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MINISTRY OF TOURISM SYRIAN ARAB REPUBLIC JAPAN INTERNATIONAL COOPERATION AGENCY (JICA)

THE PREPARATION OF NATIONAL TOURISM DEVELOPMENT PLAN IN



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THE PREPARATION OF NATIONAL TOURISM DEVELOPMENT PLAN IN

# **SYRIAN ARAB REPUBLIC**

FINAL REPORT

Volume II

Zone Plans and Priority Action Plan

**JULY 1998** 

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# The Preparation of National Tourism Development Plan in Syrian Arab Republic

## Final Report

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#### Abbreviations

AAGR : Average Annual Growth Rate

ALS : Average Length of Stay

CIQ : Customs, Immigration and Quarantine

DGAM : Directorate General of Antiquities and Museum

DGCA : Directorate General of Civil Aviation EIA : Environmental Impact Assessment

FIT : Foreign Individual Tourist

GCC : Gulf Cooperation Council (Countries)

GCETP: General Commission for Execution of Tourism Projects: GCTHT: General Commission for Tourism and Hotel Training

GDP : Gross Domestic Product

GTZ : Gesselschaft für Technische Zusammearbeit (Germany)

IEE : Initial Environmental Examination

1FAPO : Institut Français d'Archeologie de Proch-Orient

IFEAD : Institut Français d'Etude Arabe de Damas
 JATA : Japanese Association of Travel Agencies
 JICA : Japan International Cooperation Agency
 JNTO : Japan National Tourist Organization

MOC : Ministry of Culture

MOCO : Ministry of Communications
MOE : Ministry of Environment
MOF : Ministry of Finance

MOH : Ministry of Health

MOHU : Ministry of Housing and Utilities MOLA : Ministry of Local Administration

MOT : Ministry of Tourism MOTR : Ministry of Transport

OECD : Organization for Economic Cooperation and Development OECF : The Overseas Economic Cooperation Fund of Japan

RB : Syrian Arab Airlines

SYRTEL: Syrian Arab Company for Tourist Establishments
SATTA: The Syrian Association of Tourist and Travel Agents

SCTT : Syrian Company for Transport and Tourism (TRANSTOUR)

SIT : Special Interest Tourist

SP : Syrian Pounds

SPC : State Planning Commission WIO : World Tourism Organization

### 13 INTRODUCTION

This report is Volume II of the Final Report of the Preparation of National Tourism Development Plan in Syrian Arab Republic.

The Final Report consists of four volumes as follows:

Executive Summary

Volume I: Tourism Development Master Plan

Part I: Tourism in Syria, Problems and Prospects

Part II: The Master Plan

- Volume II: Zone Plans and Priority Action Plan

Part III: Plans for the Priority Zones

Part IV: Action Plan

Volume III: Appendixes

"Part I: Tourism in Syria, Problems and Prospects" examines past history and existing conditions of tourism development in Syria, identifies issues, and assesses its future prospects.

"Part II: The Master Plan" synthesizes the results of work presented in Part I, recommends the most appropriate policies and strategies for tourism development in Syria, and formulates development plans for various components contributing the sector development. Part I presents background information and analyses and Part II presents plans. Together they constitute a master plan.

"Part III: Plans for the Priority Zones (2015)" illustrates concrete strategies and plans for the four selected zones of Damascus, Aleppo, Homs and Hama, and the Coastal.

Finally "Part IV: Action Plan (2005)" indicates the most necessary and immediate actions to achieve the goals of the formulated Master Plan.

Appendixes of Volume III include detailed data and information supporting the Study.

The Preparation of National	Tourism Development	Plan in Syrian Arab Republ	ic

**PART III** 

**PLANS FOR THE PRIORITY ZONES (2015)** 

The Preparation of National Tourism Development Plan in Syrian Arab Republic

## 14 COMMON PLANNING ISSUES

#### 14.1 Proposed Master Plan

A Master Plan of National Tourism Development in Syria was formulated in Volume I. After a detailed assessment of strengths, weaknesses, opportunities and threats of the tourism sector in Syria, three basic development policies and eleven strategies were recommended as tools to shape the future of tourism in Syria. Figure 14.1.1 shows the policies and the strategies. A large number of projects and programs were identified in light of the above strategies and a desirable schedule of implementing them was proposed.

Subsequently, four tourism zones were selected for the purpose of selecting priority projects to be implemented by 2005. This chapter and the next chapter discuss tourism development strategies for the selected four zones from which the priority projects were formulated. Figure 14.1.2 shows logical relationships among the Master Plan, Zone Plans, and Priority Projects and Programs.

**POLICIES STRATEGIES** (Sector Expansion) 1. Enhance Quality of Offerings 1. DEMAND ORIVEN 2. Broaden Tourism Product Range 3. Develop Human Resources 4. Improve Marketing (Sector Efficiency) 5. Improve Government Operation's 2. CLEAR PUBLIC & PRIVATE ROLES 6. Enhance Private Sector Participation 7. Improve Infrastructure and Services Reduce Seasonality (Sustainable Sector Development) 3. EFFICIENT & SUSTAINABLE GROWTH 9. Preserve Resource / Environment 10. Promote Domestic Tourism 11. Phase Spatial Development

Figure 14.1.1 Tourism Development Policies and Strategies

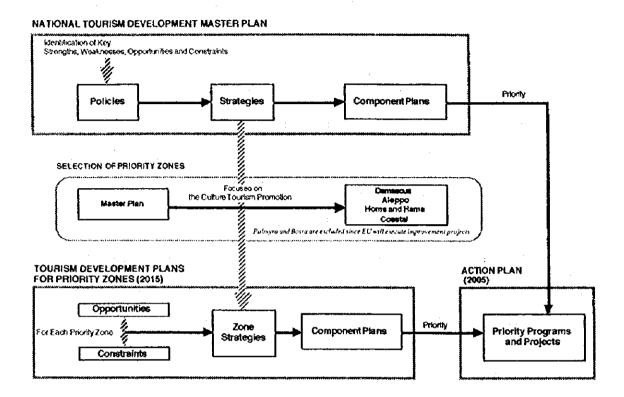


Figure 14.1.2 Relationship among Master Plan, Zone Strategies and Priority Projects

## 14.2 Common Planning Issues

In the following chapter, what should be done in each of the four priority zones are proposed. These indicative plans were prepared in line with the basic directions delineated in the Master Plan. In doing so, the following points were kept in mind as planning issues common to all four zones.

#### (1) Introducing the Prerequisites of MODERN TOURISM

Tourism in Syria in general lags decades behind the world's best, notably in the field of site presentation, tourist facilitation and servicing, which constitute the minimum basics of modern tourism to make a site visit satisfactory and enjoyable experience. Lack of tourist signs (direction, information and interpretation), tourist trails and user-friendly maps and brochures are some of the typical examples of current Syrian tourism's deficiency. The zone development strategies and resource development plans are intended to introduce those basics mandatory for the development of modern tourism in the Syrian tourism scene.

#### (2) Introducing the Prerequisites of CULTURE TOURISM

Tourism experts and tour operators in the major source markets are unanimous in foreseeing great potential for culture tourism development in Syria. However, current Syrian tourism is so heavily focused on archaeological ruins, that potentials for culture tourism development is neglected or hardly perceived. Most of historical and cultural assets are now presented to tourists with conspicuous lack of basic facilitation means and amenities for tourists (maps,

brochures, signs of various categories, tourist trails, visitor centers, clean toilets, etc.). The zone development strategies and resource development plans are intended to introduce those basics to satisfy the needs of modern culture tourists.

#### (3) Introducing the Basics of URBAN TOURISM

Gateway urban centers play a crucial role in invigorating tourist activities in any thriving tourist destination today. They constitute an integral part of modern tourism. London and Paris are the good examples of "urban tourism center". Again, all the experts and operators in the major source markets agree that there are so many areas and opportunities undeveloped or underdeveloped in Damascus and Aleppo, the two major gateways for Syrian tourism, which promise a great variety of potentials for development of sophisticated urban tourism products. Tourist trails of the Old Cities in the two cities, tourist utilization of Hijaz Railway Station and train services are just a few of such examples. The zone development strategies and resource development plans are intended to introduce those basics to develop sophisticated urban tourism potentials.

These zone plans are not meant to be comprehensive ones including plans for supporting sectors such as transportation and utilities. They do not indicate the scale of investment needed in any sector including accommodation. Rather, these plans are intended to show what should be done in tourism resources in the future and the general level of demand increase by type of guests. Since the market characteristics for Syria in the foreseeable future do not warrant large scale resort development that require substantial public sector investments, investments in hotels and restaurants and the like are assumed to take place by the private sector with reference to the plan indicated in this report. The role of the public sector will be to maintain and upgrade tourism resources and to provide proper support to the private sector.

## 15 ZONE PLANS

#### 15.1 Damascus Zone

#### 15.1.1 Zone Development Concept

- the international gateway for Syrian tourism both by air and surface;
- abundant cultural tourism resources in the city and around (Umayad Mosque, St. Anania Chapel, Ma'alula, etc.) and green areas along Barada river (Rabweh, Zabadani, etc.);
- the national center for all forms of tourist services and servicing; and
- the national core for all forms of tourist activities: from history, culture, pilgrimage, urban and cultural entertainment, to business, fair and conference.

#### 15.1.2 Target Market

- culture tourists mainly from OECD countries (increasing);
- religious tourists from OECD countries (Christians) and from Islamic regions (steady);
- business, fair and conference tourists from the world over (increasing);
- holiday, leisure and shopping tourists from GCC regions, resident expatriates and Syrians (steady); and
- shopping tourists from neighboring countries (Lebanon, Jordan, CIS, etc.) (increasing).

#### 15.1.3 Development Strategy

#### (1) Tourism Product Development

- prepare Damascus itself into an urban tourism product;
- upgrade presentation, visitor information and amenities at museums and major tourist sites:
- preserve and rehabilitate historical quarters of Damascus (Old Damascus, Sarouja, Qanawat, Salhiyeh, Midan, etc.);
- develop new tourism products (e.g. walking tour of the Old City, Hijaz Railway ride by classic engine and coaches, cultural performances and events, sophisticated souvenirs and local foods, Mt. Kassioun Lookout, sound and light show, etc.);
- develop recreation and holiday sites environmentally (Rabweh, Zabadani, Gouta, hot spring in Quneitra and others, etc.);
- encourage local tourism related industries (souvenir shops, restaurants, hotels, etc.);
   and
- develop diversified line of accommodation (e.g. conversion of a traditional Damascene house into an up-market small scale hotel, etc.).

#### (2) Infrastructure Development

- increase international air access from major tourist-generating markets;
- improve urban infrastructure and amenities (streets and sidewalks, public toilets, public parks, etc.);
- improve overall access to major tourist sites with tourist-friendly sign posting; and
- improve and upgrade the international air terminal of Damascus including landscaping.

#### (3) Resource and Environment Management

- increased pace of improvement in the presentation of museums and cultural sites (see Visitor Services Unit, proposed for DGAM);
- consistent monitoring of physical conditions in neighborhoods of tourist interest (sanitation, pedestrian safety at key avenues, street and sidewalk conditions, etc.);
- improving public services provided by Mohafazats and Municipality for cleanliness and orderliness near cultural sites and museums; and
- adoption of selected reforms in the building and investment codes to stimulate beautification and renovation projects, especially in the old cities.

#### 15.1.4 Development Plan

The following figures show the indicative tourism development plan in Damascus zone till the year 2015.

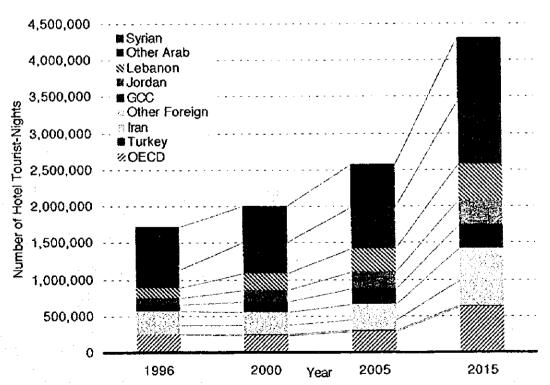


Figure 15.1.1 Indicative Demand Projections for Damascus Zone

Source: JICA Study Team

Figure 15.1.2 Tourism Resources Development in Damascus Zone (1)

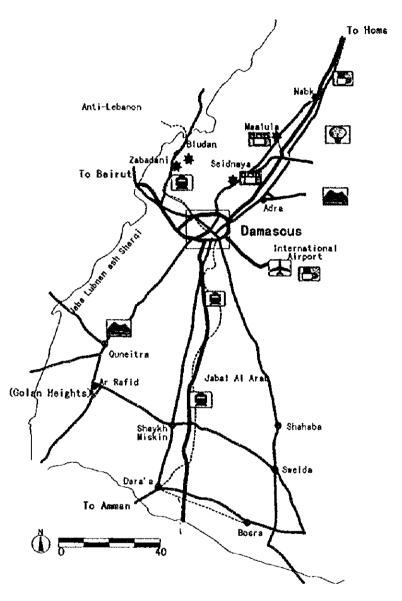
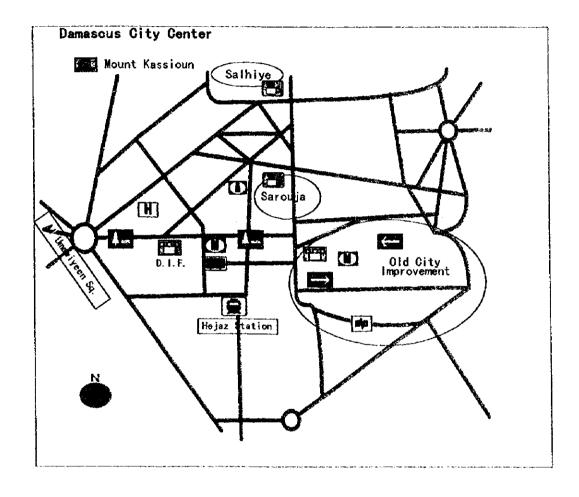




Figure 15.1.3 Tourism Resources Development in Damascus Zone (2)



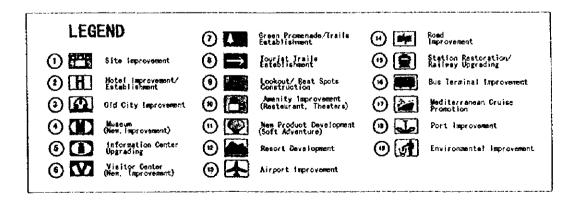
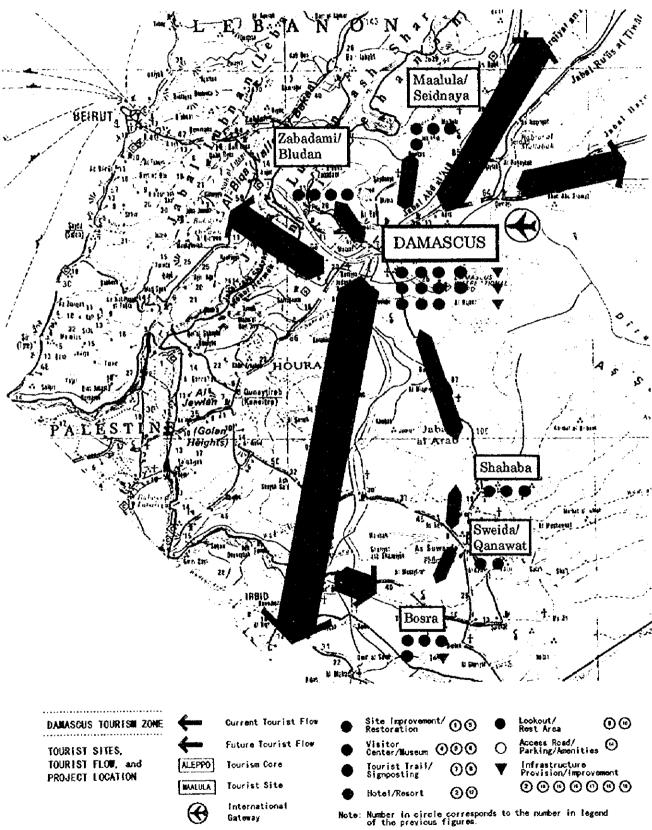


Figure 15.1.4 Tourist Flows and Tourism Facility Development in Major Locations



## 15.2 Aleppo Zone

#### 15.2.1 Zone Development Concept

- the second international gateway for Syrian tourism;
- abundant cultural tourism resources in the city and around (Aleppo Citadel, St. Simeon, etc.), and natural tourism resources around the city (Assad Lake, etc.);
- the northern core for cultural and religious tourism as well as urban and shopping tourism.

#### 15.2.2 Target Market

- culture tourists mainly from OECD countries (increasing);
- religious tourists from OECD countries (Christians) and from Islamic regions (increasing);
- shopping tourists from neighboring countries (Turkey, CIS, East Europe, etc.) (steady); and
- holiday, leisure and shopping tourists from GCC regions and Syrians (rather small for the moment).

#### 15.2.3 Development Strategy

#### (1) Tourism Product Development

- prepare Aleppo itself into an urban tourism product;
- upgrade presentation, visitor information and amenities at museums and major tourist sites;
- preserve and rehabilitate historical quarters of Aleppo (Old Aleppo, Jdaidah, etc.);
- develop new tourism products (e.g. walking tour of the Old Souq, cultural performances and events, sophisticated souvenirs and local foods, sound and light show, etc.);
- develop environmentally friendly recreation and holiday sites (e.g. Assad Lake tourist village, etc.);
- encourage local tourism related industries (souvenir shops, restaurants, hotels, etc.);
- develop diversified line of accommodation (e.g. conversion of Baron Hotel into an upmarket one, etc.).

#### (2) Infrastructure Development

- improve urban infrastructure and amenities (streets and sidewalks, public toilets, public parks, etc.);
- improve overall access to major tourist sites with tourist-friendly sign posting;
- accelerate construction of new highway linking Ariha and Latakia;
- increase air access from major tourist-generating markets and Damascus; and
- accelerate construction of the new Aleppo international air terminal including landscaping, and upgrade other airport facilities.

#### (3) Resource and Environment Management

- consistent monitoring of physical conditions in neighborhoods of tourist interest (sanitation, pedestrian safety at key avenues, street and sidewalk conditions, etc.);
- improving public services provided by Mohafazats and Municipalities for cleanliness and orderliness near cultural sites and museums; and
- through the Aleppo City Rehabilitation Project design and implementation of additional neighborhood upgrade schemes for the city's crumbling old town.

#### 15.2.4 Development Plan

The following figures show the indicative tourism development plan in Aleppo zone till the year 2015.

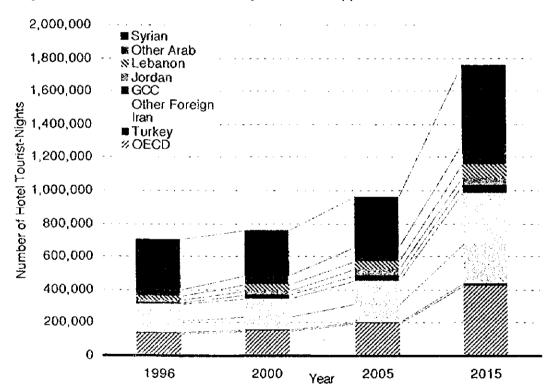


Figure 15.2.1 Indicative Demand Projections for Aleppo Zone

Note: Scale of the vertical ax is 2.5 times of that of Damascus.

Source: JICA Study Team

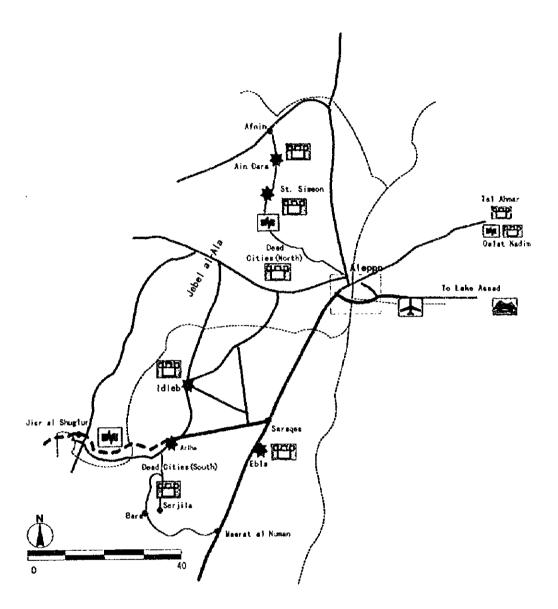


Figure 15.2.2 Tourism Resources Development in Aleppo Zone (1)

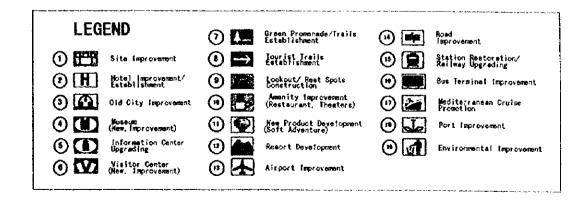
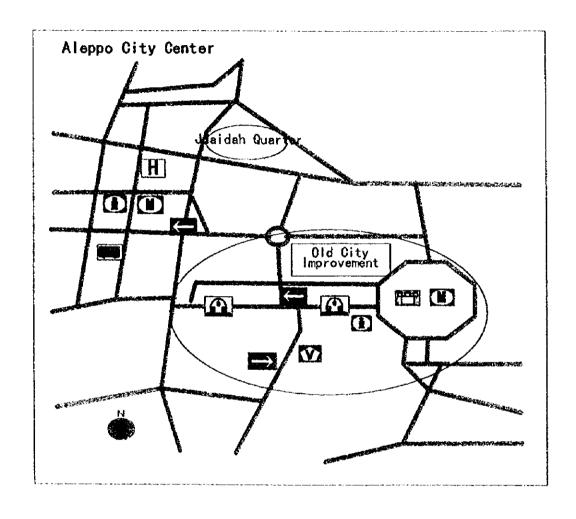
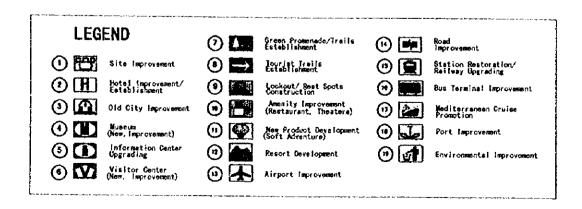


Figure 15.2.3 Tourism Resources Development in Aleppo Zone (2)





SSMANIYE (4) Tal arhus Ahmar Ain Dara Qalat Nadjim St. Simeon **Dead Cities** North (Hawa) Idleb Lake Assad Jisr ash Shughur Ebla Dead Cities South (Bare) Current Tourist Flow 00 ALEPPO TOURISM ZONE 00Future Tourist Flow 000TOURIST SITES, TOURIST FLOW, and Tourism Core Infrastructure Provision/Improvement ALEPPO Tourist Trail/ Signposting 00PROJECT LOCATION ST. SHIEDN **Tourist Site (1)** Hotel/Resort International Number in circle corresponds to the number in legend of the previous figures. Gateray

Figure 15.2.4 Tourist Flows and Tourism Facility Development in Major Locations

#### 15.3 Homs and Hama Zone

#### 15.3.1 Zone Development Concept

- the central tourism core of Syria for the cultural circuit, situated at the strategic cross point of the north-south corridor and the east-west corridor;
- abundant cultural tourism resources in the zone (Apamea, Crac des Chevaliers, etc.), and nature resources in the western mountains; and
- picturesque scenery of Hama and along Orontes river.

#### 15.3.2 Target Market

- culture tourists mainly from OECD countries (increasing); and
- holiday and leisure tourists from GCC regions, neighboring (Lebanon, etc.) countries and Syrians (rather small for the moment).

#### 15.3.3 Development Strategy

#### (1) Tourism Product Development

- upgrade presentation, visitor information and amenities at museums and major tourist sites:
- formulate new day trip excursion circuits for historical and cultural sites (e.g. east to Salamiyah, west to Qatina lake, etc.);
- preserve and rehabilitate historical quarters of Hama (Tawafra, Souq Tawil, etc.) and Homs:
- develop new tourism products (e.g. water wheels and mills along Orontes river, Orontes river and mountain trekking, cultural performances and events, sophisticated souvenirs and local foods, etc.); and
- encourage local tourism related industries (souvenir shops, restaurants, hotels, etc.).

#### (2) Infrastructure Development

- improve urban infrastructure and amenities (streets and sidewalks, public toilets, public parks, etc.); and
- improve overall access to major tourist sites with tourist-friendly sign posting, and formulate day-trip circuits of scattered tourist sites (Apamea with Dead Cities, etc.).

#### (3) Resource and Environment Management

- enhance environmental management of Orontes river and Qatina lake which are also important historical sites;
- consistent provision of sanitary conditions along Hama's river front where waterwheel viewing is a key tourist activity (trash management, water quality); and
- minimization of common problems in the tourist areas such as street and sidewalk deterioration, traffic congestion, unsafe pedestrian crossings, abusive peddlers, etc.

#### 15.3.4 Development Plan

The following figures show the indicative tourism development plan in Homs and Hama zone till the year 2015.

900,000 ■ Syrian ■ Other Arab 000,000 ⊗Lebanon **₩ Jordan** 700,000 **■**GOC Number of Hotel Tourist-Nights Other Foreign Iran 600,000 ■Turkey %OECD 500,000 400,000 300,000 200,000 100,000 2015 2000 2005 1996 Year

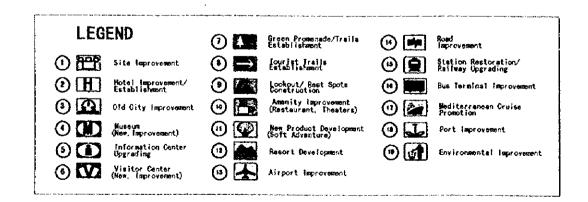
Figure 15.3.1 Indicative Demand Projections for Homs and Hama Zone

Note: Scale of the vertical ax is 5 times of that of Damascus.

Source: JICA Study Team

To Aleppo Qulaat al Madieo Selamiyah To Damascus

Figure 15.3.2 Tourism Resources Development in Homs and Hama Zone (1)



Hama City Center Touris Zone

Figure 15.3.3 Tourism Resources Development in Homs and Hama Zone (2)



Figure 15-3.2 Tourism Resources Development in Homs and Hama Zone (1)

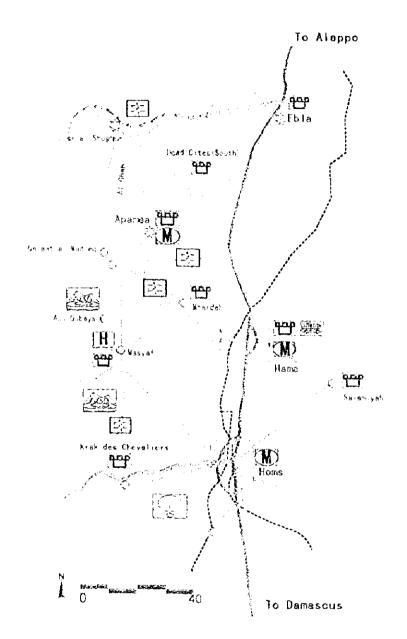
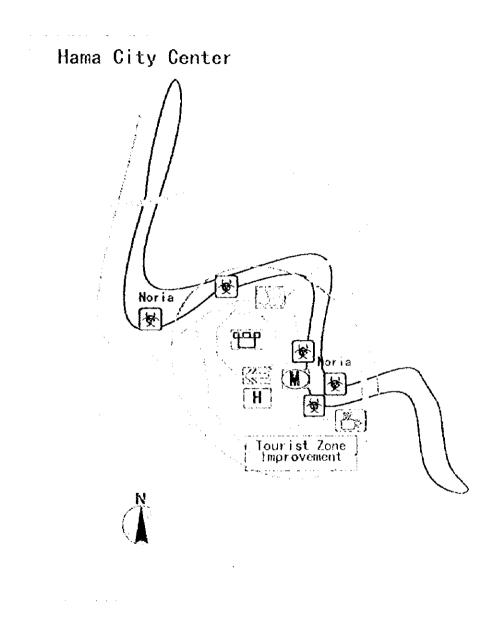




Figure 15.3.3 Tourism Resources Development in Homs and Hama Zone (2)





Apamea/ al Madiq it i chichr helt land Qasr Ibn 191. 650 538 29 Shaizar Wardan ter al Hile Castle Băn rás<sup>t</sup> Bal et Liftapant **HAMA** laddo ak Masysaf Hills Ai Beringsiyeh Bige Stierman Tartus Tali Daus Sheen Crac des Af Bamitigat Chevaliers HOMS Aride .. Accar Gulf AT BIRST faither affan gatus Al Quşayı At Book! 70 Ampus - tiat Prifit di fairni HAMA/HOMS TOURISM ZOME **Current Tourist Flow** Site improvement/ Restoration 00  $\odot$ Future Tourist Flow TOURIST SITES, 000 TOURIST FLOW, and ALEPPO Tourism Core Infrastructure Provision/leprovement  $\mathbf{0}\mathbf{0}$ PROJECT LOCATION APAMEA Tourist Site 0000000Hotel/Resort 00 International Number in circle corresponds to the number in legend of the previous figures.

Figure 15.3.4 Tourist Flows and Tourism Facility Development in Major Locations

## 15.4 Coastal Zone

# 15.4.1 Zone Development Concept

- Syria's unique holiday and leisure tourism core for beach (Latakia, Tartous and other cities) and mountain tourism (Kassab, Slunfeh, Qardaha, Mushata al Helou, Safita, etc.); and

complementary circuit for culture tourism with abundant cultural resources (Marqab Castle, Salahdin Castle, Ugarit, Jableh Amphitheater, Yahmour, Housson Sleiman

Castle, Amrit, Arwad Island, etc.).

# 15.4.2 Target Market

- mountain retreat in summer for GCC nationals and Syrians (steady);

beach and marine holiday for GCC regions, Syrians and some OECD countries (steady);

culture tourists mainly from OECD countries (increasing);

- Mediterranean cruise tourists; and

- nature and outdoor holidays for Syrians and resident expatriates in Syria (increasing).

# 15.4.3 Development Strategy

## (1) Tourism Product Development

- preserve nature resources and develop tourist sites environmentally;

- preserve and rehabilitate Old Tartous and Arwad;

- promote Mediterranean cruise by formulating attractive excursion packages (e.g. visiting cultural or historical sites with traditional food and folklore performance show, etc.);

upgrade presentation, visitor information and amenities at museums and major tourist

sites;

- develop new tourism products (e.g. crusader castles trekking tour, cultural performances and events, sophisticated souvenirs and local foods, sound and light show, summer holiday festivals, etc.);

introduce diversified and sophisticated line of marine activities (e.g. cruise, sailing,

fishing, aquarium, etc.); and

encourage local tourism related industries (souvenir shops, restaurants, hotels, etc.).

# (2) Infrastructure Development

improve urban infrastructure and amenities (streets and sidewalks, public toilets,

public parks, beach, etc.);

- improve overall road access to major tourist sites with sign posting (Salahdin Castle, Marqab Castle, Crac des Chevaliers, etc.) and formulate day-trip circuits of scattered tourist sites:
- accelerate construction of new highway linking Ariha and Latakia;
- improve passenger services of Latakia and Tartous ports; and
- improve and upgrade Latakia airport.

## (3) Resource and Environment Management

- ongoing maintenance of pleasant and healthy conditions in the historic and resort areas of Latakia, Tartous and Arwad Island;
- ongoing maintenance of adequate water quality at the recreational beaches and waterside parks and promenades by the proper authorities:
- ongoing maintenance of adequate conditions in the vicinities around the castles of Crac des Chevaliers, Marqab and Salahdin Castles, and in the nearby villages; and
- increased pace of improvement in the presentation of museums and cultural sites (see Visitor Services Unit, proposed for DGAM) especially at the three castles and in old Tartous, at Ugarit and at Amrit.

#### 15.4.4 Development Plan

The following figures show the indicative tourism development plan in Coastal zone till the year 2015.

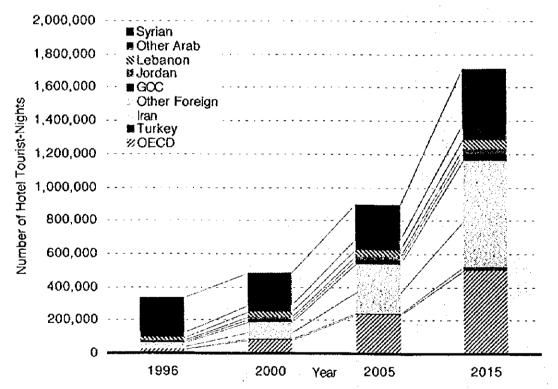


Figure 15.4.1 Indicative Demand Projections for Coastal Zone

Scale of the vertical ax is 2.5 times of that of Damascus.

Source: JICA Study Team

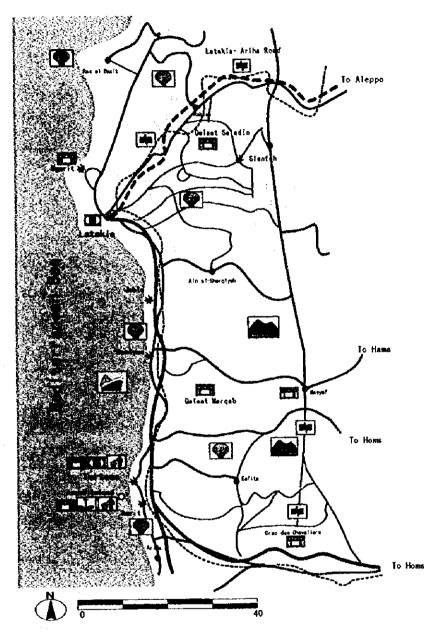
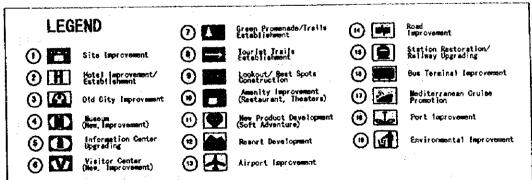


Figure 15.4.2 Tourism Resources Development in Coastal Zone (1)



## (3) Resource and Environment Management

- ongoing maintenance of pleasant and healthy conditions in the historic and resort areas of Latakia, Tartous and Arwad Island;
- ongoing maintenance of adequate water quality at the recreational beaches and waterside parks and promenades by the proper authorities;
- ongoing maintenance of adequate conditions in the vicinities around the castles of Crae des Chevaliers, Marqab and Salahdin Castles, and in the nearby villages; and
- increased pace of improvement in the presentation of museums and cultural sites (see Visitor Services Unit, proposed for DGAM) especially at the three castles and in old Tartous, at Ugarit and at Amrit.

## 15.4.4 Development Plan

The following figures show the indicative tourism development plan in Coastal zone till the year 2015.

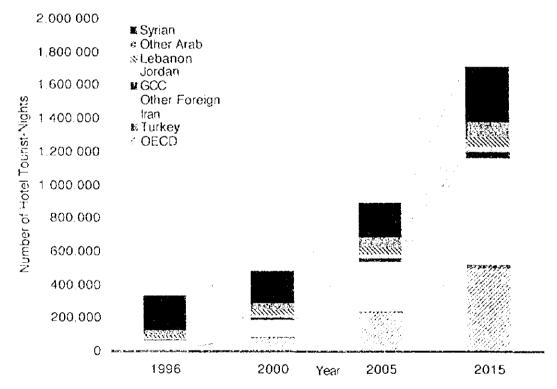


Figure 15.4.1 Indicative Demand Projections for Coastal Zone

Note: Scale of the vertical ax is 2.5 times of that of Damaseus.

Source: JICA Study Team

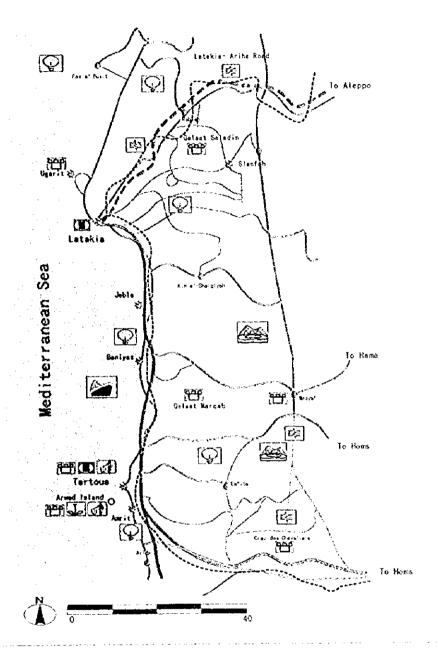


Figure 15.4.2 Tourism Resources Development in Coastal Zone (1)

•	LEGEND	0 [[	Green Promocede/Trails Establishment	🕡 🔯	Road Improvement
	Sita Improvement	<b>(1)</b>	lourist Irails Inentaildes	① <b>(2)</b>	Station Restoration' Railway Upgrading
:	2 H Botel Improvement/	① <b>(4</b> )	lookout/Rest Spots Construction	(i) [Fig. 1]	Bus Terminal Improvement
	(1) Old Gity Improvement	(a)	Amenity Improvement (Restourant, Theaters)	① 🏣	Mediterranean Cruise Promotion
:	(Nuseum (New, Improvement)	$\odot$ $\boxed{\mathbb{Q}}$	New Product Development (Soft Adventure)	اطِی 🛈	Port Improvement
:	(Information Center Upgrading	①	Resort Development	<b>⊕ </b>	Environmental Imprevenent
:	(Now, Improvement)	0 🐼	Airport Improvement		

Figure 15.4.3 Tourism Resources Development in Coastal Zone (2)

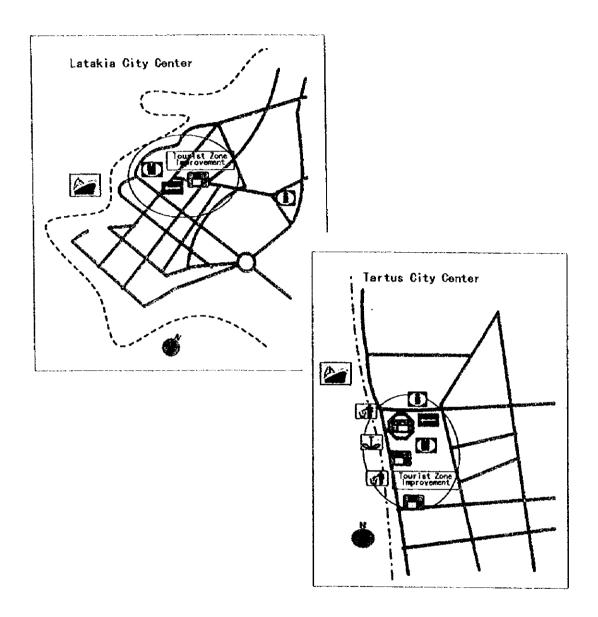
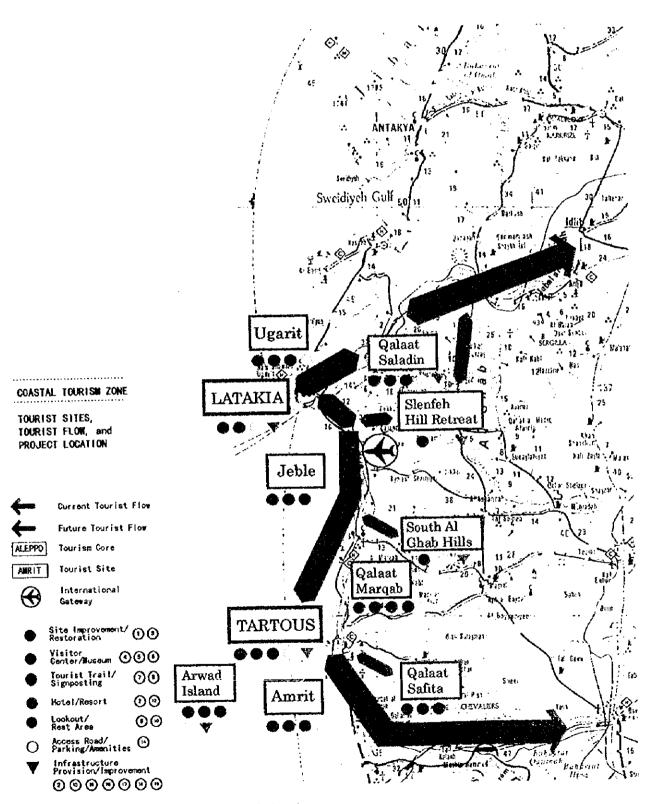




Figure 15.4.4 Tourist Flows and Tourism Facility Development in Major Locations



Note: Number in circle corresponds to the number in legend of the previous figures.

The Preparation of National Tourism Development Plan in Syrian Arab Republic