

A6.2 Utilities

A6.2.1 Water Supply

(1) Present Conditions

The domestic and industrial is being supplied through local Establishment of Water Supply and Sewerage in each Mohafazat. The Establishments of Water Supply and Sewerage operate based on the budgets received from each Mohafazat and the MOHU. The total number of employees of the Establishments of Water Supply and Sewerage are about 1,000, of which 30 percent are technicians. Each municipality has a directorate of water supply and sewerage.

For the country as a whole, supply of water is relatively stable. According to statistics from the Central Bureau of Statistics, the production of water has been growing steadily in recent years. During the five years from 1990 to 1995, there was a 32 percent increase from 462 million tons to 609 million tons. The daily per capita consumption in 1995 was 198 l/day for urban centers and 120 l/day for rural areas. The national average is 159 l/day, an increase of 15 percent in five years.

Table A6.2.1 Summary of Water Supply

Description	Unit	1990	1995	Rate of 1995 to 1990 (%)
Production Amount of Water	1000m ³	677,110	951,658	141
Capital Damascus	1000m ³	165,000	222,485	135
Aleppo	1000m ³	141,703	195,113	138
Homs	1000m ³	49,588	78,663	159
Hama	1000m ³	65,692	74,626	114
Latakia	1000m ³	39,450	51,113	130
Tartous	1000m ³	23,140	41,421	179
Population	1000persons	12,116	14,293	118
Average unit water consumption	l/day	138	159	115
Urban center	l/day	164	198	121
Rural area	l/day	106	120	113

Source: JICA Water Resource Study, 1996

Because of the old network system, there was 154 million tons of unaccounted water, representing 25 percent of the production in 1995 according to the statistics of Central Bureau of Statistics. However, the real figure appears to be much larger.

(2) Improvement Projects

In response to the growing demand for water in the city of Damascus, the water supply network is being converted to remote control, and the Barada spring development project is underway. Further, a "Study on the Development of the Water Supply System", aimed at the rehabilitation and expansion of the water supply network, undertaken with Japanese technical cooperation. In Aleppo, a project is underway to expand water supply from the current 480,000 m³/day to 750,000 m³/day.

(3) Viewpoint of Tourism Development

In general, water supply seems not to be a limiting factor for tourism development. As noted above, the total amount of water supplied is steadily increasing, but the water consumed by tourists is quite small compared to the total requirement. Further, the peak of the tourist

season is not mid-summer, when water is in shortest supply.

However, water supply facilities in the old cities and water shortages in the isolated tourist sites including Palmyra are problems.

A6.2.2 Sewerage

(1) Present Conditions

Plans for sewerage are, like water supply, under the control of the MOHU, as well as the Establishment for Water Supply and Sewerage in each Mohafazat. However, the maintenance of existing sewer pipes is conducted by each municipality. The construction of sewage treatment plants is conducted by Mohafazats

For most cities, drainage system is in place. Open wastewater drainage is not seen in the cities, as almost all drainage facilities are buried under the roads. It is reported that 95 percent of Damascus is covered by such drainage system.

Table A6.2.2 Summary of Wastewater Treatment Plants

City	Population	Capacity (m ³ /d)	Treatment method	Design year	Remarks
Damascus	2,200,000	485,000	AS+D		commissioned in 1997
Aleppo	2,000,000	255,000	AS+D		commissioned in 1998
Homs	655,000	133,900	AS		commissioned in 1998
Hama	500,000	70,000	AS		commissioned in 1998
Dara'a	124,000	21,800	AS	2005	detailed studies was completed until 1996
Suweida	138,000	18,750	BF	2002	detailed studies was completed until 1996
Idleb	183,000	30,000	AOP	2002	detailed studies was completed until 1996
Latakia	507,000	100,830	AS	2000	detailed studies was completed until 1996
Tartous	154,000	33,437	AS	2010	detailed studies was completed until 1996
Salemiyeh	45,000	5,850	OP	2005	detailed studies was completed until 1996

AS: Activated Sludge, BF: Biological Filter, OP: Oxidation Ponds, AOP: Activated Oxidation Pond

AS+D: Activated Sludge (+D: plus sludge Digestion)

Source: MOHU

Historically, the form of settlement has been concentrated in Syria, giving rise to large amounts of sewage in a limited area. This social condition, combined with hot and dry climate conditions, causes problems of hygiene when wastewater or storm water stagnates even for a short period. Problems include offensive odors and the breeding of insects. A sewer system is thus necessary in order to drain wastewater and storm water quickly. The sewer system is a combined system, whereby storm water and wastewater are drained through the same pipes. There is no sewage treatment plant. The wastewater is drained to the outskirts of towns, where it is discharged to a river without treatment.

(2) On-Going Improvement Projects

Because sewage is discharged without treatment, water pollution in the rivers near cities is becoming a serious problem. Consequently, sewage treatment plants are under construction in Damascus, Aleppo, Homs, and Hama with the Kuwait Fund. In November, 1997, a treatment plant in Damascus with a daily treatment capacity of 485,000 m³/day was completed and began operation. According to the plan, treated wastewater will be used for irrigation and the sludge produced will be used for fertilizer.

(3) Viewpoint of Tourism Development

A combined drainage system is in place in all cities. However, sewer systems are aged in old cities and insufficient in the isolated tourist sites. Therefore, for tourism development, it is necessary to rehabilitate and improve the existing facilities.

Because wastewater is discharged to rivers and used for irrigation without treatment, insects and offensive odors are noticeable in such cities as Deir ez Zor and Palmyra. These unsanitary conditions are largely due to the lack of adequate sewage treatment facilities. Proper sewage treatment is necessary for promoting tourism in cities where tourism is relatively important, and in areas where there is a possibility that untreated wastewater could pollute the waters that attract tourists.

In Latakia and Tartous areas, for which the sea is a part of their tourist attraction, the wastewater is discharged into the sea without any treatment. This causes a problem for the tourism when the polluted water drifts to the shore. Though treating wastewater costs expensive, it is necessary to implement before the problem becomes more serious.

A6.2.3 Waste Disposal

(1) Present Conditions

Collection and disposal of solid waste from homes and businesses is being carried out by the regional governments. In Damascus, collection is done by the Directorate of Cleaning, and disposal is the responsibility of the Directorate of Final Disposal Area.

The usual collection method is to collect the rubbish in compact machines that has accumulated in the open containers located throughout the city. Residents place their rubbish in plastic bags, then place in the containers. There is no accurate data on the amount of rubbish collected, which is estimated at about 0.25-0.73 t/year/person.

In 1994, the daily collection volume in Damascus city for domestic and industrial waste was 800-1,300 t/day. In the Mohafazat of Aleppo, which includes the city of Aleppo, 2,000 tons of garbage are collected every day.

The usual disposal method is to secure space for disposal in the suburbs of the city, where a large hole is dug, filled with rubbish and covered. In the city of Damascus, waste is disposed of at the Deir al Hajar final disposal area, located at about 40 km south of the city. Because 60 percent of the rubbish in Damascus is organic matter, about half of the waste collected is recycled as compost.

Many of the garbage collection trucks are old and in poor condition. The lack of adequate financing for repairing and supplementing the equipment seems to be the problem for the garbage collection.

(2) Improvement Projects

In Damascus, over 60 new machines were acquired with a Japanese assistance.

(3) Viewpoint of Tourism Development

The sight and odor of the garbage in open containers is unpleasant for tourists. Further, litter such as plastic bags is often evident. This does not particularly undermine the hygienic environment for residents, but it is a problem of appearance and it gives tourists passing

through an unpleasant impression.

A6.2.4 Power Supply

(1) Present Conditions

Electrical power supply is under the control of the MOE, and the Public Electricity Establishment under its jurisdiction is responsible for the expansion, operation and maintenance of facilities.

In 1992, electricity shortages became a serious problem, and in Damascus, periodic and intentional interruptions of power supply were conducted. The shortages came from the increased demand caused by the large numbers of people who returned to Syria due to the Gulf War, as well as the rise in industrial output and standards of living. As shown in Table A6.2.3, the annual electricity produced during the three years 1991-1993 was around 11 GkWh, but jumped to 14 GkWh in 1994. In 1993-1994, a new Gas/Steam Power Station was constructed, which contributed to the large increase in power output. Power consumption rose simultaneously with the increased output, indicating that the potential demand for power was high. Power output continues to rise, but at present power shortages are rare and the power situation is generally good.

Electrical power is transmitted throughout the country by a single grid network. As of 1995, the total length of the network including transmission and distribution was 107,000 km. For 1995, the installed capacity was 3,625 MW and the annual electricity gross generation was 15,549 GWh.

Though electricity generation has been improved considerably, distribution network is still poor, particularly in the old cities, where residents suffer from interruption of power supply and voltage down.

Table A6.2.3 Power Generation Capacity and Production

year	Electric power generation capacity (MW)	Annual electricity produced (MkWh)
1990	N/A	10,548
1991	N/A	11,249
1992	2,190	11,626
1993	2,390	11,709
1994	3,290	14,036
1995	3,625	15,549

Source: Central Bureau of Statistics, 1996

Table A6.2.4 Summary of Power Plants

Power station	Type	Expected year of commissioning	Power generation capacity (MW)
Tishreen	gas/steam	1993/1994	600
Jandar	combined cycle	1994/1995	600
Al Nasric	gas turbine	1995	300
Zezun	gas turbine	1996	300
Aleppo	steam turbine	1997/1998	1,000
Tishreen dam	hydro turbine	1998/1999	600
Alzara	steam turbine	1999	600
Total			4,000

Source: Ministry of Electricity Brochure

(2) Improvement Projects

The recent improvements in the power supply capacity can be seen in Table A6.2.4, which shows the physical conditions of major power stations in the 1990's. It can be seen that the possible increase in power supply capacity for the period 1993-2000 is 4,000 MW. Accordingly, the power supply will become about 6,000 MW, a three-fold increase over 1992. Large increases in transformers, and transmission facilities are also projected. This will result in a nationwide electrical transmission network and stable electrical power supply in all parts of the country.

(3) Viewpoint of Tourism Development

Assuming that one tourist consumes an average of 2 kW of electricity the increase of 100,000 tourists means that 200 MW of electricity is required, which is not a small figure. However, for the following reasons, the power supply seems not to be a serious restriction to tourist development. First, the expected demand increase from tourists is small relative to the currently expanding power supply. Second, the peak tourist seasons are spring and fall, when it is relatively cool, and there are few tourists during the hot summer, when air conditioners consume a lot of power.

However, in the old cities, the distribution system is aged and complicated, and necessary to be rehabilitated.

A6.2.5 Communication

(1) Present Condition

Telephones, telegrams and postal services are under the control of MOCO, under which the Syrian Telecommunication Establishment (STE) is responsible for the expansion, operation, and maintenance of the telephone network.

In recent years the telephone network, which had been slow to develop relative to other countries in the Middle East, has greatly expanded, and use of telephones is rapidly becoming commonplace. The spread in telephone use can be seen in the rise in the number of telephone lines (nearly equivalent to the number of telephones). As shown in Table A6.2.5, the number of telephone lines nationwide rose from 532,000 in 1993 to 686,000 in 1994 to 969,000 in 1995. This is primarily due to the contribution of the Kuwait Fund. The number of telephone centers has also risen by 1,500 in 5 years, to 4,450 centers in 1995. Since 1995, statistics have been released for fax and ISDN (Integrated Services Digital Network) services. However, the number of telegraph centers has hardly changed in 5 years. There were 126 centers in 1995 handling 332,000 telegrams.

The number of post offices has also increased, from 605 in 1991 to 650 in 1995. However, the volume of postal correspondence has fallen by about 2/3, to 12,664,000 letters. The number of postal parcels has also fallen by about 20 percent, to 76,130. The number of post boxes increased by 50 percent in the same period, however, to a total of 65,654 boxes.

(2) Improvement Projects

As part of the Kuwait Fund project, the German Siemens Corporation increased the number of telephone lines nationwide. To meet the sharp increase in demand for telephone service, the Telecommunication Network Expansion Plan for 1996-2010 was prepared with a Japanese cooperation. The objectives of the master plan are the expansion of the telephone

network and improved performance through the introduction of new technology. STE is preparing plans to finalize technical specifications for GSM (General System for Mobile telecommunication).

Table A6.2.5 Number of Telephone Lines

Mohafazat	Number of lines			Number of lines per 100 persons		
	1993	1994	1995	1993	1994	1995
Damascus	155,752	199,052	248,422	11.56	14.28	17.28
Homs	34,455	57,693	97,754	2.92	4.73	7.8
Hama	38,007	49,781	62,034	3.58	4.53	5.51
Aleppo	89,777	113,107	177,184	3.12	3.80	5.78
Latakia	41,463	54,978	69,073	5.57	7.36	9.08
Tartous	31,717	39,031	45,150	5.58	6.46	7.55
Others	-	-	-	-	-	-
Whole country	53,294	699,589	984,196	4.24	5.07	6.94

Source: Central Bureau of Statistics, 1996

(3) Viewpoint of Tourism Development

There have been great improvements in telephone service, and it is now easy to dial a foreign country directly. However, it is sometimes difficult to call Damascus from the rural areas, and it appears that the level of domestic telephone service is still inconsistent. The number of public telephones, which would improve convenience for tourists, is not enough.

A6.3 Environmental Issues

A6.3.1 Background

Syria enjoys exceptional environmental potentials due to the availability diversity of both natural and human historic resources, a fact that was proved through the development stages of the history of Syria for more than five thousand years. It is symbolized by its capital Damascus as the oldest continuously inhabited capital in history.

The complementary combination between the human and the natural resources is one of the basic elements that identifies the Syrian environmental resources, and reflect the rich variety of components representing different historical stages, and civilizations.

The new development movements changed the traditional structure of the society and the life style and lead to the abundance of the old cities to the new suburbs in the surrounding fields and green areas. The first priority was to build the infrastructure base needed for development projects. This movement was accelerated after 1975 particularly with the recent investment encouraging laws with centralized institutional and legislative framework. It increased significantly the urbanization process and the immigration from the rural areas to the main cities mainly to Damascus as the central attraction point on the national scale.

The additional factor of the severity of this situation is the concentration of the major activities in the historically inhabited corridor between Damascus and Aleppo, the narrow strip, which is situated between the desert region to the east (Al Badia), and the coastal mountains to the west. Historically, the availability of water resources and agricultural land were the main factor of this concentration, in addition to the main infrastructure focused on this area for the past fifty years.

The pressure resulted of this concentration is affecting negatively the over loaded natural

resources in several forms, mainly water pollution, land degradation and serious air pollution in major cities such as Damascus and Aleppo caused by industrial and urban growth. Local tourism and recreation activities, are also one of the major threats on the resources, because of the severe lack of the recreation areas and facilities in the over populated areas of the major cities.

Archeological and historical sites in the same areas are threatened, beside another negative impact on living traditional activities such as the Old City life style and handicraft. Although some legislation for the conservation of natural and cultural resources exist but they are scattered and do not provide sufficient protection. An environmental law is already under preparation but not yet adopted, and there is still a need for providing the proper effective legislative and institutional framework, that can enhance the basic steps towards a good environmental management.

A6.3.2 Legislation for Environment Protection

Although the Ministry of Environment (MOE) has been established since 1991 and responsible for environmental issues in general, legislation for the conservation of natural are scattered and do not provide sufficient protection in comprehensive perspective. The legislation is related to development sectors or natural resources, and issued in various occasions, and forms such as the following examples of the current environmentally related laws, decrees and regulations:

Law No. 16 of 1982 on irrigation

This law empowers Ministry of Irrigation in charge of irrigation to regulate water use and to monitor water quality. However, a set of regulations also involve:

- Ministry of Health to oversee drinking water from the health viewpoint (Article 1 of the Decree No. 111 of 1 September 1996;
- Ministry of Irrigation through its Directorate for Water Pollution Control created by the Decree 2145 of 1971 which is defined as lead agency in the matter of water pollution control, and
- Ministry of Agriculture and Agrarian Reform to oversee the protection of rural waters against pollution according to Decree No. 10 of 26 March 1972. MOI prepared an overall legislation on water use which provide for a unified system of water pollution control in 1987, but the draft is still under consideration.

Law No. 11 of 1991

This law is related to economic investment projects which require prior Environmental Impact Assessment (EIA).

Decision of January 12, 1992 of the Minister of State for Environment

This decree was established an Environmental Impact Assessment Commission (EIAC) within the general Commission for Environmental Affairs (GCEA). This EIAC is comprised of representatives of the Ministries of Industry, Tourism, Environment. The EIAC is assisted by four academics whose role is to advise the EIAC on technical issues.

Law No. 7 of 1994

This law states on several issues related to biodiversity protection, and constitutes a good attempt to promote a sustainable forestry policy. this law replaces the Law No. 66 of 1953.

Law No. 140 of 1970

This law amended and completed by Law 13 of 1983 on the protection of rural lands.

Law No. 10 of 1972

This law is related to the protection of marine domestic water and other international water against oil pollution.

Law No. 30 of 1964

This law is related to the protection of marine living resources.

Law No. 19 of 1984

This law is related to car traffic as well as other environmentally relevant hazardous industries, habitats and natural parks.

Draft Environmental Law

The Draft Environment Law was prepared by GCEA and will be submitted to the People's Assembly for the regular approval procedure. This law will provide to the GCEA the umbrella to deal with environmental problems by its main components that deal with pollution caused by development activities mainly urban and industrial relevant sectors. It will enforce environmental standards inspired by those of international agencies such as WHO or FAO, and will provide the basic tool for future environmental management.

The implementation of the Environment Law will enhance the enforcement of EIA studies for all relevant development projects by regulation annexes to the law that covers the detailed sectoral issues and standards. Therefore, the tourism development projects will have to be subject to IEE, and possibly EIA, particularly those which deal with natural resources and sites. At present the major issues of environment protection are examined by the existing Higher Council for Environmental Safety (HCES) established by Decree No. 11 of 1991 which coordinates environmental management activities within the government.

A6.3.3 Environmental Preservation Plan by UNDP

A National Environmental Strategy for MOE is included in a UNDP funded, World Bank executed project entitled: Strengthening National Capacity for Environmental Affairs. The Project has two main objectives:

- Formulating a NEAP: National Environmental Action Plan and a BEAP: Basin Environmental Action Plan, related to the geographic division of the water basins in Syria adopted by the project; and
- Building capacities for relevant parties and promoting awareness activities.

The methodology of this project divides the country into 7 basins and consists of the parallel execution of the activities of both objectives and the implementation of the resulted plans is expected to start early 1998. The ongoing work is focusing on defining priority problems on the national and the basins levels. Studies identified common issues for all basins and specific issues related to certain basins as follows:

Common Issues

- the agricultural land is decreasing because of many problems like soil degradation, salinitation, and surface erosion as it is not used anymore because of the urban and

- industrial expansion either planned or illegal.
- pollution and degradation of land and water because of untreated waste water and its effects on public health.
- water resources exhaustion in residential and industrial areas which is originally limited and faraway from substitutional resources (Barada and Aleppo Basins) and the decrease of the groundwater level.
- all types of air pollution resulted from different sources like factories, oil refineries, power stations and transportation in the main cities besides the domestic heating in general.
- effect on crops by extra use of pesticides and fertilizers
- deterioration of natural resources in general because of the absence of coordination and integration of development projects including treatment projects or environmental issues like waste water and wastes treatment.
- deterioration resulted from the absence of environment protection laws or the lack of enforcement of laws and regulations of protecting the resources actively, and the negative impact on all the natural and human resources also on cultural heritage.

The revision the current causes and background of those issues shows that they are related to common factors like the lack of environmental awareness in development and services sectors in general and the lack of coordination related to the requirements of sectoral projects which could be degraded or affecting other sectors negatively.

In its comprehensive practical aspect starting from the choice of suitable sites and simple and practical techniques according to the local capabilities besides the monitoring to insure that the concerned parties cope with the regulations, the following examples represent typical case studies:

- Homs refinery and factories on the Orontes river and their relation to the quality of water and air in the city.
- Baniyas power generating plant and refinery site relation with the surrounding areas and effect on the touristic activities.
- Latakia port and management the sea shore area and its relation with cultural and tourism development.
- Adra waste water treatment plant and the water management impact on Barada river and the recreational touristic activities on its banks inside and outside Damascus.
- Cement factories (Aleppo - Damascus - Tartous) and its relation to the neighboring areas especially problems concerning air pollution.
- Palmyra city land management especially main roads and their relation with the archeological site and the impact of traffic.
- Industrial zones in Damascus and Aleppo and their environmental impacts on the city and its future through master plan.

Basins Specific Issues

Environmental priority issues related to basins could be defined on geographical and historical aspects as follow:

Orontes Basin:

- Air and water pollution resulted from the industrial wastes and their direct impact on public health.

Barada and al A'waj Basin:

- Exhaustion of natural resources especially water, agricultural land and green areas as a result of industrial,
- urban development activities and desertification, and
- deterioration of the cultural heritage in the old city of Damascus.

Coastal Basin:

- Water resources and marine degradation, and
- sea water intrusion.

Al Quaik Basin:

- Industrial and urban activities concentration and the resulted pollution and their impacts on public health and cultural heritage.

Yarmouk Basin:

- Lack and deterioration of water resources and its impact on health and agricultural development.

Euphrates Basin:

- Deterioration of agricultural land because of salinitation and industrial wastes pollution.

Al Badia Basin:

- Deterioration of human and natural resources in the basin and its negative impact on Al-Badia human resources.

A12.1 Impact of Promotion on Tourist Arrivals

One may wonder to what extent would the effort in tourism promotion affect the actual amount of total tourist receipt in Syria. How much will the number of tourist arrivals be increased compared with the case of doing nothing? In reality it is extremely difficult to answer such a question as tourist arrivals is highly dependent on a host of factors, of which many are nothing to do with tourism itself such as regional security. Nevertheless it is important to know the rough range of such difference. The Study Team has attempt to carry out an analysis of NTANTO promotional budgets and tourist arrivals using data published by WTO titled "Budgets of National Tourism Administrations, WTO, 1996". The promotional budget of a NTANTO was taken to represent the level of effort in promotion in that particular country. Available data are not uniform across all countries. The subject of this analysis therefore was limited to those countries with tourism administration budget and tourist arrivals data available for both 1991 and 1995. The total number of subject countries was 97, spreading all regions of the world.

Figure A12.1.1 shows the relationship between the average of promotion budgets per tourist in 1991 and 1995 and the growth rate tourist arrivals in the four years. Each of the subject country was classified into either mature market or immature market based on the Study Team's market assessment. The designations are shown in Table A12.1.1, which presents data for each of the 97 countries. As expected, high spending countries are found primarily among mature markets, and countries with immature market spend less. It is interesting that among mature markets higher spending per tourists tends to accompany a lower growth rate, suggesting diminishing return on investment.

Plotting of all countries seems to indicate no relationship between the promotional budget and the tourist arrivals. However, a closer inspection of the relationship classified by world regions reveals some basic tendencies as well as regional differences. Figure A12.1.2 and Figure A12.1.3 illustrate the points.

Countries in Oceania spend a lot on promotion, indicating the importance of tourism in their respective countries. Barring New Caledonia, where political strife suppressed tourism, the general tendency is more promotion, more tourists. Except for Kiribati, all countries are in the mature market category and the difference between active promotion and not so active promotion resulted in the difference in tourist growth rate of about 3 percent. Countries in Central Europe spend next to nothing in tourism promotion and nothing can be said. African countries tend to have registered low growth and show no pattern, indicating various difficulties these countries are facing. Countries of Americas show positive co-relationship between promotion budget and growth rate although the rates themselves are not high. The difference in growth rate between active and non-active countries is in the range of 6 percent. The most clear tendency of positive co-relationship between the promotion budget and the growth rate is found among southern European and Mediterranean countries. Here the difference between active and non-active countries is almost 10 percent.

The difference among countries in the Middle East is even more striking. This probably is a partial reflection of socio-political situation perceived in countries of origin. Nevertheless, the Figure suggests that a proper effort in tourism promotion would results in the increase in growth rate of over 10 percent.

Table A12.1.1 Tourist Arrivals and Promotion Budget

region and country	tourist arrivals (000)		promotion budget (US\$ 000)		per tourist (US\$ 000)			*1	*2	*3
	1991	1995	1991	1995	1991	1995	AVG.	(%)	(%)	
Middle East										
Egypt	2,112	2,872	586	21,000	0.28	7.31	3.79	7.99	144.67	M
Iraq	268	330	1,000	600	3.73	1.82	2.77	5.34	-11.99	I
Lebanon	198	402	770	3,333	3.89	8.29	6.09	19.37	44.24	I
Oman	161	350	375	750	2.33	2.14	2.24	21.43	18.92	I
Qatar	141	250	329	526	2.33	2.10	2.22	15.39	12.45	I
Yemen	72	60	36	100	0.50	1.67	1.08	-4.46	29.10	I
Total	2,952	4,264	3,096	26,309	1.05	6.17	3.61	9.63	70.74	I
Central Europe										
Czech Rep	11,500	16,600	898	2,398	0.08	0.14	0.11	9.61	27.83	I
Hungary	21,860	22,087	3,100	6,612	0.14	0.30	0.22	0.26	20.85	M
Poland	11,350	19,225	2,670	6,709	0.24	0.35	0.29	14.08	25.90	M
Romania	3,000	2,750	852	2,291	0.28	0.83	0.56	-2.15	28.05	I
Slovakia	635	1,125	381	547	0.60	0.49	0.54	15.37	9.46	I
Total	48,345	61,787	7,901	18,557	0.16	0.30	0.23	6.33	23.80	I
Northern Europe										
Finland	786	835	14,666	17,777	18.66	21.29	19.97	1.52	4.93	M
Iceland	143	182	965	1,877	6.75	10.31	8.53	6.21	18.10	I
Ireland	3,571	4,398	37,254	37,811	10.43	8.60	9.51	5.35	0.37	M
United Kingdom	17,125	22,700	69,469	78,710	4.06	3.47	3.76	7.30	3.17	M
Total	21,625	28,115	122,354	136,175	5.66	4.84	5.25	6.78	2.71	M
Southern Europe										
Albania	45	29	25	54	0.56	1.86	1.21	-10.40	21.23	I
Croatia	1,521	2,418	4,735	14,498	3.11	6.00	4.55	12.29	32.28	I
Greece	8,036	9,331	30,215	13,496	3.76	1.45	2.60	3.81	-18.25	M
Italy	25,878	29,184	16,121	14,198	0.62	0.49	0.55	3.05	-3.13	M
Portugal	8,657	9,513	25,698	37,271	2.97	3.92	3.44	2.39	9.74	M
San Marino	582	550	40	107	0.07	0.19	0.13	-1.40	27.89	M
Spain	38,539	45,125	81,990	78,647	2.13	1.74	1.94	4.02	-1.04	M
Total	83,258	96,150	158,824	158,271	1.91	1.65	1.78	3.66	-0.09	M
Western Europe										
Austria	19,092	17,750	35,035	47,254	1.84	2.66	2.25	-1.81	7.77	M
Belgium	4,928	5,224	3,647	4,425	0.74	0.85	0.79	1.47	-4.95	M
France	55,041	60,584	68,726	72,928	1.25	1.20	1.23	2.43	1.49	M
Germany	15,648	14,535	17,658	20,151	1.13	1.39	1.26	-1.83	3.36	M
Liechtenstein	71	63	118	229	1.66	3.63	2.65	-2.94	18.03	M
Luxembourg	861	770	1,611	2,367	1.87	3.07	2.47	-2.75	10.10	M
Netherlands	5,842	6,304	38,600	49,700	6.61	7.88	7.25	1.92	6.52	M
Switzerland	12,600	11,835	30,849	32,233	2.45	2.72	2.59	-1.55	1.10	M
Total	114,083	117,065	196,244	229,287	1.72	1.96	1.84	0.65	3.97	M
East Medit. Europe										
Cyprus	1,385	2,150	12,086	20,790	8.73	9.67	9.20	11.62	14.52	I
Turkey	5,158	6,512	13,733	20,520	2.66	3.15	2.91	6.00	10.56	M
Total	7,486	10,747	34,319	74,610	4.58	6.94	5.76	9.46	21.43	M

Note: *1 Annual Growth rate of tourist arrivals
 *2 Annual Growth rate of budget
 *3 Mature (M) or Immature (I) destination

Source: WFO

Table A12.1.1 Tourist Arrivals and Promotion Budget (Continued)

region and country	tourist arrivals (000)		promotion budget (US\$ 000)		per tourist (US\$ 000)			*1	*2	*3
	1991	1995	1991	1995	1991	1995	AVG.	(%)	(%)	
South Asia										
Bangladesh	113	150	81	74	0.72	0.49	0.61	7.34	-2.23	I
India	1,678	2,122	12,947	18,648	7.72	8.79	8.25	6.04	9.55	M
Maldives	196	324	413	586	2.11	1.81	1.96	13.39	9.14	M
Nepal	334	346	160	1,112	0.48	3.21	1.85	0.89	62.37	M
Sri Lanka	318	451	990	1,235	3.11	2.74	2.93	9.13	5.68	I
Total	2,639	3,393	14,591	21,655	5.53	6.38	5.96	6.48	10.37	I
East Asia										
China	12,464	23,368	3,148	5,049	0.25	0.22	0.23	17.01	12.54	M
Hong Kong	6,795	10,368	16,653	28,637	2.45	2.76	2.61	11.14	14.51	M
Korea, Republic of	3,196	3,753	17,631	30,308	5.52	8.08	6.80	4.10	14.50	M
Macau	3,047	4,623	1,663	5,083	0.55	1.10	0.82	10.98	32.22	M
Taiwan	1,855	2,332	3,654	3,600	1.97	1.54	1.76	5.89	-0.37	M
Total	27,357	44,444	42,749	72,677	1.56	1.64	1.60	12.90	14.19	M
Southeast Asia										
Indonesia	2,570	4,319	2,636	4,161	1.03	0.96	0.99	13.86	12.09	M
Malaysia	5,847	6,016	22,242	23,939	3.80	3.98	3.89	0.71	1.86	M
Philippines	849	1,702	2,122	7,080	2.50	4.16	3.33	18.99	35.15	I
Singapore	4,913	6,422	37,293	53,595	7.59	8.35	7.97	6.93	9.49	M
Thailand	5,087	6,900	16,431	51,198	3.23	7.42	5.32	7.92	32.86	M
Total	19,266	25,359	80,724	139,973	4.19	5.52	4.85	7.11	14.75	M
Oceania										
Australia	2,370	3,771	63,382	87,949	26.74	23.32	25.03	12.31	8.53	M
Fiji	259	336	1,650	2,450	6.37	7.29	6.83	6.72	10.39	M
French Polynesia	121	172	3,717	6,629	30.72	38.54	34.63	9.19	15.56	M
Kiribati	8	4	7	48	0.88	12.00	6.44	-15.91	61.82	I
New Caledonia	81	86	2,807	3,535	34.65	41.10	37.88	1.51	5.93	M
New Zealand	1,056	1,409	19,337	31,597	18.31	22.43	20.37	7.48	13.06	M
N. Mariana Isl.	422	587	1,106	3,295	2.62	5.61	4.12	8.60	31.38	M
Tonga	22	29	1,777	2,252	80.77	77.66	79.21	7.15	6.10	M
Total	4,339	6,394	93,783	137,755	21.61	21.54	21.58	10.18	10.09	M
Caribbean										
Aruba	501	597	11,575	12,876	23.10	21.57	22.34	4.48	2.70	M
Bermuda	386	418	16,966	16,565	43.95	39.63	41.79	2.01	-0.60	M
Bonaire	55	58	1,059	796	19.25	13.72	16.49	1.34	-6.89	M
British Virgin Isl.	147	240	2,050	3,907	13.95	16.28	15.11	13.04	17.50	M
Curacao	217	241	5,164	5,671	23.80	23.53	23.66	2.66	2.37	M
Grenada	94	111	1,113	1,039	11.84	9.36	10.60	4.24	-1.71	M
Jamaica	171	136	1,180	1,385	6.90	10.18	8.54	-5.56	4.09	M
Montserrat	21	22	99	251	4.71	11.41	8.06	1.17	26.19	M
Puerto Rico	2,613	3,297	15,210	30,807	5.82	9.34	7.58	5.99	19.30	M
Total	4,205	5,120	54,416	73,297	12.94	14.32	13.63	5.05	7.73	M

Note: *1 Annual Growth rate of tourist arrivals
 *2 Annual Growth rate of budget
 *3 Mature (M) or immature (I) destination

Source: WTO

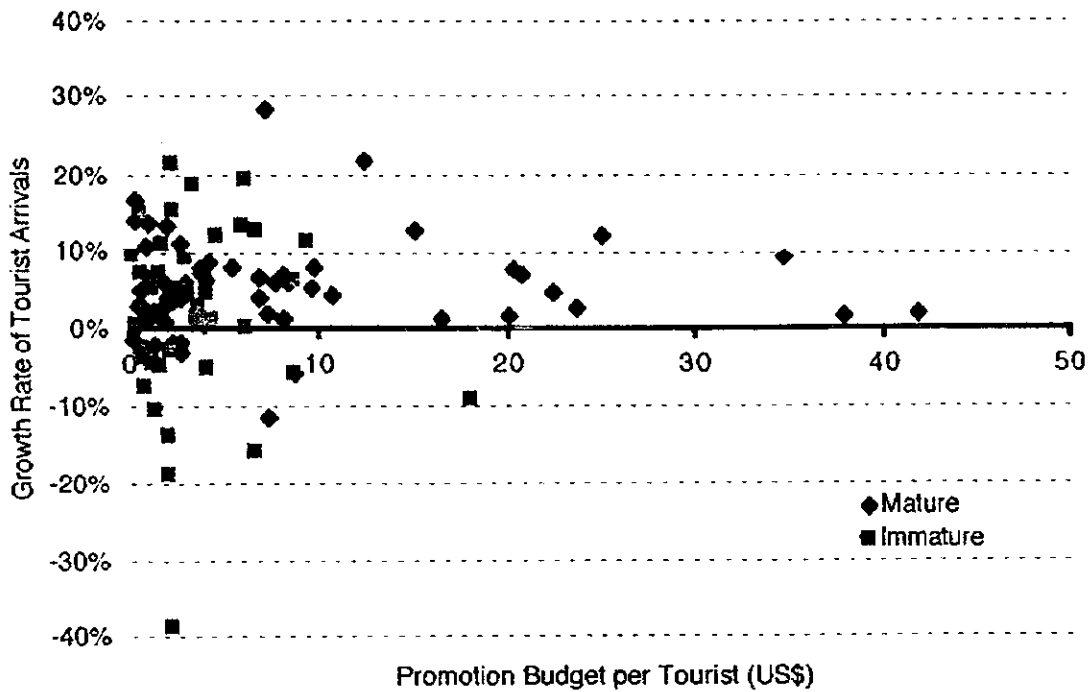
Table A12.1.1 Tourist Arrivals and Promotion Budget (Continued)

region and country	tourist arrivals (000)		promotion budget (US\$ 000)		per tourist (US\$ 000)		*1	*2	*3	
Central America										
Belize	117	131	277	628	2.37	4.79	3.58	2.87	22.71	I
Costa Rica	505	825	2,714	6,450	5.37	7.82	6.60	13.06	24.16	I
El Salvador	199	179	294	502	1.48	2.80	2.14	-2.61	14.31	I
Guatemala	513	540	2,247	1,367	4.38	2.53	3.46	1.29	-11.68	I
Nicaragua	238	245	77	31	0.32	0.13	0.23	0.73	-20.34	I
Total	1,572	1,920	5,609	8,978	3.57	4.68	4.12	5.13	12.48	I
North America										
Canada	14,912	16,854	24,500	31,504	1.64	1.87	1.76	3.11	6.49	M
Mexico	16,281	19,870	58,512	22,574	3.59	1.14	2.36	5.11	-21.19	M
USA	20,432	24,675	12,000	15,000	0.59	0.61	0.60	4.83	5.74	M
Total	51,625	61,399	113,403	97,764	2.20	1.59	1.89	4.43	-3.64	M
South America										
Brazil	1,475	1,695	4,816	1,790	3.27	1.06	2.16	3.54	-21.92	M
Chile	1,349	1,750	923	2,737	0.68	1.56	1.12	6.72	31.23	I
Colombia	857	1,310	2,248	911	2.62	0.70	1.66	11.19	-20.21	I
Ecuador	365	485	796	400	2.18	0.82	1.50	7.36	-15.80	I
Paraguay	361	407	187	151	0.52	0.37	0.44	3.04	-5.21	M
Peru	232	386	2,275	793	9.81	2.05	5.93	13.57	-23.16	I
Total	4,639	6,033	11,245	6,782	2.42	1.12	1.77	6.79	-11.87	I
East Africa										
	1991	1995	1991	1995	1991	1995	AVG.			
Brundi	125	18	26	69	0.21	3.83	2.02	-38.40	27.63	I
Comoros	17	18	57	94	3.35	5.22	4.29	1.44	13.32	I
Ethiopia	82	99	261	277	3.18	2.80	2.99	4.82	1.50	I
Mauritius	301	409	2,600	4,390	8.64	10.73	9.69	7.97	13.99	M
Seychelles	90	117	2,179	2,013	24.21	17.21	20.71	6.78	-1.96	M
Zambia	171	136	1,180	1,385	6.90	10.18	8.54	-5.56	4.09	I
Total	786	797	6,303	8,228	8.02	10.32	9.17	0.35	6.89	M
North Africa										
Algeria	1,193	520	688	1,680	0.58	3.23	1.90	-18.75	25.01	I
Morocco	4,162	2,579	19,942	24,541	4.79	9.52	7.15	-11.28	5.32	M
Tunisia	3,224	4,120	12,791	16,423	3.97	3.99	3.98	6.32	6.45	M
Total	8,579	7,219	33,421	42,644	3.90	5.91	4.90	-4.22	6.28	M
Lesolto	182	101	73	364	0.40	3.60	2.00	-13.69	49.43	I
South Africa	1,710	4,676	15,964	23,809	9.34	5.09	7.21	28.59	10.51	M
Total	1,892	4,777	16,037	24,173	8.48	5.06	6.77	26.05	10.80	M
West Africa										
Benin	117	143	160	120	1.37	0.84	1.10	5.14	-6.94	I
Cameroon	84	85	108	931	1.29	10.95	6.12	0.30	71.35	I
Cote d'Ivoire	200	161	433	940	2.17	5.73	3.95	-4.84	21.38	I
Gambia	66	79	252	335	3.82	4.24	4.03	4.60	7.38	I
Mali	38	28	11	31	0.29	1.11	0.70	-7.35	29.57	I
Niger	16	11	326	171	20.38	15.55	17.96	-8.94	-14.90	I
Nigeria	214	185	67	205	0.31	1.11	0.71	-3.58	32.26	I
Sierra Leone	89	74	98	152	1.10	2.05	1.58	-4.51	11.60	I
Total	824	769	1,455	2,885	1.77	3.75	2.76	-1.71	18.66	I

Note: *1 Annual Growth rate of tourist arrivals
 *2 Annual Growth rate of budget
 *3 Mature (M) or Immature (I) destination

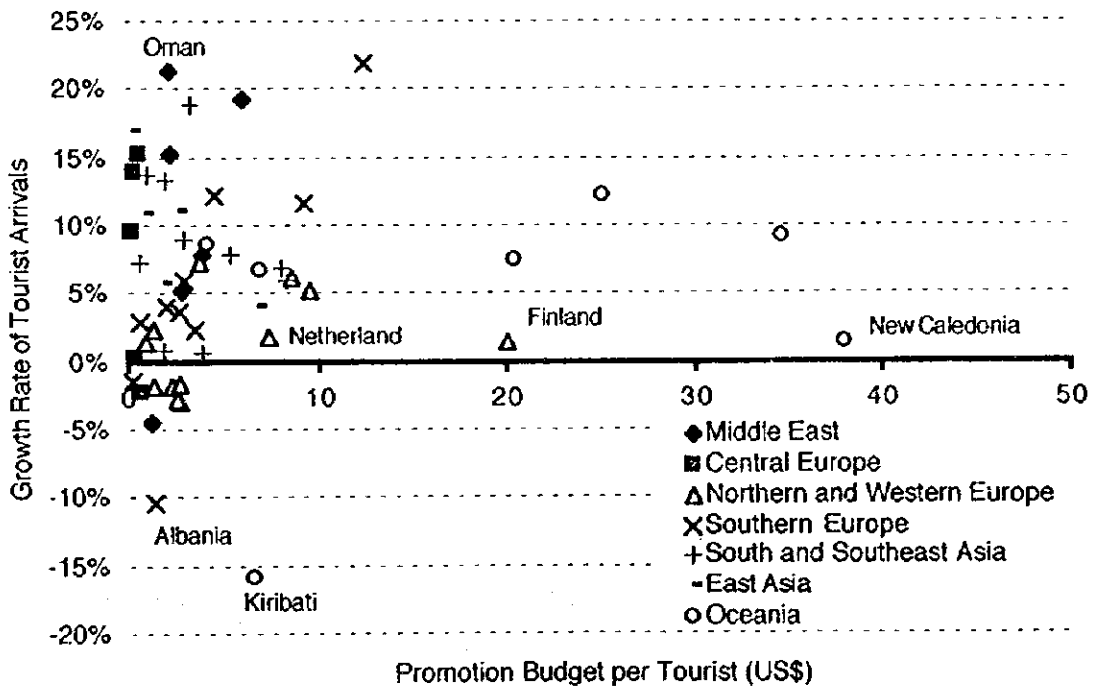
Source: WTO

Figure A12.1.1 Tourism Promotion Effort and Growth in Tourist Arrivals (1)



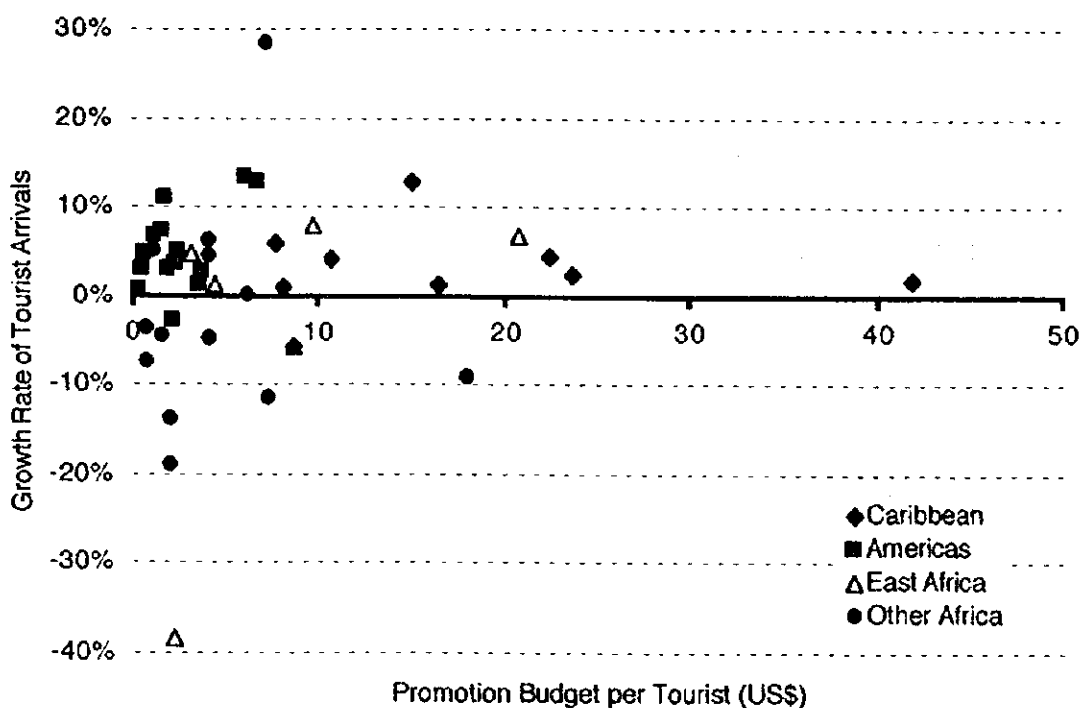
Source: WTO

Figure A12.1.2 Tourism Promotion Effort and Growth in Tourist Arrivals (2)



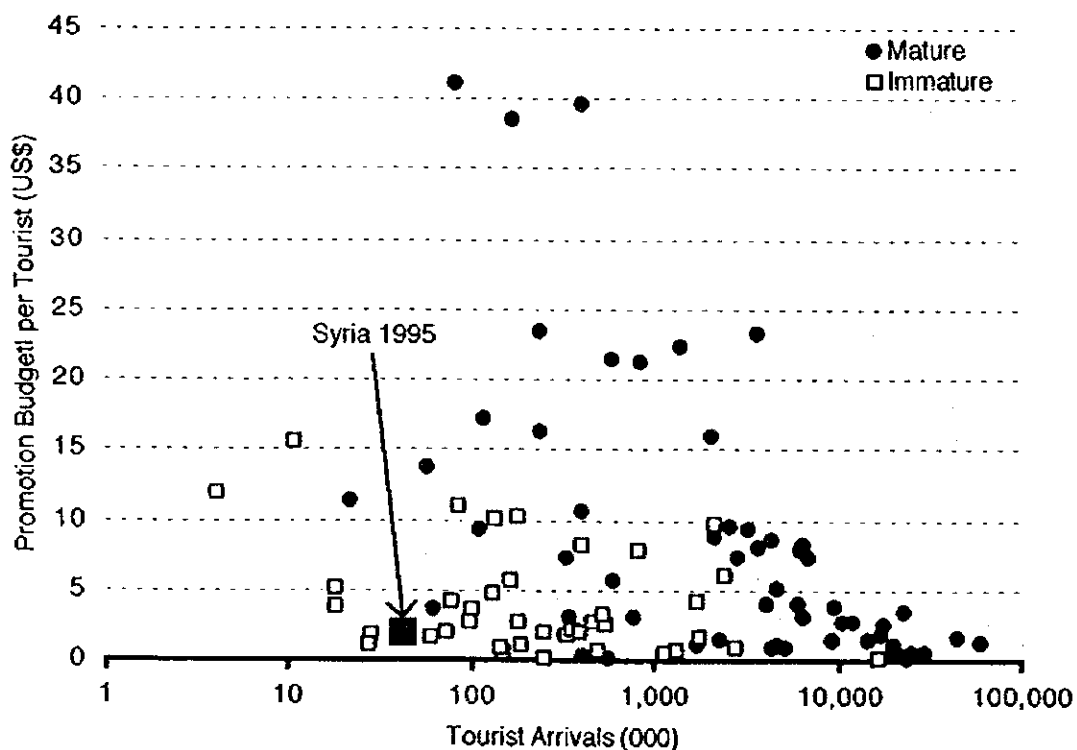
Source: WTO

Figure A12.1.3 Tourism Promotion Effort and Growth in Tourist Arrivals (3)



Source: WTO

Figure A12.1.4 Relative Promotion Levels



Source: WTO

A18.1 Appendixes for the Priority Projects

A18.1.1 Transport

For the estimation of necessary space for car parking, length of passenger piers and access road improvement, the following study was made by the Study Team.

Based on this study, detailed study will be needed before the implementation of the priority projects.

(1) Car Parking

Demand for parking place

Parking demand for tourism buses were estimated applying average vehicle occupancy rate to the average daily number of tourists by bus and parking utilization rate based on the estimated number of tourists by zone in 2005. Average vehicle occupancy and parking utilization rates were estimated in consideration of present tourist activity pattern.

Damascus		
average number of tourists in Damascus zone	Foreign	600 persons/day
	Arab	1,425 pers./day
average number of tourists in Damascus zone	Foreign	80 %
	Arab	10 %
average occupancy of large tourist bus		30 persons/veh
parking utilization rate	old city	2 times/day
	Hidjaz Station	4 times/day
parking space demand	old city	11 buses
	Hidjaz Station	5 buses
Aleppo		
average number of tourists in Damascus zone	Foreign	390 pers./day
	Arab	240 pers./day
average number of tourists in Damascus zone	Foreign	80 %
	Arab	10 %
average occupancy of large tourist bus		30 pers./veh.
parking utilization rate	old city	2 times/day
parking space demand		6 large buses

1.5 times larger parking space of above figures are assumed for peak season.

Profile

pavement	stone pavement (basalt 15 cm, sand base 10 cm)	
attached facilities	marking, lighting facilities	
cost units	clearance	SP 70 /sq.m
	pavement	SP 300 /sq.m
	lighting	SP 165 /sq.m

(2) Passenger Pier Improvement

Demand for Passenger Pier

Demand for port facilities were estimated applying average boat occupancy rate to the average daily number of tourists by ferry and berth utilization rate. Average boat occupancy and berth turnover rate were estimated by observation in this study.

Average number of tourists in coastal zone	Foreign	700 pax./day
Number of tourists in coastal zone in peak season	Foreign	1,050pax./day (peak ratio 1.5)
average number of local pax. in coastal zone	Foreign	2,050 pax./day
total number of passengers in peak season		3,100 pax./day
total number of passengers at peak hour		620 pax./hour (concentration rate 0.2)
average boat occupancy		30 pax./boat
berth utilization rate		2 times/hour
unit length for boat		20 m/boat
necessary berth length		220 m

Profile

Tartus side

A new passenger pier (presently disorderly used for fisher boats, passenger boats and cargo boats), a new break water and parking area will be constructed at the same location of existing small port of Tartus. Effluents from the Gamka River situated at about 25 km south of existing Tartus small port are carried to Tartus small port area by sea current and are silted up, therefore securing the enough water depth is a vital issue at Tartus port. It is planned that existing break water is prolonged to the extent of 700 m to the offing so as to secure sufficient water depth (7 m) and avoid the influence of siltation.

length of berth	110 m
length of break water	700 m
cost	300 mil.S.P.

Arwad side

Pontoon bridge will be equipped at the Arwad port.

area	660 sq.m (6 m x 110 m)
cost	28 mil. S.P. (pontoon 25 mil.S.P., others 3 mil.S.P.)

(3) Access Road Improvement

Cost Units

Highway maintenance cost		SP 1.5 million /km for one side, SP 3.0 million /km for both sides
National road maintenance cost		SP 0.8 million /km for both sides
Highway construction cost	plain and rolling terrain	SP 7-8 million /km
	mountainous area	SP 20 million /km
National road construction cost	plain and rolling terrain	SP 4 million /km
	mountainous area	.SP 7 million /km
Land acquisition cost	land+trees+plants+etc.	SP 130-35 thousand /1,000sq.m
(Land cost is usually estimated at the level of 10 times larger than annual revenue.)		

A18.1.2 Utilities

For the estimation of solid waste volume, the following data was taken into consideration.

Based on this study, detailed study will be needed before the implementation of the priority projects.

Table A18.2.1 Reference Data for Solid Waste Volume

Country	City	Year	Population (1,000)	GPN per Capita in 1992 (US\$)	Household Waste (kg/person/day)	Municipal Solid Wastes (kg/person/day)
Syria	Damascus	1994	1,394	1,127	—	0.717
Jordan	Amman	1992	965	1,390	—	0.759
Paraguay	Asuncion	1993	506	1,360	0.961	1.312
Poland	Poznan	1992	590	1,960	0.654	0.769
	Lublin	1992	352	1,960	0.400	0.508
Laos	Vientiane	1991	142	250	0.753	0.987
Malaysia	Pulau	1988	559	2,800	0.504	0.640
China	Siiian	1988	5,750	—	0.680	—
Guatemala	Metropolitan area	1991	—	—	0.542	—
Thailand	Bangkok	1989	—	—	—	0.887
India	—	—	—	—	0.414	—
West Europe	—	—	—	—	0.845	—

Note 1. The estimated figure of 0.961 (household waste) in Paraguay is relatively high due to the high ratio of wet waste (44.2%).

Source: Solid Waste Management in Developing Countries, WHO

A18.9 Summary of Survey Results

A18.9.1 Environmental Survey

(1) Introduction

In order to incorporate considerations on environmental capacity and constraints into the proposed tourism development plan and projects, a detailed environmental survey was conducted in the selected four tourism zones.

The objectives of the survey are:

- 1) to understand basic environmental characteristics and features of the selected tourism zones and selected tourist sites in the zones;
- 2) to prepare basic data necessary for IEE (Initial Environmental Examination), in which the Study Team would examine environmental capacity and constraints regarding the proposed priority projects; and
- 3) if any important negative environmental impact is identified, to provide necessary data for EIA (Environmental Impact Assessment), in which the Study Team would conduct further detailed environmental examination to specify environmentally appropriate countermeasures for the proposed tourism development plan and projects.

(2) Methodology of the Survey

After environmental survey items that may be affected by the proposed tourism development plan and projects were listed, they were examined through collection and assessment of available environmental data, published by related agencies, universities and laboratories. The following items were examined towards all the selected priority zones:

- 1) topography and soils;
- 2) soil erosion;

- 3) hydrological situations;
- 4) meteorology;
- 5) landscape and townscape;
- 6) water contamination;
- 7) air pollution and dust;
- 8) traffic conditions;
- 9) cultural heritage;
- 10) solid waste management;
- 11) sanitary and public health;
- 12) flora, fauna and biodiversity; and
- 13) other special items, if any.

Furthermore, the following items were examined in more detail towards the selected priority project sites:

- 1) solid waste management;
- 2) urban infrastructure;
- 3) cultural heritage;
- 4) water quality; and
- 5) traffic conditions.

In order to examine traffic conditions of the selected priority projects, traffic surveys were conducted in addition to the data collection from concerned organizations.

(3) Summary Results of the Environmental Survey

The following subsections illustrate summary results of the environmental survey, particularly focusing on problems identified by the survey.

a. Damascus Zone

Soil Erosion

Symptoms or potentials of soil erosion are observed in the eastern parts of Al-Ghouta and Al-Utiba, Al-Hejani, mountain areas of Al-Keswa, and the western parts of the zone.

Hydrological Situations

About 991 MCM water resources are available on average, and the proportion of each component is as follows:

- Surface water: 14% (141 MCM)
- Ground water: 27% (272 MCM)
- Spring water: 58% (578 MCM)

Meteorology

The climate in the zone ranges from semi-humid to very dry. The average annual temperature is between 11.3 °C in the highland and 17 °C in the plain. Annual average relative humidity may drop to 10 percent though it ranges between 45 percent to 60 percent in usual time. Prevailing winds are north westerly in the north west and south westerly in the south east.

Water Contamination

The Barada river suffers from long term water pollution problems. Major causes are partially

treated or untreated domestic and industrial effluents and agricultural run-off. Observed components of water pollution are as follows:

- Chromium (above the standard specified in the WHO health guideline);
- BOD (above the Syrian standard);
- Ammonia (above the Syrian standard); and
- Suspended solid (above the Syrian standard in 86% of samples).

Air pollution and Dust

Mainly due to the increased traffic flow, Damascus city ambience contains high levels of particulate matters and lead concentrations. Also, levels of NO_x, SO_x and CO₂ exceeds standards specified in the WHO guidelines often both in industrial and residential areas. In some industrial areas, high levels of Cd, Zn, Ni, Fe, TSP and benzene are also observed.

Traffic Conditions

One third of vehicles in Syria exist in Damascus and Al-Awaj zone. Approximately 75 percent of these vehicles use gasoline and 25 percent use diesel.

Solid Waste Management

The total quantity of solid waste produced in the Damascus city is about 1,000 tons per day (0.66 kg per capita per day), which is comprised of:

Domestic waste:	910 tons;
Commercial waste:	50 tons; and
Industrial waste:	40 tons.

The approximate quantity of waste in the surrounding rural areas is 0.5 kg per capita per day.

Produced waste is disposed of at landfills and open dumps, or managed by the compost plant in Al-Jaroneih, which has a production capacity of approximately 400 - 700 tons per day. Al-Jaroneih also has an incineration facility with a capacity of about 22 tons per day. The incineration facility is used for medical waste incineration. Damascus Zone has its main waste dump also in Al-Jaroneih, with a subsidiary dump in Sheikh-Reslan.

The survey report also outlines types of industrial activities in Damascus Zone and their potential polluting outputs.

Flora, Fauna and Biodiversity

The area of forest covering Damascus Zone is approximately 200 km². Rakhleh and Al-Qaarn valley, located at the west of the zone (40 km from the city of Damascus), is protected by borders. The botanical cover in the protected area consists of *Quercus caliprinos*, *Oistacia*, *Prunus* species, *Amygdalus orientalis* and *Pyrus syriacia*, *Pistacia*, *Cupressus* and *Conifers*.

b. Homs and HamaZone

Hydrological Situations

The main river in the zone is the Orontes River, of which average flow rate is 18.5 m³/s. The maximum flow rate is 58.0 m³/s and the minimum is 6.3 m³/s. Dryness of the Upper Orontes occurs between November and December.

There are four major dams in the zone. Their storage capacities are illustrated in the following

table.

Name	Storage Capacity
Qatina Dam	200 million m ³
Al-Rastan Dam	240 million m ³
Mohardeh Dam	67 million m ³
Teldo Dam	67 million m ³

Meteorology

The climate in Homs & Hama zone is characterized by a hot dry summer and a humid cold winter. Rainfall ranges between 340 mm and 433 mm, with little rainfall during summer months. Humidity ranges from 71 to 91 percent in the summer and from 43 to 72 percent in the winter. Winds tend to be west to northwest in the summer and east to northeast in the winter.

Water Contamination

Water contamination caused by industrial, agricultural and domestic effluents is observed in some major water resources in the zone. For example, all samples collected from the Qatina Lake exceed WHO standards for BOD and NH₄. Four high polluting industrial sites are located on its borders. Also, all samples from the Orontes River exceed WHO standards for three indicators. Textile effluents increase the levels of chromium and other trace metals much higher than the permitted levels. Wells used for drinking in many villages are also contaminated.

Air pollution and Dust

Air pollution is observed especially in Homs. Homs includes many industrial establishments and the polluted emissions from the establishments are carried by the westerly wind to various residential parts of the city. Baba Amro, an area around the Public Stadium, Ibn Alwaleed Suburb, and Alwer Housing Estate are affected by emissions from both the oil refinery and fertilizer industries, and Military Housing State Vicinity is affected by the fertilizer complex.

Traffic Conditions

The number of vehicles in the zone is 83,722, which is about a half of the number of vehicles in Damascus and 21 percent of the total number in Syria. The share of diesel vehicles is 27 percent.

Solid Waste Management

In both Homs and Hama, waste in containers located at convenient places is collected by special trucks and disposed of at disposal sites outside the cities. There is no regulation in the region for the disposal of solid waste.

Flora, Fauna and Biodiversity

The area of forest covering Homs and Hama Zone is approximately 31 thousand hectares. Abu Rajmeen, Al-Bala's mountain, Al-Mastoura Mountain, Acome, and Baqisa are the protected areas. Nationally important plant species in the zone are Populous species, Quercus species, Eucalyptus, Cupressus species, Dire and Salix species, and willow hees.

c. Aleppo Zone

Soil Erosion

Soil erosion has reached a critical point especially the western parts of the zone. Soil salinity also occurs as a result of the application of wrong irrigation methods.

Hydrological Situations

The total piped supply of water is 176,446 thousand m³ per day in Aleppo and 11,611 thousand m³ per day in Idleb. Aleppo zone has two major rivers: the Afreen, whose annual average flow is 160 million m³, and the Al-Quaik, whose annual average flow is 90 million m³. The total storage capacity of water resources is 206 million m³, out of which 190 million m³ is dominated by the Midanki Dam on the Afreen River. However, 48 percent of the population in the Aleppo Mohafazat and 99 percent in the Aleppo City obtained their drinking water from the Euphrates River through a water distribution project called "Maskanaa".

Meteorology

Aleppo Zone has a predominately Mediterranean climate. The humidity level often drops below 30 percent in the summer and tends to be much higher in the winter. Annual averages of rainfalls are 333 mm in Jisr-Al-Shogor and 705 mm in Aleppo.

Air pollution and Dust

SO₂, NO_x, VOC, Lead and dust are major compositions of air pollution in Aleppo Zone. Although the average concentrations of them are below the WHO Guideline standards, the maximum concentrations exceed the standards. Major sources are as follows:

Pollutants	Major Sources
SO ₂	power station (92%), residential furnace (6%)
NO _x	power station (53%), traffic (31%), cement factory (11%)
VOC	traffic (92%), power station (5%)
Lead	traffic (98%), battery plant (2%)
Dust	cement factory (48%), power station (40%), traffic (11%)

Traffic Conditions

Aleppo is connected by railways to Damascus through Hama and Homs, to Latakia, and to Rai. The lengths of the railways and their gauge types are illustrated in the following table.

Rail Link	Lengths (km)	Gauge
Aleppo - Latakia	1,017	Standard line
Aleppo - Hama - Homs - Damascus	294	Standard line
Aleppo - Midian - Exbes - Rai	455	Standard line

The number of vehicles in the zone is about 111,000, in which 39 percent are diesel vehicles.

Solid waste management

The approximate total amount of solid wastes in the Aleppo city is 1,700 tons per day, which comprises the following components:

Domestic	1,100 tons
Industry	300 tons
Municipal	200 tons
Hospital	50 tons

Abattoirs 50 tons

Solid wastes are generally disposed at open landfills. Means and locations of disposal are summarized in the following table.

Region	Disposal Means	Locations
Aleppo	Regular upon dump	Sheikh Gubar, 12 km from the city center
	Regular upon dump	Braij, 9 km from the city center
	Compost factory	Romosah, just south of the city
Afreen	Open dump	7 km south-east of the city
Izaz	Open dump	4 km west of the city
Bab	Open dump	14 km north of the city
Idleb	Open dump	Ariha-Msabim
Khan Sheikoon	Open dump with incineraton	
Ma'arah	Open dump with incineraton	
Ariha	Open dump with incineraton	
Jisr Al-Shogor	Open dump with incineraton	

Flora, Fauna and Biodiversity

Protected areas in Aleppo Zone are summarized in the following table.

Protected areas	Area (hectare)	Types of plants	No. of plants
AL-Odami	3,000	Atriplex Nummularia	1,000,000
		Atriplex halinus	725,000
		Salsola vermiculate	225,000
		Atriplex canesens & others	50,000
I-Muragha	8,000	Salsola vermiculate	3,000,000
		Atriplex halinus	2,000,000
		Atriplex canesens	425,000
		Atriplex Syriaca	100,000
		Atriplex Nummularia & others	100,000
Ein Al-Zarka	6,750	Salsola vermiculate	1,100,000
		Atriplex halinus	1,300,000
		Atriplex Nummularia & others	70,000
Obaisan	8,000		

d. Coastal Zone

Topography and soils

The Coastal Zone occupies an area of approximately 4,200 km², which comprises three main topographical systems extending from the coast inland as follows:

- Coastal plains: leveled land gradually inclining over an altitude of 0-100 meters;
- Hilly regions: inclining over an altitude of 100 - 400 meters; and
- Mountain regions: inclining sharply over an altitude of 400 - 1,350 meters.

Soil Erosion

Problems of soil erosion observed in Coastal Zone are summarized in the following table.

Degree of Soil Erosion	Weak Erosion (0.3/ha/yr)	Medium Erosion (30-60t/ha/yr)	Strong Erosion (50-100t/ha/yr)	Severe Erosion (100-200t/ha/yr)
Location	South of Latakia	North of Latakia	Mountain regions	North east of Latakia
Altitude	≤ 100 m	≤ 100 m	100 - 1,500 m	100 - 600 m
Zone Area	Approx. 90,000 ha	Approx. 50,000 ha	Approx. 50,00 ha	Approx. 50,00 ha

Hydrological Situations

Coastal zone is the richest in Syria in terms of water resources. Its total available capacity is estimated at 1,160 million cubic meters per year and the total water consumption in the zone is 847 million cubic meters per year. Piped water is already supplied to all houses in the major towns and cities, and additional piped water supply projects are under construction.

Meteorology

The climate in Coastal Zone is Mediterranean and characterized by relatively mild winters and humid summers. Average annual levels of rainfalls are high over the zone, raging from 850 mm in coastal plains to over 1,500 mm in mountains. Prevailing winds are warm west and south westerly.

Water Contamination

Samples of water taken from major rivers in the zone exceed WHO Guideline standards for the following quality parameters:

- electrical conductivity;
- chloride;
- fecal chloroforms; and
- total suspended soils.

Spring waters are generally acceptable for all parameters except for fecal chloroforms in some springs. A high proportion of wells in villages contain water with high levels of hardness, nitrates, ammonia and fecal chloroforms. Many wells are not suitable for drinking and irrigation.

Air pollution and Dust

SO₂, NO_x, VOC, Lead, Benzene and dust are major compositions of air pollution in Coastal Zone. Although the average concentrations of them are below the WHO Guideline standards, the maximum concentrations highly exceed the standards. Major sources are as follows:

Pollutants	Major Sources
SO ₂	power station (77%), refinery (21%)
NO _x	power station (46%), cement factory (26%), traffic (16%), refinery (11%)
VOC	refinery (82%), oil terminal (15%), traffic (3%),
Lead	traffic (100%)
Benzene	oil terminal (69%), refinery (31%)
Dust	cement factory (67%), power station (24%), traffic (3%)

Traffic Conditions

Coastal Zone is connected by railways to Aleppo and Homs. The lengths of the railways and their gauge types are summarized in the following table.

Rail Link	Lengths (km)	Gauge
Latakia - Aleppo - Al-Kamishili	1,017	Standard line
Homs - Al-Akkari - Tartous	91	Standard line
Tartous - Latakia	131	Standard line

The total number of vehicles in the zone is slightly less than 55,000. The total length of roads in Tartous and Latakia is 5,644 km.

Solid Waste Management

The city of Latakia produces approximately 250 tons of domestic solid waste per day. Approximately 100 tons of waste per day is managed by the composting plant in Latakia. Waste is generally disposed of at open landfills. In addition to the main dump of the Latakia Mohafazat called "Al-Bassah" dump, there are 55 dumps located over the rural countryside of the zone.

Abattoir waste causes a problem of spreading diseases and exacerbating water and soil contamination through disposals at landfills. Hospital waste is generally disposed of by mixing with domestic wastes, which in turn goes to open landfills.

Major hazardous wastes produced in the zone are oily wastes from oil refineries (1,000 tons per year) and putrescence waste (18,000 tons per year)

Flora, Fauna and Biodiversity

Forest cover of the zone is 1,160 km², which comprises 860 km² in the Latakia region and 300 km² in the Tartous region.

Protected areas in the zone are summarized in the following table.

Protected Area	Location	Characteristics
Abies clinicia and cedrus protected area	Northern part of the zone nearby Slunfeh town	Area: 1,350 hectare. Altitude: 1,100-1,562 m. Situated on hard limestone rocks mixed with dolomite rocks. Danger of extinction: Quercus cederum, Rhamnus cathartica, Acer hyrcanum, Paeonia mascula, Atropa belladonna, Arenaria cassia, and Saponaria bargylana.
Al-Frounlog	Located in A-Bayer region, 47 km north from Latakia.	Owned by the national government. Altitude: 550-620m. The most mature ecological system in Syria. Volcanic rocks.
Om-Altoyour	30 km north from Latakia	Seashore: 12 km. Village population: 2,000. No tourist investments so far.
Karah-Douran	Northern part of Kassab town, at the Syrian-Turkish border	Within a valley between mountains over 1,000 m. Area: 1,250 hectare. Limestone rocks.

A18.9.2 Social Survey

(1) Objectives and Survey Method

Objectives

The objectives of this survey are firstly to evaluate the impacts of tourism development to the local community, secondly, to measure attitude and acceptance of tourism development, and thirdly, to measure the potential human resource supply of the communities to tourism development.

Survey Method

Face to face interviews were conducted to the 448 samples in the selected four zones distributed as follows.

Tourism Zone	Heads of Household	Mothers	18+ Female daughter	18+ Male son	Total Number
Damascus	55	33	12	12	112
Aleppo	55	33	12	12	112
Hama/ Homs	55	33	12	12	112
Coastal	55	33	12	12	112
Total Number	220	132	48	48	448

In each zone, a stratified random sampling method was applied for the selection of the samples to check the characteristics of the residents between those of the different geographical locations. Area 1: City center of tourist site location (1 / 3 of Samples). Area 2: Major Commercial Area (1 / 3 of Samples). Area 3: Residential Area (1 / 3 of Samples)

Survey Schedule

Face to face interviews were conducted during December 11 to 20, 1997.

(2) Survey Results

a. Attitudes Toward Work Situation in Tourism Sector

Work Satisfaction of Working Respondents

Of the 330 working respondents, 85.5 percent expressed satisfaction with their current jobs. While 14.5 percent expressed dissatisfaction. Close examination of the zone data showed a little difference in their satisfaction of their current work. Hama shows the highest percentage of satisfaction (95.9%) compared to Aleppo with the lowest percentage (73.3%).

Professional Services in the Field of Tourism Development

The respondents gave their views on whether they could provide tourism-related services, falling under 6 categories. The most desirable activity was "public relations (32.4%)", followed by "travel agent (19.7%)", "hotel (19.4%)" and "tourist guide (13.8%)". More than one-third of the respondents mentioned the public relation profession as their preference. In Damascus and Hama respondents show the highest percentage of job interest in tourism sector, more than 40 percent in "public relation", followed by "travel agent". However, Aleppo respondents show the "hotel job (19.6%)" as a first preference in the tourism sector, followed by "tour guide and conductor". There is no significant difference between genders.

Importance of Training Courses for Improving Present Occupation

Of the 448 respondents who answered this question, 67.2 percent expressed an interest to

take training courses which enable them to improve their current job occupation or salary. 10.7 percent answered that they would not expect and 22.1 percent gave no answer. 20.5 percent of Aleppo respondents expressed "no expectation of improvement through training courses" more than those of other three zones.

b. Attitudes Toward Tourism Development

The Most Important Tourism Resources in Your City

Respondents were asked to evaluate the most important resources in their cities. With the exception of Aleppo, in each place, the majority (more than 66.3%) of respondents think that "museum" and "cultural heritage" are important tourism assets in their cities. Only Tartous respondents indicate that "summer resort/mountain resort" and "natural beauty" are more important assets in tourism (77.7% and 75.0%, respectively) than "museum" and "cultural heritage".

Views on the Benefits from Tourism Development

Respondents were asked to list the perceived advantages and disadvantages of having tourists in Syria. A close examination of the results reveals the following:

- The respondents see far more advantages (92.0%) than disadvantages to tourism development. Acceptance of tourism development is slightly higher among fathers and sons than among mothers and daughters. Only 3.6 percent saw no benefit of having tourism development. Mothers respondents in Aleppo expressed more fear toward tourism development (answer "no": 9.1%) than other zones (0.0%, 3.0%, 6.1% for Damascus, Hama and Tartous, respectively).
- The most perceived advantages of tourism development given by the respondents include stimulation of "better education (64.9%)" and "better infrastructure and transportation (59.6%)". "better job and income" is less expected in Tourism Development as a benefit (40.2%).
- The perceived negative impacts of having tourism development in Syria are: "traffic congestion (42.3 %)" and "noise and garbage (33.5%)". Another negative impact "religious activities" is cited less often (21.3%) than above two issues.

c. Attitude Toward Tourists and Tourist Sites

Respondents' Acceptance of Tourists

To take the attitude measurement a step further, respondents were asked to state their attitudes toward tourists by nationality. The sample expressed slight negative attitudes toward Jordanian and other Arab tourists. Respondents with positive and indifferent attitudes toward European and Lebanon tourists amount to 92.6 percent and 90.2 percent, respectively. This percentage is much higher than the percentage of respondents with negative attitudes. There is no significant difference in attitudes between the four zones.

Measures to Attract More Tourists

Respondents were asked to give ideas and suggestions on what can be done to attract more tourists into the community. The suggestions given by the respondents cover a wide range of area in tourism development. Some suggested building more "maintenance and beautification of ancient sites (81.9%)", other thought "hygienic and recreational facilities (72.5%)" would attract tourists.

d. Attitude Toward Participation In Tourism Industry

Readiness to Cooperate with Bodies Involved in Tourism

Out of the total sample 80.1 percent expressed readiness to cooperate in projects to encourage tourism, 6.3 percent will not cooperate, and 13.6 percent did not give any answer. No significant difference is found between zones. However, readiness is much higher among fathers and sons than among mothers and daughters.

Readiness to Apply for Job in Tourism Development Projects

Out of the 448 respondent who answered this question, 75.4 percent expressed their willingness to take jobs which enable them to work in tourism. 9.8 percent answered that they would not be willing and 14.7 percent gave no answer. In Tartous respondents show the highest percentage of willingness of job participation in tourism projects (84.8%) among other three zones. However, Aleppo respondents show the highest percentage of negative willingness to work in tourism project (21.4%). Willingness is much higher among fathers and sons than among mothers and daughters.

Types of Jobs for Which Would Like to Apply

Of the 448 respondents, 130 respondents expressed interest in "sales and public relations", followed by the 107 respondents for "managerial jobs" and 91 for "planning, design and construction". Aleppo respondents prefer more managerial jobs (31.3%) than "sales and public relations (17.9%)". Respondents' answers varied by gender. Fathers prefer "sales and public relations" sector. Mothers and sons prefer the "managerial" sector and daughters desire to work in "planning, design and construction" field.

Willingness to Participate in Training Courses in the Field of Tourism

Among 448 respondents, 307 are willing to take training to work in tourism projects at their own city (68.5%), while 109 of the respondents (24.3%) do not answer. Willingness is much higher among sons and daughters than among fathers and mothers. Its clear that age and gender are important determination at accepting or not accepting the training courses in tourism sector. The fact that large percentage of the respondents do not know to take training in tourism sector can be explained by the attitudes and values of the society toward work in this sector and the knowledge people have of the type and nature of work available in tourism.

Q12: What kind of Job in the tourism sector are you interested in? (multiple answer)

Kind of Job	Aleppo	Damascus	Hama	Tartous	Syria
Souvenir Shops	10.7%	14.3%	10.7%	7.1%	10.7%
Tour Guide and Conductor	17.9%	16.1%	16.1%	5.4%	13.8%
Travel Agent	11.6%	25.0%	33.0%	9.8%	19.7%
Public Relation	15.2%	40.2%	47.3%	26.8%	32.4%
Hotel	19.6%	17.0%	29.5%	11.6%	19.4%
Other	0.0%	3.6%	1.8%	9.8%	3.8%
Numbers of Respondents	112	112	112	112	448

Q13: Are you satisfied with the work you are doing now?

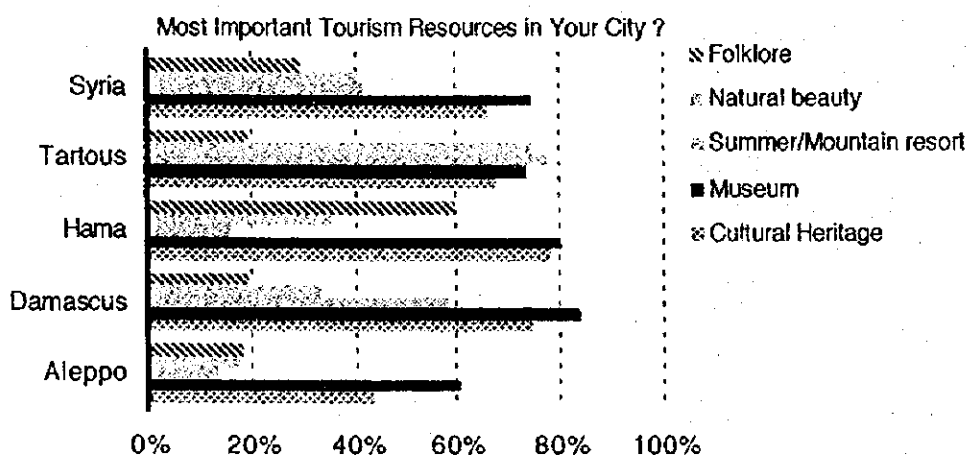
Answer	Aleppo	Damascus	Hama	Tartous	Syria
Yes	56.3%	55.4%	62.5%	77.7%	63.0%
No/No Answer	20.5%	9.8%	2.7%	9.8%	10.7%
Do Not Know	23.2%	34.8%	34.8%	12.5%	26.3%
Numbers of Respondents	112	112	112	112	448

Q15: Do you think that you can improve your present occupation and /or your salary through further training courses?

Answer	Aleppo	Damascus	Hama	Tartous	Syria
Yes	62.5%	67.0%	64.3%	75.0%	67.2%
No/No Answer	20.5%	4.5%	6.2%	11.6%	10.7%
Do Not Know	17.0%	28.6%	29.5%	13.4%	22.1%
Numbers of Respondents	112	112	112	112	448

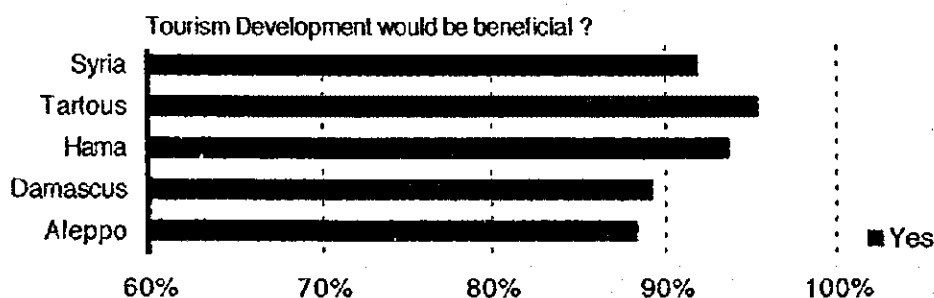
Q17: What is the most important tourism resources in your city? (multiple answer)

Type	Aleppo	Damascus	Hama	Tartous	Syria
Cultural Heritage	43.8%	75.0%	78.6%	67.9%	66.3%
Museum	60.7%	83.9%	80.4%	74.1%	74.8%
Summer resort/ Mountain resort	13.4%	58.9%	16.1%	77.7%	41.5%
Natural beauty	17.9%	33.9%	35.7%	75.0%	40.6%
Folklore	18.8%	19.6%	59.8%	19.6%	29.5%
Other	1.8%	3.6%	0.0%	0.9%	1.6%
Numbers of Respondents	112	112	112	112	448



Q18: Do you think that further tourism development would be beneficial to your community?

Answer	Aleppo	Damascus	Hama	Tartous	Syria
Yes	88.4%	89.3%	93.8%	95.5%	92.0%
No/No Answer	2.7%	8.0%	1.8%	2.7%	3.6%
Do Not Know	8.9%	2.7%	4.5%	1.8%	4.5%
Numbers of Respondents	112	112	112	112	448



Q19: What will be the benefit form tourism development? (multiple answer)

Type	Aleppo	Damascus	Hama	Tartous	Syria
Better Job and Income	17.0%	34.8%	38.4%	70.5%	40.2%
Better Education	51.8%	75.0%	74.1%	58.9%	64.9%
Better Infrastructure and Transportation	32.1%	67.0%	67.9%	71.4%	59.6%
More Leisure Facilities	35.7%	58.0%	64.3%	55.4%	53.3%
Other	3.6%	1.8%	0.0%	0.9%	1.6%
Number of Samples	112	112	112	112	448

Q20: What would you like to be done to attract more tourists to your city? (multiple answer)

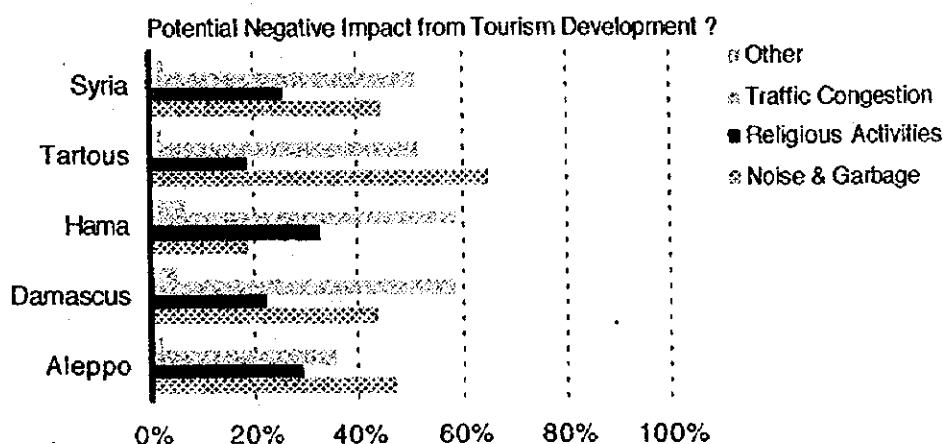
Type	Aleppo	Damascus	Hama	Tartous	Syria
Maintenance & Beatification of Ancient Sites	67.0%	90.2%	89.3%	81.3%	81.9%
Hygienic & Recreational Facilities	43.8%	82.1%	79.5%	84.8%	72.5%
Shops, Restaurants & Rest Houses	43.8%	62.5%	78.6%	60.7%	61.4%
Art Center, Galleries & Cultural Program	41.1%	64.3%	66.1%	67.9%	59.8%
Maintenance & Beatification of Streets	65.2%	62.5%	49.1%	81.3%	63.8%
Better Public Relation	47.3%	52.7%	32.1%	75.0%	51.8%
Training of Tourism Personnel	55.4%	50.0%	25.9%	68.8%	50.0%
Others	5.4%	2.7%	0.9%	3.6%	3.1%
Numbers of Respondents	112	112	112	112	448

Q21: How is your opinion about various groups of tourists in your city? (multiple answer)

Welcome	Aleppo	Damascus	Hama	Tartous	Syria
European Tourists	90.2%	96.4%	85.7%	98.2%	92.6%
Asian Tourists	87.5%	91.1%	83.9%	89.3%	87.9%
Arab Tourists	80.4%	70.5%	76.8%	91.1%	79.7%
Lebanon Tourists	89.3%	92.9%	80.4%	98.2%	90.2%
Jordan Tourists	66.1%	75.9%	77.7%	97.3%	79.2%
Syrian Tourists	84.8%	84.8%	86.6%	93.8%	87.5%
Numbers of Respondents	112	112	112	112	448

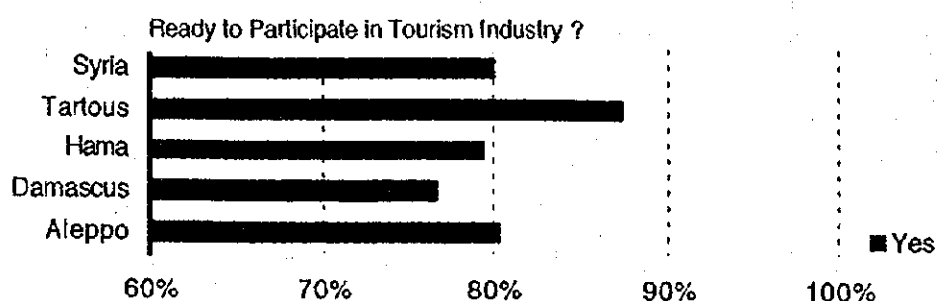
Q22: What will be the negative impact from tourism development in your city/community?

Type	Aleppo	Damascus	Hama	Tartous	Syria
Noise & Garbage	47.3%	43.8%	18.8%	65.2%	41.6%
Religious Activities	29.5%	22.3%	33.0%	18.8%	26.1%
Traffic Congestion	35.7%	58.9%	58.9%	51.8%	51.3%
Other	2.7%	5.3%	7.1%	2.7%	2.9%
Number of Respondents	112	112	112	112	448



Q23: Would you be ready, if you were asked, to participate your service in project that aim at developing tourism in your city?

Answer	Aleppo	Damascus	Hama	Tartous	Syria
Yes	80.4%	76.8%	79.5%	87.5%	80.1%
No/No Answer	6.3%	6.3%	3.6%	8.0%	6.3%
Do Not Know	13.4%	17.0%	17.0%	4.5%	13.6%
Numbers of Respondents	112	112	112	112	448



Q24: Would you be ready, to apply for job in projects that aim at developing tourism in your city?

Answer	Aleppo	Damascus	Hama	Tartous	Syria
Yes	67.9%	72.3%	76.8%	84.8%	75.4%
No/No Answer	21.4%	8.0%	4.5%	10.7%	9.8%
Do Not Know	10.7%	19.6%	18.8%	4.5%	14.7%
Numbers of Respondents	112	112	112	112	448

Q25: What kind of job would you like to apply for? (multiple answer)

Type	Aleppo	Damascus	Hama	Tartous	Syria
Planning, Design & Construction	11.6%	21.4%	21.4%	27.7%	20.3%
Secretarial	15.2%	4.5%	10.7%	3.6%	8.5%
Managerial	31.3%	21.4%	30.4%	12.5%	23.9%
Sales & Public Relations	17.9%	27.7%	33.9%	36.6%	29.0%
Others	2.7%	3.6%	0.8%	2.7%	2.5%
Numbers of Respondents	112	112	112	112	448

Q26: Would you be ready, to receive training, if needed, to work in project that aim at developing tourism in your city?

Answer	Aleppo	Damascus	Hama	Tartous	Syria
Yes	70.5%	65.2%	59.8%	78.6%	68.5%
No/No Answer	8.9%	9.8%	3.6%	6.3%	7.1%
Do Not Know	20.5%	25.0%	36.6%	15.2%	24.3%
Numbers of Respondents	112	112	112	112	448

(3) Questionnaire

The following is the questionnaire used for the social survey. This was translated into Arabic and asked to interviewees in the four cities of priority zones: Damascus, Aleppo, Hama and Tartous.

I. Household Information Section

1. Characteristics of Interviewee

Age Educational Level Occupation Monthly Income Religion Remarks

1-1. Mother

1-2. Father

1-3. Son

1-4. Daughter

2. How many people live in your household (that is, those who share the kitchen and bathroom on a regular basis) ?

3. How many children do you have ?

4. How many years have you been living in this house ?

1. less than 1 year 2. 1-2 years 3. 3-5 years 4. 6-10 years 5. more than 10 years

5. Do you own your house ?

1. Yes 2. No

6. If yes, in which section?

- | | | |
|-------------|--------------|-------------|
| 1. | 2. | 3. |
| Inside city | Outside city | Other areas |

7. How do you find the access for you and your family members from your house to:
(please circle the appropriate choice)

- | | | |
|----------------------|------------------|----------------|
| Not difficult at all | Little difficult | Very difficult |
|----------------------|------------------|----------------|

- 7-1. Shops and markets
7-2. Health facilities (hospitals/
pharmacies / health clinics/ private
doctors)
7-3. Mosques/ Churches
7-4. Government facilities(bureaus,
police stations, transportation)
7-5. Schools (nurseries, kindergartens,
primary, secondary, vocational
training centers)

II. Work Situation, Job Satisfaction, Training and Qualification Needs

8. Are you working at present ?

- | | |
|-----|----|
| 1. | 2. |
| Yes | No |

9. If not , reasons for not working. (please circle the appropriate choice)

- | | | | |
|---------------------------|---------|-----------------|--------------------------|
| 1. | 2. | 3. | 4. |
| No employment opportunity | Student | Health problems | Other (please specify:) |

10. Would you like to work? (please circle the appropriate choice)

- | | | |
|-----|----|-------------|
| 1. | 2. | 3. |
| Yes | No | do not know |

11. Do you intend to provide services in the field of tourism , if opportunity exists ?

- | | | |
|-----|----|-------------|
| 1. | 2. | 3. |
| Yes | No | do not know |

12. What kind of job in the tourism sector are you interested in ?

- | | | | | | |
|----------------|-----------------------------|--------------|-----------------|-------|------------------------------|
| 1. | 2. | 3. | 4. | 5. | 6. |
| Souvenir shops | Tour guide and
conductor | Travel agent | Public relation | Hotel | Others
(please specify:) |

13. Are you satisfied with the work you are doing now ? (please circle the appropriate choice)

- | | | |
|-----|----|-------------|
| 1. | 2. | 3. |
| Yes | No | do not know |

14. Would you prefer to have a workplace in your local community ?

- | | | |
|-----|----|-------------|
| 1. | 2. | 3. |
| Yes | No | do not know |

15. Do you think that you can improve your present occupation and/or your salary through further training courses ? (please circle the appropriate choice)

- | | | |
|-----|----|-------------|
| 1. | 2. | 3. |
| Yes | No | do not know |

16. What kind of training courses would you like to participate in ?

III. Experiences, Observations, Evaluations and Aspirations Concerning Tourism Development in Your City

17. What is the most important tourism resources in your city?

- | | | | | | |
|-------------------|--------|------------------------------------|----------------|----------|------------------------------|
| 1. | 2. | 3. | 4. | 5. | 6. |
| Cultural heritage | Museum | Summer resort /
Mountain resort | Natural beauty | Folklore | Others
(please specify:) |

18. Do you think that further tourism development would be beneficial to your community?

- | | | |
|-----|----|-------------|
| 1. | 2. | 3. |
| Yes | No | do not know |

19. If yes, what will be the benefit from tourism development?

- | | | | | |
|--------------------------|------------------|---|----------------------------|--------|
| 1. | 2. | 3. | 4. | 5. |
| better job and
income | better education | better infrastructure
and transportation | more leisure
facilities | others |

20. What would you like to be done to attract more tourists to your city?

- | | | | |
|--|---|---------------------------------------|---|
| 1. | 2. | 3. | 4. |
| Maintenance and beautification
of ancient sites | Hygienic and
recreational facilities | Shops, restaurants and
rest houses | Art center, galleries and
cultural program |
| 5. | 6. | 7. | 8. |
| Maintenance and beautification
of streets | Better public relation | Training of tourism
personnel | others
(please specify:) |

21. How is your opinion about various groups of tourists in your city?

- | | | | |
|------------|----------------|----------------|--------------|
| 1. Welcome | 2. Indifferent | 3. Not welcome | 4. No answer |
|------------|----------------|----------------|--------------|

1. European Tourist
2. Asian Tourists
3. Arab Tourists
4. Lebanon Tourists
5. Jordan Tourists
6. Syrian Tourists

22. What will be the negative impact form tourism development in your city/community?

- | | | | |
|-----------------|----------------------|--------------------|--------|
| 1. | 2. | 3. | 4. |
| Noise & garbage | Religious activities | Traffic congestion | Others |

23. Would you be ready, if you were asked, to participate your services in projects that aim at developing tourism in your city?

- | | | |
|-----|----|-------------|
| 1. | 2. | 3. |
| Yes | No | do not know |

24. Would you be ready to apply for a job in projects that aim at developing tourism in your city?

- | | | |
|-----|----|-------------|
| 1. | 2. | 3. |
| Yes | No | do not know |

25. What kind of job would you like to apply for?

- | | | | | |
|--------------------------------------|-------------|------------|-------------------------------|--------|
| 1. | 2. | 3. | 4. | 5. |
| Planning, design
and construction | Secretarial | Managerial | Sales and public
relations | others |

26. Would you be ready to receive training, if needed, to work in projects that aim at developing tourism in your city?

- | | | |
|-----|----|-------------|
| 1. | 2. | 3. |
| Yes | No | do not know |

A19.1 Summary of the Workshop in Japan

1. Introduction

1.1 Purposes

The purposes of the workshop are: 1) to increase understanding of the Japanese and East Asian Tourism Market for the H.E. Deputy Minister for Tourism in Syria, who visited Japan for the JICA counterpart training; and 2) to facilitate understanding of the study among concerned parties in Japan, through the exchange of opinions on the current status and future directions of tourism development in Syria.

1.2 Program

- Date: 13:30 - 16:30, 18th June 1998
Place: International Conference Hall, Institute for International Cooperation (IFIC)
Agenda: 1. Opening Speech
Director of JICA Development Study Division
H.E. Charge d'Affaires of Syrian Arab Republic to Japan
2. Presentation
H.E. Deputy Minister for Tourism in Syria
JICA Study Team
(Coffee Break)
3. Panel Discussion
Syrian Tourism: What should we do next?
4. Question and Answer Session
5. Closing Address

1.3 Participants

Seventy-two participants, interested in Syrian tourism development, gathered from the Embassy of Syria, the Japanese and Syrian Governments, research institutions, travel agents, developers and universities, including the following thirteen panelists:

- H.E. Mr. Ahmad Helwani, Deputy Minister, Ministry of Tourism in Syria
H.E. Mr. Mohammed Kabour, Charge d'Affaires, Embassy of Syrian Arab Republic in Japan
Mr. Tatsuhiko Ikeda, Managing Director, JICA Social Development Study Department
Mr. Akio Ishii, Professor, College of Tourism, St. Paul's (Rikyo) University
Mr. Koji Yagi, Professor, Tokyo Institute of Technology
Mr. Akira Mizuno, Director, General Manager, JTB Discover World (Tour Operator)
Mr. Asaichi Miyakawa, Urban Planning Section, Ministry of Construction
Mr. Tadateru Nishiura, Preservation Specialist, Tokyo

National Research Institute of Cultural Properties

Mr. Tsunehide Shibata, Redevelopment Planner, UD (Urban Design) Co., Ltd.

Mr. Toshiharu Nishikawa, Editor in Chief, Tour Guide Book "Chikyu no Arukikata"

Mr. Yoshiki Hatanaka, Executive Chief Economist, Institute for International Economic Studies

Mr. Hiroyuki Aoyama, Researcher, Institute of Developing Economies (IDE)

Mr. Atsuyoshi Toda, Member, Advisory Committee for the Study

2. Record of the Workshop

2.1 Opening Speech

Firstly, Mr. Ikeda, Managing Director of JICA Social Development Study Department, and H.E. Mr. Kabour, Charge d'Affaires, Embassy of Syrian Arab Republic in Japan, made opening speeches to begin the workshop.

After briefly explaining the JICA tourism development study in Syria, Mr. Ikeda stated that Syria's richness in tourism resources and warm hospitality would be a great advantage in tourism development and just like JICA does in other fields, they are hoping to play a role to maintain peace in the Middle East through cooperation in tourism development. He added that JICA would like to contribute to Syrian tourism development through this workshop, by gathering various viewpoints which would help to improve the outcome of the study.

H.E. Mr. Kabour, Charge d'Affaires of Syrian Arab Republic to Japan, began his speech by stating that the seminar aimed to symbolize a friendly relationship between Japan and Syria as well as recognizing the important position of Syria in human history. After introducing major cultural contributions by Japan, he concluded that more cooperation by Japan with Syria would promote a stronger amicable and historical relationship between the two countries which originally began with cultural and commercial trade in the Silk Road era.

2.2 Presentation

After briefly introducing general conditions and tourism resources in Syria, H.E. Mr. Helwani, Deputy Minister for Tourism in Syria, explained the current status and progress of tourism development in Syria as follows:

- The Ministry of Tourism is in charge of promotion,

leadership roles and the monitoring of tourism while the Tourism High Council provides legal facilities.

- There are three stages for tourism investment: 1) public sector investment, which is mainly used to construct five star hotels; 2) investment by public - private joint ventures; and 3) relatively small investment by private sectors.
- Private investment is promoted through the introduction of concessional conditions such as the exemption of income taxes and customs duties and the allowance of money transfers abroad.

The Deputy Minister then stated that Syria is making efforts not only for economic development but also for cultural exchanges between people, establishment of a basic human relationship, and the realization of permanent peace. He concluded that these are the fields in which Syria and Japan should cooperate together.

After the speech by the Deputy Minister, a video presentation on the contents of the study's draft final report was made. The video presented was produced by the study team with consideration to detailed contents, ease of comprehension and conciseness.

2.3 Panel Discussion

Thirteen panelists presented a variety of significant points of view related to tourism development in Syria at the panel discussion, moderated by Mr. Motomura, study team leader. Major points are illustrated in the following subsections. (Opinions written in *Italic* were made by the Deputy Minister.)

(1) Japanese Market

- The Japanese market concentrates in a few specific areas. Though there is not a great number of Japanese tourists to Syria and to the Middle East, the rate of growth shows a significant increase.
- Lengthy travel time and expensive airfares are the main reasons for the low number of Japanese tourists traveling to these areas.
- Important factors as a favorable destination for the Japanese tourists are: 1) rich tourism resources; 2) quality food; 3) attractive shopping; 4) friendliness and hospitality to the Japanese tourists; 5) Security; 6) fresh novel factors appearing annually; and 7) convenient access by air.
- *Regarding quality of tourism, we attach greater importance to quality than to quantity. Because of this, we put a special emphasis on the Japanese tourists.*

(2) Tourism Promotion

- Further promotion of foreign investment is required to facilitate the construction and operation of worldwide hotel chains which can develop promotion individually.
- It is not enough to think that good tourism resources would attract tourists. Since every country in the world is competing in tourism promotion, only the best promotion could bring tourists to Syria.
- To put pressure on foreign travel agents to develop new concepts, it is important to establish overseas offices, study the travel industry of the countries, set up feelers to collect information to comprehend the needs of agents. Based on this, various means of preparation could be developed, improvement in receiving tourists, for example.
- Advantageous points of Syrian tourism such as a high level of hospitality, friendliness to Japanese tourists, quality service, comfort and security are not well known in Japan. These should be strongly promoted.
- Establishment of a branch office in Japan is most certainly required for making steady and continuous promotion.
- Examples of tourism promotion strategies are tie-up promotion with airline companies, mass-media and neighboring regions, making good use of marketing professionals, and distinguishing sales points from other tourist destinations.
- Syria is far behind in tourism promotion in comparison with other countries. Though, this could also be an advantage for Syria, as the possibility of presenting careful and sustainable development could be expected, by studying the experiences of preceding countries.
- Marketing positioning and gaining a consensus are important factors. For example, Syria could be distinguished from Egypt in the following points: 1) simple and relaxed atmosphere; 2) the feel of Arab culture in daily life; 3) existence of a greater variety of ruins for having been an ancient cultural crossroad; and 4) warm hospitality.
- *We would like to ask the Japanese travel agents for the best promotion know-how to meet the requirements of the Japanese tourists.*
- *Regarding cooperation between land operators and the Japanese travel agents, we are making a continuous effort in setting up a tourist office in Japan, for the better communication for us. We also recognize the importance of presenting a professional promotion for Syrian tourism in foreign countries.*

(3) Tourism Industry

- Number of accommodations at main tourist sites also falls behind that of Jordan. World wide hotel chains which can develop promotion individually are still small in number so further promotion of foreign investment should be introduced.
- Compared to Jordan, the number of international flights is smaller so more foreign carriers should be attracted.
- It is important to improve the capability of land operators.
- Change of attitude among people involved in the tourism industry by educating them as to the importance and future potential of the industry is essential for the development of the Syrian tourism industry.
- For the tourism industry as a hotel business, efficient management and improvement of service are required.
- *As for the insufficient number of flights, the government is now discussing a solution to the problem with JAL.*
- *Tourism service should be treated as a service to tourists provided by the society as a whole. We are making every effort to improve the quality of service.*
- *As for hotels in Palmyra, no large hotel has been built since 1981. In the last 2 years, construction of two small hotels was authorized and another one will be approved in the near future.*
- *As for the problem of hotel chains, we made a new contract with the Four Seasons Hotels recently, added to the Lida Hotel chains (Sham Palace), the Sheratons, and the Meridians. Also, restoration of existing old traditional hotels is under examination with the Arab investors.*

(4) Sustainable Tourism Development

- In Japan and the U.S., there are some private projects that conserve and restore historical areas, based on profit by tourist revenues or sales of the restored property. Introduction of such self-financing conservation systems would be important for Syria.
- Tourism development may badly influence ruins and cultural heritages. It is important to harmonize conservation and utilization of the properties.
- Purification of rivers in Damascus and recovery of Guta Forest should be accomplished. To increase

the number of repeat tourists, a hygienic and comfortable environment for tourists' stay is important. A greater effort to improve the environment is required.

- A good image of the country should not be compromised by rapid tourism development. In addition, development with native support is vital.
- *As for the Barada River water pollution problem, it has been 3 months since the sewer system in Damascus started to function resulting in an improvement in water quality. Poor water resources and an increase in population are becoming more serious problems.*
- *Influence of tourism development on conservation of ruins is carefully examined in this study, which emphasizes that development should not affect the ruins.*

(5) Tourism and Urban/Regional Development

- It is necessary to coordinate a tourism master plan with an urban master plan to plan infrastructure facilities, roads and parks.
- It is estimated that the population of Syria will double by 2020. Considering problems of water resources, land and space, local area development will become important. Promotion in local area by providing job opportunities should be taken into consideration.
- The old city appears very attractive when residents utilize the area lively. As for Damascus, most of what is considered modern has left the area. Charms of the Old Damascus are: 1) Streets, 2) Patios, and 3) views over roofs.
- To maintain the charm of the streets, traffic related issues (parking, subways, and the possibility of access roads) should be seriously considered.
- It is important to make an urban structure which promotes utilization of residences with patios and setting-up better quality shops.
- Constructing over-roof networks (e.g. by skywalks and gondolas) would be effective for strengthening the attractiveness of the old city.
- *Regarding the old cities of Damascus and Aleppo, construction of hotels and restaurants are prohibited under the present conditions, from the viewpoint of conservation of the old districts.*
- *We are envisioning the realization of a subway system construction in the near future.*

(6) Politics, Economy and Institutions

- A visa issuing system at the airport, regardless of the number in a particular tourist group should be prepared, like that of Lebanon and Jordan.
- A magazine article points out that Syrian tourism development/promotion by private sectors has hardly progressed as planned due to bureaucracy and the frequent change of governors in charge. Syria might recognize the value of such a well-intentioned comment from a foreign source.
- Some organizational and institutional weak points (i.e. insufficient collaboration among government agencies, insufficient deregulation in the tourism sector, and a poor environment for foreign investment) and the failure to make substantive government reforms defined as a threat to tourism development are readily understood.
- Consistent and continuous economic reformation is vital for the economic development of Syria from here on. The tourism industry is expected to be a future source of strength for the Syrian economy, which should be liberalized, left to private initiatives, and attractive to both domestic and foreign investors.
- With regard to the open-door economic policy started from the 1986's agricultural crisis, the Western and the Arab media are cognizant of the term "pluralization of politics". Concretely, 1) participation of growing commercial investors and merchants, who would contribute to legislation of a liberalization bill, 2) intensifying a support basis by expanding the number of affiliates to coalition parties, 3) general pardon for economic criminals (black marketers of foreign currencies and goods) are the main points. The election to be held in the coming summer would be a guideline for a future liberalization policy.
- A tendency toward pragmatism and liberalism could be seen in recent reformations. The time may be ripe for Japan and other countries to look for contributing in Syria's economic development.
 - *As to the visa problem, we have improved the system. Now, a group of more than 5 people is able to obtain a visa at the airport. Also, for the anticipated case of a travel agent who is in urgent need of a visa at the airport, the possibility of an immediate visa issuance should be discussed seriously.*
 - *Regarding the Middle East Peace Negotiations, Syria is eagerly hoping for the attainment of a comprehensive and fair peace. This serious struggle of tourism originates from a desire for peace.*
 - *As for the promotion of tourism investment, we*

are ready to discuss the problem at anytime when a request for improvement is proposed. Existence of the Tourism High Council enables legal measures to be taken bypassing the legislation step. So, with consultation by the Council, further tourism investment could be deliberated.

- *We are aiming at equal development throughout all fields. If you consider the Syrian tourism development growth to be slow, one of the reasons could be found in this policy emphasizing impartiality in every field.*
- *Being simple and relaxed country as pointed out, this is the national character of Syria. We hope all countries of the world are blessed with peace, become comfortable and calm, and develop at a moderate pace.*
- *As for "pluralization of politics", it is proceeding slowly. We believe that the election to be held at end of this year will bring results which will meet our expectations.*

2.4 Question and Answer Session

Q1 : Since the term "tourism development" implies various meanings, it might be difficult to find an appropriate course for Syrian tourism development. A plan must take characteristics of markets for each region into consideration, or tourism development may risk losing its objective.

A1 : This study mainly considers the means of developing tourism in Syria from only the viewpoint of increasing Western and Japanese tourists. (JICA Team Leader)

Q2 : How could the historical and cultural properties of the three countries, Jordan, Egypt and Syria, be distinguished from each other, in both quality and quantity?

A2 : *There are different characteristics and cultural heritages in Egypt, Jordan and Syria. We are even proposing the idea of "the united Arab cultural heritage area" and have no intention to compete with these brother countries in tourism. Although there are different identities depending on area, we would like to keep in mind that we are Arab citizens with a warm spirit of hospitality, and pride in having peaceful life with the political stability.*

2.5 Closing Address

The Workshop closed with applause for the compliment to the Deputy Minister and the Charge d'Affaires.

JICA