5 ADMINISTRATIVE SYSTEMS

5.1 Administrative Organizations

5.1.1 Tourism Related Administrative Organizations

The central government is headed by the President and supported by 3 Vice Presidents, the Prime Minister and 26 Ministers. It consists of the Prime Minister's Office and 26 ministries. Among them, MOT is the main government organization in charge of tourism.

Because tourism is influenced by various factors, most ministries have at least some relationship with tourism. Other ministries related to tourism are:

- Ministry of Culture (cultural affairs, museums and antiquities including excavation, preservation and presentation of cultural heritage);
- Ministry of Communications (road construction, post and telecommunication);
- Ministry of Interior (passport, immigration and inspection);
- Ministry of Finance (customs)
- Ministry of Local Administration (Mohafazat, cities, etc.);
- Ministry of Transport (railway, ports/ shipping, airports/ civil aviation, road transport);
- Ministry of Housing and Utilities (water supply and sewerage); and
- Ministry of Environment (environment affairs).

Ministry of Tourism, its General Commissions, Supreme Council and committees for tourism, Directorate General of Antiquities and Museums (DGAM) under MOC, tourism-related governmental establishments are described in Appendix A5.1 in Volume III.

5.1.2 Issues of Administrative Organizations

(1) Need to Cope with the Changing Situation

The situation surrounding tourism in Syria is changing, e.g. increase in number of foreign culture tourists, change in accommodation style of Iranian tourists, growing excursionists from Lebanon, etc. Above all, there has been an explicit government policy that aims at increasingly transferring tourism development activities from the government sector to the private sector. Thus it is essential for MOT to fully analyze and to grasp the existing situation and to give a proper direction for the tourism development in the country, so that the measures and activities of the public and the private sector work effectively in a coordinated manner. Delay in understanding the market changes and the explicit and implicit effects of the privatization may result in delay and inefficiency.

However, the present organization seems inadequate to cope with the situation. Methods of statistical data collection and analysis are outdated. Too many staff are working at GCEIP and branch offices to supervise tourism facilities, while a small number of staff are working for the policy making. Given the changing situation, the policy making should be the most essential responsibility of MOT.

(2) Information for Foreign Investors

There are few materials of MOT translated into English. Neither for foreign investors who want to know about regulatory matters such as land ownership and land use regulations, infrastructure provision, local administration system, banking system, foreign currency exchange, nor for them about details of tourism in Syria. Organized information for foreign investors is needed to attract more investment to the Syrian tourism sector.

(3) Functions of the Supreme Council

Because the tourism is influenced by various factors, it is essential to coordinate government activities concerning tourism. For example, under the existing condition of growing number of culture-motivated foreign tourists, there is an increasing necessity of better collaboration between MOT and DGAM. Therefore, the policy coordination function of the Supreme Council is now more important than ever to ensure coordination of critical issues for the tourism development of the country.

In addition, because of the government policy of the private sector initiatives in the tourism, the public and private sector coordination is another important issue. Current structure and practices of the Supreme Council are weak in this account. Strengthening of the Supreme Council for this also should be of a high priority.

(4) Tourist Information Offices

There are about 20 Tourist Information Offices placed all over Syria because each MOT branch office has tourist information office. There are some information offices at good locations for tourists, such as Aleppo (in front of National Museum), Palmyra (inside the archeological site), while many of them are not. On the other hand, many isolated tourist sites do not have any tourist information. MOT plans to open Tourist Information Offices in some tourist sites such as Bosra. Further progress is desired.

Tourist Information Offices open at 8:00 and close at 14:00, with exception of Damascus (all 3 information centers open 24 hours a day), Aleppo (until 20:00) and Latakia (until 20:00 in summer). Extension of working hours is desired at least until 17:00 at major tourist sites.

5.2 Policies and Measures

5.2.1 Tourism Policy

MOT carried out a study on the future course of tourism development, and formulated the first Tourism Master Plan in 1974, immediately after its establishment. It was authorized by the Decision No. 43 of 1974 of the Supreme Council of Tourism. The Plan included the construction of five-star hotels, and development of summer resort in the coastal area, etc. It was the only Tourism Master Plan ever formulated in Syria. Subsequently, some lands for the projects proposed in the Master Plan were acquired by MOT, or initial payments were made.

In 1985, Decision No. 186 of the Supreme Council of Tourism was put into force to attract private investors to the tourism sector. Several projects were selected as candidates for joint-venture projects, for which the investors can get incentive measures of the Decision. But only a few projects have been realized.

MOT also drafts the tourism related part of 5-year development plans. In 1995, Minister's Council ordered to formulate a committee to evaluate the situation of tourism in the 5 years of 1990 to 1994. The evaluation report noted that a number of development projects proposed in the draft plan had actually implemented in general, while tourists' visits to Syria had not increased significantly. Moreover, a significant decrease in hotel tourist-nights was observed probably because of increase in holiday villas or chalets. In response to a request of SPC, MOT will submit a new tourism sector report in July 1998, including statistical analysis and new project proposal which will be used for the formation of 8th five-year plan.

Details of existing policy making and measures for the tourism in Syria are described in Appendix A5.2 in Volume III.

5.2.2 Problems of Tourism Policy and Measures

(1) Clarification of Government Policy Direction

The previous National Tourism Master Plan was authorized in 1974 and never officially revised, although many of subsequent policies and measures reflected necessary revision of the plan. A thorough clarification of tourism policy direction and principal strategies is urgently needed.

(2) Roles of MOT

Government measures in tourism have concentrated on hotels and restaurants construction and supervision, especially in 1970s and 1980s. Now, MOT has a clear mandate to stimulate the private companies' participation into the tourist services. The next direction of MOT should shift to strengthen the capabilities of tourist services including government ones.

(3) Government Regulation

Most tourism industries have to be licensed by the government. Regulations based on licenses must have clear purposes, if they are to be justified. In some cases, any regulatory measures are counterproductive to achieve some specific administrative purpose, but the market competition can do better.

Since the tourism is a complex business which is prone to volatile market changes, the private sector is more suitable to respond to such changes rather than the public sector. No regulatory measures can ever force the private companies to cope with market realities. So it is essential to give the private sector enough freedom to develop and improve their services in response to the changing demand patterns. Thus, regulations concerning the tourism industry which do not show substantial benefits should be abolished. In this view, the present regulations should be re-examined and necessary amendments and cancellations should be made.

Re-examination of Syria's hotel rating system is also needed. It should be recognized that the hotel standards can never reflect all possible service levels of hotels; at the best, the hotel rating is used only as one of many reference items by tourists and travel agents when they choose a hotel: e.g. reputation, facilities, room rate, etc. Improvement of quality as a whole is realized only under the competition in the market, not by regulation. Room rate controls should be dropped or at least defused, which is already under consideration at MOT. It would be better to leave the room rates to the market. The restaurant regulations should be handled similarly.

(4) Private Participation

The Decision No. 186 for 1985 by Supreme Council of Tourism provides promotional measures for private investment. However, transfer of profits accruing from the investment of foreign capital is not allowed under the Decision, although it is allowed in the fields covered by the Law No. 10 of 1991 (Article 24 c.).

(5) Government and Private Cooperation

Although Syria has good potential as a tourist destination, it is still at an early stage in its tourism development. Even with recent measures for improvement of the investment environment, it is not yet generally considered to be a desirable country for private tourism investment that seeks reasonable returns. Therefore, it is not appropriate to regard that tourism investment is purely the concern of the private sector nor to expect that necessary infrastructure for tourism development will be provided by private investors. The government, therefore, should positively undertake tourism development as well as encourage private investment. Tourism development in Syria at this stage is possible only when both government and private industry invest together in a coordinated manner.

The role of the government is to clarify the target and direction of tourism development and to develop related infrastructure and public tourism facilities such as historic sites and museums, tourist information offices, public parks, public resthouses where necessary, etc. in coordination with private investment. This is, in other words, for the government to bear part of the risk of tourism development, and thereby the government's investment will serve as a form of security for private investors.

Private tourism enterprises are a matter of concern not only to the companies involved, but also to the nation as a whole, since tourism can be extremely beneficial to the national economy. Private tourism professionals need to recognize the fact that the image of Syria held by foreign visitors is heavily influenced by the level of services of the private companies. As a result, private marketing activities ought to be designed to help improve the image of the whole country, and firms should see their role not only in protection of their own immediate benefits but also in upgrading Syria's overall image.

The government should therefore help private efforts to improve services, as well as generate opportunities for further learning about upgraded services. Government and private industry should work in close cooperation, and the Supreme Council can be instrumental in fostering an open exchange of opinions when it welcomes representatives from private sector.

(6) Budget Allocation for MOT

The budget of MOT is SP 375 million in 1997, which is about 0.2 percent of total government budget. The amount of budget is not sufficient for implementing proper measures for the tourism administration. For example, a museum or visitor center building of 3,000 sq.m costs about SP 100 million (US$ 2 million). MOT alone can not develop even such an important tourism facility. As a result, MOT can only scatter the allocated money by dividing into smaller amount, accordingly paced down the realization of development projects. Inactive promotion activity is caused by lack of money as well. It is apparent that inadequate budget is one of the major obstacles of tourism development.

The government of Syria should recognize that the government is directly earning impressive revenues from tourism, such as revenue from government owned hotels, excise taxes paid by tourists on hotel rooms and restaurants. Admission fees for cultural sites are also related to the tourism. Bearing in mind these sources of revenue, amount of revenue from the government owned hotels is calculated at SP 376 million, and the government may be able to earn an additional SP 200 million annually from excise tax on hotel room charges. There are several other taxes and fees which are calculated here, such as excise tax from restaurants, income tax imposed on wages of workers in tourism industry. In addition, it should be noted that because of a broad multiplier effect to other industries, tourism receipt from tourists will create considerable multiplied effect.

It is concluded that the current budget for MOT, lower than SP 400 million, is far too small.

Table 5.2.1 Estimation of Government Revenue from Tax on Room Charge

	Nights Spent by Tourists (1995)	Average Room Charge (assumption, US$)	Tax Rate	Hotel Revenue (US$)	Govt. Revenue (SP thousand)
Foreign Tourists				3,131,060	137,776
5-star	202,523	100	10%	2,025,230	89,110
4-star	183,846	50	10%	919,230	40,446
3-star	186,600	20	5%	186,600	8,210
Arab Tourists				1,440,306	63,373
5-star	82,364	100	10%	823,640	36,240
4-star	105,640	50	10%	528,200	23,241
3-star	88,446	20	5%	88,466	3,893
TOTAL				4,571,366	201,140
(Reference) Hotel Revenue					376,000

Hotel Revenue is the revenue from govt. owned hotel. Budget table item No. 04 of revenue.
Source: Night Spent by Tourists: MOT, Hotel Revenue from Government Budget: JICA study team

6 SUPPORTING INFRASTRUCTURE

6.1 Transport

6.1.1 Airports and Air Transport

There are five airports in Syria that serve civil aviation. Out of 1.7 million passengers handled in 1995, 1.5 million were at Damascus Airport. The second largest, Aleppo airport took less than 200 thousands. International arrivals by air were less than 300 thousands in 1995, same level as in 1986, while the total international arrivals doubled. Arrivals by land more than doubled in 10 years.

About 300 international scheduled flights were operated to and form Damascus Airport a week in July, 1995. Out of those some 100 flights a week were operated between Syria and Europe, and European air companies comprising Air France, Lufthansa, KLM, British Airways and others operate some 40 flights a week. Other international flights at Damascus Airport were those to and from the Middle East countries.

At Aleppo Airport, another international airport in Syria, 44 international scheduled flights a week were operated to and from Europe and the Middle East countries in 1995. Chartered flights mostly from Russia also fly to Aleppo Airport.

Syrian Arab Airlines is the national carrier under the MOTR. Although there exist more than seventy bi-lateral agreements on international air transport between Syria and other countries, presently international direct flights to and from Syria are limited either in the region or to and from a limited number of European cities.

However, efforts are being made by the Syrian government to establish new international routes between Syria and Kuala Lumpur, Caracas, Beirut and Armenia during 1997.

Due to well developed road network and short distances between major cities the domestic air transport is rather inactive.

Damascus Airport has a 3,600m length runway and another 3,000m length runway in parallel. Only one runway has a high speed run-off taxi way. Between two parallel runways frontal airport terminal is located for both domestic and international passengers. Design standard of Damascus airport terminal is below present day international level. Also airport facilities needs upgrading.

A new airport terminal building is being constructed at Aleppo Airport.

6.1.2 Roads and Road Transport

Road network in Syria are generally good and modernized, which play a dominant role in both international and domestic passenger transport.

At present, several border crossing points are designated for international road transport between Syria and neighboring countries. Between Syria and Turkey Bab al-Hawa connected with Aleppo, and Kassab connected with Latakia are the border crossing points from the E.5 international highway. There are five border-crossing points between Syria and Lebanon and two at Dara'a between Syria and Jordan.

The total length of paved roads has increased rapidly, particularly asphalt roads has increased at a rate of 600 to 800 km a year since 1985. As of now, 95 percent of the total length of roads are paved.

Highways with 6 lanes are well arranged between major cities, which assure the traveling speed of 110 km/h, except a section between Aleppo and Latakia. Some paved roads are damaged because of insufficient maintenance and some access roads to tourism sites are in need of improvement in terms of curvature and pavement.

Syria has ratified the United Nations Convention on Road Signs and Signals, Vienna, 1968, and arrangement work of road signs is being implemented, although gradually.

Two Highway projects and two main road projects are in progress at the moment. They are:

i) Latakia - Ariha through Shughour Highway construction project;
ii) Damascus Loop Highway and relevant roads construction project;
iii) Aleppo - I'zaz - Salmiya (Turkey) road improvement project;
iv) Latakia - Kassab road improvement project.

Public road transport under the control of the Syrian Government is inexpensive and well-scheduled. State-owned buses and privately-owned buses are competitively operated. The state-owned Karnak buses connect all major towns and cities; these are air-conditioned, speedy and reliable, but seats need to be reserved at least a day in advance. Privately-owned buses are generally called Pullman bus and mostly air-conditioned and comfortable. Karnak and Pullman buses are also operated on the international routes to neighboring countries. Other than those large buses Micro buses are operated for short and medium distance transport by small private companies based on the so-called Law No. 10. Bus services for international tourists are usually arranged by tour companies for their customers.

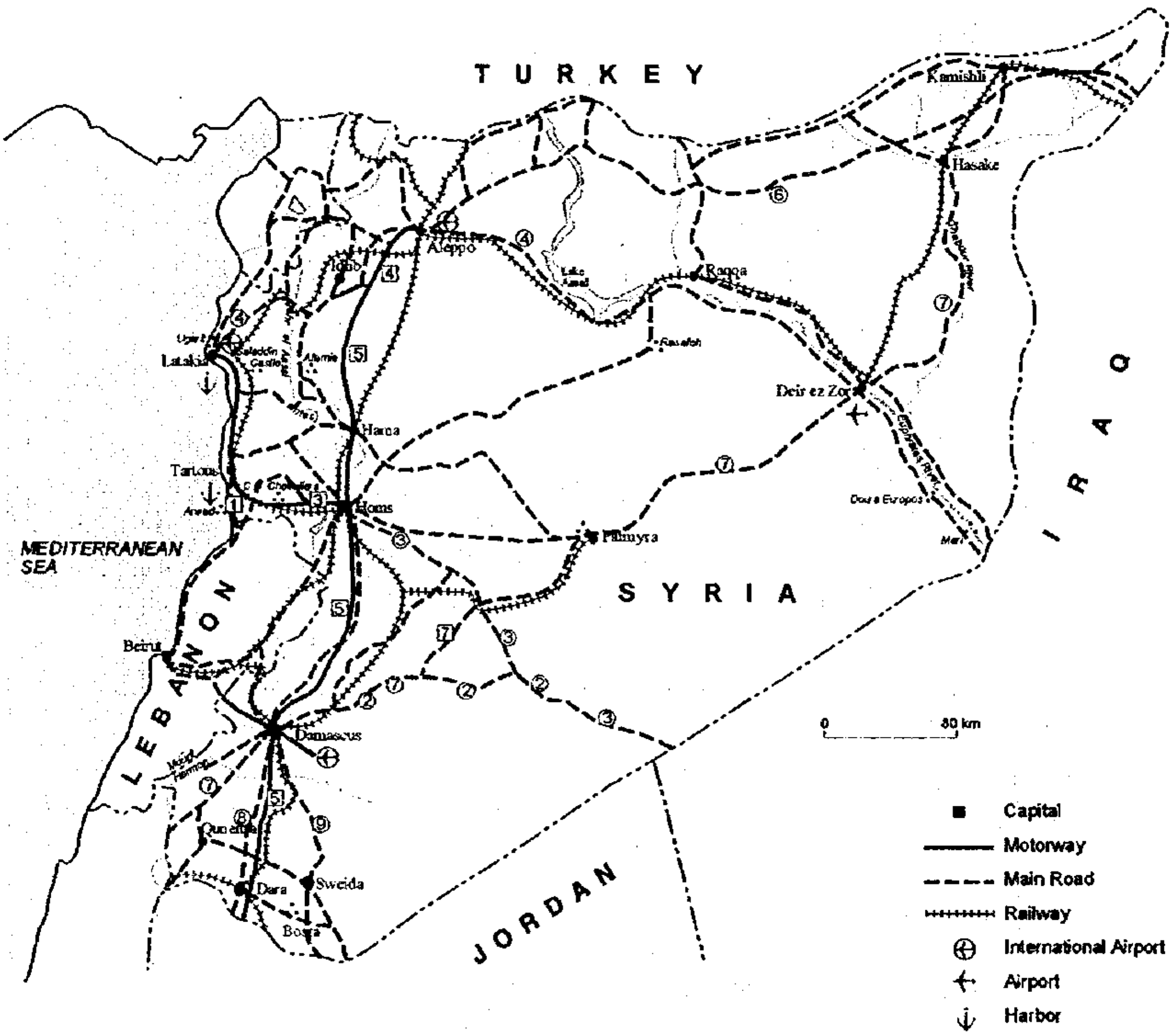
Car rental service for individual international tourist is developed in Syria. More than one hundred and fifty rental car companies are operated in Syria. Most international tourists utilize such services as car rental with driver.

6.1.3 Railway and Rail Transport

Railways in Syria are constructed by the General Company for Railway Construction and operated by the General Organization for Railway and Hijaz Railway General Organization. All railway lines in Syria are of single-track and not electrified. Out of the total length of 2,423 km as of 1993, 327 km is constructed as narrow gauge and the rest has standard gauge. Narrow gauge lines are distributed in the south of Damascus. The railway network connects major cities in Syria. However, between Damascus and Deir ez Zor long detour of way is required due to the missing railway link between Palmyra and Deir ez Zor.

The total number of railway passengers reached the peak in 1991, registered 4.65 million However the number of railway passengers has decreased ever since. In 1995 the total number of railway passengers was 1.82 million. The decrease is due to long travel time and inconvenient fixed operation schedule. During Bosra Festival in September special trains are operated from Damascus to Bosra. Also train bound for southern Syria from Damascus could be chartered for special purpose even now. Although the importance of railway as transport means declined, there still remains some attractiveness for tourists who seek nostalgia and elegance. The historical building of stations represented by the Hijaz station, old fashioned rolling stock, and the name of Orient Express, all these have still some magic to attract tourists.

Figure 6.1.1 Major Road and Railway Network in Syria



6.1.4 Ports and Water Transport

Two principal commercial ports, Latakia and Tartous are used mainly for cargo transport. Passenger ships providing Mediterranean cruise occasionally call at these ports. These ports are administrated and operated by respective port general companies as state-owned ports. There are two local ports mainly used for fishing boats; the ports of Jableh and Arwad, which are administrated by the General Directorate of Ports under the Ministry of Transport. The ferry facilities at Arwad and Tartous are in need of improvements for foreign tourists.

Inland water transport for passengers is currently not utilized in Syria. Assad Lake was constructed in 1975 for the purposes of power generating, irrigation and flow regulation of the Euphrates River with a technical assistance of former Soviet Union. This Lake is now attracting much attention because of its potential for tourism other than the above mentioned direct purposes. Until now no large boat cruising service is provided for international tourists on the Lake, but only small boat cruising is provided for local tourists.

6.2 Utilities

Present situation of utilities in Syria is summarized below and details are presented in Appendix A6.2 in Volume III.

6.2.1 Water Supply

For the country as a whole, supply of water is relatively stable. In general, water supply would not be a limiting factor for tourism development. However, aging water supply facilities in the old city, Damascus, Aleppo, etc. and water shortages in the isolated tourist sites are problems in this sector. For tourism development, it seems to be necessary to rehabilitate and expand the existing facilities in these areas.

6.2.2 Sewerage

A combined drainage system is in place in all cities. However, sewage is discharged without treatment, water pollution in rivers is becoming a serious problem.

6.2.3 Waste Disposal

Most cities in Syria have waste disposal systems. However, international tourist interviews revealed that many tourists had impression of unsanitary. The problem of waste disposal should be solved in order to promote tourism growth. An example of this problem is in Arwad.

6.2.4 Power Supply

Progress is being made throughout the country to increase the power supply. At present power shortages are rare and the power situation is generally good. In the old cities there are persistent problems with power failure and low voltage due to aged power distribution network.

6.2.5 Communication

In recent years the telephone network has greatly expanded, and it is now easy to dial foreign countries directly. However, the level of domestic telephone service is still not satisfactory.

6.3 Environmental Issues

Current situation and legislative aspects are summarized in Appendix A6.3 in Volume III. The following describe environmental issues related to the tourism sector.

International experience in environmental plans has shown that integrated environmental management is the perfect way to deal with any action in the development fields. Tourism development is particularly sensitive in this respect, because of its complex relation with most of the environmental resources, natural and human, in different degrees of importance. The wide range of tourism required facilities can affect negatively the surrounding environment, and in some cases, a lack of precaution, might even degrade the very same resource that was its destination. The main issues of common interest are the following:

- The urgent need for rehabilitation plans to stop and reveres the accelerating degradation of the forests and green areas in general, which has serious negative direct and indirect impacts on tourism natural resources. Moderate climate green areas were historically famous in the Arab Islamic History, especially Damascus region known as the Oasis in the desert or Heaven on Earth;
- The impact on air pollution is also important considering the high concentrations of suspended particles caused by dust and other components, which increase the wind erosion especially in the historic and archeological sites;
- The rehabilitation of the main rivers, for water quality and quantity in general, especially Barada and Orontes rivers, in which the domestic and industrial wastes pollution, affect the surrounding monuments and cultural sites, and decreasing severely the local and regional tourism and traditional recreational sites; and
- The rehabilitation of the coastal areas and sea water pollution and the excessive illegal fishing methods, that reduces the advantages of the beech holiday tourism.

7 DIAGNOSIS OF CURRENT SITUATION

The analytical tool known commonly as the SWOT Analysis has been adopted in developing this Master Plan. This analysis provides a logical justification for the strategies and component plans that make up this Master Plan. The treatment of weaknesses is relatively more thorough than strengths since the analysis focuses intentionally on Syria's deficiencies as a step in developing strategies that will address tourism's weaknesses. The notion of weaknesses is close to that of constraints and obstacles.

7.1 Strengths

The following factors are highly favorable ones that can serve as key strengths for Syria's tourism. Strategies have been formulated in part to derive advantages from these strengths.

(1) Cultural Attractions with Strong International Appeal

The ancient desert city of Palmyra, the Aleppo Citadel and covered souqs, the crusader castle of Crac des Chevaliers, historic old Damascus and the Roman theater-castle of Bosra are just some of the country's famous attractions that raise vivid and positive images for culturally motivated travelers worldwide. Their appeal compares favorably with that of other world icons of tourism. The level of satisfaction of visitors to Syria's monuments is high. The design of new circuits linking these famous attractions with lesser ones, and the use of these images in marketing Syria abroad can generate increased cultural tourism to Syria.

(2) Traditional Hospitality of the Syrian People

Visitors to Syria commonly praise the sense of hospitality of the Syrian people, as indicated by comments of European tour operators surveyed under this Study, and also as revealed in the tourist survey. This is a considerable asset for a destination preparing for an increased presence in the international tourism industry.

(3) An Interesting Diversity of Resources

Syria offers atmospheric old neighborhoods, desert sites, sites along the Euphrates River, hilltop castles, ancient mosques and schools, and points along the Mediterranean Sea. It also offers mountain resorts with mild summers. Because of this diversity of resources, tour operators can offer a variety of circuits that will appeal to a broad range of culturally motivated tourists, and also to Arab holiday tourists. Many such resources in other nations of North Africa and in the Eastern Mediterranean have gained tourist popularity. The variety of attractions and facilities is apparent from the comparison table. Survey results also confirm an appreciation of the variety of attractions.

(4) Good Roads & Short Driving Distances

Distances between attractions within Syria are generally not long, and can be covered in 1-2 hours by road. Most of the road system is adequate for travel by motor coaches. Consequently, conditions for touring by road are good and are improving as more roadside services are added, and as the road system is improved. Motoring conditions between

Damascus and Beirut and Amman are also quite good, facilitating the operation of multi-country tour circuits.

(5) An Environment of Personal Safety

Visitors to Syria can feel safe whether in the cities or at rural locations. Tourist harassment by touts is not a significant problem and street crime is virtually insignificant. This is in stark contrast to the crime-ridden urban environment found in many other countries (in both developed and developing nations) where numerous security warnings are needed and protective precautions common. This is also in contrast to the perception of lawlessness and danger created by some of the international media coverage with respect to Syria.

7.2 Weaknesses

The following factors are cited as constraints or obstacles hindering the growth of tourism. They are presented in three broad groupings, relating to product development, to international linkages and to institutional support, which is provided by the public sector. The strategies explained later, will be designed to overcome these weaknesses.

Relating to Poor Product Development:

Product development refers to the preparation of cultural and other resources that will be of strong appeal to different segments of tourism, and that will be used to create internationally marketable tour packages.

(1) Lack of Diversity in Tourism Product Offerings

At present it is the ancient sites at rural locations including Palmyra, and the old cities of Aleppo and Damascus that make up the tour itineraries. There is little offered in terms of rest houses or camps to present the Syrian desert; no water excursions along the Euphrates or Orontes Rivers, on Lake Assad or the Mediterranean coastline; little commercial lodging in the old cities of Aleppo and Damascus; a minimal choice of evening activities, and few opportunities for cultural performances or sporting events. As a result the tour offerings are largely one-dimensional, focusing mainly on antiquities, a few museums and ancient mosques; they currently draw only a limited share of the broad culturally motivated market, consisting mainly of ruins enthusiasts.

(2) Poor Presentation of Cultural Attractions

Whether at the ancient sites themselves or in museum displays, the standard of explanatory aids (exhibit explanations) is low, with many exhibits often having no text at all, or lacking any English language explanation. The visitor without a good foreign language-speaking guide or without a good guide book is unable to understand the importance of exhibits or of attractions. The poor quality of interpretation is a major drawback for cultural tourism, limiting the appeal mainly to the limited group of enthusiasts of ruins; it also reduces educational value for Syrian visitors. The current efforts of the MOT and DGAM are not sufficient.

(3) Poorly Adapted Lodging Supply

In recent years investors have built much chalet-furnished flat capacity in mountain and coastal areas that are now popular with Arab families on holiday and with Syrian families.

However, there has been no significant construction of mid and small size hotels in the key cities of Damascus and Aleppo in the middle price range. Nor is there any significant upgrading or renovation of existing hotels in progress. Consequently, tour operators complain of a lack of good quality, competitively priced hotels in Syria, and cite this as a factor in the high pricing of Syrian package tours. They also cite capacity problems at Palmyra, having a detrimental bottleneck effect of restricting traffic.

Relating to Weak International Linkages:

The easy flow of people and information across borders is indispensable for the solid development of international tourism. The three following factors highlight problem areas of an international nature for Syrian tourism.

(4) Weak International Marketing & Promotion

Without the benefit of an appointed marketing representative in any of the OECD or Arab countries, and without any foreign promotion offices of its own, the Ministry of Tourism is using few of the standard tools of marketing and promotion to develop a positive image in the target countries. The result is that in the international travel press, Syria gets little exposure; in the travel trade and general public, there is little awareness of the country's outstanding attractions or of safe conditions for touring. Syria's marketing and promotion efforts to date have not been effective in reversing its problem.

(5) Limited International Air Service

In terms of the number of flight frequencies, of air carriers, and of international cities with direct air links, Damascus and Aleppo have far less air service than Amman or Beirut. Scheduled services to key European capital cities is normally not daily, and is often at inconvenient nighttime hours. Chartered flights are few. Scheduled services into Aleppo are extremely limited, and operate mainly from Eastern European points rather than Western European points. The Syrian Arab Airlines network does not extend to any points eastward beyond India. Air fares including the tour base air fares, tend to be high, another contributing factor to the relatively high tour package prices.

(6) Lack of Diversification in Target Markets

Of the total 1995 frontier arrivals of 2.3 million, a modest share of 89,000 is estimated to constitute the segment of cultural tourists, and 258,000 holiday tourists. Of the cultural tourists, 76 percent come from OECD nations, mainly Western Europe, with a minimal share from North America or Asia. Of the holiday tourists, 72 percent come from Arab nations excluding neighboring Jordan and Lebanon; if these nations are included, the ratio rises to over 97 percent. These two critical segments are highly concentrated as to source markets, which is a factor in the peaking problems that tourism to Syria now has. The industry has not yet diversified its market base by building up different types or segments of business from its primary sources, or by developing secondary target markets such as North America, Eastern Europe and Asia.

Relating to Deficient Institutional Support:

The role of government as embodied in its multiple institutions, is a critical one creating the basic environment in which the joint sector and the private sector are to grow. Key problem areas are identified below.

(7) Insufficient Collaboration among Government Agencies

The primary relationship is between MOT and MOC, in particular with its DGAM. These bodies have not been collaborating closely to improve presentation and preservation of the ancient sites that represent the nation's primary attractions and most valuable tourist resource. Another area of ineffective collaboration is between MOT and Syrian Arab Airlines, specifically regarding ineffective international marketing and promotion. In addition, the Supreme Council of Tourism together with MOT is not asserting the needs of the tourism sector effectively enough before other government agencies such as MOC, Ministry of Finance, and others. Other government agencies are unfamiliar with tourism and need better guidance on the needs of the industry. In general, the MOT and Supreme Council are not clarifying the division of activities between the concerned government agencies.

(8) An Unclear Division of Activities between the Private/Joint/Public Sectors

The nation's leaders are undertaking profound changes to modernize the Syrian economy and raise its competitiveness; in principle, the industries reserved for public and joint sector development are shrinking while those available to the private sector are expanding. However, the MOT is not succeeding in communicating this to the private sector and to foreign investors, as judged from the low level of investment in the lodging industry. A clear policy regarding the specific industries now open to investment and all related incentives, followed up by consistent supportive actions by MOT and related agencies to boost investment, is not yet in place.

(9) A Poor Environment for Foreign Investment

Foreign investment in Syria remains very weak because of its restrictive regulatory environment, which includes foreign exchange controls, limitations on foreign lending, and capital repatriation limitations. Tourism by definition relies on the wide use of international marketing channels to distribute air, lodging, inclusive tour and other travel-related services. However, because foreign investment in the hotel and other travel-related businesses in Syria is so minimal, Syria as a travel destination is largely bypassed by the travel industry in many high income countries.

(10) Insufficient Deregulation in the Tourism Sector

The industries of hotels, restaurants, tour operation, and scheduled bus services remain forced to operate under various explicit and implicit government controls as to licensing, pricing and other types of restrictions. Barriers exist keeping out new entrants into these activities. Some financial liberalization is needed to attract foreign investment into Syria tourism industries. A competitive market is needed within Syria as in the outside world, but the continued restrictive environment is slowing modernization in these industries.

(11) Poor Preservation of Old Damascus and Old Aleppo

The urban areas of greatest interest and outstanding potential to cultural tourism, the famed old sections of Aleppo and Damascus, continue to decay at an alarming rate in part because of poor public services (poor sanitation, sometimes unreliable electric power, water problems) and in part because of highly restrictive regulation of businesses and housing rental. The municipal governments' efforts to renovate neighborhoods have not been able to reverse this serious downward trend. Capital scarcity is not a reason for low investment;

while substantial amounts of investment by building societies and cooperatives have created vast neighborhoods of empty or little used apartment housing on the fringes of Syria's major cities and in some mountain resort areas, little investment in housing or new businesses has found its way into these historic areas. The present regulatory environment is severely distorted and major new incentives are indispensable to save these dying neighborhoods. Government initiative is essential.

(12) Inefficient Pattern of Investment

There is a track record of inefficient public and private investment in lodging capacity, as indicated by the very low annual hotel occupancy in some of the major hotels (Damascus suburbs, other cities) and in much of the holiday apartment blocks in the Latakia and Tartous areas, where building societies and labor unions have built. Some of the capacity stands empty much of the year because it is overpriced or because there is little demand for it; coastal capacity suffers from a short, two-month high season necessitating closure for much of the year. This is evidence of an unproductive use of capital by the joint and private sector companies, into projects that don't match the users' needs.

(13) Insufficient Promotion of Domestic Cultural Tourism

The Syrian population does not have a strong interest in the significance of many of the antiquities scattered around the country, and in fact commonly makes use of many such sites for recreational purposes of picnicking or sports gatherings on holidays, often causing some damage to the sites. The public education system is not sufficiently instilling in the young an appreciation for the ancient sites, resulting in the continued abusive use of the sites and an unawareness of their educational value. Since most sites lack meaningful information in Arabic language, for the layman, their value is not clear. Sites with sufficient information would be more educational and probably attract heavier Syrian and Arab visitor volumes and suffer less abuse.

7.3 Opportunities

Opportunities represent areas of action where the Syrian tourism industry can derive specific, durable benefits.

(1) To Achieve Rapid Growth in the Short Run

There are no signs of congestion at hotels or at key attractions in Syria. Annual occupancy at hotels is well under 50 percent, and there is normally no crowding at any of the cultural sites outside of the short peak season at Palmyra in April-May. In recent years crowding has been occurring only at the popular coastal and mountain resort areas in July and August. This means that with reforms in regulations, with marketing innovations and with increased promotion, tour operators can achieve rapid growth in arrivals in the short run within 2-3 years without requiring any major hotel construction program, by developing business in the shoulder seasons and off season.

(2) To Collaborate Effectively with Lebanon & Jordan

In the eastern Mediterranean, the nations of Turkey, Egypt, Israel and Jordan are emerging as well established cultural destinations popular with citizens of the OECD countries. In addition, Jordan and Lebanon are becoming popular with high income Arab families in the summer months. Effective collaboration between Syrian travel businesses and those from neighboring countries through joint promotions and multi-country tour packaging can be beneficial for all. Similar joint promotion efforts by the national tourism agencies of these countries are required. Finally, the removal of visa requirements and slow immigration processing at borders will further promote cross-border tourism. In these ways Syria can learn from its neighbors and also directly derive benefits from its neighbors increasing success in international tourism.

(3) To Distinguish Itself as a Unique Cultural Showcase for Arab Civilization

If Syria explains the meaning of its cultural sites through adequate bilingual displays and trained guides, its cultural monuments and old cities will become meaningful for visitors of all backgrounds, both Arab and foreign. Such improvements will increase for foreigners their awareness and appreciation of the many civilizations that have thrived on Syrian soil, and also raise their understanding of the development of today's Arab civilization. With its many fine examples of ancient religious, military and civilian architecture, as a cultural center, Damascus is particularly well suited to present Arab culture to international tourism. With improved presentation of the cultural assets, both Syrian and foreign populations will gain a better understanding of Syria, which to some extent will reduce ignorance about Syria and counter widely held misconceptions about the country.

(4) To Expand its Market Presence as a Competitively Priced Destination

Through improved tour packaging that is based on competitively priced lodging, Syrian tour operators can develop new packages that will be marketable in new countries, and generate higher volume business than at present. The low cost advantage that visitors to Syria can already enjoy in the areas of food & entertainment, local transportation and shopping for arts & crafts, in many packages is erased by the high priced lodging. Progress in reducing the cost of lodging will make possible competitive package pricing, and will boost the volume of visitors.

7.4 Threats

Threats represent very possible negative factors that reduce the likelihood of success in expanding tourism to Syria. These areas reflect a failure to counter or overcome many of the weaknesses cited above.

(1) Failure to Make Substantive Government Reforms

Because tourism includes a somewhat complex combination of services that come under different areas of responsibility, reforms are required on many fronts by various ministries such as tourism, transport, culture, environment, taxation and investment, among others. A consensus for reform will be needed that the Ministry of Tourism alone may not be able to create even with the backing of the Superior Council for Tourism. Fortunately, the government has already achieved some reforms and has announced additional ones that will further improve the business environment for tourism related industries.

(2) Failure to Collaborate Effectively with Neighboring Nations

Tourism is of course not the primary consideration in bilateral relations with neighbors such as Lebanon, Jordan and Turkey. Broader issues of security and trade can dominate bilateral relationships, and even friendly governments often do not readily see the types of collaboration required to create user-friendly borders over which tourism of different kinds will expand freely. In view of Jordan's head start in tourism, and of Lebanon's well known pre-war success in tourism, Syria can derive much benefit from closer collaboration with these neighbors in practical areas cited above. How quickly it will do so is not clear at this point.

(3) Failure to Arrest the Decline of Cultural Resources

In numerous Mediterranean cities of France, Italy and Greece it is the old cities that have been upgraded and redeveloped into major tourist and retailing areas offering broad dining, lodging, shopping and entertainment services as a result of private investment by small and mid sized businesses. Old cities have been long recognized to offer unique and nostalgic urban environments that cannot be effectively recreated in new developments. The sad fact in Syria is that the governments of Damascus and Aleppo are having great difficulty in reversing the trend of decay in their old cities, which is endangering the survival of some ancient buildings including khans and schools. It is not clear at this point if either city can succeed in stopping this decline through some combination of neighborhood improvement programs and reforms in investment incentives.

PART II

THE MASTER PLAN

8 NATIONAL TOURISM DEVELOPMENT POLICY AND STRATEGY

8.1 Overall Tourism Development Policy

In Part I, the issues and problems in the tourism sector and related sectors in Syria have been identified, and their significance within the context of changing international tourism marketplace and the reality in Syria have been assessed. Based on the assessment, it is recommended to adopt the following three basic policies to guide the tourism development in Syria in order to achieve the standing development objectives.

8.1.1 Demand Driven

Ensure that Tourism Development in Syria is Demand Driven.

As seen in Chapter 3, international tourism is one of the fastest growing sectors in the world. The sector, however, is characterized by the fierce competition among destination countries trying to woo tourists with their ever changing tastes from competitors. No matter how well endowed in resources, no country can dictate the world tourist demand. Tourism development in Syria, therefore, must be demand driven, rather than supply-driven, i.e. presenting itself according to what planners and businessmen think is good for tourists.

Recognition of the nature of tourism development as demand driven is particularly important at this stage in Syria, where the legacy of planned economy still lingers on. People concerned about tourism development in Syria should realize that one cannot plan tourist market in foreign countries and act accordingly. Syria's tourism industry will need to carefully learn about the expectations of targeted segments of travelers, in order to design hotels and to create tour "products" that will meet their demands successfully.

8.1.2 Clear Roles of Public and Private Sectors

Develop Clearly Defined Roles for the Public Sector and the Private Sector.

The policy of giving the private sector a larger role in tourism sector development has been in place for some time. However, in actual practice, exact roles of the public and the private sectors does not seem to be well understood among many tourism officials and industry leaders, which in turn causes uncertainty among them. This is quite understandable considering the past history of government-led development. Tourism sector serves a complex market that is highly volatile and prone to changes in taste and fads, which are largely outside of governmental control. No government can be expected to be fast enough to respond such changes. Private initiatives in investment and operation are therefore most desirable, as opposed to direct government involvement. It is the private investor who is better at matching risks and rewards in efficient investment, than the government official. The government role should be limited to providing infrastructure and an enabling business environment, and actively intervene where shortfalls in private initiative exist. This does not mean that the role of the government is small. On the contrary, in the case of Syria, where the supporting framework to encourage private sector investment in tourism sector is still in its infancy, the government could play a significant role in steering the private sector to tourism activities, by implementing well targeted supporting investments and institutional reforms. Moreover, it is government's responsibility to provide an enabling environment for foreign investment to work alongside Syrian investment in developing the nation's tourist industries.

8.1.3 Efficient and Sustainable Development

Pursue Efficient and Sustainable Development.

It appears that many investments in and operation of the tourism sector in Syria have been made without rigorous concern for their efficiency. Effort should be taken to raise their efficiency in order to meet the national goal of raising the living standards of Syrian people by not wasting money on projects with a low economic return. This means that investment must be concentrated on high-priority high-return projects through streamlined and well coordinated operation, which the private sector can provide.

Syria's primary tourism resources will continue to be its cultural heritage and natural settings. Poor management of such resources will directly result in the deterioration of the very assets on which the tourism sector relies to attract tourism. It is a key role for government to provide safeguards in the form of protective measures that ensure sustainable use of these resources in the long run, even under greatly increased usage. It is government's role to ensure that profitability can be compatible with sustainability.

8.2 Overall Strategy

The three policy statements presented in the preceding section are meant to induce a broad recognition of the need that Syria's tourism development should be undertaken with an attitude different from the extension of the past practice. For the purpose of implementation a set of eleven specific strategies is proposed. These eleven strategies have been selected considering the various issues and problems presented in Part I. Figure 8.2.1 shows the relationships among the policies and the strategies. The strategies can be grouped into three areas by major purpose. Among policies and strategies, and between policies and strategies, individual issues are highly mutually dependent and Figure 8.2.1 shows only those of the strongest relationship. Table 8.2.1 shows how the strategies were derived from the SWOT analysis presented in Chapter 7.

8.2.1 Strategies for Sector Expansion

Four strategies are proposed to guide the expansion of tourism in Syria under this Master Plan. The first relates to the quality of tourism offerings, which need to be brought up to world standards. The next relates to the scope or diversity of travel experiences to be offered, which currently is somewhat limited. The third strategy focuses on development of requisite human resources to capably manage this expansion in activity. Finally, the last strategy focuses on the need for Syria's travel trade to boost and sharpen its marketing efforts internationally to generate the increased volumes of foreign visitors.

(1) Enhance Quality of Offerings

The quality of tourist sites and services currently offered in Syria is found to be inadequate to compete in the world market as described before. Improvement is needed even just to stay in place, as the surrounding countries are putting great effort in improving their resources and services. The presentation of archaeological and historical sites, and cultural resources is to be provided in ways to appeal to tourists. Amenity facilities at archaeological/historical sites should be provided. Quality of accommodation facilities should be improved to a standard that is at least on a par with facilities of similar rank in competing countries. For Syria to create an enduring, favorable reputation, the traveling public must perceive good value for money throughout its travel experience when in Syria. Syria's travel businesses can upgrade to international standards.

(2) Broaden the Tourism Product Range

Syria has the potential to greatly diversify the range of travel products it can offer to include cultural exchange programs, study tours along historic themes, courses in traditional arts such as calligraphy, international music festivals, sporting events, and desert discovery treks, in addition to regional and international conferences and commercial events. The scope of attractions needs to be broadened, and in collaboration with the foreign travel trade, Syrian tourism must learn to package and market these attractions in variations matching the needs of different travel populations or segments. In offering new travel products, the industry will to some degree reduce its vulnerability to political or economic setbacks in the region or in source countries, while employing more Syrian labor and building business in the off-peak seasons. By providing a broader variety of services, visitor satisfaction will rise and directly improve the country's name as a travel destination. The country will also be able to tap new markets such as Eastern Europe or Asian points.

(3) Develop Human Resources

The development of a broad variety of skills in various service industries is essential to the successful expansion and upgrading of tourism in Syria. In the public sector, improved management of cultural resources (museums and ancient sites) is a necessity as much as improved international marketing by tourism officials; in the private sector, improved training is required to raise the level of skills in the critical lodging and restaurant industries, as well as in tour operations. For this reason, various components of this Master Plan define specific areas for training.

(4) Improve Marketing

Our market survey revealed that a negative image is held in the West. This is correctly perceived by the Government. However, on the one hand, the extent to which this limits tourism to Syria and on the other hand, the necessary remedial action on the side of Syrian government, do not seem to be well understood. In the mid-1990s, Egypt took up counter-measures correcting the effect of negative reports by mass media in tourist generating countries as a national priority and launched thorough and concentrated campaigns in those countries by teams of hired professionals. Syria urgently needs to design a well-focused marketing program, in several phases, to repair its poor image among specific populations in selected markets.

8.2.2 Strategies for Sector Efficiency

The government has a crucial role to play in improving the efficiency of the sector. A number of weaknesses in the preceding section relate to the deficient institutional support of many agencies, that is hindering, rather than helping, the tourism industry. The following strategy elements are proposed to create a positive environment in which business can expand profitably.

(5) Improve Government Operations

A cooperative working relationship between the MOT and other relevant agencies is essential to expand tourism. This is particularly important between MOT and DGAM and the national air carrier, Syrian Arab Airlines. MOT must also represent the interests of tourism in getting other agencies such as the Ministry of Finance to adopt reforms, or to undertake construction projects (Finance Ministry, Waqf). MOT also has a responsibility to represent the interests of tourism at the local administration level as well, particularly in areas involving local environment. Another critical element of MOT's improved role is to more actively maintain its dialogue with the private sector and with the foreign investment community.

(6) Enhance Private Sector Participation

Closely linked to the preceding strategy is an additional strategy for government's active promotion of investment in tourism enterprises. MOT's reduced regulation of the restaurant and hotel industries, coupled with the assertion of the private sector's expanded role, and public sector's more limited role, in tourism businesses, are clear signs for the business community of government's reduced (and more efficient) role. As a more accurate judge of risks and rewards, the entrepreneur is forced by the rigors of competition to design projects with an acceptable level of risk. Under the expanded private sector role, increased foreign participation is desirable to bring in foreign capital and know-how, and in particular to give Syria the crucial broad exposure it needs in the international marketing channels.

(7) Improve Infrastructure and Services

With an improved understanding of the needs of an expanding tourism industry, both central and local administration agencies must provide suitable infrastructure and services in diverse areas such as well presented cultural sites and museums, well provided and managed tourist amenity including toilets, hotels and restaurants of international norms, pleasant urban environments, road access, domestic and international air services, efficient waste management and upkeep of public places, as well as other areas. MOT must function as an effective advocate for the interests of tourism, by maintaining a dialogue with the numerous agencies providing infrastructure and public services, and by assisting in planning for needed improvements.

(8) Reduce Seasonality

The very high degree of seasonal peaking in tourist arrivals in Syria, particularly in the coastal area, the mountain resorts and in Palmyra, is detrimental to the healthy growth of the sector. It not only lowers the overall efficiency and profitability, but also gives the industry the false impression of hotel shortage, resulting in lost business for Syria, as suggested by the findings of our survey. Absolute capacity shortages must be tackled with the encouragement of new hotel construction, while seasonal ones can be managed. Methods to cope with seasonality and spread the tourist arrivals can include:

- Active marketing
- Price incentives
- Development of origin markets with different peak season, e.g. Japan in the summer
- Development of special markets, e.g. MICE
- Development of domestic tourists

8.2.3 Strategies for Sustainable Sector Development

The ideal pattern of expansion avoids bottlenecks and congestion and avoids labor shortages, by means of growth at a manageable pace. It also avoids damage to the urban and natural environments as well as to the nation's cultural resources. The following three strategies relate to sustainability.

(9) Preserve Resources and Environment

The MOT is not the primary agency responsible for the natural environment, for urban environments or for the cultural resources of the nation; other agencies are clearly designated for these responsibilities in this regard. However, MOT will productively work with them to raise the awareness of their officials of the pressures and needs related to tourism to maintain suitable environmental conditions and to avoid deterioration of resources. For this purpose, MOT, as the official spokesman for the tourism industry, must work both at the central government level as well as at the local administration level; moreover, it must also increase its cooperation with international environmental and cultural organizations and facilitate their cooperation with Syrian counterpart agencies.

(10) Promote Domestic Tourism

The promotion of domestic tourism, particularly cultural tourism, is important for the sustainable development of tourism sector in Syria. If Syria's rich archaeological/cultural resources are seen by its citizens only for the enjoyment of foreign tourists, growth of the sector can not be sustained in the long run. Resentment could lead to neglect or cynicism which would ruin the atmosphere. On the other hand, Syrian people, rightfully proud of their rich heritage, would develop a healthy respect for cultural and natural resources if they understand their significance. In addition, the development of domestic tourism will also have the economic benefit of reducing the peaking problem that the tourist industry has at key times of the year, by building up business at other times of the year

(11) Phase Spatial Development

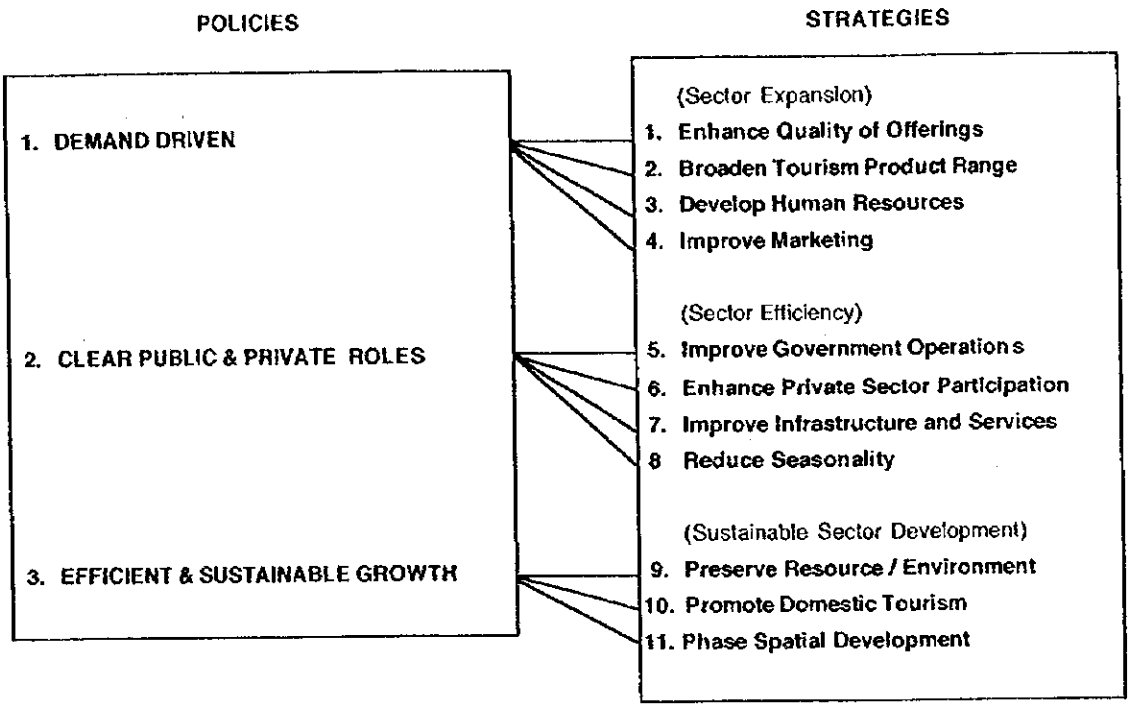
Syria's managerial and financing resources for tourism are somewhat limited and the industry has limited experience in collaborating with the international travel trade. These resource constraints, including monetary, human and physical, make a pattern of development that is thinly spread across the country, virtually impossible if efficiency and sustainability are objectives. A strategy based on a phased or staged plan of development of tourism infrastructure, that makes use of the best endowed zones in the short term while extending activity to outlying or secondary zones in later phases, is pragmatic, and is the one adopted in this Master Plan. This strategy will enable the travel trade to extend tour circuits into new areas thereby diversifying the offering of circuits and extending the benefits of tourism to new communities.

Table 8.2.1 Strategies and SWOT Weaknesses Addressed

Strategy	SWOT Weaknesses Addressed
(1) Enhance Quality of Offerings	(1) Lack of Diversity in Tourism Product Offerings (2) Poor Presentation of Cultural Attractions (3) Poorly Adapted Lodging Supply (12) Inefficient Pattern of Investment
(2) Broaden the Tourism Product Range	(1) Lack of Diversity in Tourism Product Offerings (3) Poorly Adapted Lodging Supply (11) Poor Preservation of Old Damascus and Old Aleppo
(3) Develop Human Resources	(2) Poor Presentation of Cultural Attractions (4) Weak International Marketing & Promotion
(4) Improve Marketing	(4) Weak International Marketing & Promotion (5) Limited International Air Service (6) Lack of Diversification in Target Markets
(5) Improve Government Operations	(7) Insufficient Collaboration among Government (8) An Unclear Division of Activities between the Private/Joint/Public Sectors
(6) Enhance Private Sector Participation	(4) Weak International Marketing & Promotion (8) An Unclear Division of Activities between the Private/Joint/ Public Sectors (9) A Poor Environment for Foreign Investment (10) Insufficient Deregulation in the Tourism Sector (11) Poor Preservation of Old Damascus and Old Aleppo (12) Inefficient Pattern of Investment
(7) Improve Infrastructure and Services	(5) Limited International Air Service (7) Insufficient Collaboration among Government Agencies
(8) Reduce Seasonality	(1) Lack of Diversity in Tourism Product Offerings (6) Lack of Diversification in Target Markets (9) A Poor Environment for Foreign Investment
(9) Preserve Resources/Environment	(1) Poor Presentation of Cultural Attractions (7) Insufficient Collaboration among Government (11) Poor Preservation of Old Damascus and Old Aleppo
(10) Promote Domestic Tourism	(11) Poor Preservation of Old Damascus and Old Aleppo (13) Insufficient Promotion of Domestic Cultural Tourism
(11) Phase Spatial Development	(12) Inefficient Pattern of Investment

Source: JICA Study Team

Figure 8.2.1 Tourism Development Policies and Strategies



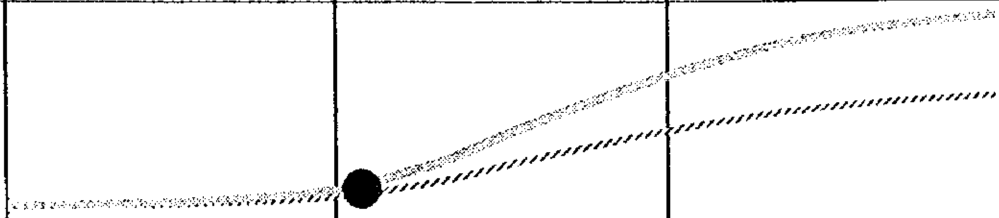
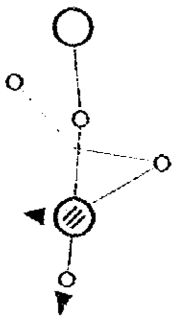
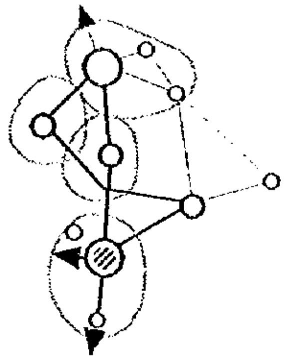
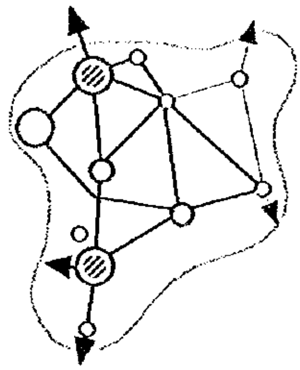
8.3 Staged Development Strategy

The situation of tourism development process of a tourist destination can be considered divided into three major stages: pioneer stage, growth stage and mature stage. Syrian tourism today can be considered as evolving into the initial growth stage. In order to accelerate its tourism development and to remain competitive in the regional and world tourism, it is essential for Syria to aggressively develop its potential and fully explore market opportunities, in a manner appropriate to the stage of tourism development in Syria.

Through continuous tourism development, Syria should aim to become a single destination by target markets in future. Table 8.3.1 examines Syria's position in the process of tourism development in relation to the following criteria: number of tourists, development patterns and their features, marketing strategy, and target market segments.

In order to be successful in the endeavor, however, the quality of tourism products must be upgraded to meet the market expectations, degradation of tourism resources must be prevented, adequate infrastructure must also be in place, and agreeable services must be provided. Such strengthening can only be realized in stages, which consolidate existing tourism products first, and then broaden tourism products in accordance with major segments' markets. These staged improvements must be synchronized with a coherent marketing strategy as well.

Table 8.3.1 Development Stages and Patterns

Stage	Pioneer Stage	Growth Stage	Mature Stage
Number of Tourists		Syria's Position	
Development Patterns and Features Gateway Tourism Core Tourist Site Corridor	 - isolated and small scale tourism development - undeveloped tourism resources	 - consolidation of existing products - cluster development - corridor formation - diversification of tourism products	 - broaden and established tourism products - network formation - tourism cores and tourist routes establishment
Marketing Strategy	- traditional market - Europe	- traditional market expansion - new market exploitation by region: Asia, Pacific, Americas, etc. by motive: MICE, soft adventure, etc.	- established traditional market - new market expansion
Target Market Segments	- archaeology - religion (pilgrim) - Arab holidays	- culture tourism (integration of archaeology, history, folk life and culture) - soft adventure - holidays - MICE tourism	- culture tourism - soft adventure - holidays - urban tourism - MICE tourism

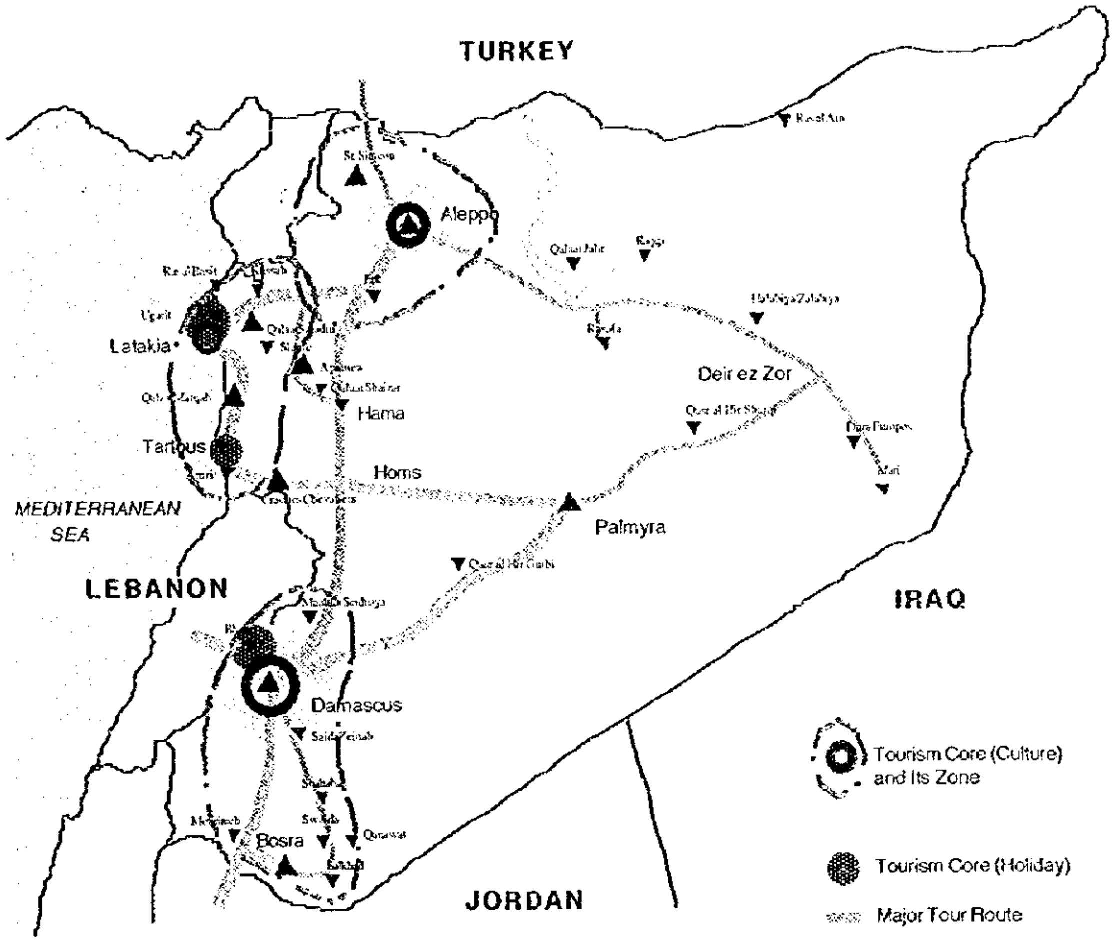
Source: JICA Study Team

8.4 Zonal Priority

For a country with many and diverse tourism resources, each appealing to different markets and spreading over the country, it is not appropriate to select a limited number of zones and neglect others for the purpose of the most effective tourism development. The selection presented in this Section should be understood as the process for the purpose of facilitating Part III and Part IV of this study.

At present, major tour routes in Syria are shown in Figure 8.4.1. Major resources for culture tourism, holiday tourism, and pilgrim are located within the corridors covered by these routes. Following the recommended strategy of gradual spatial expansion, it is important to strengthen tourism resources, facilities, and infrastructure located in the major corridors of Bosra-Damascus-Palmyra-Homs/Hama-Tartous-Latakia-Aleppo.

Figure 8.4.1 Current Tourism Structure in Syria



Source: JICA Study Team

Among them, Palmyra and Bosra are the subject of forthcoming EU program and therefore were eliminated among the candidate zones. Damascus and Aleppo are also the subject of the above-mentioned EU program, but both are large enough to accommodate additional planning effort.

Therefore, the following zones were selected for Part III and Part IV of the Study:

1 Damascus;
2 Aleppo;
3 Homs and Hama; and
4 the Coastal.

An objective exercise was carried out to test the above selection results from a wider view. A set of criteria were established and scores were assessed for each zone against each criterion. Scores weighted by importance were summed up for each zone and the totals were compared. Criteria were chosen in consideration of the national objectives of the tourism development, and the policies and strategies determined in this study. In due consideration of the relative importance of the criteria, the Study Team attached weights on each criterion. The chosen criteria and respective weights (shown in parenthesis) are:

- Foreign Exchange Earning Capacity (10);
- Broadening Tourism Products (7);
- Attractiveness to the Private Sector (5);
- Environmental Capacity (5);
- Contribution to Reducing Seasonal Fluctuation (5);
- Domestic Tourism Promotion (3); and
- Strengthening Tour Circuits (7).

For each criterion an area judged with the high appeal was given 5 points, the medium appeal 3 points and the low appeal 1 point. Weighted total scores were calculated for each tourism zone. The resulting ranking is as shown in Table 8.4.1.

Table 8.4.1 Evaluation of Tourism Zones

Criteria	Foreign Exchange Earning Capacity		Broaden Tourism Products		Attract the Private Sector		Environment Capacity		Contribution to Reducing Seasonality		Domestic Tourism Promotion		Strengthen Tour Circuits		Total	Rank
Tourism Zone	rate	10	rate	7	rate	5	rate	5	rate	5	rate	3	rate	7	total	
1: Damascus	5	50	5	35	5	25	5	25	5	25	3	9	5	35	204	1
2: Aleppo	5	50	4	28	5	25	5	25	5	25	3	9	4	28	190	2
3: Coastal	4	40	3	21	4	20	3	15	4	20	4	12	4	28	156	4
4: Homs & Hama	3	30	4	28	4	20	5	25	3	15	4	12	4	28	158	3
5: Palmyra	4	40	2	14	5	25	3	15	3	15	4	12	4	28	149	5
6: Euphrates	3	30	3	21	3	15	4	20	3	15	4	12	2	14	127	7
7: Northeast	2	20	3	21	2	10	4	20	1	5	4	12	1	7	95	8
8: South	3	30	4	28	4	20	3	15	3	15	3	9	3	21	138	6

Source: JICA Study Team

9 DEMAND PROJECTIONS

9.1 Foreign and Arab Tourist Projection

(1) Assumptions for the Projection

For estimating the future demand, an analysis on the past trends of the frontier arrivals of foreign countries (OECD countries, Turkey, Iran and other foreign counties), and Arab countries (Lebanon, Jordan, GCC, and other Arab countries) was made as well as a review of recent world tourism market trends.

Improvement of local infrastructure and services and strengthening of marketing and promotion will affect the future demand. In particular, air transport is considered to be a most important factor of tourist growth and development recently. However, more important factors affecting the future demand are considered to be external factors such as economic situations in the major tourist generating countries and regional political stability. If these factors change drastically, substantial fluctuation of the demand would occur. The projections were made assuming that jeopardizing factors such as economic recession in the major tourist generating countries and instability in the Middle East may occur in a limited scale, but not for long. The analysis on the "tourist arrivals" trend of OECD countries and regional Middle East made by WTO was also reviewed and used for this projection.

Major assumption applied for this projection are as follows:

- combined with the 4 to 5 percent expansion in the 1995-2000 period, an overall average growth rate of tourist arrivals of 3.8 percent a year is predicted for the 1990s as a whole, with a level of around 660 million tourist arrivals a year by 2000 by WTO;
- WTO forecasts a near doubling in international tourist arrivals between 1990 and 2010 i.e. from 456 million to 937 million;
- recent trend of the rapid increase in frontier arrivals from foreign countries will continue in the early stage and will slow down in the later stage;
- among the frontier arrivals from foreign countries, those from OECD countries are expected to increase at a higher growth rate reflecting the recent trend and considering the continuous marketing and promotion effort;
- among the frontier arrivals from OECD countries, those from the UK, the USA., and Japan are expected to increase at a higher growth rate reflecting the recent trend. These countries offer a good possibility of increasing tourists to Syria compared with tourists from Germany and France;
- at present, Europe and Americas maintained their position of leadership regarding the tourism destination in international tourism in 1996, together accounting for over 78 percent of tourist arrivals. However, their shares (especially Europe's) have fallen over the past few decades. Rather than an actual decline in Europe, that trend is representative of the diversification of world tourism;
- current share of the Middle East in international tourist arrivals shows about 2.6 percent. However, this share will most certainly be improved to 3 percent in 2000, 3.3 percent in 2005 and 3.7 percent in 2015 due to the progress of diversification of world

tourism according to the forecast of WTO;

- the share of Syria in international tourist arrivals of the Middle East is about 7 percent. Egypt occupies about 25 percent share of international tourist arrivals to the Middle East. The share of Egypt will decline in the long run as a result of diversification of tourism destination
- the growth rates of the frontier arrivals from Turkey and Iran will follow the past trend, but will decrease in the long-run;
- the frontier arrivals from Arab and GCC countries will increase at a slightly higher growth rate due to the expected intensive regional economic activities; and the growth rates of the frontier arrivals from Lebanon and Jordan will go down in the long-run as a result of market saturation.

(2) Frontier Arrivals Projection

Based on the above assumptions, projections of the frontier arrivals in Syria were made for two cases, the middle case and the low case.

Table 9.1.1 Projection of Frontier Arrivals in Syria

Scenario A: Modest Growth

	1996	2000	AAGR	2005	AAGR	2015	AAGR
1. Foreign	617,829	*816,754*	*7.23 %*	*1,175,261*	*7.55 %*	*2,067,477*	*5.81 %*
OECD	127,140	*207,298*	*13.00 %*	*381,934*	*13.00 %*	*972,773*	*9.80 %*
Turkey	156,507	*179,595*	*3.50 %*	*203,196*	*2.50 %*	*235,817*	*1.50 %*
Iran	181,805	*208,625*	*3.50 %*	*241,854*	*3.00 %*	*280,681*	*1.50 %*
Other foreign	152,377	*221,235*	*9.77 %*	*348,277*	*9.50 %*	*578,205*	*5.20 %*
2. Arabs	1,817,552	*2,335,706*	*6.47 %*	*3,037,725*	*5.40 %*	*4,121,976*	*3.10 %*
GCC	285,434	*414,420*	*9.77 %*	*623,145*	*8.50 %*	*1,015,031*	*5.00 %*
Jordan	462,501	*541,061*	*4.00 %*	*642,610*	*3.50 %*	*806,685*	*2.30 %*
Lebanon	908,839	*1,147,388*	*6.00 %*	*1,429,855*	*4.50 %*	*1,742,985*	*2.00 %*
Other Arabs	160,778	*232,838*	*9.70 %*	*342,115*	*8.00 %*	*557,269*	*5.00 %*
Total	2,435,381	*3,152,461*	*6.66 %*	*4,212,985*	*5.97 %*	*6,189,453*	*3.92 %*

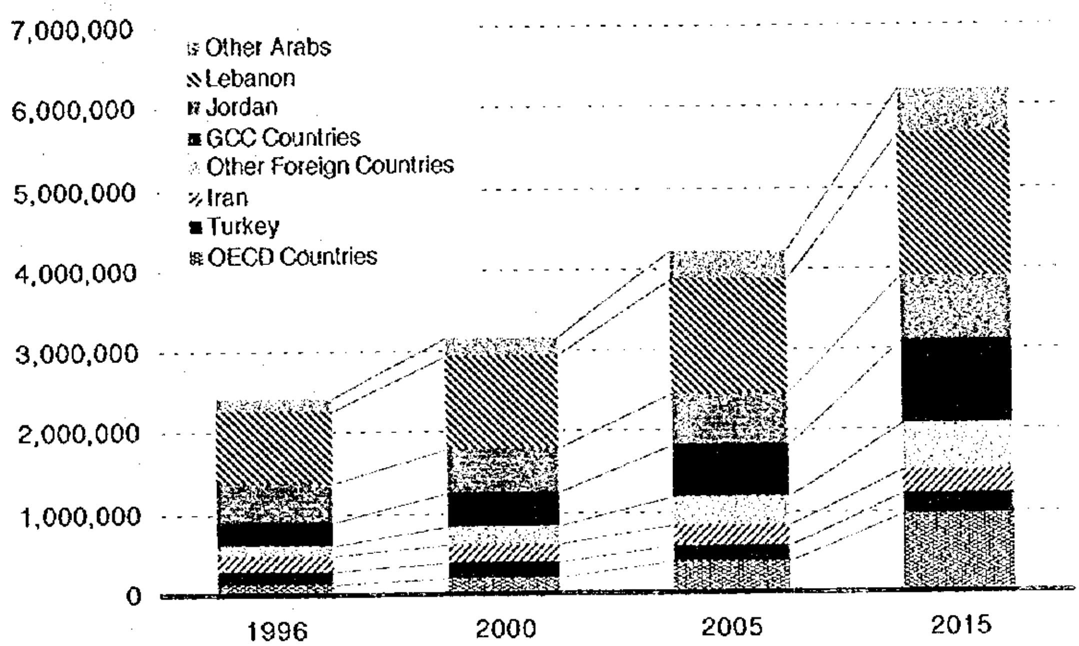
Scenario B: Low Growth

	1996	2000	AAGR	2005	AAGR	2015	AAGR
1. Foreign	617,829	*743,123*	*4.72 %*	*917,662*	*4.31 %*	*1,277,817*	*3.37 %*
OECD	127,140	*147,595*	*3.80 %*	*173,609*	*3.30 %*	*228,825*	*2.80 %*
Turkey	156,507	*179,595*	*3.50 %*	*203,196*	*2.50 %*	*247,694*	*2.00 %*
Iran	181,805	*208,625*	*3.50 %*	*241,854*	*3.00 %*	*309,594*	*2.50 %*
Other foreign	152,377	*207,307*	*8.00 %*	*299,003*	*7.60 %*	*491,703*	*5.10 %*
2. Arabs	1,817,552	*2,090,296*	*5.01 %*	*2,692,631*	*4.26 %*	*3,956,043*	*3.34 %*
GCC	285,434	*333,917*	*4.00 %*	*416,122*	*4.50 %*	*575,736*	*3.30 %*
Jordan	462,501	*541,061*	*4.00 %*	*642,610*	*3.50 %*	*863,615*	*3.00 %*
Lebanon	908,839	*1,147,388*	*6.00 %*	*1,429,855*	*4.50 %*	*2,016,951*	*3.50 %*
Other Arabs	160,778	*188,088*	*4.00 %*	*234,391*	*4.50 %*	*342,298*	*3.30 %*
Total	2,435,381	*2,953,577*	*4.94 %*	*3,640,640*	*4.27 %*	*5,058,417*	*3.34 %*

Figures in italic are estimated number

Source: MOT, JICA Study Team

Figure 9.1.1 Projection of Frontier Arrivals in Syria (Scenario A)



Source: JICA Study Team

The reasonable case (Scenario A) takes the modest growth rate based on the WTO projection as a whole and assumes that the external situation will not change drastically in the short-run, however, it will be improved in the long-run, and the domestic supporting infrastructure and services will be strengthened corresponding to the increased demand. The Study Team assume that the diversification of tourism affect the share of frontier arrivals in the tourism market greatly.

The low case (Scenario B) takes a lower growth rate of the frontier arrivals than the Scenario A under the assumption that the external situation including the regional political stability will not improve and the growth rates of the frontier arrivals from OECD and other Arab and GCC countries will smaller than Scenario A.

In this projection, the Study Team assumed that the share of the Middle East in the international tourist arrivals will most certainly be improved to 3.7 percent in 2015 from 2.6 percent in 1996 due to the progress of diversification of world tourism. Approximately 40 millions international tourists excluding excursion or one-day visitors etc., will visit to the Middle East in 2015 according to the above assumptions. And the share of Egypt in the Middle East will decrease gradually and the share of Syria, Jordan and Lebanon in the Middle East will increase gradually as a result of the decline of share of Egypt. In addition, many tourists from the UK, Japan and the USA will visit to Syria by 2015, because the tourists from these countries to Syria is much small compared with the tourists to Egypt from these countries. Thus, the share of Syria in the Middle East will increase to 8.8 percent in 2015 from about 7 percent in 1996. Approximately 3.6 million international tourists excluding Jordanian and Lebanese will visit Syria in 2015. In particular, the arrivals from OECD countries are projected to maintain the high growth rate (around 10 percent) by 2015 as the following reasons:

- Current growth rate of arrivals from OECD countries to Syria shows around 10 percent without any effective investment for the supporting infrastructure and services;
- Egypt attained about 20 percent growth rate except for the year of incidents brought about by fundamentalist attacks through the effective investment and strategy for the tourism sector; and
- As Figure 3.1.1 shows, the frontier arrivals of Syria are projected to be changed from intra-arrivals to inter-arrivals. Thus, arrivals from OECD countries, in particular the UK, Japan and the USA, will increase by 2015.

(3) Demand Projection according to Accommodation Type

However, the above-mentioned increase will not directly lead to the increase in the hotel accommodation requirements. Because each tourist segment has the following characteristics:

The arrivals from OECD are about 80 percent tourists who stay at hotels. The arrivals from Turkey are about 98 percent transit travelers. The arrivals from Iran are about 90 percent pilgrims who stay at pilgrim apartments. About only 10 percent of arrivals from Iran stay at hotels. The arrivals from other foreign countries are almost 100 percent people who come to buy something. The arrivals from other Arabs and GCC countries are almost all holiday tourists who stay at holiday villas. But about 70 percent of other Arabs will stay at hotels, on the other hand, only 15 percent of GCC countries will stay at hotels. The purpose of arrivals from Jordan and Lebanon is mainly one-day excursion or to visit to their relatives. Thus, they do not use hotels for accommodation.

Based on the above assumptions, projected frontier arrivals were distributed according to their accommodation type and the results are shown in Table 9.1.2.

It is quite difficult to make a reliable projection of tourist arrivals for the long-run. If the present political and economic situation in Syria and the region is taken into account, this task seems extremely difficult one. Under this circumstance, Scenario A is taken up to be incorporated in the national plan formation, that is to be considered as the target figures for the long-run.

Table 9.1.2 Distribution of Frontier Arrivals by Accommodation Type

	1996	2000	2005	2015
Hotels				
OECD Countries	*99,570*	*163,081*	*300,467*	*765,279*
Turkey	*3,539*	*4,331*	*4,900*	*5,687*
Iran	*24,908*	*18,704*	*21,683*	*25,164*
Other foreign Countries	*41,469*	*69,734*	*109,775*	*182,247*
GCC Countries	*61,318*	*110,851*	*166,681*	*271,506*
Jordan	*58,517*	*76,232*	*90,540*	*113,657*
Lebanon	*82,822*	*114,411*	*142,577*	*173,800*
Other Arabs	*95,197*	*149,495*	*219,657*	*357,798*
Total	*467,340*	*706,837*	*1,056,280*	*1,895,138*
Holiday Villas				
OECD Countries	*0*	*0*	*0*	*0*
Turkey	*0*	*0*	*0*	*0*
Iran	*0*	*0*	*0*	*0*
Other foreign Countries	*0*	*0*	*0*	*0*
GCC Countries	*112,058*	*242,855*	*365,171*	*594,825*
Jordan	*0*	*0*	*0*	*0*
Lebanon	*0*	*0*	*0*	*0*
Other Arabs	*52,465*	*41,671*	*61,229*	*99,735*
Total	*164,523*	*284,526*	*426,400*	*694,560*
Others				
OECD Countries	*27,570*	*44,217*	*81,467*	*207,494*
Turkey	*152,968*	*175,264*	*198,296*	*230,130*
Iran	*156,897*	*189,922*	*220,171*	*255,518*
Other foreign Countries	*114,970*	*157,401*	*247,786*	*411,372*
GCC Countries	*112,058*	*60,714*	*91,293*	*148,706*
Jordan	*403,984*	*464,829*	*552,071*	*693,028*
Lebanon	*826,017*	*1,032,977*	*1,287,278*	*1,569,184*
Other Arabs	*13,116*	*41,671*	*61,229*	*99,735*
Total	*1,807,580*	*2,166,995*	*2,739,591*	*3,615,167*

Note: *Figures in italic indicate estimated numbers.* "Others" of Turkey and Lebanon include excursionists and transit who do not stay at least one night., Most of Iranian "Others" stay at special apartments for pilgrim.

Source: MOT, JICA Study Team

9.2 Domestic Tourist Projection

The number of Syrian domestic tourists is expected to increase in the future with an upward trend of family income and business opportunities. However, the number of Syrian hotel guests is not expected to increase in the short-run unless effective incentives are provided. The number of Syrian hotel guests up to 2015 is estimated under the following assumptions:

- domestic tourists grow at a rate of 3.2 percent p.a. by 2015 judging from the growth rates of population and GDP in the past and for projected;
- however, the above-mentioned increase will not directly lead to the increase in the hotel accommodation requirements, because alternative places other than hotels (chalets, holiday villas, apartments, etc.) are available and preferred by many Syrians;
- but this tendency will change gradually in proportion to the growth of GDP and marketing and promotion effort in the tourism sector after 2000;
- holiday tourists (about 15 percent of Syrian tourists by the year 2000) will remain at the same level until 2005 judging from the projection of GDP and they prefer to stay

at places other than hotels, but then hotel stay increase at 3.0 percent p.a. afterwards in proportion to the growth of GDP; and

- after the year of 2000, the number of Syrian hotel guests by business purpose would increase at an average growth rate of 3.0 percent p.a. up to 2005, and 4.5 percent up to 2015 in proportion to the development of intra-business.

The projected number of Syrian hotel guest and hotel tourist-nights in 2015 is still less than the 1989 level (1,303,894 hotel guests and 2,087,116 hotel nights).

Table 9.2.1 Projection of Syrian Hotel Guests

Scenarios	1996	1997 (estimated)	1998 (estimated)	1999 (estimated)	2000 (projected)	2005 (projected)	2015 (projected)
Syrian Hotel Guests	790,348 (-9.2%)	*742,927 (-6.0%)*	*720,639 (-3.0%)*	*709,829 (-1.5%)*	*706,280 (-0.5%)*	*801,898 (+2.6%)*	*1,223,175 (+4.3%)*
Holiday Tourists (assumed 15%)					*105,942*	*105,942 (0.0%)*	*142,377 (+3.0%)*
Business Tourists (assumed 85%)					*600,388*	*695,956 (+3.0%)*	*1,080,798 (+4.5%)*

Note: Number in parenthesis is Average Annual Growth Rate.
Source: JICA Study Team

Table 9.2.2 Projection of Syrian Hotel Tourist-Nights

Scenarios	1996	1997 (estimated)	1998 (estimated)	1999 (estimated)	2000 (projected)	2005 (projected)	2015 (projected)
Syrian Hotel Tourist-Nights	1,247,261 (-6.7%)	*1,172,425 (-6.0%)*	*1,137,253 (-3.0%)*	*1,120,194 (-1.5%)*	*1,114,593 (-0.5%)*	*1,265,490 (+2.6%)*	*1,930,316 (+4.3%)*
Holiday Tourists (assumed 15%)					*167,189*	*167,189 (0.0%)*	*224,688 (+3.0)*
Business Tourists (assumed 85%)					*1,114,593*	*1,265,490 (+2.6%)*	*1,930,316 (+4.5%)*

Note: Number in parenthesis is Average Annual Growth Rate.
Source: JICA Study Team

10 COMPONENT PLANS

10.1 Plan Structure

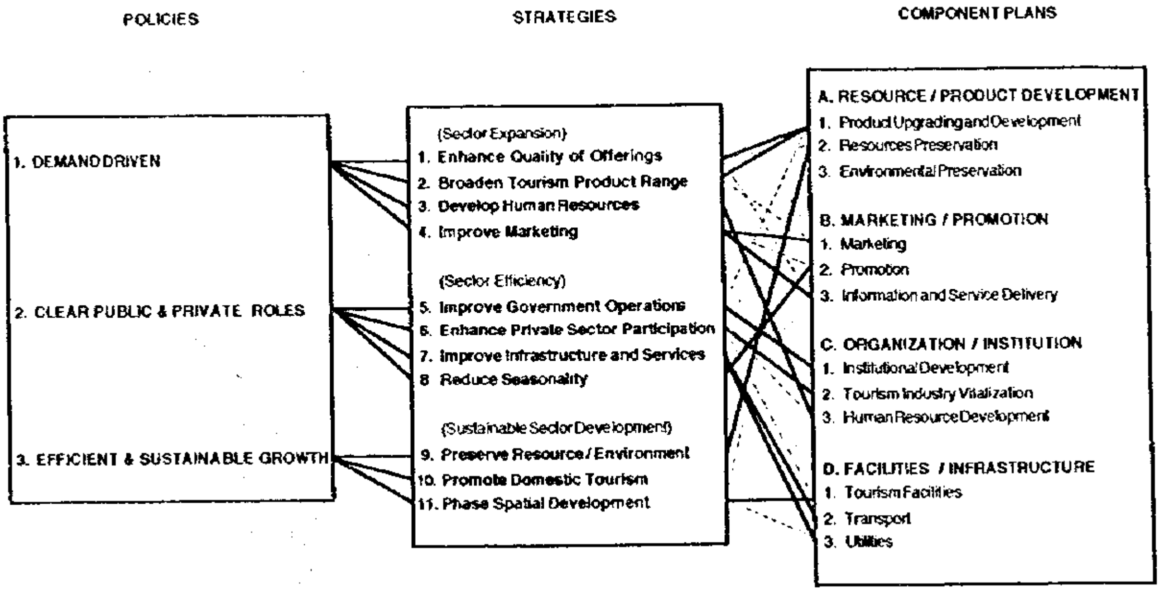
The component plans were prepared as concrete measures to realize the formulated tourism development policies and strategies. They were prepared in four broad categories:

1. Resource and Product Development Plan (RP Plan);
2. Marketing and Promotion Development Plan (MP Plan);
3. Organization and Institutional Development Plan (OI Plan); and
4. Facilities and Infrastructure Development Plan (FI Plan).

The component plans include recommended measures of short term (to 2005) and medium to long term (beyond 2005), which are classified by serial numbers with a prefix to each plan number: i.e. RP, MP, OI and FI.

Figure 10.1.1 shows the conceptual interrelationship among tourism development policies, strategies and component plans.

Figure 10.1.1 Policies, Strategies and Component Plans



10.2 Resource and Product Development Plan

10.2.1 Product Upgrading and Development Plan

(1) Objectives

The general objectives of this plan are:

- to improve quality of presentation of the most interesting sites to raise their value and satisfaction of all visitors, Syrian, Arab and foreign;
- to broaden tourism products to meet the expectations of all tourists to Syria; and
- as a result, to increase Syrian competitiveness in the world tourism market.

This plan follows the Strategies No. 1, No. 2, No. 5, No. 6 and No. 11.

(2) Measures for Cultural Tourism Products

RP1 Museum Improvement

Display upgrading and visitor facility provision of the most frequented museums: Damascus, Aleppo, Palmyra, Apamea, etc. Candidate museums and schedule are shown in table 10.2.1.

RP2 Site Presentation Upgrading

Provision and maintenance of international standard interpretation and tourist amenity in the most frequented cultural sites. Audio-guide (handy cassette tape player recorded in major languages of visitors) preparation under the private sector concession is also recommended. Candidate sites and schedule are shown in table 10.2.1.

Table 10.2.1 Museums and Sites Improvement

	before 2005 (SP 100 million a year)	beyond 2005 (SP 100 million a year)
Museums (signage, facilities)	Damascus National *	Damascus History
	Damascus Popular Traditions *	Damascus Epigraphy
	Aleppo National	Damascus Medicine & Science
	Aleppo Citadel *	National Archive and its Museum
	Latakia National, Tartous National	Aleppo Popular Traditions
	Arwad, Hama (Azem Palace)	Palmyra Popular Traditions
	Apamea National	Homs
	Bosra	
	Palmyra National	
Major Sites (signage, trails, facilities)	Damascus Citadel *	Qasr al Heir al Gharbi
	Crac des Chevaliers *	Qasr al Heir al Sharqi
	St. Simeon	Marqab Castle
	Salahdin Castle	Mari
	Apamea	Halabiya, Zalabiya
	Bosra	Ebla
	Rasafa	Palmyra (additional sites)
	Palmyra (various sites)*	Dead Cities (additional sites)
	Dura Europos	Ain Dara
	Dead Cities	

Note: * audio-guide provision candidate sites.
Source: JICA Study Team

Short Term (to 2005)

RP3 Tourist Zones in Old Cities

Creation of tourist zones in the historical districts of Damascus, Aleppo, Hama and Tartous is needed by the following measures (SP 1 to 2 billion in total):

- provision of improved foot path with signs, amenity (toilets, fountains, gazebos, shelters, etc.), visitor information centers, etc.;
- integration of tourist facilities and services into the network: restaurants, souvenir shops, art work studios, souq, stylish accommodation, etc.;
- provision of information booklets, etc.; and
- provision of maintenance program for the above and existing tourist amenity.

RP4 Palmyra-Qasr Ibn Ma'an Arab Citadel Panoramic Lookout

Because of its hilltop location, this ancient castle provides the best panorama over the ancient city, and is a favorite stopping point for tourists. Reworking of the access road and parking area for safe use by busses, and the construction of a lookout deck for pedestrians on the southeast side of the hill will make possible the increased use of this popular site by visitors without causing any further deterioration to the ancient site. Design and construction of these improvements should not exceed SP 5 million.

Medium to Long Term (beyond 2005)

RP5 Damascus-National Museum Development Plan

A long term management plan is needed to address critical issues of modernization and expansion of the nation's most important museum, and even of its ultimate transfer to a new location. This plan is needed for DGAM in the short term and is to be prepared by a Syrian-foreign team to include an architect, engineer and museum designer to work alongside DGAM personnel. The total cost for the foreign technical assistance including expenses could fall in the range SP 15 to 20 million.

RP6 Hama-Creation of the Byzantine Mosaic Garden

Protective landscaping, construction of paved walks and explanatory exhibits are required to prepare this city-center site as a cultural attraction. The mosaics are located on the private property of the newly built Roman Orthodox Church in central Hama, and some of them are situated beneath the structure of the church. The project is urgent since the mosaics are not yet prepared for permanent display for public viewing in the garden. The church itself or private benefactor could provide some or all of the funding. Total cost of the work is estimated in the range SP 5 to 10 million.

(3) Measures for Holiday Tourism Products

Short Term (to 2005)

RP7 Mt. Kassioun Lookout and Cable Car in Damascus

Mt. Kassioun is a suitable place to have a panoramic view of the oldest inhabited city of Damascus and its oasis: Gouta. This plan will attract not only local population but also foreign tourists. The cost is approximately estimated at SP 2.0 billion.

RP8 Recreation Area Development

Recreation area development in the vacant areas in Damascus (Rabweh, Gouta, etc.), Aleppo (Lake Assad, etc.) and the Coastal zones, etc.: nature parks, theme parks, amusement parks, Syrian cultural villages, etc.

RP9 Sports Facilities and Fields Development

Sports facilities and fields development in Damascus, Aleppo and the Coastal zones, etc.: sand and grass skiing grounds, ice skate rinks, gulf courses, tennis courts, swimming pools, introduction of various water sports, etc.

RP10 Soft Adventure Development

Soft adventure development the vacant area in Damascus, Aleppo and the Coastal zones, etc.: ballooning, camel ride, camel trekking, Bedouin camping, etc.

Medium to Long Term (beyond 2005)

RP11 Hot Springs and Water Parks Development

Development of hot springs near large cites: Damascus, Aleppo, Latakia, and along the major tour route as therapeutic centers or water parks, etc. Several sources are available for this plan.

(5) Measures for Other Tourism Products

Short Term (to 2005)

RP12 Souvenir Improvement and Development

Incorporation of existing souvenir shops into the Syrian tourism by:

- upgrading their offers and services;
- forming shopping network with provision of signs and information booklets, etc.: Damascus and Aleppo; and
- improvement of art works and souvenirs by means of marketing surveys and training program.

RP13 Folklore Performance Development

Incorporation of traditional and newly developed folklore into the Syrian tourism by encouraging the following measures:

- rehabilitation and training of traditional folklore;
- development of new performance based on the traditional folklore to meet the expectations of tourists both domestic, foreign and Arab;
- giving incentives to tourist restaurants to have folklore shows; and
- provision of information booklets, etc. for the today's performance.

RP14 Hijaz Railway Development

Incorporation of Hijaz Railway into the Syrian tourism by the following measures:

- restoration and development of Hijaz station; and

- service upgrading and facility maintenance between Damascus and Zabadani; and
- promotion of Hijaz railway in cooperation with tour operators.

Medium to Long Term (beyond 2005)

In the medium to long term, further development of all above is needed in the expanded areas.

10.2.2 Resources Preservation Plan

(1) Objectives

The general objectives of this plan are:

- to prepare selected sites for sustainability; and
- to promote a process of redevelopment in the old cities.

This plan follows the Strategies No. 1 and No. 9.

(2) Measures

The following measures are generally the responsibility of DGAM. DGAM will need more material resources to substantially increase its work of managing sites that are experiencing rising visitor volumes. The preservation of cultural sites is critical to the sustained expansion of cultural tourism. Increased revenues from tourism will enable DGAM to fund the appropriate preservation work, which is why the following series of measures is recommended.

Short Term (to 2005)

RP15 Computerized Building Inventory

There is no satisfactory building inventory available for the 5,000 structures in the old city of Damascus (and far more in Aleppo). A computerized database combining identification, architectural, photographic, archeological, historical, usage and ownership information is to be set up as a permanent planning tool, at the Old Damascus Technical Bureau (a local administration agency located in the Muktab Anbar) with access from several other relevant agencies. In addition, the database will serve as an urban redevelopment management tool to evaluate applications for building permits. Experts including an architectural historian and cadaster specialist will be needed. The technical assistance for this agency including foreign expertise and computer equipment, should be covered within a budget of SP 15 million.

RP16 Ancient Facade Cleaning Program

A technical assistance team of stone restoration experts is to test different methods including high technology methods to identify the most suitable techniques for cleaning of the numerous centuries old mosques, schools, caravansaries, castles and other structures found in the old parts of Damascus and Aleppo. Coordination between DGAM and Waqf is essential. This project will reverse the discoloring effects of 20th century pollution arising from unregulated motor vehicle emissions and fuel burning; it will also improve the beauty of these structures for nighttime illumination. It will also improve the role of both cities as "open air museums". Experts with experience in ancient façade cleaning in European cities will be required. Funding for the works can come from the regular operating budget of Waqf, while the foreign technical expertise needed for testing methods can represent a cost of broadly SP 20 to 25 million, to include experts and limited equipment supply.

Medium to Long Term (beyond 2005)

RP17 Palmyra-Urban Development Master Plan

The city needs to improve its long term plan for the eventual quadrupling of the urbanized area adjacent to Palmyra for internal consistency and compatibility with the ancient site. Preservation of Palmyra is crucial to Syria's international tourism industry (as well as for the continued study of archeology) so it is imperative that this Master Plan be substantially revised around 2005 to guide the form of future urban development. There is a need for foreign expertise including an archeologist, a parks and recreation planner as well as an urban planner, to revise and update the existing plan. The cost of this assistance is estimated at SP 20 million.

RP18 Underground Infrastructure Mapping for Old Cities

An increased pace of construction and renovation activity is expected in the old sectors of Damascus and Aleppo, yet the authorities have incomplete information on the composition of the underground natural morphology and of the ancient water systems installed by man. An accelerated pace of construction in these cities is expected, and there is currently a data void. One or more types of sensoring technology can be used to map modern and ancient systems of infrastructure (water supply, drainage, etc.) the locations of underground rivers, and soil types, in order to produce accurate maps for use for the engineering of future construction projects and environmental impact statements of all kinds. Required skills include a GIS specialist, urban archeologist, and infrastructure engineer. Foreign expertise would assist the technical bureaus of these two cities to set up and start the mapping process. Cost of foreign expertise is estimated at SP 20 to 25 million.

RP19 Damascus Citadel Foundation Diagnostics

The Citadel will be getting increased usage for cultural and tourism purposes, with new structures to be constructed inside it. DGAM needs technical assistance to define a diagnostic program using techniques such as soil borings and sensory instrumentation to measure humidity and salinity effects on the foundations of this structure, which lies immediately alongside the Barada River, and which is believed to be sitting over two or more underground river branches. The skills of a structural engineer and underground hydrology expert are needed to work with Syrian archeologists. The cost of foreign expertise is estimated at SP 20 million including provision for instrumentation.

10.2.3 Environmental Preservation Plan

(1) Objectives

The objectives of this plan which are common to the Environment Action Plan are:

- to preserve the nation's historical and cultural resources, as well as of its natural resources;
- to raise the awareness of the general public regarding environmental issues and to build the capacity of environmental responsibility; and

- to create a clear awareness among official planners and national and local level authorities of the requirements for sustainable development.

This plan follows the Strategies No. 5 and No. 9.

(2) Measures

RP20 Environmental Management of Tourism Projects

The projects formulated under this Master Plan are to be undertaken using IEE and EIA methods already established and in wide use. Execution of these projects will be in compliance with the dictates of the Ministry of Environment and with those of JICA. The continued application by the Syrian authorities of these methods in other tourism projects is strongly recommended. Areas for special attention include:

- waste management improvement in all the priority areas and selected sties, mainly solid waste collection and sewage systems;
- forests and green areas protection and development;
- air pollution reduction and control measures;
- rivers preservation plans, e.g. Barada and Orontes rivers;
- marine coastal areas rehabilitation; and
- traffic management and improvement.

RP21 Municipal Capability Building for Environmental Management

Coordination of measures of this plan will be necessary with the ongoing EU program for institutional strengthening of local administration management at Damascus, Aleppo, Homs and Latakia. A large part of the burden of good environmental management falls on local administration and for this reason close coordination between the implementation of tourism development projects and municipal authorities will be essential.

RP22 Rehabilitation of Old Cities

Lack of environmental management in the old cities is leading to severe quality of life problems of substandard sanitation, unsightly random waste accumulations in public areas, poor drainage, etc. The interests of tourism are essentially the same as those of the local residents, so the improved environmental management of these sensitive urban areas is a critical goal of all of these rehabilitation projects.

10.3 Marketing and Promotion Development Plan

10.3.1 Marketing Plan

(1) Objectives

The objectives of the marketing plan are:

- to increase the awareness of Syria as a favorable tourist destination in the established tourist generating markets of the world;
- to develop new and potential markets by monitoring and identifying changing desires and needs of market segments; and

- to hold a competitive position in the world destination market by mobilizing effective promotional measures supported with attractive proposals and products.

This plan follows the Strategies No. 2 and No. 4.

(2) Measures

Short Term (to 2005):

MP1 Foreign Media and Travel Trade Approach

Intensifying of foreign media and travel trade approaches, in order to reverse negative tourist perception toward Syria that now exists particularly in the West.

MP2 Widen Target Market Approach

Introduction of a modern segmented marketing approach toward:

- traditional European markets (firstly Germany, France, the UK, Italy, Spain, and secondly Benelux and Scandinavian countries) from the routine all-round approach across Europe to a country-by-country approach focused on growing market sources and segments, from the narrow antiquity-oriented market base to a broader culture-tourism base;
- neighboring Arab markets to cultivate the up-market intra regional clientele, beside the established middle-class segment seeking cool summer retreat in Syria;
- seminar, meeting and incentive market, initially in the neighboring region, then on to European market;
- Asian market through programmed and segmented approaches, with due consideration to the diversity of Asian cultural backgrounds (such as on religious level, from Shinto-Buddhist Japanese, Confucian-Taoist Chinese, Christian Filipino, Buddhist Thai, Muslim Malay-Indonesian to Hindu Indian); and
- niche markets for activity holidays (desert experience, nature trek and soft adventure - desert safari, hot-ballooning, etc.).

MP3 Alleviation of Seasonality

Initiation of measures to alleviate high seasonality and to broaden salable tourist season:

- introduction of 3-season tariff: high, shoulder and low;
- offer of reduced tariff package for 2 to 3 city combination, for shoulder and low seasons (e.g. Damascus, Palmyra, Latakia 3-city combination); and
- direct marketing approach to the European market to persuade the travel comfort advantage of shoulder season.

MP4 Price-Awareness Increase

Increase of price-awareness and competitiveness:

- monitoring current price and tariff situation in competitive destinations; and
- establishing pricing policy for all Syrian tourism products across the industry.

MP5 Appointment of Marketing Agency

Hiring of one or more qualified foreign marketing agencies (one-year term contract for a minimum of two years), covering the major European markets (firstly Germany, France, the UK, Italy, Spain, and secondly Benelux and Scandinavian countries), in order to increase media exposure of Syria as a desirable destination:

- to open up media and travel trade dialogue and contact;
- to prepare regular press releases (from quarterly to bi-monthly) and to hold regular press conferences in major European business centers; and
- to organize sponsored media and travel trade "familiarization (fam) trip" to Syria from major European markets (firstly Germany, France, the UK, Italy, Spain, and secondly Benelux and Scandinavian countries); two to four fam trip teams of 15 members each annually.

Medium to Long Term (beyond 2005)

MP6 Consolidation of the Traditional Market

Consolidation of Syria's position in the traditional European market by:

- forging closer business partnership with major established tour operators, through regular and repeated after-sale call (from minimum bi-annually to quarterly);
- extending approach to influential tour organizers (e.g. clubs, associations, incentive houses, meeting and conference organizers, etc.).

MP7 Approach to the New Market

Intensifying approaches to new and emerging geographical markets (Australasia, South and Central Asia, Eastern Europe, etc.).

MP8 Approach to the Niche Market

Enhancing of product profile for niche markets through introduction of diversified product line (culture, folk arts, folk life, performing arts, theme events, sports gathering and competition).

MP9 Approach to MICE Market

Tapping of the urban and conference tourism market (so called MICE market - Meeting, Incentive, Convention and Exhibition), with Damascus as its center as the necessary supportive infrastructure and services are being provided (a modern and well-equipped conference complex with the services of PCO - professional congress organizers).

MP5 Appointment of Marketing and Promotion Agency

Hiring of one or more qualified foreign marketing agencies (one-year term contract for a minimum of two years), to cover European, American and Asia-Pacific markets;

- to open up contact for influential tour organizers (clubs, associations, incentive houses, conference organizers, etc.) active in each market;
- to produce purpose-edited "MICE tour planner and sales manual" for tour organizers;
- to organize an appropriate venue for focused sales campaign at major business centers

of the potential market: Europe, Americas, and Asia-Pacific;
- to work out a practical plan and guideline for sophisticated product development and marketing such as MICE segment;

10.3.2 Promotion Plan

(1) Objectives

The objectives of the promotion plan are:

- to enhance the Syrian profile and exposure as a tourist destination in the travel trade and the general public in the tourist generating countries ; and
- to motivate and persuade potential tourists to visit Syria through an efficient mix of promotional measures.

This plan follows the Strategies No. 4, No. 8 and No. 10.

(2) Measures for Promotion Materials

Short Term (to 2005)

MP10 Syrian Sales Materials

Production of a variety of sales tools specially focused to the travel trade and organizers (tour operator sales manual, newsletter, theme tour route catalog, video clip, poster).

MP11 Motivation Materials

Production of motivational materials aimed for the general public (example: "Jordan, Legend, History, Hospitality" issued by Jordanian MOT).

MP12 On-Site Materials

Production of practical, user-friendly on-site materials aimed for the general public.

MP13 Appointment of Promotion Agency

Hiring of one qualified professional promotion agency (either foreign or Syrian; one-year term contract for a minimum of two years) to prepare appropriate promotion materials:

- to draw up a list of wholly new and modern promotional collateral required for upgraded Syrian tourism promotion and presentation; and
- to supervise production and distribution of required materials.

Medium to Long Term (beyond 2005)

MP14 Purpose-Edited Sales Tools

Production of purpose-edited sales tools focused to the travel trade and organizers (incentive and conference organizer manual, newsletter for niche and SIT market).

Table 10.3.1 Recommended Overseas Promotion Materials

Title	Category	Size / Format	Language	Target and Content	Priority
a) Syria: Cradle of Civilization	general promotion	1 sheet-folds 10 x 21 cm full-color	E, F, G, I, S, A, J	general public: modified content of MOT's existing "Syria at a glance"	1
b) Syria Tour Planner / Sales Manual	planning / sales guide for travel trade	A4 full-color 30/40 pages	E, F, G, I, S, A, J	tour operator: model tour route, service directory (hotel, transport, travel agent), feature events / activities, etc.	2
c) Syria: Cradle of Civilization	general promotion	A4 full-color 8 pages	E, F, G, I, S, A, J	general public: condensed edition of existing material, with practical references.	3
d) Syria Travel Newsletter	promotion	A4 1 or 2 sheets mono-color	E, F, G, I, S, A, J	travel trade and media for publicity / promotion: monthly or bi-monthly	
e) Syria Visitor's Companion (Dual use for Gateway Information)	general promotion and gateway information	10 x 21 cm cover in color, text in mono-color 15 / 20 pages	E, F, G, I, S, A, J	general public and travel trade: general, but more practical information (transport, hotel, dining, shopping, tourist attractions)	1
f) Syria Travel Guide (Dual use for Gateway Information)	promotion and gateway information	1 sheet four-folds 10 x 21 cm part-color	E, F, G, I, S, A, J	general public and travel trade: theme tour routes (antiquities, roman ruins, crusader castles, etc.)	3

Language: E: English, F: French, G: German, I: Italian, S: Spanish, A: Arabic, J: Japanese
Source: JICA Study Team

Table 10.3.2 Recommended Gateway and On-Site Materials

Title	Category	Size / Format	Language	Target and Content	Priority
a) Syria: Visitors Companion (Dual use of Promotion Material)	gateway information	10 x 21 cm cover in color, text in mono-color 15 / 20 pages	E, F, G, I, S, A, J	general public: general, but more practical information (transport, hotel, dining, shopping, tourist attractions)	1
b) Damascus: Map & Guide Aleppo: Map & Guide	gateway information	1 sheet four-folds 10 x 21 cm cover-color reverse side mono-color	E, F, G, I, S, A, J	general public: practical tourist information and detailed map	2
c) 9 Site Titles: Palmyra Bosra/Sweida Crusader Castles Latakia/Ugarit Tartous/Arwad Christian Sites Hama/Homs Apamea/Dead C. Euphrates	on-site information	1 sheet two-folds 10 x 21 cm mono-color Palmyra sheet can be expanded to 1 sheet of four-folds 10 x21 cm	E, F, G, I, S, A, J	general public: concise / practical information and guide on attraction / site with practical detailed map	2
d) Syria Travel Guide (Dual use of Promotion Material)	gateway information	1 sheet four-folds 10 x 21 cm part-color	E, F, G, I, S, A, J	general public: theme tour routes (antiquities, roman ruins, crusader castles, etc.)	3
e) Theme Titles Arts and Crafts Dining and Entertainment	gateway information	1 sheet two-folds 10 x 21 cm full-color	E, F, G, I, S, A, J	general public: concise introduction and motivation for souvenir purchase, motivation / practical information on eating out / night-out	1

Language: E: English, F: French, G: German, I: Italian, S: Spanish, A: Arabic, J: Japanese
Source: JICA Study Team

MP15 Theme Motivation Materials

Production of theme motivational materials aimed for the travel trade and general public, according to the progress of new line of product development (example: "Christian Pilgrimage: Maalula, Seidnaya, St. Simeon", "Crusader Castles: Crac des Chevaliers, Salahdin, Marqab, Safita").

(3) Measures for Promotional Approaches

Short Term (to 2005)

MP16 Participation in Travel Trade Shows

Participation in selected travel trade shows and fairs in the major source markets (firstly in Europe, then on to Americas and Asia - Pacific), with well-trained staff and ample stock of promotional materials.

MP17 After-Sales Calls

Strengthening of repeat after-sales calls at a regular interval to follow up the initial contact established with potential buyers (tour operators and organizers) at the fairs and shows (from minimum bi-annually to quarterly), to keep the buyers posted with up-dated information and products (press releases, new brochures, sales kit et al.).

MP18 Familiarization Tour

Organization of sponsored travel trade "familiarization (fam) tour for the buyers (firstly from major European source markets, then on to Americas and Asia - Pacific - two to four teams from Europe, one each from Americas, Asia and Pacific, each team of 15 members annually).

MP19 Contracted Representative Offices

Opening Syrian tourist representation office in major European centers: Paris, Frankfurt and London, utilizing cost-effective contract representation system locally available in each center (one-year term contract for a minimum of two to three-years).

MP18 Liaison with Airlines

Making liaison closely with the Syrian Airlines and other international airlines serving Damascus to heighten the profile and exposure of Syria in major source market (joint participation in their scheduled advertisement programs on cost -share basis).

MP20 Syrian Cultural Exhibitions

Holding a Syrian cultural exhibition (the like held at L'Institut du Monde Arabe in Paris in 1993) in major markets, ideally to tie in with the timing of major travel fairs: ITB Berlin, WTM London, etc. Suggested cities are Paris, Frankfurt and London up to the year 2005. Bilateral government level (MOC) cooperation needed, in order to enhance its exposure and to solicit host country contribution in kind (finance, materiel, personnel, and exhibition know-how).

MP13 Appointment of Promotion Agency

Hiring of one or more qualified foreign promotion agencies (one-year term contract for a minimum of two years), to cover the major markets (Europe, then to Americas and Asia - Pacific:

- to upgrade Syrian travel booth presentation, in order to increase its visibility in the fair and show;
- to supply professional information and service staff on temporary term during the fair;
- to organize opportunity for media exposure and ad-hoc destination seminar;
- to prepare a listing of most influential buyers (tour operators, organizers) to facilitate sales approach of Syrian suppliers (air, hotel, tour and others);
- to keep business contact with Syrian suppliers; and
- to cultivate possibility of collaboration in Syrian destination development from established international air carriers of the source market (such as Air France, Lufthansa, etc.).

Medium to Long Term (beyond 2005)

MP22 Joint Sales Mission

Organization of joint and repeated sales mission (MOT, Syrian Airlines, hoteliers, tour operators, tourist service providers) in order to strengthen established business partnership and to cultivate potential and new business opportunities: twice annually to each major source market country, inclusive of the occasion for major travel fair.

MP23 Purpose-Made and Theme Sales Mission

Organization of purpose-made and theme sales mission to SIT and niche markets in the established source market with attractive products and proposals, according to the progress of new line of product development.

MP24 Own Representation Offices

Opening own tourist representation offices in Paris, Frankfurt and London.

MP19 Contracted Representative Offices

Opening contracted tourist representation offices in New York and Tokyo.

MP25 Promotion through Syrian Embassies

Initiation of tourist promotion information service at Syrian diplomatic delegations in other major source markets not covered as above.

MP26 Promotion Seminars

Organization of ad-hoc promotional seminar and workshop for the buyers in major source markets, as opportunity materializes.

MP27 Joint Promotion with Neighboring Countries

Strengthening of regional promotional tie-up (Lebanon, Jordan and Egypt).

10.3.3 Information and Service Delivery Plan

(1) Objectives

The objectives of the information and service delivery Plan are:

- to develop a new range of information service systems in order to enhance the level of tourist experience and satisfaction; and
- to develop a competent service delivery system in order to keep up with competition in the world tourist market.

This plan follows the Strategies No. 1 and No. 4.

(2) Measures

Short Term (to 2005)

MP28 Provision of Gateway Information

- production and improvement of gateway information materials;
- improvement of tourist information centers in the old cities: Damascus and Aleppo;
- tourist sign-posting - Damascus and Aleppo; and
- extensive front-line service staff retraining.

MP29 Provision of On-Site Information

- production of tourist-friendly information materials;
- introduction of tourist trails and sign-posting at major sites; and
- extensive front-line service staff training.

Medium to Long Term (beyond 2005)

MP28 Provision of Gateway Information

- diverse option for holidaying in Syria;
- customized suggestions for SIT and FIT market segments;
- multi-language materials - European, Arabic, Asian and others; and
- staff retraining on language skills and cross-cultural service delivery.

MP29 Provision of On-Site Information

- new visitor center in developing tourist sites and areas;
- introduction of audio-visual orientation programs in visitor center and museums at major sites; and
- staff training on language skill and cross-cultural service delivery.

10.4 Organization and Institutional Development Plan

10.4.1 Institutional Development Plan

(1) Objectives

The objectives of this plan are:

- to induce efficiency of the operation of MOT and related agencies;
- to clarify roles among the public, joint and private sectors; and
- to enhance the private sector participation.

This plan follows mainly the Strategies No. 3, No. 5 and No. 6.

(2) Measures for Overall Tourism Administration

OI1 Authorization of the Master Plan

This study formulates a draft National Tourism Development Master Plan; it will include some optional proposals and alternatives that the MOT will contribute. Considering the importance of tourism in Syria, the Master Plan should be authorized by the appropriate authority of the Syrian government. The Master Plan should be then made fully available to the public, because it will be an effective plan only if both the government and the private sector are fully aware of its contents and share a common understanding of the direction of tourism development in the country.

OI2 Strengthening Supreme Council and Administrative Coordination

The Demand Driven tourism development can not be realized only by the government side, but also by the private sector. In the interest of the efficient public-private dialogue and coordination, it is recommended that representatives of tourism industries be added to the members of the Supreme Council: e.g. representatives of the Hotel Association and SATTA.

OI3 Inter-Ministerial Cooperation between MOT and DGAM

Because of the increased importance of the cultural tourism, close collaboration can be formalized through periodical meetings held between MOT and DGAM. The issues of meeting should include the coordination relating to the management, preservation and development of archeological sites and historic buildings, etc. The creation of a Visitors Services Unit as a joint effort of these two agencies is another example of recommended collaboration, which will be described later part of this section.

OI4 Proper Budget Allocation

Considering the importance of tourism in Syrian socio-economy, the existing budget of MOT is too small. Enough allocation of governmental budget to the tourism related agencies is needed to secure appropriate measures to protect and develop resources, to foster related industries, etc.

OI5 Creation of Formal Committee for Tourism Promotion

Creation of a consultative committee among MOT, Syrian Airlines, hotels and tour operators, in order to forge collaborative working platform is strongly recommended in order to give common direction of tourism promotion among related agencies.

OI-6 Launching Public Awareness Program

Activation of the private sector, keeping Syrians' good hospitality and preservation of tourism resources including cultural heritage, all of these are guaranteed through the understanding of Syrian nation that how important the tourism is.

Public Awareness Program to improve peoples' understandings are thus taken by many countries. The program is not only for promoting tourism, but also for improving national identity. The following examples are considered as specific measures:

- publishing the booklet explaining the role of tourism in national economy, the importance of tourism in cultural development and the function of contributing to world peace, as well as the general situation of tourism;
- holding the meetings at local community level to explain about the situation of tourism, the relationship between tourism and their daily life, the better tourist services, tourism and their economy and job opportunities, etc.;
- introducing school education concerning the relationship between tourism and Syrian economy, history, culture, etc. in coordination with Ministry of Education; and
- encouraging school trips to tourist sites, especially to archeological and cultural sites, in coordination with Ministry of Education.

(3) Measures for Strengthening MOT

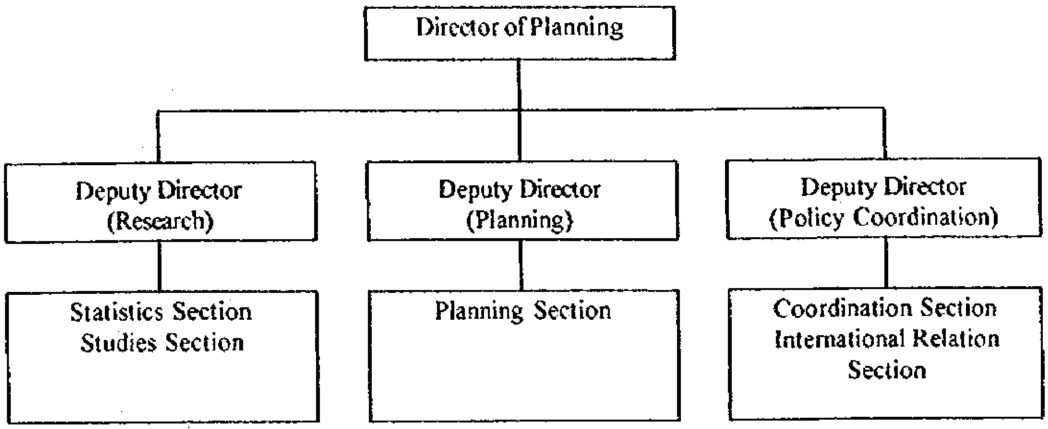
OI7 Strengthening Directorate of Planning

In order to lead the Demand Driven tourism development, it is essential to grasp the accurate situation of Syrian tourism market and to give a proper policy direction. The following is recommended to strengthen the Directorate of Planning:

- Appointing three Deputy Directors for Research, Planning, and Policy Coordination;
- Deputy Director for Research is responsible for analyzing the situation of Syrian tourism from the aspect of both demand and supply;
- Deputy Director for Planning is responsible for identifying policy direction, drafting master plan and 5-year plan, investment budget, etc.; and
- Deputy Director for Policy Coordination is responsible for the matters concerning the Supreme Council, international organizations, bilateral international negotiations, coordination with other government, collaboration with neighboring countries, and the private sector organizations.

It is also recommended to have assistance of foreign experts dispatched from foreign donor agencies.

Figure 10.4.1 Proposal for the Organization of Directorate of Planning



Source: JICA Study Team

OI8 Introduction of Computerized Statistical Analysis

The following is recommended for the introduction of computerized statistical analysis:

1st step (immediately):
- introduction of a few PCs at Directorate of Planning (Statistics Section) with spread sheet calculation software and database software; and
- creation of a database of arrivals, hotel registration, hotel tourist-nights, etc. by Mohafazat, nationality, year and month, etc. including creation of tables and figures.

2nd step (to 2005):
- publication of tourism statistics;
- introduction of PCs at every MOT regional office;
- creation of data at each regional offices and sending magnetic data to MOT; and
- analysis of regional data would be done by regional offices.

3rd step (beyond 2005):
- establishment of on-line computer network among MOT and regional offices; and
- expansion of computer use for other purpose (personnel affairs, financial affairs, providing information, etc.).

Analysis can be made according to Mohafazat, however, Palmyra is recommended to be separately analyzed from Homs, similar to the analysis in this Study.

OI9 Tourist Survey

The Deputy Director for Research can set up tourist surveys to fill the serious void of market data about visitors' behavior, level of satisfaction, length of stay, and detailed expenditures. The survey can be initially defined with the assistance of a tourism survey expert, and undertaken once every 2-3 years, and then annually once the process is clarified. The results will be valuable for market research purposes, and are to be widely distributed for the benefit of the Syrian and foreign travel trade.

OI10 Visitor Behavioral Analysis

The Deputy Director for Research will collaborate with the Immigration Directorate to develop a mutually acceptable visitor records to generate statistics by nationality on subjects such as: entry and exit gateways, mode of travel, length of stay, visa type, and seasonal patterns. At present, this information is totally lacking, and if these two directorates collaborate, they can easily process the data on an ongoing basis at no sacrifice to the security of the information or efficiency of the directorates. This is a form of market data which tourism ministries in many countries generate and publish for the benefit of the international travel industry.

OI11 Production of Annual Report

Planning and Tourism Relations directorates of MOT can produce a line of publications that are informative for both the public and private sector sectors in Syria and abroad. These are to include annual reports with improved statistical and survey information, quarterly (and eventually monthly) newsletters tracking the latest trends in all sorts of tourism related activities, and even summarizing trends in neighboring countries of Lebanon and Jordan. Full versions of the publications in Arabic and English are essential as well as in French and German languages. This will represent tangible proof of the improved demand-driven orientation of the ministry and responsiveness to the needs of private business.

(4) Measures for Improving Tourists' Satisfaction

OI12 Creation of a Visitors Services Unit within DGAM

A Visitors Services Unit is to be created within Engineering Department of DGAM to contain 4-5 experts from both DGAM and the MOT. Its purpose is:

- to design improvement programs for museums and ancient sites to raise their educational value;
- to make them safe for visitors to visit; and
- to better safeguard the sites from abuses by visitors and by local populations.

Actual construction work is to be done by DGAM's own resources. The work can include improvements such as:

- multilingual signage and displays;
- restaurant facilities and retail stands or shops;
- sanitary facilities and public telephone installations;
- safety features (handrails, staircases, lighting, etc.);
- vehicle driveways and parking areas; and
- way-marked trails to direct visitor flows through sites.

Experts are to include skills such as a landscape architect, an archeologist, a graphics artist, a museum specialist and a displays expert. These members can be drawn from the staff of the two ministries so that no new personnel need be hired. If possible, the unit is to be operated by the personnel trained under the EU Cultural Heritage Program.

OI13 Creation of a Sites Improvement Fund for DGAM

Its purpose is to fund urgent improvements to the priority museums and ancient sites, including projects managed by the Visitors Services Unit described above. This fund will supplement and not replace the funding for improvements that is already provided by MOC.

The Supreme Council of Tourism and the Higher Council for Antiquities are to approve DGAM's spending programs for this fund. Income sources can include:

- a share of admission income for museums and archeological sites;
- fees from cultural events held on DGAM properties;
- fees from private events held on DGAM properties (rental of rooms for ceremonies, parties, etc.);
- corporate sponsorships and endowments; and
- other international donor and culturally oriented agencies.

OI14 Introduction of Ticketing Innovations

The introduction of ticketing innovations popular in some countries, such as master passes valid for one, three or twelve months, in one city, or nationwide, is recommended to increase visitor volumes and revenues. Finance Ministry permission may be required for this reform, which proposes financial autonomy and accountability for this specific purpose.

OI15 Creation of a Corps of Heritage Site Guides

This multilingual corps will consist of tested university graduates in archeology, architecture, history or anthropology. The guides are to be licensed by MOC on a site-specific basis, for the most heavily visited sites such as Damascus Citadel, Azem Palace, Damascus National Museum, Omayad Mosque or Aleppo Citadel. Unlike the existing corps of generalist tour guides licensed by MOT, the site guides will be tested and licensed for their thorough knowledge of specific sites and for their ability to provide highly informative commentary in one or more languages. MOC together with the history department of the national universities at Damascus and Aleppo will train the candidates. This proposal builds on the same proposal in the EU program, which provides only limited funding.

OI16 CIQ Procedure

There are also rooms for improvement in CIQ procedures and condition of visa issue. Although immigration control by visa is traditionally a reciprocal matter, many countries intending to increase foreign tourist visits allow the entry without visa regardless of the reciprocal rule. In order to facilitate the processing of tour groups at checkpoints, and to strengthen the competitiveness of Syria, visa free entry for visitors from high income countries (e.g. OECD and GCC countries) should be introduced as early as possible at the both international airports and at the major road border crossing (with Lebanon, Turkey and Jordan) . In addition, it is desirable to make further efforts to speed up CIQ procedures in the airports and highway borders. Smoothness of CIQ procedures gives tourists a first impression of the country and stay influencing tourists' image.

10.4.2 Tourism Industry Vitalization Plan

(1) Objectives

The objectives of this plan are:

- to minimize restrictive regulations and increase incentive measures;
- to introduce free and competitive environment for the tourism development; and

- to upgrade the quality of services of tourism industry.

This plan follows the Strategies No. 1, No. 6 and No. 7.

(2) Measures

OI17 Deregulation for Hotels

Regulation of the hotel industry in many countries is minimal, with no apparent detriment to tourism in those countries. Hotels need to be built according to sound building standards, and operated safely and hygienically. In a competitive hotel industry, many pricing strategies exist, so price controls are largely ineffective. Travel agencies, tourist information offices, hotel associations and travel guide books typically supply valuable recommendations enabling travelers to make educated selections of hotels. MOT's rating system is not very informative. For this reason, it is recommended that the MOT discontinue the existing hotel regulation. Under deregulation, less complicated procedure for establishing and operating hotels should be introduced.

OI18 Deregulation for Restaurant:

A registration system rather than a licensing system can be set up at the restaurant association enabling all properly registered members to proudly display the membership symbol in full public view. The restaurant association can function as a self-disciplining mechanism, by withdrawing membership from restaurants that fail to meet minimal service standards (hygiene, foreign language menus and staffing, full price disclosure, menu size, etc.).

OI19 Strengthening Incentives

As it is mentioned, the transfer of profit to abroad is not allowed in the tourism field, although it is allowed to the field covered by the Law No. 10 of 1991. It vitally affect the judgment of investors, is considered as a reason of minimal foreign investment in tourism field. Legislative Decree No. 186 of 1985 should be amended to allow transfer of profit.

Introduction of government loans for tourism development is another point to be considered. To avoid undo favoritism for the tourism sector over others, temporary financial incentives could be adopted. The incentive of low interest government loans could be considered for a limited period of time: e.g. up to four years, to stimulate needed investment into the hotel industry. A more restrictive option is a government guarantee program for a limited initial period.

OI20 Clarification of Investment Criteria and Procedures

Investment in tourism field, especially to tourism facilities, is influenced by the governmental regulations of various fields, such as foreign currency, land ownership, land use and urban planning, architectural standard, food hygiene, etc. These regulations are managed by different agencies representing many hurdles for any new project to clear. MOT's Investment Directorate can fulfill the important function of the reliable source of complete information on investment conditions for Syrian, Arab and foreign investors alike. It can compile a "Businessman's Guide to Tourism Investment in Syria" in Arabic and English languages and provide counseling to potential investors. This directorate must maintain continuous liaison with the other agencies for foreign trade and investment promotion; it must also represent the interests of the tourism entrepreneurs and recommend reforms that MOT and Supreme Council of Tourism can seek, such as simplification of procedures to cut red tape.

O121 Introduction of "One-Stop Shop" System

It is usually very difficult for especially foreigners to clear the government procedures because of language barrier, difference of administrative system, etc. So it is very helpful for investors that MOT helps clearing regulation procedures. Therefore, it is recommended that MOT open a unified window or "one-stop shop" for investors which will show and arrange clearance of all necessary procedure of central and local administration, and to announce it clearly to investors. Specifically, one of the directorate of GCETP should be renamed that everyone can easily understand that is the window section for investors. Similar agencies are found in Egypt, Dubai, Morocco, Southeast Asian countries, etc.

O122 Increased Financial Incentives for Construction Projects in Old Cities

To compensate owners for the higher cost of architectural preservation in the old cities (i.e. for the purpose of "recycling" old buildings) builders such as companies, building societies and cooperatives can be awarded increased financial incentives for funding projects in accordance with architectural norms in designated historic areas. For example, a full or partial exemption from the onerous "change of use tax", collected whenever a structure is changed from residential to commercial use, can be granted for qualifying renovation projects. This incentive can be further restricted to lodging, restaurant or retail activities.

O123 Increased Hotel Investment Incentives in Old Cities

To address the lack of hotel space in old cities in mid and small sized hotels, the existing incentive scheme for hotel investment can be modified to offer more advantageous terms for renovation projects. Longer tax holidays or higher tax reductions can be offered for such projects, as compared to projects in other areas. This will help offset the high cost of architectural preservation.

O124 Partial Rent Decontrol in Old Cities

For investors renovating buildings in the old cities for commercial or residential rental purposes, a less restrictive rental code can apply such as a shorter rent hike phase-in period of two years in place of the current three. Easier eviction terms for delinquent commercial tenants is another possible decontrol measure. The Mohafazat can also provide special assistance for renovation projects by relocating incompatible nuisance-causing industrial businesses (workshops or warehousing activities) to specially designated locations outside the old districts, to facilitate the clearance of tenants from old structures.

O125 Relocation Inducements for Institutions to Old Cities

To increase the number of "smokeless" economic activities in the old districts, and to raise the daytime population with professional workers, the government can provide tax or utilities inducements to non-profit and foreign institutions (consulates, diplomatic housing, cultural centers, etc.) and to professional firms such as accounting firms or insurance companies, to establish offices in buildings in the old cities. This measure will speed the replacement of nuisance-causing industrial and wholesaling activities with compatible retail and office activities. This process has occurred in renovated old neighborhoods in many countries.

O126 Capital and Profit Repatriation Privilege

Old cities in other countries have attracted much private and foreign investment for preservation purposes. Not only can foreign investment bring capital, but it also brings in valuable business expertise. To stimulate foreign investment in the old cities, the extension of privileges already granted for other sectors of activity under Law No. 10 of 1991, is recommended for renovation projects in designated historic districts. This reform can contribute as a partial solution to the problem of capital scarcity that is limiting capital investment in Syria.

10.4.3 Human Resource Development Plan

(1) Objectives

The objectives of the human resource development plan are:

- to upgrade services quality and establish its system;
- to support capability building of MOT staff; and
- to improve quality of offerings.

This plan follows the Strategies No. 1, No. 3, No. 5 and No. 7.

Table 10.4.1 Training and Type of Education

	Formal Education			Non-Formal Education	
Private and Public Services	University /College	HITC /HIPS	Vocational School (Public/Private)	Short Training Course	Seminar (International)
Hotel restaurant management staff	♦	♦			♦
Hotel restaurant operation staff		♦	♦	♦	
Tour guides travel agents			♦	♦	
Craftsman artisan			♦	♦	
MOT staff	♦			♦	♦

Source: JICA Study Team

(2) Measures for MOT

O127 Planning Staff Training Program

Training of officials is essential for MOT to carry out its tasks. Especially, it is important to bring up younger staffs who can be in charge of policy and planning matters. So it is recommended that MOT carry out in-service training program. The program should include lectures of private tourism companies, associations, foreign airlines and embassies in Damascus to learn the idea and way of thinking outside the ministry.

In addition, MOT staff should be given the opportunity to look at activities in foreign countries. Watching comparative examples is a useful way to improve ability. A suitable budget should be arranged to support these foreign visits. Participating seminar program by foreign donor agencies should also be considered positively.

O128 Marketing Staff Training

Introduction of extensive executive and managerial level training on modern tourism marketing, with the support and input of appointed foreign marketing experts.

(3) Measures for HTTC and HITS

Short Term (to 2005)

OI29 Private Sector Participation

Appointment of experienced instructors from the private sector through the collaboration with the related private associations. It is recommended to keep close relation with the private sector and foreign institutions which have good experiences, and the latest knowledge and information.

OI30 Appointment of Foreign Instructors

Invitation of foreign instructors (short term and bilateral and multilateral aids basis): 4 to 5 candidates from WTO, GCC or OECD countries.

Medium to Long Term (beyond 2005)

OI31 Overseas Training

Introduction of overseas training scheme under bilateral and multilateral aids (10 to 15 candidates per year) (SP 13.5 million per year).

(4) Measures for the Private Sector

Short Term (to 2005)

OI32 Incentives for In-Service Training

Tourism is labor intensive industry, and the quality of workers at all levels affect directly to the satisfaction of tourists. In-Service training of workers: e.g. foreign language course, upgrading services and general education, is needed and to be encouraged. MOT can provide incentives: e.g. holding free classes, financial assistance or tax reduction for these in-service training.

OI33 Creation of Handicraft Committee

Creation of a handicraft committee among the related agencies such as MOT, the Ministry of Social Affairs, the Ministry of Labor, NGOs and international organizations for improving handicrafts quality and their development.

Medium to Long Term (beyond 2005)

OI34 Handicraft Development and Training

Improvement of the existing handicraft centers in Damascus and Aleppo under the guidance of the above committee having the following functions:

- improve product design and development, focusing on foreign tourists;
- ensure quality control;
- provide management consulting in planning, costing and pricing, order processing, accounting, materials control and packaging for satisfying foreign tourists; and
- train in advanced production technology.

10.5 Facilities and Infrastructure Development Plan

10.5.1 Tourism Facilities Plan

(1) Objectives

The general objectives of this plan are:

- to provide adequate and sufficient facilities to accommodate all type of tourists;
- to upgrade quality of tourism facilities to satisfy tourists' experience; and
- as a result, to make Syria recognized as a prepared destination in the world tourism market.

This plan follows the Strategies No. 5, No. 6, No. 7 and No. 11.

(2) Measures for Accommodation Facilities

FI1 Provision of Additional Hotel Capacity

The following estimation was made to identify the necessary additional hotel capacity.

Based on the frontier arrivals projected before (Scenario A), the hotel tourist-nights for 2000, 2005 and 2015 were estimated by applying the following assumptions:

- for each tourist segment (OECD countries, Turkey, etc.), the shares of the mode of accommodation will be the same as those in 1995 estimated in Chapter 3;
- ALS (average length of stay) for hotels, which often tends to decrease was assumed constant at the average between 1991 to 1995, assuming appropriate measures for tourism development and promotion will be applied; and
- the number of hotel tourist-nights by Syrians is described in Section 9.2.

Necessary number of hotel beds were calculated based on the hotel tourist-nights projection above. Following assumptions were applied for the distribution:

- hotel tourist-nights were distributed to the 8 tourism zones according to the shares of their hotel tourist-nights in 1995 for each market segment; foreign, Arab and Syrian tourists;
- annual gross bed occupancy rates are assumed at 30 percent (approximately equivalent to 40 percent of room occupancy) for Palmyra and Coastal zones taking into account the strong seasonality, and 45 percent (approximately equivalent to 60 percent of room occupancy) for all other zones[3]; and
- above assumed bed occupancy rates are low if they were real achievement, however, fluctuation was taken into consideration.

It should be noted that the distribution of hotel tourist-nights was made according to the shares of each market segment in 1995. Therefore, the distribution should be reviewed according to the progress of spatial tourism development.

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[3] In case of Egypt, Ministry of Tourism makes hotel provision projection on the assumption of 60 percent occupancy.

Table 10.5.1 Hotel Tourist-Nights Projection

	1996	2000	ALS	2005	ALS	2015	ALS
1. Foreign	1,083,240	*1,238,118*	*4.84*	*2,065,193*	*4.73*	*4,455,069*	*4.55*
OECD	464,619	*685,716*	*4.20*	*1,263,388*	*4.20*	*3,217,808*	*4.20*
Turkey	17,299	*14,400*	*3.32*	*16,292*	*3.32*	*18,908*	*3.32*
Iran	254,214	*148,036*	*7.91*	*171,614*	*7.91*	*199,165*	*7.91*
Other foreign	345,108	*389,966*	*5.59*	*613,899*	*5.59*	*1,019,188*	*5.59*
2. Arabs	771,676	*1,261,151*	*2.80*	*1,755,614*	*2.83*	*2,652,304*	*2.89*
GCC	121,666	*224,540*	*2.03*	*337,631*	*2.03*	*549,965*	*2.03*
Jordan	129,918	*165,500*	*2.17*	*196,562*	*2.17*	*246,749*	*2.17*
Lebanon	187,976	*262,281*	*2.29*	*326,850*	*2.29*	*398,428*	*2.29*
Other Arabs	332,116	*608,830*	*4.07*	*894,572*	*4.07*	*1,457,163*	*4.07*
3. Syrian	1,247,261	*1,114,593*		*1,265,490*		*1,930,316*	
Total	3,102,177	*3,3613,862*		*5,086,297*		*9,037,689*	

Figures in italic are estimated by the Study Team. ALS: Average Length of Stay (days)
source: MOT, JICA Study Team

Table 10.5.2 Distribution of Additional Hotel Beds

	Hotel beds in 1995	tourist-nights in 2000	Additional beds	tourist-nights in 2005	Additional beds	tourist-nights in 2015	Additional beds
Damascus	14,294	*2,103,785*	*0*	*2,974,146*	*3,813*	*5,191,333*	*17,312*
Aleppo	4,206	*770,451*	*485*	*1,100,408*	*2,494*	*2,050,062*	*8,275*
Homs & Hama	1,560	*166,945*	*0*	*238,308*	*0*	*435,868*	*1,094*
Coastal	7,800	*361,167*	*0*	*472,227*	*0*	*789,084*	*0*
Palmyra	817	*78,279*	*0*	*125,945*	*333*	*264,117*	*1,595*
Euphrates	1,088	*77,709*	*0*	*103,263*	*0*	*183,807*	*31*
Northeast	385	*37,070*	*0*	*44,221*	*0*	*69,277*	*37*
South	372	*18,455*	*0*	*27,780*	*0*	*54,143*	*0*
Total	30,522	*3,613,862*	*485*	*5,086,297*	*6,640*	*9,037,689*	*28,344*

Figures in italic are estimated by the Study Team
Additional beds: necessary addition to the provision in 1995
Number of hotel beds exclude those of "hostels"
Source: JICA Study Team

FI2 Quality Upgrading of Hotels

Although the analysis above indicates that the provision of hotels in quantity is not critical for several years, interviews to international tourists and tour organizers revealed several defects: difficulty of booking in peak season, shortage of medium range hotels, comparatively low facility and service standards, etc. Therefore, it is necessary to upgrade their operation, services and facilities. In line with increased business tourists, conference and banquet facilities also need to be upgraded.

This plan will be implemented by the private sector. However, the public sector should provide measures such as various incentives, financial assistance, deregulation, etc.

FI3 Provision of Various Accommodation Type

In addition to ordinary hotels, various accommodation type according to the market segment (e.g. villas and chalets, apartments, tourist villages, camping sites or traditional stylish hotels) should be provided. This plan also will be implemented by the private sector.

(3) Measures for Supporting Facilities

Avoiding the duplication, measures directly related to the tourist sites such as tourist amenity provision at the tourist sites, recreation and sport facilities, etc. are included in Section 10.2.

Short Term (to 2005):

FI4 Damascus International Fair Improvement

Improvement of Damascus International Fair Ground and upgrading of its conference facilities (SP 10-20 million) are needed.

FI5 Foreign Currency Exchange Offices

Provision of additional convenient exchange offices or upgrading service of existing CBS branches in major tourist core cities: Damascus, Aleppo, and Latakia. As CBS is the only responsible agency, coordination with CBS is essential.

FI6 Training Facility Provision and Upgrading

Construction of new school buildings corresponding to the increased number of students for HTTC (SP 22.5 million) and improvement of teaching materials such as textbook and other instruction manuals; (SP 9 million for HTTC and three institutes).

FI7 Restaurants, Shops and Services Upgrading

Upgrading of tourist services to international standards: restaurants and coffee shops, traditional performance theaters, souvenir shops, etc. In addition, additional ones are needed in major tourist cores: Damascus, Aleppo and Latakia.

FI8 Hygiene Upgrading

Sanitary conditions in Syria in general were rated low according to the international tourist interview survey carried out by the Study Team. Further investigation revealed that the urgent improvement is needed for the maintenance of public toilets at tourist sites, street sweeping and restaurant services. Each of them is included in the different component plan. MOT must function for this common issue as an effective advocate for the interests of tourism, by maintaining a program of regular inspection and guidance at specific sites, and dialogue with the numerous agencies concerned.

Medium to Long Term (beyond 2005):

FI9 Damascus International Convention Center

Planning and construction of the Damascus international convention center (SP 1-2 billion) at the reserved site near Damascus airport.

FI5 Foreign Currency Exchange Offices

Provision of additional convenient exchange offices in tourist cities is needed in line with the expansion of tourism development: Palmyra, Bosra, Hama, Tartous, etc.

FI6 Training Facility Upgrading

The following improvement is needed:

- introduction of computers and the intra-system in HTTC; (SP 90 million)
- improvement of teaching facilities such as kitchen, restaurant, etc.(SP 67.5 million for HTTC and three institutes); and
- improvement of equipment such as language laboratory, audio-visual aids, etc. in HTTC; (SP 22.5 million)

FI7 Restaurants, Shops and Services Upgrading

Upgrading of tourist services to international standards: restaurants and coffee shops, traditional performance theaters, souvenir shops, etc. In addition, additional ones are needed in the expanded tourist cities: Hama, Homs, Tartous, Palmyra, Bosra, Deir ez Zor, etc.

FI10 World Business Center

Provision of world class business centers including offices, hotels, and conference and banquet facilities in Damascus, Aleppo and Latakia is needed by the private sector.

10.5.2 Transport Plan

(1) Objectives

The objectives of the transport development plan as they related to tourism development are:

- To provide fast and comfortable transport for tourists traveling within the country;
- To provide pleasant environment for tourists while utilizing transport facilities; and
- To make the experience of utilizing transport means in the country a tourism product in itself.

This plan follows the Strategies Nos. 2 and No. 7.

Avoiding the duplication, measures directly related to the tourist sites such as car parking, etc. are included in Section 10.2.

(2) Measures for Road Transport

Short Term (to 2005)

FI11 Highway Construction

Implementation of the planned Highway project between Ariha and Latakia with due consideration of financial sources is needed. MOCO has completed the updating of the feasibility study on the Highway construction between Ariha and Latakia, financed by the Kuwait Fund of. The length of the Highway is some 90 km, and construction cost is estimated about SP 10 to 12 billion.

FI12 Approach Road Improvement

Improvement of access to major tourist sites is needed to assure more comfortable tour for international tourists. The improvement include widening of roads for large buses to enable them to pass by each other, road paving, and maintenance of existing roads. The construction of new access road should be considered where large time reduction is expected.

The route between Rasafa and Sikhneh can provide a circular tourism route centered by Aleppo, and the road improvement work has been carried out for the most part by Ministry of Petroleum and Mineral Resources. The road improvement between Bosra and Dara'a is expected to provide more comfortable international route connected with Jordan, and improvement work is underway by MOCO. The other important route between Latakia and Highway No. 5 passing through Salahdin Castle and Apamea is not yet improved.

FI13 Bypass Way

Construction of bypass roads in Palmyra, for example will reduce the traffic into the archaeological site, and improve the tourists' safety and satisfaction. Palmyra bypass way construction is scheduled to begin in 1997 by MOCO. The length of this road is 16 km with 8m width. Estimated project cost is SP 90 million.

FI14 Traffic Signs and Signals Improvement

Traffic signs and signals are need to improve according to the increase of individual foreign tourists. Syria has ratified United Nations Convention on Road Signs and Signals, Vienna, 1968. MOCO is now improving the traffic signs in Syria.

In many countries tourist direction signs in addition to ordinary signs for local traffic are provided. These are carefully designed for tourists from other cities and countries (attractive ones with pictograph and written in major languages).

FI15 Bus Terminal Improvement

The followings are needed at major bus terminals, MOTR is supposed as implementing body:

- provision of guide board written in foreign language;
- issuing time table written in foreign language;
- improvement of ticketing system;
- improvement of terminal facilities; and
- improvement of terminal entrance and exit way.

Medium to Long Term (beyond 2005)

FI16 International Road Improvement

Some roads designated as international road needs to be improved in terms of road width, curvature, and pavement. The government puts a high priority on the international road improvement projects, and following projects are underway.

- Aleppo - I'zaz - Al Slameh (Turkey) route (National road No. 17, secondary road)
- Latakia - Kassab route (National road No. 1, Arterial road)

These improvements will encourage border crossing tourists and induce more international tourists to Syria. Other than the projects listed above road improvement or Highway construction project between Tartous and border lead to Tarablosis in Lebanon is provisionally considered.

FI17 Tourist Bus Development

The followings are needed according to the increase of tourists to Syria:

- scheduled bus services with tour guide visiting major tourist sites located within one day trip radius from tourism bases such as Damascus and Aleppo; and
- facilitation of border crossing tourist bus services for non Arab tourists.

FI22 Approach Road Improvement

For expanded areas.

(3) Measures for Air Transport

Short Term (to 2005)

FI18 International Airport Improvement Project

Improvement of facilities at Damascus and Aleppo Airports are needed.

Damascus Airport:

- renovation of terminal building;
- procurement of advanced control system; and
- procurement of emergency navigational lighting system.

Aleppo Airport:

- expansion of apron area and runway;
- replacement of runway lighting; and
- construction of new passenger terminal.

A new terminal building is being constructed at Aleppo Airport. An early opening is needed.

FI19 Service Upgrading of Syrian Airlines

National air career is essential for the tourism promotion. Service upgrading of Syrian Airlines is needed including promotion activities through their branch offices abroad.

FI20 International Air Access Improvement

Establishment of direct links with other countries is expected to have large latent potential for future tourism in Syria. Air access to major cities in Europe and elsewhere should be enhanced to the extent possible.

In spite of more than seventy bi-lateral agreements on international air transport between Syria and other countries, direct air access between Syria and Far East or North America which is not scheduled as yet.

Medium and Long Term (beyond 2005)

FI21 Local Airport Improvement Project

Deir ez Zor Airport and Qamishli Airport are expected to play more significant role in eastern Syria tourism development. The project is to improve the facilities, runways and apron areas of both airports to cope with the increase of tourists in future.

(4) Measures for Rail and Water Transport

Short Term (to 2005)

FI22 Passenger Boat Service Improvement

Improvement of passenger boat facilities at both Tartous and Arwad, and placement of new passenger boats are urgently needed. MOTR and Mohafazat are both preparing studies.

FI23 Mediterranean Cruise Promotion

Mediterranean cruise is popular activity among European tourists. Promotion of more cruise to Syria is efficient utilizing the existing ports of Latakia and Tartous. Tourists can visit several cultural sites along the coast and stay at hotels along the beach or in the mountain.

FI24 Rehabilitation of Hijaz Railway

Hijaz station is one of the historical and elegant buildings in Syria. Several steam locomotives of the previous century are still in service. This plan will attract a large number of international tourists. Hijaz Railway Corporation is assumed as the implementing body.

Medium to Long Term (beyond 2005)

FI25 Assad Lake Cruising

Cruising boats on Lake Assad in combination of road transport from Aleppo is considered as a good tourist attraction for domestic tourism.

FI26 Euphrates River Cruising

Introduction of cruising on the Euphrates River may be worth. Tourists can enjoy the scenery of riverside and are also given feasts on board. Development of Deir ez Zor as a tourist base is essential for this plan.

10.5.3 Utilities Plan

(1) Objectives

The objectives of this plan are:

- to improve the quality of the existing utilities;
- to provide the minimum necessary facilities in the isolated tourist sites; and
- eventually, to support tourism development in the country.

This plan follows the Strategy No. 7.

(2) Measures for Water Supply

Short Term (to 2005)

FI27 Tourist Water Resource Development

Expansion of water supply capacity in Palmyra (On-going), and introduction of additional water tanks during peak seasons in isolated tourist sites: Salahdin Castle, Marqab Castle, St.

Simeon, etc.(SP 100 million).

Medium to Long Term (beyond 2005)

FI28 Water Supply Piping

Improvement and expansion of water supply pipe lines in the old cities of Damascus and Aleppo (SP 1.8 billion)

(3) Measures for Sewerage

Short Term (to 2005)

FI29 Sewerage Treatment Plant

Construction of sewerage treatment facilities in major tourist sites: Aleppo, Hama and Homs (On-going), construction of sewerage treatment plant in Palmyra (SP 216 million); and installation of septic tanks in the isolated tourist sites such as Salahdin Castle, Marqab Castle, St. Simeon etc. (SP 18 million).

Medium to Long Term (beyond 2005)

FI29 Sewerage Treatment Plant

Construction of sewerage treatment plant in Latakia and Tartous, and construction of small scale sewerage treatment plant in the isolated areas: Crac des Chevaliers, Marqab Castle, St. Simeon, Bosra, etc. (SP 450 million).

(4) Measures for Waste Disposal

Short Term (to 2005)

FI30 Garbage Collection Improvement

Improvement of garbage collection system including increased garbage cars in old cities of Damascus and Aleppo (On-going), and installation of waste management system in Arwad Island (SP 162 million).

Medium to Long Term (beyond 2005)

FI30 Garbage Collection Improvement

Increased garbage cars and improvement of collection system in Hama, Homs, Latakia and Tartous (SP 450 million).

(5) Measures for Power Supply and Communication

Short Term (to 2005)

FI31 Electricity Distribution System Improvement

Improvement of electric distribution system in old cities of Damascus and Aleppo.

FI32 Public Telephone Installation

Increased public telephones at major gateways (SP 5.4 billion).

Medium to Long Term (beyond 2005)

F133 Domestic Telephone Improvement

Improvement of domestic telephone system.