destination Development, Governance and Management".

At the outset, she shared some figures on tourism and tourist activities by comparing world and regions. According to this presentation, international tourist arrivals have been around 4% for the last decade. While the most tourism spenders are China, USA, Germany, UK, France, the earners are USA, Spain, Thailand, China and France.

She continued her presentation by giving examples on the importance of tourism. Tourism with the share of 7% of the world's whole export is of particular importance for creating jobs and providing services. She also mentioned about destination management and marketing organizations. According to this concept while public sector has many strengths like long term strategic planning, destination awareness, public administration, SME support, quality assurance, it has also some shortcomings like, lack of interest in new business and innovation, weaknesses in generating commercial income, reluctance to take risks, , slow decision making and lack of confidence to the private sector and motivation to profit., On the other hand, private sector has some strengths in terms of such as , fast decision making and local community involvement. It has also some weaknesses including lack of concern for general public, limited interest for long term planning, limited/inadequate resources and lack of confidence to the public sector.

She also emphasized the the key principles for developing a strategic plan for destination development and management:

- i) Situation assessment (where are we now?)
- ii) A strategic framework (where would we like to be?)
- iii) An integrated, multi-year implementation plan (how do we get there?)
- iv) Institutional & performance management arrangements – governance (what are the institutional arrangements for performance?)

She concluded her presentation by underlying the keys for success:

- i. Vision and leadership for a sustainable and competitive tourism,
- ii. Knowledge and understanding of the needs of our target markets and the "new tourist",
- iii. Connectivity and infrastructure,
- iv. Ensuring destination quality performance,
- v. Legal framework and incentives for sustainable growth,
- vi. Positioning and differentiating our destination and "image management",
- vii. Improvement of collecting reliable data and competent analysis of the data,
- viii. Improvement of the competitiveness of the destination, providing "through the chain", positive visitor experience,
- ix. Product innovation and management,
- x. Capitalizing on the opportunities provided by new technologies,

- xi. Greater professionalism in service levels and overall HR management,
- xii. Synergy between all the stakeholders in creating the destination vision,
- xiii. Public-private sector partnership in the key areas of management and marketing,
- xiv. Continuously adapting to the dynamically changing macro, competitive and market environments.

7.2. Kayseri Erciyes Corp.

“The Experience of Kayseri Erciyes Corporation in Destination Development”

Mr. Murat Cahid CINGI, Chairman of Board Management, Kayseri Erciyes Corp. made a presentation on developing destination in the Experience of Kayseri Erciyes.

At the beginning of the presentation, he briefly mentioned potential tourism in Erciyes Mountain which is one of the highest ones of Turkey with its 3.917 m peak and has become one of the ski areas of the country for almost 70 years.

He underlined the Kayseri Metropolitan Municipality has launched a Master Plan in 2005 to transform the gorgeous mountain Erciyes into a global scale ski resort. Based on 5 years desk and field works and the feasibility studies, the Master Plan was prepared.

Mr. CINGI emphasized the Municipality has spent more than 200 Million Euro within the last decade for infrastructure and now Erciyes Ski Resort has all sportive advantages whatever is available in a European prominent ski resorts.

Moreover, he elaborated on the facilities provided in the resort. In this respect, he expressed that there are 19 mechanical lifts including telesiege, gondola, teleski and magic carpet with 24 km rope length with 27.000 persons carriage capacity per hour. The length of slopes has reached around 102 km with very differentiated difficulty level from training area to the most challenging black slopes. Artificial snow making system has been active for more than 35 km of the total ski-runs. Thanks to this powerful infrastructure, Erciyes has hosted the venues of World Cups 4 times at several branches like snowboard and snowkite.

In his closing remarks, he underlined the importance of having destination development strategy. and he expressed that Erciyes emerged as a globally important winter tourism destination..

8. Utilizing the COMCEC Project Funding

Mr. Burak KARAGÖL, Director at the COMCEC Coordination Office made a presentation on the COMCEC Project Funding introduced by the COMCEC Strategy. At the outset, Mr. KARAGÖL informed the participants about instruments of the COMCEC Strategy; working groups and project funding. Mr. KARAGÖL emphasized that the project funding provides financial support for projects of Member Countries and OIC Institutions and it has been implemented since 2013.

After briefly explaining the instruments of the COMCEC Strategy, Mr. KARAGÖL highlighted the essentials of the COMCEC Project Funding. Mr. KARAGÖL mentioned that COMCEC Funded Projects can be in two different types as activity-based projects and research projects. He also touched upon the eligible activities under each type of project.

Then, Mr. KARAGÖL stated that topics of the funded projects should be in line with the COMCEC Strategy, Policy Recommendations adopted by the COMCEC Ministerial Session and Sectoral Themes published on the COMCEC website. He continued his presentation by explaining the main characteristics of projects as well as timeline for project submission.

Mr. KARAGÖL shared brief information with participants regarding common characteristics of successful project proposals and stated that “sufficient and informative project summary”, “sound project activities and relevant details about them”, “qualified human resources in line with Project Submission Guidelines requirements”, “detailed and well-designed work plan”, “realistic cost estimations in the budget and sufficient explanations for them” are key success factors.

Mr. KARAGÖL also gave information on previously supported projects. He stated that 44 projects were implemented in 2014, 2015, 2016 and 2017 9 of them were tourism projects. They were titled as “Improving Statistical Capacities of Tourism Sector in COMCEC Mediterranean and Gulf Region”, “Cities of Common Cultural Heritage”, “Strengthening Community Resilience through eco-tourism”, “Enhancing the Capacity of Craft Producers in the OIC Member Countries” and “Short Course on Strategies in Enhancing Tourism Workforce in Community-Based Tourism (CBT) within the OIC Member Countries”, “Developing a Training and Certification Program for the Muslim Travel, Tourism and Hospitality Industry”, “Enhancing Capacity of Muslim Friendly Tourism Workforce”, “Enhancing the Capacity of Craft Producers & Customers Service in OIC Member Countries”, “Training Program on the Development and Promotion of Muslim Friendly Tourism in OIC Member Countries” implemented by SESRIC, Azerbaijani, the Gambia, the Gambia and Malaysia, the Gambia, Mozambique, Sudan, SESRIC respectively. He also mentioned that 5 tourism projects will be implemented in 2018 by the Burkina Faso, Iran, Mali, Mozambique and SESRIC respectively.

9. Closing Remarks

The Meeting ended with closing remarks of Mr. Zulkifly MD SAID, Director General of Islamic Tourism Centre of Malaysia and Chairman of the Meeting and Mr. Selçuk KOÇ, Director in the COMCEC Coordination Office.

In his remarks, Mr. SAID thanked all the Member Countries for giving her the opportunity to chair this session. She also thanked all the participants, presenters for their invaluable contributions, comments and ideas presented during the discussions.

Mr. Selçuk KOÇ also thanked all the participants for their invaluable contributions. He underlined that the observations and comments of the participants on the analytical study prepared specifically for the Tourism Working Group Meetings would be mostly welcome in order to improve its quality. He also stated feedbacks about the main output of the meeting, the draft policy recommendations which will be presented to the 34th Session of the COMCEC, would be very valuable. Mr. KOÇ also highlighted the importance of COMCEC Project Funding and invited the Member Countries as well as the relevant OIC Institutions to submit project proposals to benefit from this important asset.

Mr. KOÇ also informed the participants that the next (12th) Meeting of the Tourism Working Group will be held on September 13th, 2018 in Ankara with the theme of “Destination Marketing Strategies in the OIC Member Countries.”

Annex 1: Agenda of the Meeting



11th MEETING OF THE COMCEC TOURISM WORKING GROUP

(February 15th, 2018 Ankara)

*“Destination Development and Institutionalization Strategies
in the OIC Member Countries”*

AGENDA

Opening Remarks

1. The COMCEC Tourism Outlook
2. Destination Development and Institutionalization Strategies: Global Trends, Approaches and Success Factors
3. Destination Development and Institutionalization Strategies in the OIC Member Countries: Current Situation, Main Challenges, Recommendations
4. Policy Options for Destination Development and Institutionalization Strategies in the OIC Member Countries
5. Member State Presentations
6. International Institutions’/ Private Sector’s Perspective
7. Utilizing the COMCEC Project Funding

Closing Remarks

Annex 2: Program of the Meeting



11th MEETING OF THE COMCEC TOURISM WORKING GROUP

(February 15th, 2018, Crowne Plaza Hotel, Ankara)

*“Destination Development and Institutionalization Strategies
in the OIC Member Countries”*

PROGRAMME

- 08.30-09.00 **Registration**
- 09.00-09.05 **Recitation from the Holy Quran**
- 09.05-09.15 **Opening Remarks**
- The COMCEC Tourism Outlook**
- 09.15-09.35 - *Presentation: Mr. Gürel ÇETİN
Associate Professor
COMCEC Coordination Office (CCO)*
- 09.35-09.45 - *Discussion*
- Destination Development and Institutionalization Strategies: Global Trends and Success Factors**
- 09.45-10.15 - *Presentation: Ms. Reem EL SHAFKI
Senior Associate
Dinar Standard*
- 10.15-10.45 - *Discussion*
- 10.45-11.00 *Coffee Break*
- Destination Development and Institutionalization Strategies: Selected Case Studies, Main Challenges, Recommendations and Prospects**
- 11.00-11.40 - *Presentation: Ms. Reem EL SHAFKI
Senior Associate
Dinar Standard*
- 11.40-12.20 - *Discussion*

- 12.20-14.00 *Lunch*
Policy Options for Destination Development and Institutionalization Strategies in the Member Countries
There will be a moderation session under this agenda item. The participants are expected to discuss the policy options/advice on destination development and institutionalization strategies in the OIC Member Countries. At the beginning of the session, the CCO will make a short presentation on the responses of the Member Countries to the policy questions and the Room Document.
- 14.00-14.10
- Presentation: “Responses of the Member Countries to the Policy Questions on destination development and institutionalization strategies”
Mr. Selçuk KOÇ
Director
COMCEC Coordination Office (CCO)
- 14.20-15.30
- Discussion
- Utilizing the COMCEC Project Funding**
- 15.30-15.45
- Presentation: Mr. Burak KARAGÖL
Director
COMCEC Coordination Office (CCO)
- 15.45-15.55
- Discussion
- 15.55-16.10 *Coffee Break*
- Success Stories of the Member States**
- 16.10-17.10
- Presentation(s)
 - Discussion
- International Institutions/Private Sector’s Experiences**
- 17.10-17.25
- Presentation: “Destination Development, Governance and Management in the OIC”
Esencan TERZİBAŞOĞLU
Advisor
UNWTO
- 17.25-17.40
- Presentation: “The Experience of Kayseri Erciyes Corporation in Destination Development”
Dr. Murat Cahid CINGI
Chairman of Board Management
Kayseri Erciyes Corp.
- 17.40-17.55
- Discussion
- 17.55-18.05 *Closing Remarks and Family Photo*

Annex 3: The Policy Recommendations

THE POLICY RECOMMENDATIONS HIGHLIGHTED BY THE 11TH MEETING OF THE TOURISM WORKING GROUP

The COMCEC Tourism Working Group (TWG) has successfully held its 11th Meeting on February 15th, 2018 in Ankara, Turkey with the theme of “Destination Development and Institutionalization Strategies in the OIC Member Countries.” During the Meeting, Tourism Working Group, made deliberations on destination development and institutionalization strategies in the OIC Member Countries in tourism sector. Accordingly, the participants has come up with some policy recommendations.

The Member States of the TWG are kindly invited to communicate their final observations on the said policy recommendations, if there is any, to the COMCEC Coordination Office by February 23th, 2018. The comments received before February 23th, 2018 will be able to be incorporated into the Document. After incorporating the Member States’ contributions, this document will be submitted to the 34th Ministerial Meeting of the COMCEC to be held on 26-29 November 2018 in İstanbul, as an outcome of the 11th TWG Meeting.

Policy Advice 1. Encouraging the establishment of/Strengthening local and regional public-private Destination Management Organizations (DMOs) with the assignment of responsibilities related to destination planning, development, marketing and management.

Rationale:

Destinations need a holistic approach in planning, development, marketing and management that would coordinate and lead various stakeholders as well as integrate their efforts effectively. Existence of a governing body (i.e. DMO) to develop, lead and implement destination wide strategies is of particular importance for a destination’s success.

Destinations have different characteristics and their development, marketing and management need to be customized to local needs. Besides a central governing body (e.g. National Tourism Organization); developing, facilitating and empowering regional and local tourism governance structures (e.g. DMOs) lead to a more effective and efficient use of limited resources. This would also improve stakeholder engagement and participation, internalize external costs and create synergies between different actors.

Effective coordination and communication among various stakeholders is of utmost important for the success of a destination. A public-private legal structure of a DMO can facilitate all stakeholders’ involvement, pooling of knowledge and expertise, and cooperation, coordination as well as communication among the various stakeholders. In this respect, a purely public DMO managed by central governments may not have the necessary efficiency, funding, expertize and outcome orientation whereas a purely private DMO might focus on short-term gains while neglecting sustainable development, the needs of locals and environmental costs associated with tourism activity. Thus a combination of two approaches might create necessary efficiency while

ensuring sustainability and transparency. In this framework, DMOs can be managed by private sector and audited by public authorities through a public private partnership.

Policy Advice 2. Planning supply and demand as well as identifying and monitoring KPIs for ensuring sustainable tourism development at the destination.

Rationale:

Traditionally, DMOs mainly focus on destination promotion. However, in developed destinations their role has expanded to cover product development, stakeholder coordination, as well as monitoring, evaluation and ensuring sustainability. Stakeholder engagement, carried by local and regional DMOs, requires effective coordination of various stakeholders including local tourism companies, government bodies, professional associations, universities, the local community and tourists. Since the interests of stakeholders differ, it is important for the DMO to balance the needs of different stakeholders. DMOs should create platforms such as stakeholder meetings and seminars, a digital portal etc. that can facilitate engagement of the various stakeholders. DMOs should also allocate sufficient staff to manage stakeholder relations, planning and representation of destination as a whole.

Countries seeking to attract more tourists often overlook the risk it imposes on natural and cultural resources, as well as its negative effect on the quality of life of the locals. In order to preserve natural environment and economic benefits and to distribute the latter equitably, tourism must be planned, developed and managed within step-by-step, ranging from the local to the territorial or provincial, to the national, and even to the international level. The responsibilities at each level must be clearly identified and implemented. Majority of the OIC Member Countries, have national public governance structures and very few of them have DMOs at regional level. Planning supply and demand and conducting impact analysis at the local level will help avoid overuse of shared resources and prevent underutilization during stagnant periods. Destinations at the development stage should therefore prepare master plans defining their vision of desired future state while preserving the resources. Mature destinations on the other hand are recommended to diversify their products and manage supply and demand at optimum prices in order to avoid overcrowding and low per tourist spending. DMOs should also encourage local participation, entrepreneurship and employment in tourism. Key performance indicators (e.g. average spending, occupancy levels, average length of stay, amount of leakages, level of environmental degradation, extent of community participation) should also be developed.

Policy advice 3. Encouraging self-funding of DMOs and improving efficiency as well as transparency in utilization and management of resources.

Rationale:

Funding DMO activities is a major challenge for countries. Many OIC member countries use public resources to finance local DMOs. On the other hand, other resources can also be utilized for this purpose. When DMOs are encouraged to create their own funds (e.g. membership fees, commissions, marketing contributions,

sponsorships, ticket sales, project grants, revenues from attractions and convention centres), the demand for public funds decrease. In this framework, while government incubation funds might be utilized during their establishment phases, DMOs should have the ability to finance some of their activities.

The public funding should also be linked with private funding and major KPIs (e.g. tourism tax revenues). Since DMOs are not profit organizations, they should aim to facilitate increased sales and improved sustainability of the region rather than concentrating on improving their own revenues. Therefore, transparent and fair use of funds raised also need to be ensured.

Policy Advice 4. Promoting destinations through forming OIC country alliances and the alliances with external stakeholders.

Rationale:

Complementary OIC cross-border destinations (e.g. national parks, cultural routes) can pool resources and efforts to promote the region as a whole, even an umbrella DMO can be created which might focus on a specific shared travel theme such as mountain climbing or desert safaris. In this respect, OIC Member countries can collaborate to promote each other's destinations, which would allow them to promote their destination, with limited expenses, to the tourists visiting other complementary OIC destinations.

Additionally, DMOs can form strategic alliances with external stakeholders (e.g. national airlines, sports federations, retail outlets (as in the case of shopping festivals)) for joint projects that would be benefited by both sides. To illustrate, Dubai Department of Tourism and Commerce Marketing formed a strategic alliance with Emirates Airlines to promote the destination. They implemented joint advertising campaigns such as "Hello Dubai" and joint familiarization tours for influencers and journalists. They also jointly offered special promotions aimed at attracting tourists to Dubai, including special airline ticket fares from certain destinations as well as complimentary products such as visas, park tickets etc. They also jointly developed "My Emirates Pass" which offers discounts to tourists for various activities and attractions.

Instruments to Realize the Policy Advices:

- **COMCEC Tourism Working Group:** In its subsequent meetings, the Working Group may elaborate on the above-mentioned policy areas in a more detailed manner.
- **COMCEC Project Funding:** Under the COMCEC Project Funding, the COMCEC Coordination Office calls for projects each year. With the COMCEC Project Funding, the Member Countries participating in the Working Groups can submit multilateral cooperation projects to be financed through grants by the COMCEC Coordination Office. For the above-mentioned policy areas, the Member Countries can utilize the COMCEC

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

- **OIC/COMCEC Private Sector Tourism Forum:** In its future meetings, the OIC/COMCEC Private Sector Tourism Forum may elaborate on the above-mentioned policy areas and the sub-areas from the private sector perspective.

Annex 4: List of Participants

LIST OF PARTICIPANTS 11th MEETING OF THE TOURISM WORKING GROUP 15 February 2018, Ankara

A. MEMBER COUNTRIES OF THE OIC

REPUBLIC OF AZERBAIJAN

- Mr. AZER ORUJOV
Consultant, Ministry of Culture and Tourism

ARAB REPUBLIC OF EGYPT

- Mr. AMR SELIM
Counsellor, Embassy of Egypt in Ankara

REPUBLIC OF GAMBIA

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

REPUBLIC OF GUINEA

- Mr. MOMOU DONE
Chief of Service, Ministry of Tourism
- Mr. MOHAMED SECK
Counsellor, Ministry of Tourism

MALAYSIA

- Mr. MOHD DAUD MOHD ARIF
Undersecretary, Ministry of Tourism and Culture
- Mr. ZULKIFLY MD SAID
Director General, Ministry of Tourism and Culture
- Dr. AZRUL ANAZ MOHD ANY
Director, Ministry of Tourism and Culture
- Mr. MUHAMMAD AIMAN ZAKARIA
Focal Point, Ministry of Tourism and Culture

KINGDOM OF SAUDI ARABIA

- Mr. ABDULLAH ALQAHTANI
Director, Saudi Commission for Tourism and National Heritage

REPUBLIC OF TURKEY

- Mr. RAMAZAN ÇOKÇEVİK
Head of Department, Ministry of Culture and Tourism
- Ms. BAŞAK ÖNSAL DEMİR
Coordinator, Ministry of Culture and Tourism

- Mr. ENİS UĞUR
Expert, Ministry of Culture and Tourism
- Mr. ERKUT ATALAR
Expert, Ministry of Culture and Tourism
- Mr. GÜRSEL GÜNDOĞDU
Expert, Ministry of Culture and Tourism
- Ms. ZEYNEP BULUT ASLAN
Expert, Ministry of Culture and Tourism
- Ms. YASEMİN ÇELİK
Translator, Ministry of Culture and Tourism

**B. THE OIC SUBSIDIARY ORGANS
STATISTICAL, ECONOMIC, SOCIAL RESEARCH AND TRAINING CENTER
FOR
ISLAMIC COUNTRIES (SESRIC)**

- Mr. CEM TİNTİN
Senior Researcher
- Mr. OUSMAN BAH
Project Assistant

**C. INVITED INSTITUTIONS
WORLD TOURISM ORGANIZATION**

- Ms. ESENCAN TERZİBAŞOĞLU
Advisor

KAYSERİ ERCİYES CORP

- Dr. MURAT CAHİD CINGI
Chairman of Board Management

DINARSTANDARD

- Ms. REEM MOHAMED ELSHAFAKI
Consultant

D. COMCEC COORDINATION OFFICE

- Mr. SELÇUK KOÇ
Head of Department
- Mr. BURAK KARAGÖL
Head of Department
- MEHMET ASLAN
Head of Department
- Mr. GÜREL ÇETİN
Consultant
- Mr. GÖKTEN DAMAR
Expert

- Ms. AYTEN KAÇAR
Expert
- Mr. FATİH ASLAN
Expert
- Mr. CANER UYANIK
Expert