

THE ISLAMIC REPUBLIC OF IRAN

IRANIAN CULTURAL HERITAGE, HANDICRAFTS AND TOURISM ORGANIZATION (ICHTO)

**DATA COLLECTION SURVEY
ON
TOURISM AND CULTURAL HERITAGE
IN
THE ISLAMIC REPUBLIC OF IRAN**

FINAL REPORT

FEBRUARY 2018

JAPAN INTERNATIONAL COOPERATION AGENCY (JICA)

HOKKAIDO UNIVERSITY

JTB CORPORATE SALES INC.

INGÉROSEC CORPORATION

RECS INTERNATIONAL INC.

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JAPAN INTERNATIONAL COOPERATION AGENCY (JICA)
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FINAL REPORT

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ABBREVIATIONS

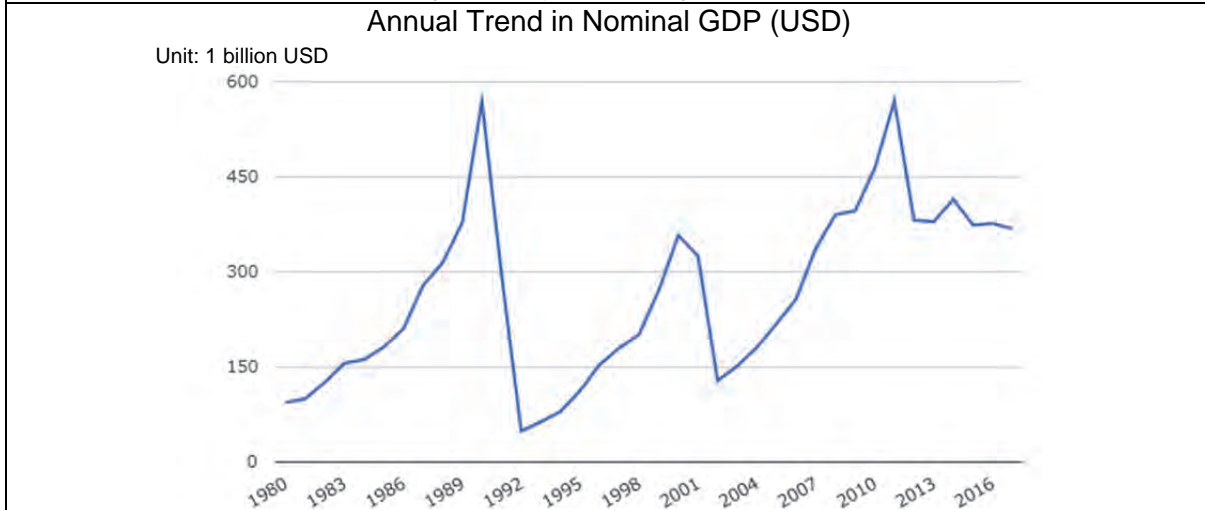
Abbreviation	Official Name
ADB	Asian Development Bank
AIIB	Asian Infrastructure Investment Bank
BOT	Build Operate and Transfer
CBT	Community Based Tourism
DMO	Destination Management Organization
EU	European Union
FAO	Food and Agriculture Organization
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
GIAHS	Globally Important Agricultural Heritage Systems
ICHTO	Iranian Cultural Heritage, Handicrafts and Tourism Organization
ICOMOS	International Council on Monuments and Sites
IMF	International Monetary Fund
JBIC	Japan International Cooperation Bank
JCC	Joint Coordination Committee
JICA	Japan International Cooperation Agency
JTB	JTB Corporation (Japan Travel Bureau)
MICE	Meeting Incentive Convention/Exhibition
NGO	Non-Governmental Organization
OIC	Organization of Islamic Cooperation
PPP	Public Private Partnership
SAPI	Special Assistance for Project Implementation
SWOT	Strengths, Weaknesses, Opportunities and Threats
TSA	Tourism Satellite Account
UAE	United Arab Emirates
UNDP	United Nations Development Programme
UNESCO	United Nations Educational Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
VFR	Visiting Friends and Relatives
WTTC	World Travel & Tourism Council

MAPS

	Country	: Islamic Republic of Iran
	Political structure	: Islamic Republic
	President	: Hassan Rouhani
	Capital	: Tehran
	Main religion	: Islam (Shiah)



National land area	: 1,648,195 km ²
Population	: 79,360,487
GDP	: 393.4 billion USD
Income level	: Fairly developed country



Source: World Bank World Development Indicators (2015)

PHOTOS (THE 1ST FIELD SURVEY)



Meeting with the ICHTO



Workshop during the 1st Mission



Hotel that utilized historical building in Ksahan



Village of Abyaneh



Handicraft atelier and shop utilizing a Caravanserai



Student staff in a carpet shop



Meidan Emam in Esfahan



Chogha Zanbil

PHOTOS (THE 2ND FIELD SURVEY)



The 1st workshop at the ICHTO



Meeting with the stakeholder in Tabriz



Meeting with the stakeholder in Esfahan



Meeting with the stakeholder in Yazd



Meeting with the stakeholder in Shiraz



The 2nd workshop with the ICHTO



The 2nd meeting with the stakeholder in Tabriz



The 3rd workshop with the ICHTO

PHOTOS (THE 3RD FIELD SURVEY)



Meeting with the ICHTO



Meeting with the stakeholder in Tabriz



Media interview at Tabriz city council



Meeting with the mayor of Tabriz



Site inspection at Kandovan



Site inspection at Bazaar in Tabriz



The opening ceremony at Tourism Exhibition in Tehran



The workshop with the ICHTO

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1. OUTLINE OF THE SURVEY

(1) BACKGROUND AND OBJECTIVES

1) Background of the Survey

The history of the Islamic Republic of Iran (Iran) dates back to the Mesopotamian civilization before the birth of Christ. Reflecting this and other historical eras such as the Persian Empire and the Islamic Empire, Iran has 21 UNESCO Cultural Heritage sites and one Natural Heritage site, while its vast national land and climate include other tourism resources and tourist sites such as deserts, geo parks, and ski resorts.

The number of tourists visiting Iran is growing every year, increasing 2.3 million over five years, from 2.93 million in 2010 to 5.23 million in 2015¹. In particular, following the lifting of nuclear-related economic sanctions conditional on implementation of the Joint Comprehensive Plan of Action (JCPOA) on Iran's nuclear development activities in January 2016, further increase is expected and it is forecast that more than 6 million tourists will visit the country in 2017. Looking at tourism revenue, the figure increased from 2,438 million USD in 2010 to 3,483 million USD in 2014², making tourism a precious source of revenue for Iran as it aims to achieve economic growth of 8%.

However, according to the tourism competitiveness rankings at the 2017 World Economic Forum, Iran is ranked low at 93rd among 136 countries, despite being ranked high (first) for price competitiveness. Further issues are pointed out regarding environmental sustainability (119th), policy priority of the tourism sector (117th), quality of tourism infrastructure and services (116th) and so on. Moreover, with an unemployment rate of 11.2% (according to statistics for 2016), employment promotion measures are an important policy issue for Iran.

Against this background, the Government of Iran has earmarked petrochemicals, electric power, water resources, automobiles, tourism, etc. as priority fields while leveraging private funding including foreign investment in its sixth five-year plan (2017-2021). In the field of tourism, in addition to developing tourism attractions, it aims to generate employment in the tourism sector through including sale of handicrafts and development of sectors related to tourism.

2) Objectives of the Survey

The objectives of the Survey are as follows: 1) to confirm and analyse current status of the tourism sector, tourism policies, administration and institutions, and tourism resources centred on cultural heritage sites in Iran, current statistical status of the tourism industry, and situation regarding assistance by other donors, etc., and 2) to examine the direction of cooperation by JICA in the tourism sector.

¹ United Nation World Tourism Organisation (UNWTO), Yearbook of Tourism Statistic Dataset, 2016

² UNWTO, Tourism Highlights 2016 Edition

3) Target Area

- The entire country of Iran (excluding border regions with Iraq, Afghanistan, and Pakistan)

4) Counterpart

- Iranian Cultural Heritage, Handicrafts and Tourism Organization (ICHTO)

(2) IMPLEMENTATION SCHEDULE

1) Work Plan

Table 1-1: Work Plan

Month	FY2017								
	8	9	10	11	12	1	2	3	
Work in Japan		<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Field Survey		■		■			■		
Report		○	▽			△		▲	
○ : Inception Report									
▽ : Progress Report (Japanese・English・Persian)									
△ : Draft Final Report (Japanese・English)									
▲ : Final Report (Japanese・English)									

2) Mission Schedule

The schedule of the first field survey is shown below.

Table 1-2: First Field Survey Schedule

DATE		Mr. Ueda	Mr. Nishimaya	Ms. Usui	
15-Sep	Fri		Narita/Dubai (EK319 22:00/03:40)		
16-Sep	Sat		Dubai/Tehran (EK971 07:45/10:25)		
17-Sep	Sun		<ul style="list-style-type: none"> Meeting with ICHTO, International Affairs Dept. Meeting with JICA Iran Office 		
18-Sep	Mon		<ul style="list-style-type: none"> ICHTO, Kick off meeting ICHTO, Human Resource and Welfare ICHTO, Planning and Budget Office ICHTO, Office of Coordination for provincial Affairs ICHTO, Tourism Deputy Advisor for provincial affairs ICHTO, Cultural Heritage 		<ul style="list-style-type: none"> Persepolis Travel & Tourism Services Co. Touring & Automobile Club of the Islamic Republic of Iran Parsian Sepanta
			<ul style="list-style-type: none"> ICHTO, Office for National Agreement and Coordination on Tourism ICHTO, Tourism Special Zone Office ICHTO, Secretary of National Institute for Tourism Coordination ICHTO, Finance Department 		<ul style="list-style-type: none"> Raja Rail Transportation Co. DELTABAN Tour & Travel Agency Federation of Tourist Guide Association
			<ul style="list-style-type: none"> ICHTO, Tourism Marketing and Promotion ICHTO, Office for Monitoring & Evaluation of Tourism Services ICHTO, Tourism Education Research Office ICHTO, Center for Preservation & Renovation of Historic Sites and Districts ICHTO, Department for Museum Affairs 		<ul style="list-style-type: none"> Iranian Tour Operators Association Iran Tourist Guide Association
			<ul style="list-style-type: none"> ICHTO, World and National Heritage Sites' Affairs 		
21-Sep	Thu		Site visit : Tehran - Kashan (by car) <ul style="list-style-type: none"> Gom/Qom (Hazzat Masumeh) Abyaneh (Old city)→Kashan 		
22-Sep	Fri		Site visit : Kashan - Esfahan (by car) <ul style="list-style-type: none"> Kashan (Sultan Amir Ahmad Bathhouse, Tabatabai House, Souvenir shops, Fin Garden) Abbasi caravanserai Esfahan (Bus terminal, Siosepol Bridge) 		
23-Sep	Sat		Site visit: Esfahan - Tehran (by car) <ul style="list-style-type: none"> Esfahan (Emam Sq., The Mosque of Emam, The Mosque of Jame, Chehelsotaa, Aali Aapu Palace, Sheikh Lotfollah Mosque, , Souvenir shop/Handicraft shop) 		
24-Sep	Sun	<ul style="list-style-type: none"> ICHHITO, Handicraft Deputy ICHHITO, NGO & Associations Department 		<ul style="list-style-type: none"> Olympic Hotel Espinas Palace Hotel Varzesh Hotel 	
		<ul style="list-style-type: none"> JICA Iran Office 			
		<ul style="list-style-type: none"> Omid Entrepreneurship Fund ICHHTO, International Affairs Bureau Department of Environment 		<ul style="list-style-type: none"> Pardisan Tour & Travel Agency Mhregan Hotel Persia Tourism Group(Logistic meeting) Parsian Enghelab Hotel 	
26-Sep	Tue	Golestan Palace, National Museum, Bazar inspection		<ul style="list-style-type: none"> Bus terminal, Metro, Exhibition center inspection 	
27-Sep	Wed	<ul style="list-style-type: none"> UNESCO 		Joopar Passenger & Freight Trains Co.	
		Work shop at ICHTO and meeting with JICA			
28-Sep	Thu	<ul style="list-style-type: none"> ICHTO, National Committee of Ecotourism 		Meeting with interpreter	
		Site visit: Tehran - Ahvaz (by flight) <ul style="list-style-type: none"> Shush World Heritage Site Haft Tappe Tchoga Zanbil World Heritage Site 		Golestan Palace, National Museum, Bazaar, Tea House inspection	
		Site visit: Ahvaz - Tehran (by flight) <ul style="list-style-type: none"> Shushtar World Heritage Site Salasel Citadel 		Restaurant, shops, Tajrish are inspection	
30-Sep	Sat	Tehran city inspection			
1-Oct	Sun	Report writing	Tehran/Dubai (EK980 20:00/22:50)		
2-Oct	Mon	ICHTO, International Affairs	Dubai/Narita (EK318 02:40/17:35)		
3-Oct	Tue	JICA Iran Office			
4-Oct	Wed	20:00 IKA/DXB (EK980)			
5-Oct	Thu	02:40 DXB/NRT (EK318)			

The schedule of the second field survey is shown below.

Table 1-3: Second Field Survey Schedule

DATE	Nishiyama	Fukumura	Ohara	Usui	Ueda
3-Nov Fri		22:00/04:55 NRT/DXB (EK319)	22:00/04:55 NRT/DXB (EK319)	22:00/04:55 NRT/DXB (EK319)	
4-Nov Sat		07:45/09:35 DXB/IKA (EK971)	07:45/09:35 DXB/IKA (EK971)	07:45/09:35 DXB/IKA (EK971)	
5-Nov Sun		<ul style="list-style-type: none"> Logistic meeting Meeting with JICA @ JICA Iran office Kick off meeting with ICHTO @ Khalij-e-Fars Hall, Rudaki Str, Azadi Str. 			
6-Nov Mon		<ul style="list-style-type: none"> Meeting with ICHTO, International Affairs Data collection in Tehran 			22:00/04:55 NRT/DXB (EK319)
7-Nov Tue		<ul style="list-style-type: none"> Work shop preparation Work shop with ICHTO @ Fajr Conference Hall of ICHTO main building 			07:45/09:35 DXB/IKA (EK971)
8-Nov Wed		< Tehran to Qazvin by car >			
		<ul style="list-style-type: none"> Qazvin (Tehran Gate, Jame Mosque, Forth Coournn Palace, Ghajar Hammam, Kantor Church, Mostofi Tomb, Saado Saltane Bazar, Aminiha Husseinie, Sardab Water Resever, Shahzade Hossein Shrine) 			
9-Nov Thu		< Qazvin to Takab by car >			
		<ul style="list-style-type: none"> Soltaniyeh Dome and Takht-e-Soleyman 			
10-Nov Fri		< Takab to Kandovan by car >			
		<ul style="list-style-type: none"> Orumiyeh Lake, St. Mary Church, and Kandovan Village 			
11-Nov Sat		< Chaldoran anrea to Tabriz by car >			
		<ul style="list-style-type: none"> St.Thaddeus Church 			
12-Nov Sun		< Tabriz >			
		<ul style="list-style-type: none"> Meeting with ICHTO Tabriz and stakeholder 			
13-Nov Mon		< Tabriz to Tehran by flight >			
		<ul style="list-style-type: none"> Heritage tourism team: St. Stepano Church Tourism Industry Development team: Railway station, Bus terminal, TIC, Bazar, Blur Mosque, Airport 			
14-Nov Tue		< Tehran to Esfahan by flight >			
		<ul style="list-style-type: none"> Meeting with ICHTO Esfahan and stakeholder visit Khaju Bridge, Emam Sq., Si-o-se Bridge 			
15-Nov Wed		< Esfahan and neighboring area to Na'in by car >			
		<ul style="list-style-type: none"> Heritage team: Ghurtan Village, Ziar Village, Caravanserai, Cultural Heritage site, Qanat, Jame Mosque in Na'in Tourism Industry Development team: Railway station, Bus terminal, TIC in Esfahan, and Jame Mosque, Old city, Na'in Tourism Hotel, and etc. 			
16-Nov Thu		< Na'in to Yazd by car >			
		<ul style="list-style-type: none"> Visit Mayor of Na'in and ICHTO Water Mill, Carpet workshop, and transfer to Meybod (Nalin Qa'leh, Water Mill, Hammam, meeting with ICHTO and Deputy Mayor) 			
17-Nov Fri	22:00/04:55 NRT/DXB (EK319)	< Yazd and neighboring area by car >			
		<ul style="list-style-type: none"> Heritage Tourism team: Hotel used the old house, Conservation facility, The Mosque of Jame, ICHTO research office, Mehriz (Pahlevanpour Garden), Saryazd, Zeinodin Caravanserai, Qanat in Yazd Tourism Industry Development team: Hotel used the old house, Conservation facility, The Mosque of Jame, ICHTO resarch office, Fire Temple, Tower of Silence, Old city, TIC, Railway station, Bus terminal, Airport) 			
18-Nov Sat	9:15/10:10 DXB/SYZ (EK2092)	< Yazd to Shiraz by car >			
		<ul style="list-style-type: none"> Meeting with ICHTO and stakeholder in Yazd Transfer to Shiraz 			
19-Nov Sun		< Shiraz and neighboring area by car >			
		<ul style="list-style-type: none"> Persepolis, Naghsh-e Rostam, Naghsh-e Rajab, and Pasargadae 			
20-Nov Mon		< Shiraz >			
		<ul style="list-style-type: none"> Mosque of Nsir-ol Molk, Eram Garden, Karim Khan Citadel Meeting with ICHTO and stakeholder in Shiraz 			
21-Nov Tue		< Shiraz to Tehran by flight >			
		<ul style="list-style-type: none"> Heritage Tourism Team: Bishapur and surranging area Tourism Industry Development Team: Railway station, Bus terminal, TIC, Vakil Bazar 			
22-Nov Wed		TV meeting with JICA HQ from JICA Iran office			
		Meeting with Mr. Shintani, JICA expert of other project			
23-Nov Thu		Work shop preparation	10:00 Tour leaders institute	Work shop preparation	10:00 Tour leaders institute
			Work shop preparation		Work shop preparation
24-Nov Fri		<ul style="list-style-type: none"> Work shop preparation TEL meeting with JICA HQ Meeting with ICHTO International Affairs 			18:35/21:20 IKA/DXB (EK980)
25-Nov Sat		<ul style="list-style-type: none"> Work shop at ICHTO JICA TEL Meeting & internal meeting 			
26-Nov Sun		< One day inspection at Qazvin by car >			
27-Nov Mon		<ul style="list-style-type: none"> Caravanserai, Hammam Muserum, Sardab water reserve, Bungadi, etc. 			20:05/22:50 IKA/DXB (EK980)
28-Nov Tue		<ul style="list-style-type: none"> JICA Iran Office Meeting with ICHTO: International Affairs, Cultural Heritage, Handcraft, Tourism Dep. 			02:55/17:20 DXB/NRT (EK318)
		18:35/21:20 IKA/DXB (EK980)			
29-Nov Wed	02:55/17:20 DXB/NRT (EK318)	< Tehran to Tabriz >			
		<ul style="list-style-type: none"> Workshop with ICHTO Tabriz 			
30-Nov Thu		< Kandovan and Maragheh >			
		<ul style="list-style-type: none"> Meeting with Village leader and village people of Kandovan Meeting with ICHTO, Maragheh Office, Museum, etc. 			
1-Dec Fri		< Tabriz to Tehran >			
		<ul style="list-style-type: none"> Azerbaijan Meseum, Mashroote (Constitutional) Meseum, Bazar, Carpet studio, University, etc. 			
2-Dec Sat		<ul style="list-style-type: none"> Meeting with Statistical Center of Iran 			
3-Dec Sun		<ul style="list-style-type: none"> Wrap-up meeting at ICHTO 			
4-Dec Mon		<ul style="list-style-type: none"> Report writing 			
		18:35/21:20 IKA/DXB (EK980)		23:55/02:30 IKA/DXB (EK978)	
5-Dec Tue		02:55/17:20 DXB/NRT (EK318)		8:35/22:45 DXB/HND (EK312)	

The schedule of the third field survey is shown below.

Table 1-4: Third Field Survey Schedule

DATE		Nishiyama	Ueda	Usui
18-Jan	Thu	22:00/04:55 NRT/DXB (EK319)	22:00/04:55 NRT/DXB (EK319)	22:00/04:55 NRT/DXB (EK319)
19-Jan	Fri	07:45/09:35 DXB/IKA (EK971)	07:45/09:35 DXB/IKA (EK971)	07:45/09:35 DXB/IKA (EK971)
20-Jan	Sat	•Meeting with ICHTO International Affair		
21-Jan	Sun	< Tehran --> Tabriz >		
		•Meeting with ICHTO Tabriz		
		•Courtesy call to City Council of Tabriz		
		•Visit carpet studio		
		•Courtesy Call to Mayor of Tabriz		
22-Jan	Mon	< Tabriz --> Tehran >		
		•Visit Kandovan, Bazaar, Blue Mosque, Azerbaijan Museum		
		•Tabriz World Heritage Center		
23-Jan	Tue	•JICA Iran Office	•11th Tehran International Tourism Exhibition	
24-Jan	Wed	•Work shop at ICHTO		
		•Courtesy call to Embassy of Japan		
		18:35/21:20 IKA/DXB (EK980)	18:35/21:20 IKA/DXB (EK980)	18:35/21:20 IKA/DXB (EK980)
25-Jan	Thu	2:55/17:20 DXB/NRT (EK318)	2:55/17:20 DXB/NRT (EK318)	2:55/17:20 DXB/NRT (EK318)

3) Meetings held during the Mission in Iran

The following table shows the agencies visited during the first field survey.

Table 1-5: Meetings during the First Field Survey

Date	Place	Participants
Sep. 17 (Sun)	ICHTO 11:00-13:30	Dr. Faezeh BEHZADNEJAD, Head of International Affairs Department Ms. Kiandokht TORABI, Senior Expert Mr. Ali SHEIKHAN, Expert · JICA Iran Office: Ms. Atefeh Asadi, Programme Officer · JICA Study Team: Nishiyama, Usui
	JICA Iran Office	Mr. Yukiharu Kobayashi, Chief Representative Ms. Atefeh Asadi, Programme Officer · JICA Study Team: Nishiyama, Usui
Sep. 18 (Mon)	ICHTO Cultural Heritage 09:00 – 10:30	Klantari, Deputy of Handiraft Talebi Mahmoudrezd, Secretary of National Institution for Tourism Coordination Gorbanoo Khavari, Tourism Marketing Expert Marzie Shahrabi, Tourism Marketing Expert Hassan Mizae, Investment Deputy Elham Ghaem Maghdme, Investment Deputy Ali Sheykhoun, International Affairs Rasoul Aslavie (NA), Aboutaleh Ghessemi, Tourism special zone office Mozgan Nahavandi, Tourism special zone office Seyed Maehdi Yasini, Tourism planning, ICHTO Hamid Eghbali, Handicrafts Department and World Handicraft Council Asia-Pacific Region-West Asia sub-region office Seyed Asghar Khodae, Deputy of Cultural Heritage Faezeh Behzadrezad, Head of International Bureau Kiandokht Torabj, Senior Expert of International Affair Bureau International Affair Bureau (3 pax) · JICA Study Team: Nishiyama
	Persepolis Travel & Tourism Services Co. 09:30 – 11:00	Dr. Alireza Mahmoudi, CEO & deputy chairman of the board · JICA Study Team: Usui
	ICHTO Cultural Heritage 11:00 – 12:00	Masaud Bastami, Deputy of Human Resource and Welfare Office · JICA Study Team: Nishiyama
	Touring & Automobile Club of the Islamic Republic of Iran 11:30 -13:30	Mr. Ebad Reza Eslami, Director Tourism & Handicrafts · JICA Study Team: Usui
	ICHTO Cultural Heritage 12:40 – 13:30	Masoud nori, Deputy of Planning and Budget Office · JICA Study Team: Nishiyama
	Parsian Sepanta 14:00 - 15:45	Mr. Mehrdad Asedifard · JICA Study Team: Usui
	ICHTO Cultural Heritage 14:00 – 15:00	Mahmocd Rahbaran, Expert of Office of Coordination for provincial Affairs · JICA Study Team: Nishiyama
	ICHTO Cultural Heritage 15:00 – 16:00	Mohammad Sabet Eghlidi, Tourism Deputy Advisor for provincial affairs · JICA Study Team: Nishiyama

Date	Place	Participants
	ICHTO Cultural Heritage 17:00 – 18:30	Mohammad Hassan Talebian, Deputy for Cultural Heritage S.Maryam Mehran, English Lecturer, Advisor for deputy of ICHTO for International Affairs Farhad Azizi Zallani, General Director of IWHS: World and National Heritage Sites' Affairs Sareh Ziyaee, Head of Presentation and International Department of IWHS · JICA Study Team: Nishiyama
Sep. 19 (Tue)	Raja Rail Transportation Co. 09:00 -11:00	Mr. Reza Hemmati Ahoei, Deputy of Sales & Marketing Dept. Mr. Saeed Khedmatloo, Manager, Sales & Marketing Dept. Mr. Mehرداد Naseri, Head of Product & Band Dept. in Marketing Directory · JICA Study Team: Usui
	ICHTO, Office for National Agreement and Coordination on Tourism 10:15 – 11:30	Mr. Fayazi, Director Ms. Masjedi, Ecotourism Expert, International Affair Bureau (2 pax) · JICA Study Team: Nishiyama
	DELTABAN Tour & Travel Agency 11:45 - 13:45	Mr. Mohammad Ansari, Senior Operation Manager Mr. Meysam Kaveh, Domestic Sales Manager · JICA Study Team: Usui
	ICHTO, Office of Tourism Special Tourism Zone 12:00 – 13:00	Mr. Aboutaleb Ghassemi, Expert International Affair Bureau (2 pax) · JICA Study Team: Nishiyama
	ICHTO, Secretary of National Institute for Tourism Coordination 14:15 – 15:00	Mr. Alireza Zamani, Expert International Affair Bureau (2 pax) · JICA Study Team: Nishiyama
	Federation of Tourist Guide Association 14:30 - 16:00	Mr. Mohammad Yazdani, Head of Association Mr. Saied Ayoubi, Tour Guide · JICA Study Team: Usui
	ICHTO, Finance Department 15:00 – 15:45	Ms. Elham Ghaem Maghame, Investment Expert International Affair Bureau (2 pax) · JICA Study Team: Nishiyama
Sep. 20 (Wed)	ICHTO, Tourism Marketing & Promotion Office 9:00 – 10:00	Leila Ajdari, Director General of T M&P Leila Mirhoseini, Tourism Promotion Division Head Mohammad Ghasmi, Tourism Marketing Division Head Kazem Jalili Zalpool, Expert Galbanoo Khavari, Marketing Expert International Affair Bureau (2 pax) · JICA Iran Office: Ms. Atefeh Asadi, Programme Officer · JICA Study Team: Nishiyama, Usui
	ICHTO, Office for Monitoring & Evaluation of Tourism Services 10:15 – 11:30	Dr. Wali Teymouri, Tourism Economics Expert International Affair Bureau (2 pax) · JICA Iran Office: Ms. Atefeh Asadi, Programme Officer · JICA Study Team: Nishiyama
	Iranian Tour Operators Association 11:00 - 12:45	Mr. Seyyed Hadi Shirazi, Secretary of the Association · JICA Study Team: Usui
	ICHTO, Tourism Education Research Office 11:30 – 12:30	Dr. Batool Sabzali, Head of Education Ms. Rasoul Asgari Ms. Mohsen Ranjibar International Affair Bureau (2 pax) · JICA Iran Office: Ms. Atefeh Asadi, Programme Officer · JICA Study Team: Nishiyama

Date	Place	Participants
	Iran Tourist Guide Association 14:00 - 16:00	Mr. Jalil Charkhian, Member of Board of Directors & Managing Director Ms. Forough azel Ardakani, Vice President · JICA Study Team: Usui
	ICHTO, Centre for Preservation & Renovation of Historic Sites and Districts/ Department for Museum Affairs/ World and National Heritage Sites' Affairs 14:00 – 15:30	Farhad Azizi Zallani, General Director of IWHS: World and National Heritage Sites' Affairs Sarch Zigae, Head of Presentation and International Department of IWHS Mohamad Ali Kabiri, Expert in Conservation & Maintenance of Heritages Ghotamreza Misaghian, Director General of Conservation & Maintenance of Heritages Mohammad Reza Afashkhaneh, Head of Historic Architecture in Conservation & Maintenance of Heritages Hosein Amin Afshar, Expert in Conservation & Maintenance of Heritages Semed Hadi Ahmandi, First Advisor for deputy of Cultural Heritage Sara Babaei, Head of Conservation Department of IWHS Beheshteh Nasiri Rad Hasshan Hatbini International Affair Bureau (2 pax) · JICA Study Team: Nishiyama, Ueda (a half of meeting)
Sep. 24 (Sun)	Olympic Hotel 10:00 - 11:45	Mr. Ali Kabiri, Vice President and Manager · JICA Study Team: Usui
	ICHTO Handicraft Deputy 10:00 – 12:15	Mohammad Hosein Dehghani, Office for Education and Support of Production Maseed Kalantari, Export Office Ali Haji Shizari, Production & Development Office, Promotion Shohreh Kheradpishe (Production & Development Office, Human Resources Development International Affair Bureau, Ms. Torabi · JICA Study Team: Nishiyama, Ueda
	Espinas Palace Hotel 12:30 - 14:00	Mr. Mario Candeias, General Manager · JICA Study Team: Usui
	ICHTO NGO & Associations Department 12:30 – 13:20	Hassan Mirzaee , Senior Expert of NGO's Branch International Affair Bureau, Ms. Torabi · JICA Study Team: Nishiyama, Ueda
	Varzesh Hotel 15:00 - 16:30	Mr. Mohammadreza Afgheh, Hotel Manager · JICA Study Team: Usui
	JICA Iran Office 17:30 – 18:30	Mr. Hiroyuki Tanaka, Senior Representative Mr. Jinya Mizutani, Representative · JICA Study Team: Nishiyama, Usui, Ueda
	Sep. 25 (Mon)	Omid Entrepreneurship Fund 8:30 – 10:00
Pardisan Tour & Travel Agency 9:30 - 11:30		Mr. Mehdi Shafiee Shakib, Tour Manager · JICA Study Team: Usui
ICHTO International Affairs Bureau 10:45 – 11:15		Kiandokht Torabi · JICA Study Team: Nishiyama, Ueda

Date	Place	Participants
	Department of Environment 12:00 – 13:40	Maytoba Shirzad, Expert of Department of Environment, Ecotourism Raziyeh Mirzajani, International affairs of Department of Environment · JICA Study Team: Nishiyama, Ueda
	Mhregan Hotel 13:00 – 14:30	Mr. Mehran Davaran, Manager · JICA Study Team: Usui
Sep. 26 (Tue)	Parsian Enghelab Hotel 11:30 – 12:30	Mr. Sabah Rashidi, Rooms Devision Manager · JICA Study Team: Usui
Sep. 27 (Wed)	UNESCO 8:30 – 9:45	Esther Kuisch-Laroche, Director and Representative UNESCO Tehran Cluster Office Mahta Mohegh, Programme Assistant for Culture UNESCO Tehran Cluster Office Faezeh Behzadnejad, Director of ICHTO International Affairs Bureau Kiandokht Torabi, Senia Expert of ICHTO International Affairs Bureau Ali Sheikhan, Head of International Group of ICHTO International Affairs Bureau · JICA Study Team: Nishiyama, Ueda
	Joopar Passenger & Freight Trains Co. 9:00 – 12:00	Mr. A. Bashiripour, Marketing & Sales Manager Mr. M. Sadeghi, Marketing & Sales Officer · JICA Study Team: Usui
	ICHTO Work Shop 11:30 – 16:00	Mohammad Reza Atashkhaneh, Cultural Heritage in ICHTO Poorang Poorhosseini, National Committee of Ecotourism, Office for National Agreement Coordination on Tourism in ICHTO Tahereh Masjedi, National Committee of Ecotourism, Office for National Agreement Coordination on Tourism in ICHTO Marzieh Shahrabi, Marketing Tourism ICHTO Jassam Orzaee, Senior Expert, Investment Deputy Elham Ghaem Maghdme, Investment Deputy Hadi Ahmadhi, Cultural Heritage Sector Sara Babaei, World Heritage Office Faezeh Behzadnejad, Director of ICHTO International Affairs Bureau Kiandokht Torabi (Senia Expert of ICHTO International Affairs Bureau) Ali Sheikhan, Head of International Group of ICHTO International Affairs Bureau Dr. Mohsen Ranjbar, Cultural Heritage Sassan Ghassemi, Internashinal Affairs Hosain Karany, Ceelrock Natanz Seyed Mahdi Yasini, Tourism Planning ICHTO Armin Hadighi, Tourism Planning ICHTO Mahboubeh Safarzadeh, Tourisim Deputy Farahnaz Rafieyan, ICHTO Education · JICA Iran Office: Mr. Yukiharu Kobayashi, Chief Representative (Part 1) · JICA Iran Office: Mr. Jinya Mizutani, Representative (Part 2) · JICA Iran Office: Ms. Atefeh Asadi, Programme Officer (Part 1) · JICA Study Team: Nishiyama, Ueda, Usui (a half of Part 2)
	ICHTO National Committee of Ecotourism 16:30 – 17:00	Poorang Poorhosseini, National Committee of Ecotourism, Office for National Agreement Coordination on Tourism in ICHTO Faezeh Behzadnejad, Director of ICHTO International Affairs

Date	Place	Participants
		Bureau Kiandokht Torabi, Senia Expert of ICHTO International Affairs Bureau · JICA Study Team: Nishiyama, Usui, Ueda
	JICA Iran Office at ICHITO 17:00 – 17:30	Mr. Jinya Mizutani, Representative · JICA Study Team: Nishiyama, Usui, Ueda
Sep. 28 (Thu)	ICHTO Shush Office 11:00 – 15:30	Mohammad Hosesin Arastoozadeh, Manager of Shush World Heritage Site Mohammad Onidfar, Archaeologist Mohamed Amini, Head of Guard Hadi Nirvali, Head of Conservation Sector Mr. Ahmadi, ICHTO · JICA Study Team: Nishiyama, Ueda
	ICHTO Tchoga Zanbil Office 17:30 – 19:00	Atefeah Rashnoei, Manager in Tchoga Zanbil Rahim Bonna, Head of Workshop Conservation, Haft Tappe Ahmad Khanifer, Head of Workshop Conservation, Tchoga Zanbil Alireza Jonawaz, Public Relation Manager Najmeh Bostani Mr. Ahmadhi, ICHTO · JICA Study Team: Nishiyama, Ueda
Sep. 29 (Fri)	ICHTO Shushtar World Heritage & City Office 10:30 – 17:00	Bijan Heydarizadeh, Manager of Shushtar World Heritage Site Ali Mohamad Chaharmahali, Manager of Shushtar City M. Masha Kiani, Head of Conservation and Water Control Abol Ghasem Gholamheidar, NGO Chief Representative Mr. Ahmadi, ICHTO · JICA Study Team: Nishiyama, Ueda
Oct. 2 (Mon)	ICHTO International Affairs Bureau 11:00 – 12:00	Faezeh Behzadnejad, Director of ICHTO International Affairs Bureau Kiandokht Torabi, Senior Expert of ICHTO International Affairs Bureau · JICA Study Team: Ueda
Oct. 3 (Tue)	JICA Iran Office 13:00 – 13:45	Mr. Hiroyuki Tanaka, Senior Representative Mr. Jinya Mizutani, Representative · JICA Study Team: Ueda

The following table shows the agencies visited during the second field survey.

Table 1-6: Meetings during the Second Field Survey

Date	Place	Participants
Nov. 5 (Sun)	JICA Iran Office 10:00-11:00	Mr. Hiroyuki Tanaka, Senior Representative Ms. Atefeh Asadi, Programme Officer · JICA Study Team: Ohara, Usui, Fukumura
	ICHTO 13:30-16:00	Faezeh Behzadnejad, Director, ICHTO International Affairs Bureau Ms. Kiandokht Torabi, Senior Expert, ICHTO International Affairs Bureau Niloufar Yazadi, ICHTO International Affairs Bureau Kazem Jalili Zalpool, Tourism Deputy, ICHTO Gholamreza Missaghian, Culture Heritage Deputy, ICHTO Tahenek Wasjedi, Tourism Deputy, ICHTO Ms. Rasoul Asgari, Tourism Deputy, ICHTO Zahra Hossaeinian, Plan and Budget Organization Seyed Masoud Mirtalebi Agndam, Plan and Budget Organization Amir Sadeye, Tourism Deputy, ICHTO Seneh Ziyau, Culture Heritage Deputy, ICHTO Ms. Mohsen Ranjibar, Director General, Education of Tourism Deputy Leila Ajdari, Director General of T M&P Mr. Ali Shelkhan, ICHTO International Affairs Bureau · JICA: · JICA Study Team: Ohara, Usui, Fukumura
Nov. 6 (Mon)	ICHTO International Affairs Bureau 10:00-11:00	Kiandokht Torabi, Senior Expert, International Affairs Bureau, ICHTO · JICA Study Team: Ohara, Usui, Fukumura
Nov. 7 (Tue)	Workshop at ICHTO 13:45-15:30	Faezeh Behzadnejad, Director, ICHTO International Affairs Bureau Sara Naghadi, Deputy Director General, International Affairs, ICHTO Mina Rouhani, Expert, International Affairs, ICHTO Mohammad Reza Halezi, Senior Expert, International Affairs, ICHTO Kazem Jalili Zalpool, Expert, Tourism Marketing, ICHTO Golbanao Khavari, Senior Expert, Marketing Department, ICHTO Seyed Masoud Mirtalebi Agndam, Expert, Plan and Budget Organization Morteza Kossarneshan, General Office of Museum Niloufar Yazadi, Expert, International Affairs, ICHTO Mitra Narvend, Senior Expert, International Affairs, ICHTO Hadi Ahmed, Advisor of Culture Heritage, ICHTO Mohammad Sanet, ICHTO Farhad Azizi Zallani, General Director of IWHS: World and National Heritage Sites' Affairs Sareh Ziyae, Head of Presentation and International Department of IWHS Seyed Asghar Khodae, Deputy of Cultural Heritage · JICA Iran Office: Ms. Atefeh Asadi, Programme Officer · JICA Study Team: Ohara, Usui, Fukumura

Date	Place	Participants
Nov. 12 (Sun)	ICHTO (Tabriz) 9:00-14:00	Hohamad Alagheband Aydin Nezaot, Head of Guides Association Babak Soleimani Saha, Manager of Guides Association Fashad Rostami, Assistant of East Azerbaijan, ICHTO Ahmad Hamzehzadeh, Cultural Handicraft Tourism Organization Mohammad Hosein Eshaoji, Assistant Manager Mortaza Abdar Bakhshayshi Ghasehi Ghalarez, Agency Karim Razelzadeh, Head of hotels in Tabriz Add Jaferi, Head of Tourism Facilities and Services Navid Mashhouriafag, Head of Public Relations, ICHTO Arash Sohrabi, Tabriz Municipality Other 2 attendants from ICHTO · JICA Study Team: Ueda, Ohara, Usui, Fukumura
Nov. 14 (Tue)	ICHTO (Esfahan) 11:30-13:00	Mr. Fereydoun Allahyari, Managing Director, ICHTO Esfahan Mr. Naser Taheri, Managing Director, ICHTO Esfahan Mr. Hamid Amini, Deputy of Investment of Cultural Heritage of Isahan Mr. Mohsen Yarmohamadi, Deputy of Tourism of Cultural Heritage of Esfahan Mr. Jafar Jafarsalehi, Deputy of Handicraft of Cultural Heritage of Esfahan Mr. Shahram Amiri, Public Relations, ICHTO Esfahan Mr. Ali Lawafan Mr. Alireza Khayyam Mr. Kavons Masoudi Mr. Abbas Khorram, Secretary of Tourism Guide Association Amir Masoud Lavafan, Piroozy Hotel, Manager Kavous Masoudi, Direct Manager, YADMAN Tour & Travel · JICA Study Team: Ueda, Ohara, Usui, Fukumura
Nov. 16 (Thu)	ICHTO (Naein) 9:00-11:00	Ardeshir Asgari, Mayor M. Mohammadipoor, ICHTO of Naein · JICA Study Team: Ueda, Ohara, Usui, Fukumura
	ICHTO (Meybod) 15:00-16:30	Mohamad Javad Ahmadi, Deputy of Local Government Office Sasha Riahi Moghadam, Manager of Meybod Research Centre and Deputy of ICHTO Yazd Rasol Moshtaghian, Manager, ICHTO · JICA Study Team: Ueda, Ohara, Usui, Fukumura
Nov. 18 (Sat)	ICHTO (Yazd) 10:00-11:30	M. Lesansedgh, Yazd Development Tourism Corporation Jasha Riahi Moghadan, ICHTO Mohammed Rezasasiri, ICHTO Armad Reza Movahed, Travel Agency Associations Morteza Mahmodi, Investment Services Centre Fatemah Daneshyazdi, ICHTO
Nov. 20 (Mon)	ICHTO (Shiraz) 16:00-18:00	Mohsen Ameri, Fars Tourism Organization Mehran Soukkakian, Fars Tourism Organization Ahmadreza Naghibzaheh, Manager of Fars Tourism Development Corporation Alirala Ghajar, Manager of Gasht Tour Bahador Askari, Assistant of Guest House Amir Sabooki, Head of Tourist Guide Association of Fars Province Naser Bahmany, Manager of Fars Tourism Development Corporation

Date	Place	Participants
		Hassa Siyadatan, Head of Society of Fars Hoteliers Cholam Hashemi, Advisor of Fars ICHTO Director General Karim Ansari, Advisor of Fars ICHTO Director General Seyad Moayed Mohsennezhad, Deputy of Tourism of ICHTO Masayyeb Amiri, Director General of ICHTO Ebrahim Fouzani, Deputy of Tourism & Pilgrims of Fars Governor General · JICA Study Team: Nishiyama, Ueda, Ohara, Usui, Fukumura
Nov. 22 (Wed)	JICA TV meeting 12:00-13:30	Mr. Hiroyuki Tanaka, Senior Representative, JICA Iran Office Mr. Noriyuki Tsuruoka, Mr. Kakeru Furihata, Mr. Yoshihito Urano, JICA Tokyo Office · JICA Study Team: Nishiyama, Ueda, Ohara, Usui, Fukumura
Nov. 23 (Thu)	Tourism Service Training Institute 10:00-12:30	Mohammad Sahraie, Education Ward / Accounting · JICA Study Team: Usui, Fukumura
Nov. 25 (Sat)	Workshop at ICHTO (Tehran) 13:30-16:00	Rasoul Falahat, Expert of Tourism S. Hadi Ahnadi, Deputy of Cultural Heritage Poorang Poorhosseini Shima Bazrolshar Kazem Jalili, Marketing Department Mitra Narvand, Museum Department Roya Saatian Maedeh Ghadirinia Golbanoo Khavari Mohammad Sabet Eghlidi, ICHTO Faezeh Rehzadregad, Head of International Affairs Bureau, ICHTO Rasoul Asgari, ICHTO Seyed Masoud Mirtelebi, Plan and Budget Organization, Culture, Tourism and Sport Affairs Zahman Sadat Hosseinier, Plan and Budget Organization Mira Rouhani, International Affairs Bureau, Expert · JICA Iran Office: Mr. Hiroyuki Tanaka, Senior Representative, Ms. Atefeh Asadi, Programme Officer · JICA Study Team: Nishiyama, Ohara, Usui, Fukumura
Nov.28 (Tue)	JICA Iran Office at ICHTO 8:30-10:00	Mr.Yukiharu Kobayashi, Chief Representative Mr. Jinya Mizutani, Representative · JICA Study Team: Nishiyama, Ohara, Fukumura
	ICHTO 11:20-13:00	Ms. Faezeh Behzadnejad, Director General, International Affairs & Specialized Organization Bureau, ICHTO Dr. Ahmadi, Director General, Cultural Heritage Department, ICHTO Mr. Falahat, Senior Expert, Tourism Department / Tourism & Hotel Management, ICHTO Mr. Afrund, Executive manager, Tourism Department/ “ Tabriz 2018” project, ICHTO Ms. Torabi, Senior Expert, International Affairs & Specialized Organization Bureau, ICHTO · JICA Study Team: Nishiyama, Ohara, Fukumura
Nov. 29 (Wed)	ICHTO, Tabriz 15:00-17:00	Farshad Rostanmi, Deputy of Tourism, ICHTO Seyed Ramin Asabaghi, Head of Office of Tabriz M.Reza Rakhshemah, Ecotourism Head Office, ICHTO Sima Poortaghi, Tourism Expert, ICHTO Mina Ranjbar, Tourism Expert, ICHTO

Date	Place	Participants
		Fanshad Behafarin, Deputy of Handicrafts, ICHTO Gholemn Reza Ghasemi, Association of Agency Aydin Nezahet, Head of Board of Guide Association Arash Sohrabi, Research and Development of Tabriz Municipality Navid Mashhouri, Head of Public Relations · JICA Study Team: Ohara, Fukumura
Nov. 30 (Thu)	Kandovan 11:00-11:30	Mr. Fatollahi, Village Leader of Kandvan · JICA Study Team: Ohara, Fukumura
	ICHTO, Maragheh 13:20-14:00	Mr. Talabi, Head of ICHTO, Maraghe · JICA Study Team: Ohara, Fukumura
Dec. 2 (Sat)	Iran SCI 10:00-11:00	Mr. Peyman, DG, office of Cultural Trade and Service Statistics Mr. Hosseini, Expert on cultural and social statistics Mr. Ghoiami, Deputy General Office of economic accounts Ms. Torabi, Senior Expert, International Affairs & Specialized Organization Bureau, ICHTO · JICA Study Team: Ohara, Fukumura
Dec. 3 (Sun)	ICHTO 11:30-13:00	Ms. Faezeh Behzadnejad, Director General, International Affairs & Specialized Organization Bureau, ICHTO Dr. Ahmadi, Director General, Cultural Heritage Department, ICHTO Mr. Falahat, Senior Expert, Tourism Department / Tourism & Hotel Management, ICHTO Mr. Afrund, Executive Manager, Tourism Department/ "Tabriz 2018" project, ICHTO Mr. Kazem Jalili Zalpoor, Expert, Tourism Marketing and Promotion Bureau, ICHTO Ms. Torabi, Senior Expert, International Affairs & Specialized Organization Bureau, ICHTO · JICA Iran Office: Ms. Atefeh Asadi, Programme Officer · JICA Study Team: Ohara, Fukumura

The following table shows the agencies visited during the third field survey.

Table 1-7: Meetings during the third Field Survey

Date	Place	Participants
Jan. 20 (Sat)	ICHTO International Affairs 09:30 – 11:45	Mrs. Faezeh Behzanejad, Head Advisor to President, International Affairs Bureau Mrs. Tahereh Masjedi, Expert of Tourism Planning & Development, Tourism Deputy, Tourism Planning & Development Office Mrs. Parvin Heidari Shakh Tabaghi, Head of International Group, Plan and Budget Organization, International Department Mr. Ali Sheykhan, Head Group of the Specialized Organization, International Affairs Bureau Ms. Kiandokht Torabi, Senior Expert, International Affairs Bureau • JICA: Mr. Furihata, Mr. Mizutani • JICA Mission Team: Nishiyama, Ueda, Usui
Jan. 21 (Sun)	ICHTO (Tabriz) 10:30 – 12:15	Mohammad Shahdad, East Azerbaijan Guide Association, Agent-Tour Guide Navide Raovf Fard, East Azerbaijan Cultural Heritage & Tourism Org., Agent and Public Relation Gasem Hassan Nejad, East Azerbaijan Cultural Heritage & Tourism Org., Security Section, Agent Arash Sohrabi, Tabriz Municipality, Director, R and D of Technical and Engineering Dep. Mohammad Hossein Eshagi, Deputy of Tabriz Mayor, Tabriz Municipality, R and D of Technical and Engineering Dep. Morteza Abda Bakshaish, Director General, ICHTO Omid Rouhani, Head of the Group, ICHTO, Marketing and Advertising Navid Mashhour Afag, Head of the Group, ICHTO, Public Relations Office Mohammad Alagheband, Chairman, East Azerbaijan Restaurants Association Rahmat Mahmoudi, East Azerbaijan Tour Agencies Association Agent Aydin Nezafat, East Azerbaijan Guides Association, Agent • JICA: Mr. Kobayashi, Mr. Furihata, Mr. Mizutani • JICA Mission Team: Nishiyama, Ueda, Usui
	Tabriz City Council 14:00 – 15:00	Member of city council and member of Tabriz 2018 • JICA: Mr. Kobayashi, Mr. Furihata, Mr. Mizutani • JICA Mission Team: Nishiyama, Ueda, Usui
	Tabriz City Hall 18:30 – 19:30	Mr. Iraj Shahin Baher, Mayor Mr. Aboomousavi, Advisor to mayor, Tabriz 2018 • JICA: Mr. Kobayashi, Mr. Furihata, Mr. Mizutani • JICA Mission Team: Nishiyama, Ueda, Usui
Jan. 23 (Wed)	JICA Iran Office 14:00 – 15:00	Mr. Yukiharu Kobayashi, Chief Representative Mr. Jinya Mizutani, Representative Mr. Kakeru Furihata, Country Officer (JICA HQ) • JICA Mission Team: Nishiyama

Date	Place	Participants
Jan. 24 (Thu)	Workshop at ICHTO (Tehran) 09:30 – 11:45	<p>Mr. Mohammad Sabet Eghlidi, Director, Planning & Development of Tourism Office</p> <p>Mr. Amir Sadeghi, Ecotourism Expert, Ecotourism</p> <p>Mr. Moslem Shojaei, Marketing and Promotion Managing Assistant, Tourism Deputy</p> <p>Mr. Kazem Jalili, Tourism Deputy, Reserch and Education Office</p> <p>Mrs. Golbanoa Khavari, Markeing Group Head, Marketing & Promotion Bureau</p> <p>Mrs. Zhaleh Nasleaziz, Supervision Expert, Tourism Deputy, Monitoring and Evaluation</p> <p>Mr. Seyed Masoud Mirtalebi Aghdam, Expert, Plan and Budget Organization</p> <p>Mrs. Tahereh Masjedi, Expert, Planning and Development of Tourism Office</p> <p>Mrs. Athareh Ayashi, Association, Planning and Development of Tourism Office</p> <ul style="list-style-type: none"> • JICA: Mr. Kobayashi, Mr. Furihata, Mr. Mizutani, Ms. Asadi • JICA Mission Team: Nishiyama, Ueda, Usui
	Embassy of Japan 13:20 – 14:00	<p>Mr. Akira Norota, First Secretary, Head of Economic Cooperation Section, Embassy of Japan</p> <ul style="list-style-type: none"> • JICA: Mr. Furihata, Mr. Mizutani • JICA Mission Team: Nishiyama, Ueda, Usui

2. SOCIO-ECONOMIC CONDITION IN IRAN

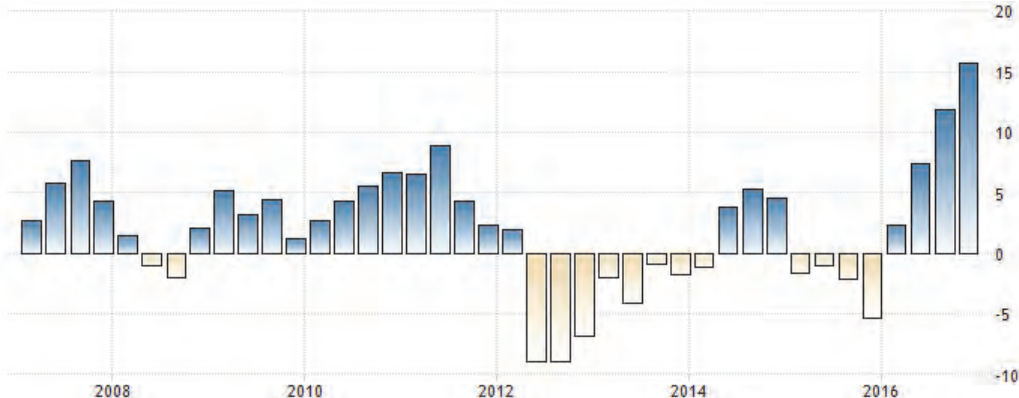
(1) ECONOMIC CONDITIONS IN IRAN

Having national land area of 1,648,195 square kilometres, equivalent to approximately 4.4 times the size of Japan, and a population of 79,926,270 (2016, Census), Iran is a major power in the Middle East. It also has the reserves of petroleum in the third place in the OPEC countries³.

In 2015, Iran’s GDP stood at USD 456.9 billion and its per capita GDP was USD 5,758, giving it the status of a fairly advanced country. Although its GDP growth rate turned negative as a result of the strengthening of economic sanctions related to the nuclear sector since 2011, following the relaxation of sanctions in 2016, the World Bank forecasts that growth will be 6.5%, higher than initial estimates (4.4%, World Bank, IMF).

Against the backdrop of economic sanctions, the Government of Iran has been focusing policies on various industrial sectors including manufacturing and agriculture with a view to lowering its dependence on revenue from foreign trade. Looking at the breakdown of its GDP, whereas petroleum and gas-related industries account for 42.5% of GDP in Saudi Arabia, this figure is just 15.3% in Iran (2015). Even compared to other oil-producing countries in the Middle East, Iran has relatively low dependence on petroleum and gas-related industries. Regarding the GDP share of each sector in Iran, the agriculture sector is 10.8%, 33.8% in the industrial sector and 55.4% in the service sector respectively (2015), which is characterized by the high ratio of service sectors in terms of GDP share.

Manufacturing accounts for 11.8% of GDP. Within this, in the auto manufacturing sector, an industrial cluster has developed whereby 13 companies (of which around 10 are actually operating) manufacture approximately 986,000 vehicles (2016), and they are supported by approximately 800 working suppliers (out of approximately 1,200 registered companies).



Source: Tradingeconomics.com/ Central Bank of Iran

Figure 2-1: Iran’s GDP Growth Rate (Quarterly: Converted to Annual Rate)

Regarding the GDP share of the service sector in Iran, the tourism industry, including hotels, and restaurants, accounting for more than 20%. The service sector accounts for just under 50% of all employed persons, however, the unemployment rate in recent years has remained still high.

³ OPEC Annual Statistical Bulletin 2017

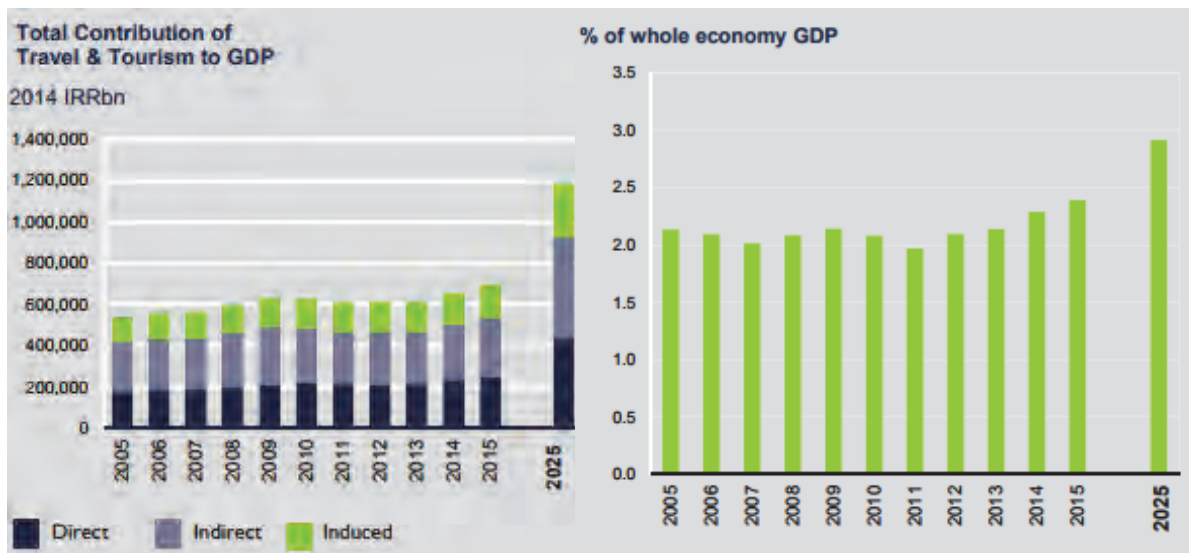
Table 2-1: Economic Conditions in Iran

Indicator	Unit	2013	2014	2015
Actual GDP (2010 prices)	100 million USD	4,445	4,639	4,569
GDP growth rate	%	-1.9	4.3	-1.5
Per capita GDP	USD	5,741	5,916	5,758
Per capita GDP growth rate	%	-3.2	3.0	-2.7
GDP share of the agricultural sector	%	9.0	9.3	10.8
GDP share of the industrial sector	%	40.2	38.2	33.8
GDP share of the service sector	%	50.8	52.4	55.4
Persons employed in the agricultural sector	People	18.3	17.9	18.0
Persons employed in the industrial sector	People	34.3	33.8	32.5
Persons employed in the service sector	People	47.4	48.3	49.4
Unemployment rate	%	10.4	10.6	11.1

Source: World Bank

According to the WTTC, the direct contribution by the travel and tourism industry to the GDP of Iran in 2015 was more than 200 trillion IRR, rising to 691 trillion IRR when also counting induced effects. In percentage terms, the direct effect of the travel and tourism industry on GDP is 2.4% and the indirect effect including induced impacts is 6.5%. However, when this is compared with the situation in other countries, Iran is ranked poorly at 135th in the world in terms of the ratio of the direct effect on GDP. This suggests that there is a lot of room for improvement, as is forecast by the WTTC.

In terms of the effect on employment, the travel and tourism industry directly employs 413,000 people, and the figure rises to 1.224 million people when indirect and induced employment is also taken into consideration.



Source: WTTC Travel & Tourism Economic Impact 2015

Figure 2-2: Contribution by the Travel and Tourism Industry to GDP

Figure 2-3: GDP Share of the Travel and Tourism Industry (Direct Effect)

(2) SOCIAL CONDITION IN IRAN

Population of Iran has increased and reached to 80 million in 2016. Population growth rate of Iran has been 1.2% recently with slight decreasing trend. Proportion of urban population is about 73% in 2016. Urbanization has already progressed to a considerable extent and proportion of urban and rural population has been fixed at constant rate. From the Gini coefficient⁴ in 2013 (0.37), it would be somehow fair society, which income distribution has been implemented fairly compared with other countries. Net primary enrolment rate is almost 100% while gross enrolment rate was just 50.8% in 2015. It implies that some of elder generation did not enrol the primary school whereas current young generation could enjoy the primary education. Percentage of internet users has been increased. More than half percent of the population can have access to internet in 2016. Literacy rate was 84.7% in 2014.

Table 2-2: Economic Conditions in Iran

Indicator	Unit	2013	2014	2015	2016
Population	Person	77,435,384	78,411,092	79,360,487	80,277,428
Population growth rate	%/year	1.28	1.25	1.20	1.15
Total fertility rate	%	1.72	1.70	1.68	N/A
Urban population proportion	%	72.3	72.9	73.4	73.9
Rural population proportion	%	27.7	27.1	26.6	26.1
Gini coefficient	-	0.37	N/A	N/A	N/A
Gross primary school enrolment rate	%	38.1	42.4	50.8	N/A
Net primary school enrolment rate	%	98.7	99.2	99.2	N/A
Proportion of internet uses	%	30.0	39.4	45.3	53.2
Literacy rate	%	84.6	84.7	N/A	N/A

Source: World Bank

Shia Islam is the established religion of Iran. Around 98% of the population in Iran is the Muslim. 90% of the population out of total Muslim is recognized as Shia. The situation is clearly different from neighbouring countries where the majority of Sunni people live in. There are some Christian, Jewish people and Zoroastrian other than Muslim in Iran.

Based on the Constitution of the Islamic Republic of Iran, governing of jurist is specified as the core of the political system for Iran. In addition, the foundation of governing principle put Islamic Republic based on the Shia Islam. As of October 2017, Ayatollah Ali Khamenei is a current Supreme Leader and Mr. Hassan Rouhani is a current president of Iran. Islamic Consultative Assembly is a unicameral assembly with 290 assembly members.

Official data about proportion of ethnic's population in Iran is not available. According to some estimation, Iranian population consists of Persians, followed by Azerbaijanis, Kurds, Arabs, Baloch, Turkmens, and others.

⁴ The Gini coefficient is an indicator to measure equality of income distribution. It is indicated by numbers from 0 to 1, meaning equality as approaching 0, inequality as being closer to 1 means bigger disparity. The warning line of frequent social unrest is 0.4.

(3) SOCIO-ECONOMIC INDICATORS

Socio economic indicators by province are summarised in the table below. Around 17% population in the country is living in Tehran. Other than Tehran province, Khorasane Razavi province and Esfahan province has the larger population, which are more than 5 million. The unemployment rate in Markazi province is 7.3% and relatively low while the rates in Chaharmahal and Bakhtiyari, and Kermanshah are more than 20%. Tehran and Khuzestan province has relatively high GRDP per capita while GRDP per capita in Sistan and Baluchestan, and Kordestan province are just one-third level compared to Tehran and Khuzestan province. From the above data, there are the huge socio-economic disparities among the provinces in Iran.

Table 2-3: Socio Economic Indicators by province

Province	Population in 2016	Average Population Growth Rate: 2011-2016	Unemployment Rate in 2016	GRDP in 2014 Unit: Million IRR	GRDP per Capita in 2014 Unit: 1,000 IRR
Total country	79,926,270	1.24	12.4	11,487,170	147,328
East Azarbayejan	3,909,652	0.97	10.8	397,753	103,744
West Azarbayejan	3,265,219	1.17	11.0	255,495	80,092
Ardebil	1,270,420	0.35	15.3	130,596	103,565
Esfahan	5,120,850	0.97	14.6	766,587	152,555
Alborz	2,712,400	2.37	14.3	392,259	151,510
Ilam	580,158	0.80	11.6	87,546	153,320
Bushehr	1,163,400	2.41	11.3	446,201	402,345
Tehran	13,267,637	1.72	11.6	2,711,017	211,402
Chaharmahal & Bakhtiyari	947,763	1.15	20.2	78,961	85,363
South Khorasan	768,898	3.02	10.7	64,091	85,001
Khorasane Razavi	6,434,501	1.43	13.2	649,815	103,887
North Khorasan	863,092	-0.11	11.2	74,228	85,813
Khuzestan	4,710,509	0.78	12.7	1,111,207	239,536
Zanjan	1,057,461	0.81	9.7	112,458	108,133
Semnan	702,360	2.16	8.6	104,034	154,582
Sistan & Baluchestan	2,775,014	1.83	12.9	164,066	61,287
Fars	4,851,274	1.08	11.4	566,007	119,210
Qazvin	1,273,761	1.17	11.6	182,024	146,322
Qom	1,292,283	2.33	11.2	115,739	93,792
Kordestan	1,603,011	1.42	15.2	121,083	77,767
Kerman	3,164,718	1.49	11.5	390,084	126,939
Kermanshah	1,952,434	0.07	22.0	213,961	109,780
Kohgiluyeh & Boyerahmad	713,052	1.60	13.3	153,861	222,664
Golestan	1,868,819	1.01	12.6	147,894	80,728
Gilan	2,530,696	0.40	11.3	258,756	103,090
Lorestan	1,760,649	0.07	13.0	146,641	83,414
Mazandaran	3,283,582	1.33	11.6	400,869	125,350
Markazi	1,429,475	0.22	7.3	264,588	185,937
Hormozgan	1,776,415	2.39	10.3	299,101	176,565
Hamedan	1,738,234	0.23	9.5	181,964	104,218
Yazd	1,138,533	1.17	12.8	236,011	217,923

Source: JICA Study Team based on the documents form Statistical Centre of Iran

(4) TRENDS IN EXPORTS AND FOREIGN DIRECT INVESTMENT (FDI)

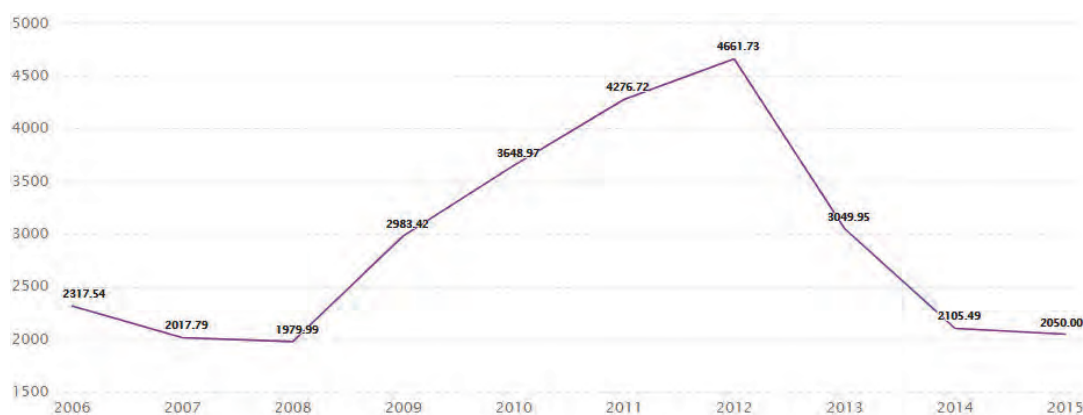
Following the lifting of nuclear-related economic sanctions conditional on the agreement of the Joint Comprehensive Plan of Action on Iran's nuclear development activities, there has been a rush of foreign investment into Iran including supply of Airbuses to replace the country's deteriorating fleet of domestic aircraft, start of a business tie-up between auto manufacturers of France and Iran, construction of a nuclear power station and high-speed roads by China, signing of an MOU with South Korea, and so on.

The latest five-year national economic development plan in Iran, sixth five-year development plan, requires investment of more than USD 230 billion, of which includes 20% foreign investment amounting to USD 51.8 billion. Iran especially intends to introduce foreign investment to the key sectors of petrochemicals, electric power, water resources, autos, tourism and so on.

Iran's largest trading partner in terms of both exports and imports is China. For China, which continues to experience growing demand for energy, Iran is its third largest source of imported petroleum behind Saudi Arabia and Nigeria; while another important factor is that China does not participate in the economic sanctions placed on Iran by Europe and America. Meanwhile, the United Arab Emirates (especially Dubai), which is Iran's second largest source of imports, plays an important role as a relay trade hub making it possible for foreign products to enter Iran in spite of the sanctions. In terms of financial transactions too, a lot of remittances go through Dubai to and from Iran. The third biggest source of imports to Iran is South Korea, which exports TV display modules, automobiles, auto parts, iron and steel products, mobile phone components and so on.

The trade figures for fiscal 2015 fell sharply over the previous year due to the falling price of crude oil and ongoing impact of the economic sanctions. However, in the fiscal year 2016, trade rebounded thanks to relaxing of the economic sanctions and gentle increase in the price of oil.

Similarly, the amount of foreign direct investment to Iran peaked in 2012 but subsequently declined to approximately USD 2.1 billion due to the strengthening of the economic sanctions. However, this too is expected to rise from now on following the relaxation of sanctions.



Unit: Million USD

Source: Tradingeconomics.com/Central Bank of Iran

Figure 2-4: Foreign Direct Investment to Iran

(5) NATIONAL ECONOMIC DEVELOPMENT PLAN IN IRAN

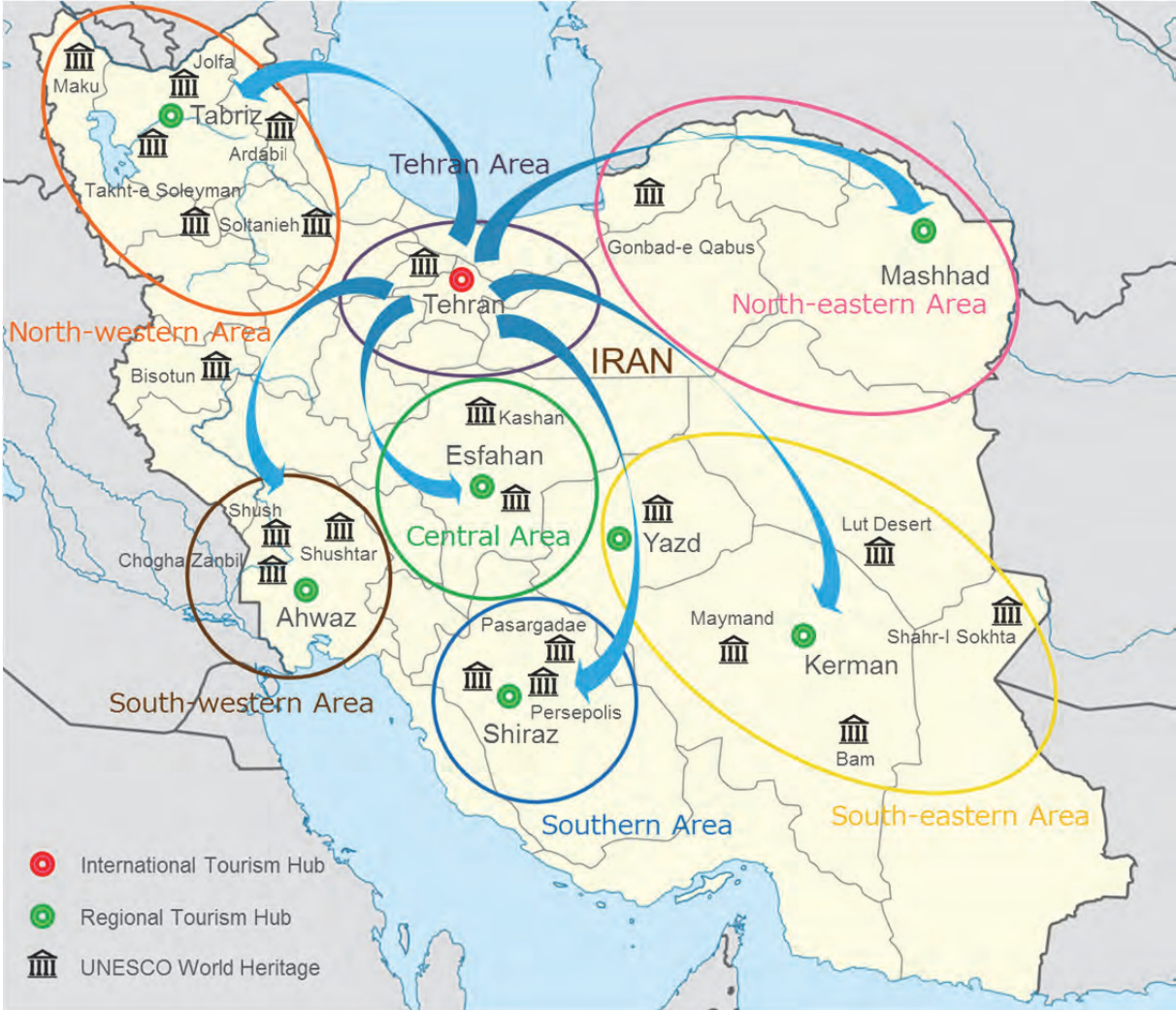
In the sixth five-year plan (2017-2021), which is Iran's national economic development plan, it is intended to achieve a GDP growth rate of 8% per year and exports worth USD 112.7 billion, and petrochemicals, electric power, water resources, automobiles, and tourism are regarded as the key sectors. Expected average annual growth rate of production per capita is set as the 6.7% and the rate of total productivity of production factors is set as 2.7%. It is noteworthy that the plan emphasizes export of non-oil service and goods. The target of average annual growth rate for export of non-oil service and goods is 21.7%. The plan gives the priority on the production and export of oil and gas. In addition, Iran will focus on increase of export non-oil services and goods other than oil and gas. Inflation rate in 2016 was 7.9% and the rate is set as 8.8% in the sixth five-year plan.

Unemployment rate was 12% in 2016 and will be decreased to 8.6% in 2021 in the plan.

3. CURRENT STATUS OF TOURISM RESOURCES IN IRAN

(1) TOURISM RESOURCES IN IRAN

The history of Iran dates back to the Mesopotamian civilization before the birth of Christ. Reflecting this and other historical eras such as the Persian Empire, the Islamic Empire, the Timurid Empire, and the Ottoman Empire, Iran has a diverse culture and an abundance of cultural heritage sites. Against a backdrop of diverse climate and national land features, it has a whole host of tourism resources including deserts in the east, beach resorts on the Caspian Sea in the north and the Persian Gulf in the south, ski resorts and so on. Tourism destinations in Iran, including the tours that are organized by Japanese travel agents, etc., are grouped into following seven tourism destinations.



Source: JICA Study Team

Figure 3-1: Major Tourism Destinations in Iran

Table 3-1: Major Tourism Destinations and Tourism Resources in Iran

International Tourism Hub	Tourism Destination	Regional Tourism Hub	Tourism Resources	
			Main Tourist Sites	Other Tourism Resources
Tehran	Tehran and Surrounding Area	Tehran	<ul style="list-style-type: none"> • Golestan Palace * • Mt. Damāvand 	<ul style="list-style-type: none"> • Traditional embroidery • Ski resort
	North-western Area	Tabriz	<ul style="list-style-type: none"> • Tabriz Bazaar * • Sheikh Safi al-Din Khānegāh and Shrine Ensemble * • Takht-e Soleyman * • Soltaniyeh * • Bisotun * 	<ul style="list-style-type: none"> • Armenian Monastic Ensembles of Iran • Cave dwellings of Kandovan • Pile rugs
	North-eastern Area	Mashhad	<ul style="list-style-type: none"> • Haram-e Motahhar Square • Gonbad-e Qabus* 	<ul style="list-style-type: none"> • Sacred site of Shia Muslims
	Central Area	Esfahan	<ul style="list-style-type: none"> • Naqsh-e Jahan Square * • Kashan * 	<ul style="list-style-type: none"> • Hamadan ceramics • <i>Minakari</i> • (Enamel products) • Copperware • Pile rugs ** (Esfahan Province)
	Southern Area	Shiraz	<ul style="list-style-type: none"> • Persepolis * • Pasargadae * 	<ul style="list-style-type: none"> • Pile rugs ** • (Fars Province)
	South-western Area	Ahwaz	<ul style="list-style-type: none"> • Choga Zanbil * • Shush * • Shushtar * 	
	South-eastern Area	Kerman	<ul style="list-style-type: none"> • Yazd* • Bam * • Lut Desert * • Maimand * 	<ul style="list-style-type: none"> • Persian <i>Qanat</i> facilities *

Source: JICA Study Team, * UNESCO Cultural Heritage, ** UNESCO Intangible Heritage

			
Northwestern Area Armenian Monastic Ensembles of Iran UNESCO World Heritage	Central Area Esfahan Naqsh-e Jahan Square UNESCO World Heritage	Southern Area Remains of Persepolis UNESCO World Heritage	Southeastern Area Bam and its Cultural Landscape UNESCO World Heritage

Photographs: UNESCO World Heritages in each Tourism Destination

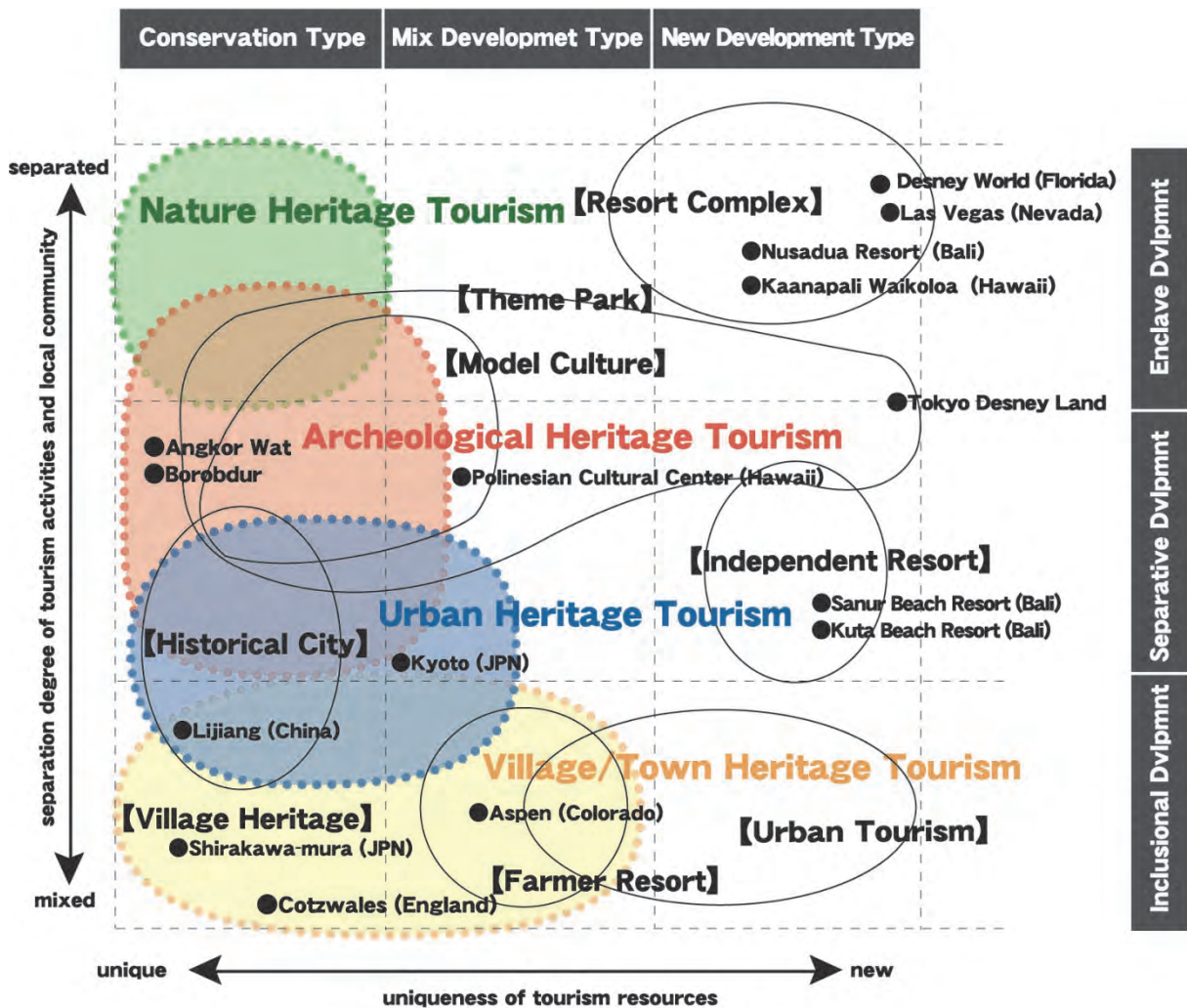
(2) FEATURES AND ISSUES OF TOURISM RESOURCES IN IRAN

1) Typological Analysis of Tourism Resources

In this Study, in addition to identifying the major tourism destinations in Iran described above, the types of tourism resources that are already recognized in Iran will be analysed.

In conducting the analysis, two axes were utilized: the “uniqueness of tourism resources” axis, indicating whether resources are unique (cannot be substituted) or whether new resources can be

created through conducting development (can be substituted), and the “separation degree of tourism activities and local community”, indicating whether the space where tourism activities are conducted overlaps with the local community (living/residential areas) or whether the two are separated (see Figure 3-2). Doing this makes it possible to ascertain the presence and development situation of tourism resources in Iran on the national and regional levels, identify the types of tourism resources that should be given priority in future development, and select the tourism resources where sustainable tourism development that includes local communities should be applied.



Source: Noriaki NISHIYAMA, Hokkaido University

Figure 3-2: Typological analysis based on the Two Axes of “Uniqueness of tourism resources” and “Separation degree of tourism activities and local community”

2) Typology of Tourism Resources in Iran

In the Study, the existing tourism resources of Iran were categorized during a workshop with ICHTO employees conducted on September 27, 2017. From there, examination was conducted on identifying the types of tourism resources that should be given priority in future development, and considering the approach to sustainable tourism development that includes local communities.

As a result, concerning the tourism resources presented by the ICHTO employees, the responses of all participating groups tended to focus on the four blocks in the bottom left corner of the analysis chart (Table 3-2). This signifies that cultural heritage such as ruins, communities, historical towns, etc. are the prevalent tourism resources and that these resources are situated in close proximity to local communities.

Through developing such tourism resources as Living Heritage (heritage where tourism resources and local communities maintain a relationship or heritage where local life, ruin and townscape coincided together), it will be possible to realize sustainable tourism development. It was understood that Iran is abundantly blessed with such resources. Specifically, such tourism resources refer to ancient ruins, traditional techniques and culture centring on handicrafts, urban tourism with a historical context, and renovation of traditional architectures such as Caravanserai. Such areas are handled by the ICHTO Cultural Heritage Department and Handicraft Department and may be regarded as tourism development linked to living heritage, which also overlaps with Ecotourism and eco-lodge, which are recently developed in Iran.

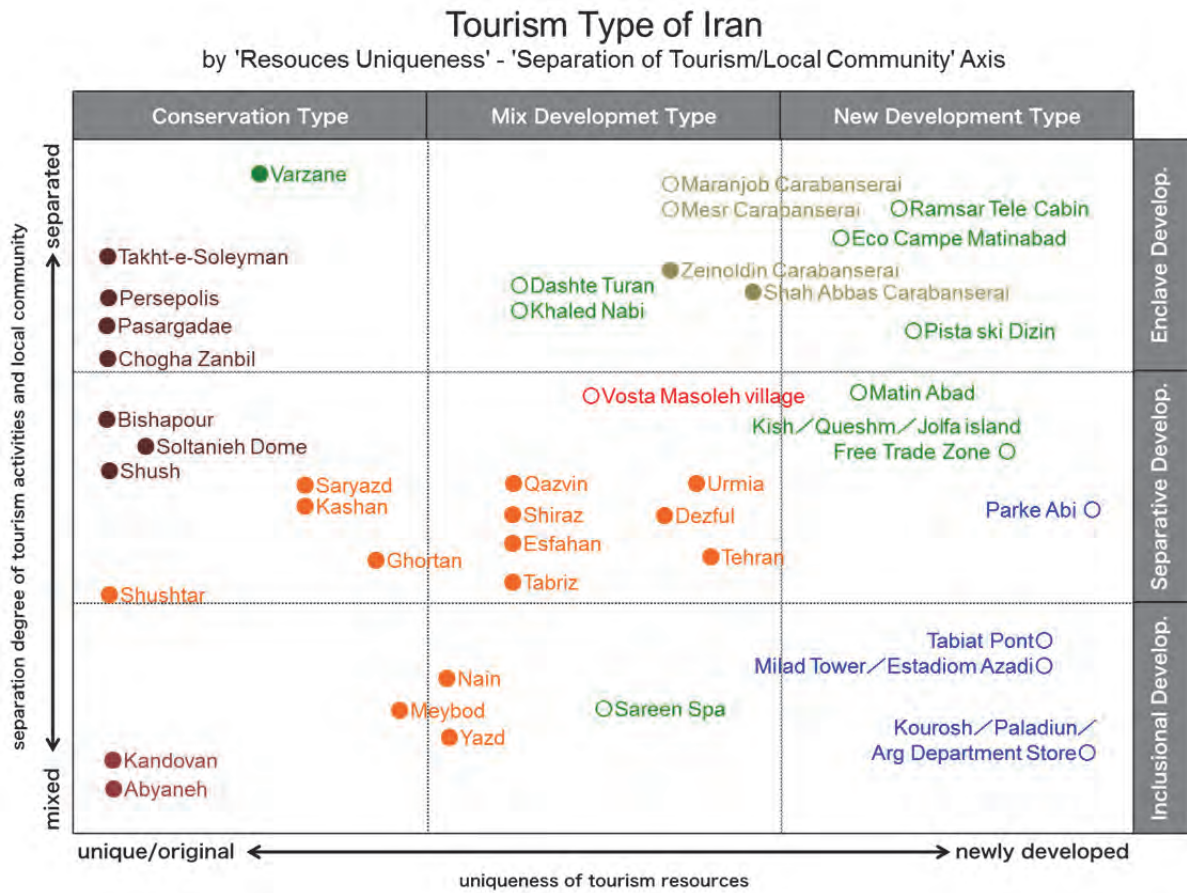
Table 3-2: Results of Type Analysis in the Workshop for ICHTO Employees

Tourism Type of Iran by Resouces Uniqueness - Separation of Tourism/Local Community Axis

	Conservation Type	Mix Developmet Type	New Development Type	
separation degree of tourism activities and local community	[Conservation/Enclave] Lut 砂漠 (世界遺産)*4 Margon 滝 (シーラーズ近く) Chadgan湖 (イスファハーン州) Damavand山 (テヘラン近く) Urmia湖 Jiroft (ケルマン州ジーロフト文化都市) Shahre Sukhteh (スイースタン・パローチェスタン州ジーロフト文化都市) Shahdad歴史都市 (ケルマン州) Abr ジャングル (セムナン州雲海) Hara ジャングル / Darreh Setareghan (ゲシュム島)	[Mix/Enclave] Bagh Meli Giah Shenesi (テヘラン近郊植物公園) Maranjob (キャヴィール砂漠の中の町、キャラバンサライ改修ホテル) Mesr (キャヴィール砂漠の中の町、キャラバンサライ改修ホテル) Hotel Kapari (ケルマン州の遺跡のホテルリゾート) Guilan Rural Heritage Museum (古民家移築) Dashte Turan (塩湖の公園) Khaled Nabi (ゴレスタン州の古い墓地)	[New/Enclave] Parke Abi (マシュハドやテヘランにある複合プール施設) Pista ski Dizin (テヘラン近郊スキー場) Take Jabub Ransar (ラムサル ローブウェイ) Eco Campe Matinabad (カシャーン近くの民間エコツーリズム会社開発のリゾート)	Enclave Development
	[Conservation/Separative] Persepolis (世界遺産)*4 Isfahan (世界遺産)*4 Soltanieh Dome (ザンジャーン州世界遺産)*3 Pasargadae (シーラーズ世界遺産)*2 Arg of Karim Khan (シーラーズの城塞) Naghsh Rostam (シーラーズ王の墓) Ghamsar村 / Niasar村 (カシャーン近くのバラ栽培) Roudkhan城 (ギーラーン州カスピ海近く) Takhte Soleyman (世界遺産) Tepe Sialk 丘 (カシャーン近く遺跡) Dareh Shahr (ロレスタン州遺跡) Yazd (世界遺産) Shushtar (世界遺産) Hara ジャングル (マングローブ林) Nyasar村 (カシャーン近くバラ栽培) Shah Abbasの母のキャラバンサライ (エスファハーン近く) Ghara Kelisa (世界遺産アルメニア修道院)	[Mix/Separative] Taghe Bostan (ケルマンシャー州レリーフ遺跡) Tangeh Vashi (テヘラン近郊自然地) Lalejin (ハマダーン州陶器の町) Kashanの歴史的ホテル Ezmighan村 (ホラサーン州谷の景勝地) Palangan村 (コルデスタン州) Zeinoldin キャラバンサライ (ヤズド近くリゾート)	[New/Separative] Tabiat Pont (テヘランのモダンな橋) Milad Tower (テヘランのタワー) Pole Tabiat (テヘランの橋) Matin Abad (エスファハーン州のエコキャンプ) Kish島 (国境沿い免税特区) Queshm島 (国境沿い免税特区) Jolfa島 (国境沿い免税特区)	Separative Development
	[Conservation/Inclusional] Abnane 村 (エスファハーン州)*3 Kandovan村 (タブリーズ近く)*3 Oraman 村 (コルデスタン州) Kalpurgan 村 (スイースタン・パローチェスタン州陶器の村) Bazar Tabriz (タブリーズ世界遺産) Midane Amir Chakhmag (ヤズドの広場) Horeyzeh (フーゼスタン州の町) Masuleh町 (ギーラーン州カスピ海近く) Meymand村 (ケルマン集)	[Mix/Inclusional] Gheshm 島 Kish 島 Vosta Masoleh 村 (ギーラーン州歴史村) Sareen 温泉 (アルダビーレ州) Sarae Amerian (カシャーン歴史建築) Qamsar村 (カシャーン近くバラ栽培) Kandolus村 (カスピ海のリゾート) Bastam (セムナン州モスク)	[New/Inclusional] Kourosh (テヘランのデパート) Paladiun (テヘランのデパート) Arg (テヘランのデパート) Borje Milad (テヘランのタワー) Estadiom Azadi スタジアム モール Chabahar港 (免税特区) Azadi タワー Miladタワー	Inclusional Development
		← unique/original	← newly developed →	
		uniqueness of tourism resources		

Source: JICA Study Team

In addition to the above, the results of typological analysis of the tourism resources in Iran including tourism resources in the six destinations, such as Tehran, Tabriz, Esfahan, Yazd, Shiraz and Ahwaz, surveyed during the mission are detailed in Figure 3-3.



Legend :

- Archaeological heritage, Ruin
- Tourism destinations with natural heritage and natural resources
- Urban heritage (combination of attractions of historical city, ruin and modern city)
- Town / Village heritage
- Commercially developed heritage (Caravanserai, etc.)
- Theme park
- Tourism destinations with attractions of modern city
- ※ ○: Site that was mentioned at Workshop with ICHTO, but JICA Study Team did not visit during the survey.

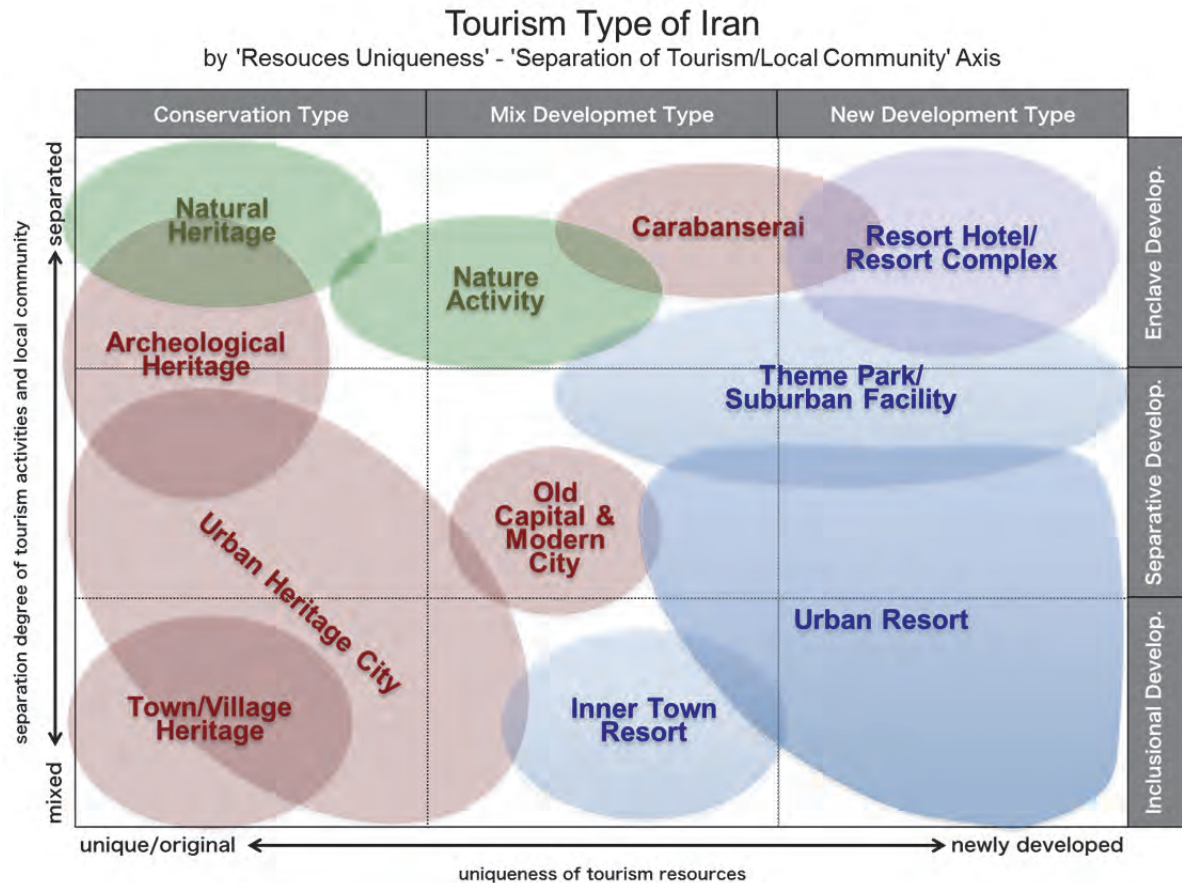
Source: JICA Study Team

Figure 3-3: Typology Analysis of Tourism Resources in Iran

3) Features of each Type of Tourism Resource and Development Issue

Figure 3-4 shows conceptual group of tourism resources in Iran based on the matrix of typological analysis of tourism resources.

In addition, the features and development issues of each type of tourism resources in Iran will be explained as follows.



Source: JICA Study Team

Figure 3-4: Typology of Tourism Resources in Iran

(a) Archaeological Heritage

This is the most abundant type of heritage in Iran. Archaeological heritage was created by past cultures and civilization, almost all these sites were subsequently abandoned and cut off from society; hence remains are likely to be discovered anywhere regardless of current places of human activities. Moreover, after such heritage is discovered and improved, this kind of tourism resource will be basically turned into parks and offered for use as tourism resources, so spatial relationship with local communities is relatively limited. However, if local people can build relationships with such heritage through interpreting its value (operating commentary facilities, acting as guides, etc.) and managing facilities (restaurants, souvenir shops, etc.) that enhance the convenience of tourism, rather than being something apart from the local community, the heritage becomes something that generates economic benefits, becomes an object of faith, nurtures a sense of pride and affection, i.e. it becomes able to exhibit value as living heritage. In the 21st century, this will become the way to approach heritage, whether it be World Cultural Heritage that already attracts a lot of visitors, or heritage that is scheduled to be improved as a tourist attraction in future.

(b) Urban Heritage City

In this type of heritage, old historical cities retain their urban functions while also acting as tourism resources. Such cities may include remains that have already lost their functionality. In the case of Iran, cities include fortress remains, squares, caravanserais, irrigation facilities, hot bathing facilities (*Hammam*), mansion architecture and so on, and there is a wide variation of such heritage. Through complexly developing such tangible real estate heritage and intangible heritage such as traditional arts, bazaars and so on as tourism resources, it becomes possible to develop products that appeal to a wide range of customers, and realize the participation of local communities; hence there is a lot of potential for sustainable tourism development.

(c) Old Capital & Modern City

It is a type of "Urban Heritage" that can be seen particularly in Iran more than other countries. It was ancient capital of different dynasties that previously prospered and continue to attract people as cities that possess the functions and appeal of modern cities, for example, Esfahan, Shiraz, Qazvin and Tabriz. It is possible to brand the importance of Iran's history within the theme of the Silk Road through consciously improving and honing the features and heritage of the former dynasties that prospered in such cities and compiling a story comprising a series of urban heritage. In each city, rather than diversify tourism products, the city brand can be formed by extracting and improving the heritage that symbolizes that city's history and highlighting it within the modern urban functions.

(d) Urban Resort

This is a type represented by Tehran including urban facilities such as commercial facilities, cultural and arts facilities, sports facilities, convention facilities and universities that large cities only have; and receive domestic and international visitors are regarded as resorts. Compared to aspects as urban heritage, this description is used for cities that have outstanding such characteristics and functions. Since such cities become regional tourism hubs for domestic tourism, it is important to improve the transportation infrastructure such as airports and railways.

(e) Inner Town Resort

This is a type of tourism resources consisting of spring water, hot springs, parks, green areas, squares, and religious facilities, these are not an important heritage neither nor commercial, cultural and art facilities but facilities and spaces that Iranian people consider to be tourism resources. In addition to the tourism resources recognized as a cultural heritage, there are some cases where it is effective to utilize and develop such facilities as tourism resources to make the city unique.

(f) Town / Village Heritage

This is a type of tourism resources in rural areas, areas located along historical roads away from capitals (including old capitals) and major cities, and remote areas in mountain and along coast where groups of historic buildings and townscape have been formed as the heritage based on specific

industries (agriculture, fisheries, mining, manufacturing, etc.) or functions (ports, accommodation, distribution, transport, etc.) at present/past. Because such heritage has been passed on together with people's livelihoods, in many cases the residents are cultural successors and are suitable for CBT development whereby they participate as guides or interpreters or as owners of accommodation facilities. Diverse cultures like this can be found together with communities and townscapes all over Iran and they have very high potential as tourism resources. However, in cases where residents cannot recognize the value of such cultures as their own community's heritage, this type of heritage has a tendency to be transformed by tourism development and suffer from adverse effects such as being purchased by external capital. Accordingly, such heritage requires extremely careful development based on correct understanding of its nature and qualities.

(g) Caravanserai

Iran has almost 1,000 caravanserais registered as the National Heritage. Each caravanserai has its own historical background and it also has a universal value of being widely distributed along the Silk Road. Accordingly, these are worthy of attention as being rare tourism resources that provide potential for utilizing diverse resources. There are some caravanserais that are utilized as commercial facilities, hotels, etc. while effectively preserving their value as cultural heritage, whereas in other cases, development or reuse is carried out without paying due attention to preservation as cultural heritage. Accordingly, it is necessary to review the approach to balancing development with preservation of caravanserais upon appropriately assessing their intrinsic value as cultural heritage and potential as tourism resources.

(h) Natural Heritage

This is a type of tourism resources where people can enjoy primeval natural resources in protected areas. The Lut desert is a representative example of this type of tourism resource which is inscribed in UNESCO World Natural Heritage list only in Iran. Also, 22 lagoons in Iran, including the lagoons of Ansari Province where Ecotourism is being developed, will be potential tourism resources. Since it is not acceptable to conduct development inside and around such natural heritage areas, it is necessary to develop methods by using Ecotourism concept, such as organizing an Eco-tours from external accommodation locations and conducting an Ecotourism where visitors stay overnight in temporary tents.

(i) Nature Activity

This is a type of tourism resources situated within natural surrounding but have a certain degree of developed roads and facilities so that visitors can enjoy driving and sports and other activities in nature such as canoeing, trekking, and hot spring. It is ideal that the government systematically develops such areas while paying attention to protecting the natural environment. Since there are also cases where local communities such as mountain villages participate in such tourism development (running of

hotels, restaurants, tours, etc.), it is important to first introduce measures such as Eco-lodge and *Bumgardi*, and promote Public-Private Partnership.

(j) Resort Hotel / Resort Complex

This is a type of tourism resources in coastal or mountain areas away from urban cities, where hotel or complex development has been conducted based on private investment or master plans. These are important tourism resources and destinations that can diversify a country's or area's tourism through attracting higher income and affluent groups based on investment, however, since such developments entail greatly altering nature and developing nature-based activities for large numbers of tourists, it is necessary to conduct adequate planning and environmental impact assessment.

(k) Theme Park / Suburban Facility

This is a type of tourism resources represented by the world are the Disney Land, the Universal Studios, the Polynesian Cultural Center (Hawaii) and the Tivoli Park (Netherlands) which is newly developed for attracting visitors of all age groups based on a particular cultural theme (animation culture, movie culture, marine culture, local area culture, etc.) and, in some cases, combining this with amusement park or attractions. Such resorts cannot be successful unless an attractive theme and operation based on an appropriate management plan; however, they exhibit great capacity to interpret the cultural themes and form a brand image. It is also able to function as year-round tourism resources. In Iran, there are some local facilities that exhibit traditional daily life, but since noticeable success cases are not seen, therefore, in some cases, it is also effective to use theme park as a regional brand strategy.

(3) CURRENT STATUS OF CULTURAL HERITAGE IN IRAN (TANGIBLE / INTANGIBLE HERITAGE)

Iran has 21 cultural heritage sites and one natural heritage site are inscribed in the UNESCO World Heritage List including Yazd which was inscribed in 2017 and 56 cultural heritage sites are inscribed in the Tentative UNESCO World Heritage List in 2017. In addition, Mashhad in the northeast of the country is a sacred site for Shia Muslims, while the monasteries of the Armenian Apostolic Church in the northwest also attract many pilgrims from inside Iran and around the world. Also, the *Qanat* irrigation system of Kashan in Esfahan Province was registered as a Globally Important Agricultural Heritage Systems (GIAHS) by the FAO in 2014. Meanwhile, urban development projects around World Heritage site have become a problem, so much so that discussions are being held in UNESCO with a view to degrading sites to the Endangered Heritage list⁵. Hence, there is room for improvement

⁵ Based on the ICOMOS recommendation that the high-rise building planned in the protected area of the Meidan Emam of the UNESCO World Heritage Site in Esfahan will disturb the landscape of the World Heritage Site, and also, there is a concern that the vibration of the adjacent subway construction will affect the world heritage, the World Heritage Committee decided that the Meidan Emam will be inscribed to the World Heritage in Danger unless removal of the upper floor of the building and they announced this decision to the ICHTO. After that, a part of the building was dismantled.

regarding the management and preservation of cultural heritage including landscape controls and development controls.

In addition to the tangible heritage, Iran has a wealth of tourism resources including 11 objects of the UNESCO World Intangible Cultural Heritage. One such heritage is the traditional Gabbeh pile rug. Such rugs are popular among interior decorators in Europe, America and Japan, although they are not well known generally. The development of these and other regional specialty products is an important element of tourism development in areas designated for development of tourism.



Traditional Iranian Gabbeh rug (pile rug)
UNESCO World Intangible Cultural Heritage

(4) CURRENT STATUS OF NATIONAL PARK AND NATURAL HERITAGE IN IRAN

The Department of Environment has jurisdiction over management of national parks and other natural heritage in Iran. Natural heritage in Iran is divided into four categories: national parks, nature reserves, bio reserves, and natural treasures. Moreover, the Lut Desert (*Dasht-e Lūt*) is registered by UNESCO as a World Natural Heritage.

Ecotourism initiatives, having the aim of preserving nature, were started 10 years ago. Ecotourism is practiced with emphasis placed on the benefits for local residents. The Environment Department has compiled a policy for the promotion of Ecotourism in the shape of “A National Strategy for Development of Nature Based Tourism in Iran”.

Table 3-3: National Parks and Natural Heritage in Iran

Category	Main Sites
National parks	Bakhtegan (RM), Bamou, Bojagh (RM), Dayer-Nakhiloo, Ghamishloo, Ghatroyeh, Golestan, Kavir, Khabr, Khojir, Kiasar, Kolahghazi, Lar, Nayband, Paband, Salouk, Sarigol, Siyahkooh, Sorkh-e Hesar, Tandooreh, Tang-e Sayad, Khar Turan, Lake Urmia (RM)
Natural treasures	Alam-Kuh, Damavand, Sabalan, Sarv-e Abarkuh, Taftan
Bio reserves	Amirkalayeh (RM), Bakhtegan (RM), Hamoon, Miandasht, Miankaleh (RM), Robot Shur, Selkeh (RM), Shadegan (RM), Shidvar (RM), Sorkhankol (RM), Touran
Nature reserves	Alvand, Arasbaran, Arjan and Parishan (RM), Dena, Gando (RM), Geno, Hara (RM), Haraz, Heleh (RM), Jajrood, Karkas, Karkheh, Kavir, Mianjangan, Mozaffari, Siahkeshim (RM), Touran

RM: Site registered under the Ramsar Convention
Source: JICA Study Team

(5) FESTIVALS IN IRAN

According to the Iranian calendar, New Year is March 21. The New Year festivities at this time constitute Iran's largest festival and are known as Nowruz. During 13 days of Nowruz, various ceremonies and cultural events are staged, and the festivities of Nowruz were registered as Intangible Cultural Heritage by UNESCO in 2016. Other examples of UNESCO Intangible Cultural Heritage are the *Qalisuyan* rituals, which are held to honour the memory of Soltan Ali in Kashan and environs, and the ritual dramatic art of *Ta'zye*, which conveys religious, historical and mythological episodes and stories of Iran.

(6) OTHER TOURISM RESOURCES (HANDICRAFT, CUISINE)

1) Traditional Handicrafts

Many traditional crafts of Iran are produced in Esfahan, for example, the inlaying craft of *Hatamkari* (Esfahan, Shiraz), the cotton print craft of *Garam Kar* (Esfahan), the enamel craft of *Minakari* (Esfahan), the copper craft of *Ghalam Zani* (Esfahan) and so on. *Ghalam Zani* workshops can be found in the bazaar that surrounds Naqsh-e Jahan Square in Esfahan and visitors can watch the products actually being made here.

Pile rugs have distinctive designs and colouring in each area with representative examples being the rugs made in Qom, Nain, Tabriz, Esfahan, Mashad, Kashan, Khoy, etc. Rugs are made mainly with geometric patterns and simple but modern designs by ethnic minorities such as Qashqai, Bakhtiari, Baloch, Turkmen, etc. Miniature paintings are painted onto *Hatamkari* and animal wifes in Esfahan. Past masters of this art include Behzad, while the modern miniaturist Mahmoud Farschian is regarded as a human national treasure (the *Farshchian* Miniature Museum can be found inside Saadabad Palace).

Other examples of Iran's widespread traditional crafts are the chessboards, backgammon boards and other woodworks that are made in Sanandaj, while production of *Termeh* artificial silk was started in Yazd around 15 years ago. Such traditional craft products are popular as souvenirs among foreign tourists, and crafts such as *Hatamkari* and *Minakari* are especially popular because products are available in various sizes and are convenient for buying. In contrast, judging from souvenir stores in Tehran, *Garam Kar* products are only available in limited designs and sizes, and this may be detracting from their sales opportunities.

The tradition of ceramics has largely disappeared; however, ceramic manufacture is conducted in the city of Lalejin around Hamadan. Tile manufacture, too, was previously conducted primarily in Kashan, however, traditional techniques are no longer passed down and the centre of tile manufacturing has shifted to Yazd.

In addition to such traditional crafts, other potential souvenirs for foreign tourists include rose water and rose oil made from roses, nut products such as almonds and pistachios, aesthetic oils made from nuts, dry fruits and so on.

In Tehran, Golestan Palace, the Archaeological Museum of Iran, the Abgineh Museum of Tehran, etc. have museum shops that sell general handicrafts, post cards, magnets and the like, however, there are not many products that pertain to the articles that are on display in the museums.

As another example, in the village of Abyaneh, which is famous for its buildings made from red clay, foreign-made cheap toys, etc. are on sale, however, no local specialties can be found. The cheap toys and so on are purchased by Iranian travellers, however, since Abyaneh is becoming increasingly popular as a destination for overseas tourists, it is hoped that progress will be made regarding development of local specialties that can entice foreign visitors.

In the village of Kandovan, which is gaining popularity among foreign tourists for its similarities to Cappadocia in Turkey, in addition to the local specialty of honey, visitors can find handicrafts and other foreign-made souvenirs of types that are sold all over Iran. It is hoped to see the development of souvenirs made using local materials apart from honey. Concerning the honey, too, sales opportunities could be increased through developing sealed packages of sizes that are easy to purchase for foreign tourists.

Moreover, although the souvenir stores in general tourist locations sell souvenirs that are related to those areas, it is doubtful whether they are made in Iran and impart many benefits to the local population.



2) Cuisine

Iranian dishes include kebabs made using lamb, beef, chicken, fish, prawns, etc., vegetables, and vegetable-and-meat stews, while popular deserts include Safran ice cream, rice (white rice or Safran rice) and *Nan* bread. Since all restaurants tend to adopt the same method of preparation, there is not much variation. Beverages that are served in restaurants include *Dooqh* (yoghurt diluted with water or

soda water, with salt or mint added for flavouring), fruit juices, soda beverages (Coca-Cola, Fanta, ginger ale, etc.), non-alcoholic beer and black tea. Numerous fruits are cultivated in Iran and can be enjoyed according to each season. Examples include water melons, melons, grapes, peaches, persimmons, apricots, strawberries, pomegranates, sweet lemons, etc. Numerous eateries also serve pizzas, hamburgers, sandwiches (sandwiches containing falafel, vegetables, etc.) and so on. Apart from such traditional Iranian cooking and fast food establishments, not many foreign food restaurants including Italian or Chinese can be found even in regional cities or the capital Tehran.

There are numerous local dishes and methods of cooking as well as stories and humorous episodes concerning their origins. Well-known local dishes include *Kufteh* (large meatballs cooked in tomato-base soup) and *Abgoosht* (meat, potatoes, onions, chickpeas, etc. cooked for a long time in a small stone crock called a *Dizi*, the vegetables are crushed by the person eating) in Tabriz; *Kalam Polo* (fried cabbage, meatballs and rice mixed together and flavoured with salt and pepper), Shiraz salad (comprising finely sliced cucumbers and tomatoes), *Faloodeh* (thin strips of sherbet with the appearance of noodles) and so on in Shiraz. Also, it would be interesting for tourists to make *Ahe Shole Ghalamkar* (soup cooked with different types of beans and rice), which is simmered for a few hours on cold days, together with the local people.

Local dishes are not well known, however, through skilfully promoting local specialty cuisines, cooking methods, food stories, etc., it is thought that interest in Iranian cuisine could be stimulated among foreign tourists and that memories of eating such cuisine could stay long in the mind of the tourists who try it.

On the other hand, Tehran has a wide range of eating establishments including restaurants that have a high-class ambience, restaurants and tea houses that are furnished with traditional architectural features and decorations, modern cafes, etc., and it should be possible to attract foreign tourists to such establishments through creatively offering information.



4. INSTITUTIONAL FRAMEWORK FOR TOURISM SECTOR DEVELOPMENT IN IRAN

(1) HIGHER PLANS CONCERNING TOURISM DEVELOPMENT IN IRAN

All the policies that are formulated by the Government of Iran are planned according to the sixth five-year plan, which aims to achieve eight basic goals. In relation to tourism, the sixth five-year plan requires that this sector makes contributions towards the GDP, foreign affairs, employment creation, and expansion of internal demand.

In terms of the contribution to GDP, it is intended to attract more European tourists primarily in the field of historic sites, expand pilgrimage-based tourism from nearby countries, and increase the number of tourists from all over the world wanting to see the country's natural resources.

In terms of the contribution to foreign affairs, Iran aims to emphasize cultural diversity as one of its attractions. It aims to implement a promotion strategy to advertise intangible heritage including cuisine, regional diversity, culture, universities, arts and handicrafts, and is especially utilizing TV media (Euro News, etc.) for this purpose. Through doing so, Iran hopes to rectify damage caused by harmful rumours and misinformation.

In terms of the contribution to employment creation, the government deems it especially important to increase high-value inbound tourists (1,350 USD per person), and it aims to increase the current number of 5.23 million tourists (2015) to 8.0 million by 2020. This figure of 8.0 million is significant because achieving it could generate foreign currency revenue of 4 billion USD, which would exceed revenue from oil production and make tourism the top business sector in the country.

Concerning contribution to "expansion of internal demand", clear tourism development maps have been prepared in each of the 31 provinces, and particular effort is being directed towards expanding the health tourism field. Also, concerning aesthetic and dental treatment, Iran can be expected to attract visitors from surrounding countries and the rest of the world.

In terms of higher plans for development of the tourism sector, a tourism master plan having 2000 to 2015 as the target years was compiled in 2000 under support from the UNWTO, however, as of 2016, there is no tourism development master plan officially approved by the government.

The above-mentioned master plan raised numerical targets in accordance with the sixth five-year plan, and aimed to achieve the following kinds of goals: creation of sustainable tourism models while mitigating loads on cultural heritage and environmental resources, human resources development in the tourism sector, qualitative and quantitative improvement of accommodation facilities, and so on. According to this plan, it was intended to increase the number of inbound tourists by 5% per year and welcome 6.7 million foreign tourists to Iran in 2020.

(2) ORGANIZATIONS RELATED TO TOURISM DEVELOPMENT IN IRAN

The main agencies related to tourism in Iran consulted in the field surveys are as follows.

Table 4-1: Main Agencies Related to Tourism Development

	Agency	Main Roles
Governmental Organizations	Iranian Cultural Heritage, Handicrafts and Tourism Organization (ICHTO)	Counterpart agency for the Survey, it promotes Iran's cultural heritage, handicrafts, tourism, and investment sectors.
	Ministry of Economic Affairs and Finance	It formulates and implements policies for promotion of industries including tourism.
	Ministry of Industry, Mine, and Trade	In addition to conducting administration and formulating policies for the commercial and trade sectors including tourism, it administers the mining sector, which is a key source of foreign currency.
	Department of Environment	It formulates and implements policies and regulations for conservation and preservation of the natural environment, and it also coordinates with other government agencies.
	Statistical Centre of Iran	It implements and manages tourism statistics.
	Iran Tourism & Touring Organization	It advertises information on Iranian tourism via its homepage.
	Tehran Intangible Cultural Heritage Centre	It conducts research and conservation of intangible cultural assets in cooperation with UNESCO.
	Urban Development and Revitalization Organization	Under the auspices of the Ministry of Road and Urban Development, it formulates and implements plans for the regeneration of historical towns.
Private Organizations	Iran Tour Operators Association	Membership comprises 120 travel agents in Iran. In cooperation with ICHTO, it conducts activities aimed at improving the quality of tourism services for inbound tourists, creating employment, and promoting sales of handicrafts.
	Iranian Federation of Tourist Guide Associations	Established in 1996, this upper level organization supervises 23 tourist guide associations, which comprise 3,000 tour guides, in 20 cities throughout Iran. It is registered with the World Federation of Tourist Guide Associations. The Iran Tourist Guides Association (ITGA) is also registered.
	Iran Hotel Association	This is a nationwide hotel association.

Source: JICA Study Team

1) Governmental Organizations

Iranian Cultural Heritage, Handicrafts and Tourism Organization (ICHTO)

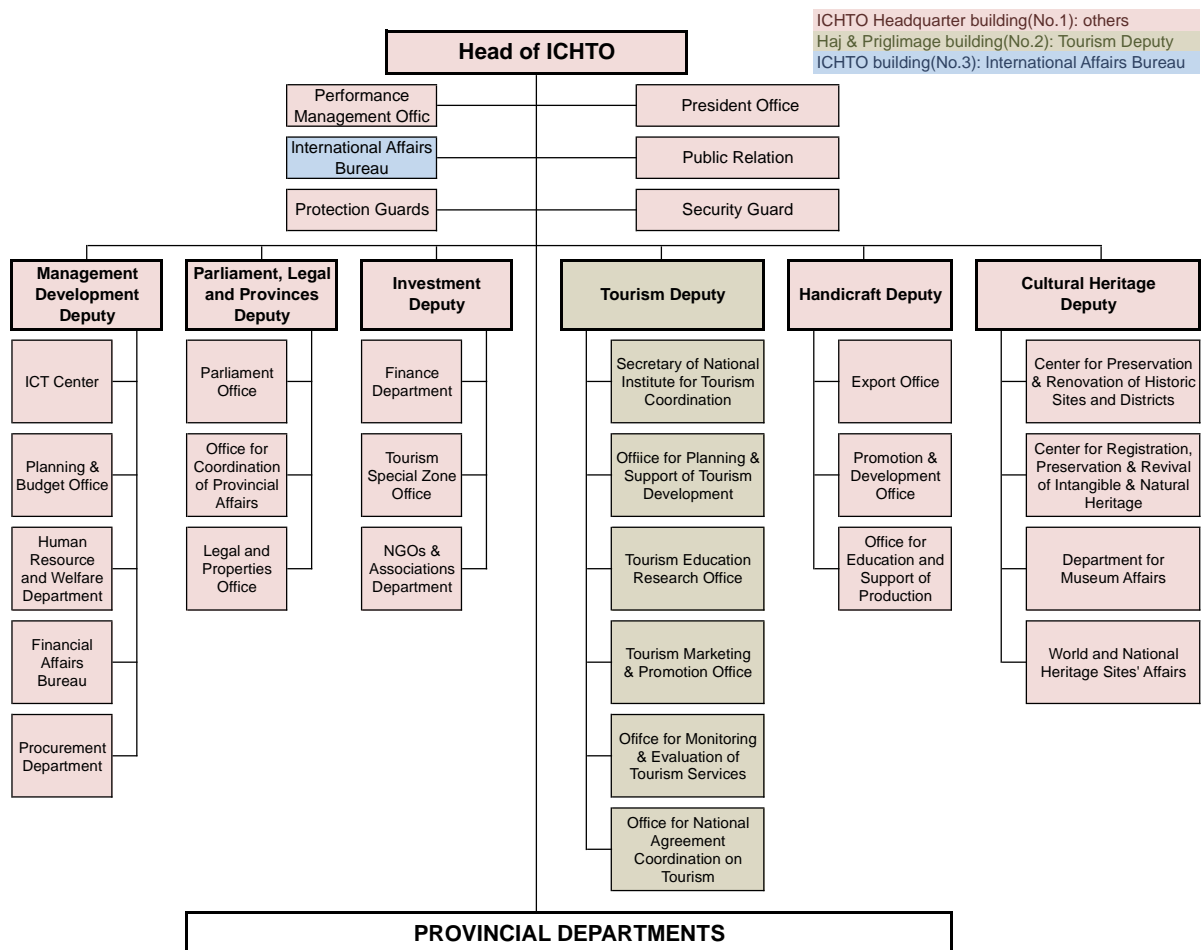
(a) History of the organization

ICHTO has overall jurisdiction over tourism development in Iran, which is the target of the fieldwork in this Survey. The major historical milestones of ICHTO are as follows:

- 1907 : Established as Protect Cultural Heritage
- 1981 : It became the Islamic Cultural Ministry following the Islamic Revolution
- 1991 : It separated from the Islamic Cultural Ministry and became independent as ICHTO
- 2006 : With the addition of the Tourism Agency, the organization became ICHTO
- 2009 : With the addition of the Handicraft Deputy, ICHTO assumed its current organization

(b) Organization Chart

The organization chart of ICHTO is shown below.



Source: JICA Study Team

Figure 4-1: ICHTO Organization Chart

(c) Manpower

The following table shows the manpower of each department in ICHTO.

Table 4-2: Manpower of ICHTO

Department		Employees	Breakdown
ICHTO Headquarter (Tehran)	Cultural Heritage Deputy	107	Approximately 70 experts in 4 fields that were redefined 8 years ago: (i) architecture, (ii) archaeology,(iii) cultural properties conservation studies, and (iv) cultural properties restoration studies
	Handicraft Deputy	71	
	Tourism Deputy	124	Approximately 100 tourism development experts
	Other Deputies	1,245	
	Total	1,547	18 doctors, 358 masters, 668 bachelors, 128 engineers graduated from colleges
Departments in each of 31 provinces		6,376	22 doctors, 1,075 masters, 2,512 bachelors, 637 engineers graduated from colleges
Research Institute of Cultural Heritage and Tourism (RICHT)		471	

Source: JICA Study Team

(d) Division of duties

The division of duties in each department of ICHTO is described below.

- **Tourism Deputy**

This is the central department responsible for promoting tourism policies in Iran. It is responsible for promoting Iranian tourism to foreign countries and preparing infrastructure for receiving inbound tourists. It coordinates with other government ministries and offices and international agencies for tourism development, establishes laws and regulations for private sector travel operators, conducts monitoring and assessment and so on.

- **Cultural Heritage Deputy**

This is the original organization of ICHTO since its foundation and the central department responsible for protecting and making use of cultural properties, also serves as a department in charge of UNESCO World Cultural Heritage in Iran. It conducts the management and restoration of cultural properties and manages museums and so on. Concerning management of cultural properties, it is faced with the issues of protecting cultural properties and securing beneficial effects for citizens through tourism. Concerning the restoration of cultural properties, its main challenges concern the restoration of wooden architecture and underwater heritage. Concerning museums, it faces challenges in terms of transmitting information and utilizing display techniques.

- **Handicraft Deputy**

This department is responsible for improving the quality of handicraft products and training human resources. It also has jurisdiction over UNESCO intangible cultural heritage. It conducts the licensing,

certification, registration, etc. of handicrafts and handicraft makers, and deploys a nationwide training programme for that purpose. Also, in order to encourage exports of handicrafts, it conducts overseas marketing surveys and promotion activities and offers assistance to private sector participants in international exhibitions. It considers its main challenge to be the promotion of sales rather than the shortage of handicraft successors.

(e) ICHTO Local Office

ICHTO has branch offices in all 31 provinces and they coordinate all aspects of tourism, cultural heritage and handicrafts with the goal of linking the central government's tourism policies to practical application in provinces and cities. For example, ICHTO prepares travel industry standards and assessment indicators on the national level, while the branch offices assess and authorize travel operators on the provincial level. Through monitoring tourism activities on the ground, ICHTO identifies problems and has a mechanism for resolving such issues on the local, provincial and national levels. Moreover, the local office conducts promotion activities in each province and training programmes for tourism human resources.

(f) Tourist Information Centre (TIC)

ICHTO has branches in all 31 provinces of Iran and provides TIC functions in the main tourism cities such as Esfahan, Shiraz, Yazd, Mashhad, etc. It is thus possible to obtain maps, local information and so on in these places. However, the distributed materials on offer differ according to each area; for example, the TIC in Imam Square in Esfahan only provides multilingual maps to foreign tourists, whereas the TIC in Shiraz offers multilingual maps, tourism pamphlets and so on. Also, the level of service provided by TIC staff differs in each location: whereas some staff only hands over materials, others make an effort to listen to the needs of foreign tourists and so on.

(g) Linkage with other Ministries and Organizations

The Secretary of National Institute for Tourism Coordination coordinates with the Ministry of Foreign Affairs, Ministry of Health and other government offices to facilitate the receiving of inbound tourists and preparation of infrastructure, while the Office for National Agreement and Coordination of the Tourism Deputy cooperates with related ministries and offices according to each tourism development theme. For example, it cooperates with the Ministry of Agriculture for promotion of agro-tourism, the Ministry of Health and Medical Education concerning medical tourism, and the Environment Department concerning Ecotourism, which has become a priority area in recent years. In the field of Ecotourism, efforts are made to protect and promote cultural diversity in such areas as music, handicrafts, dialects, architecture, public morals, design, etc. while utilizing historical buildings, and coordination is also sought with the Ministry of the Interior and Ministry of Roads and Urban Development. In reality, however, coordination is difficult due to vertically divided administration between landowners (for example, state-owned forests and the Forest Agency), the tourism associations (ICHTO), the Environment Department, and the provincial governments.

Touring & Automobile Club of the Islamic Republic of Iran (TACI)

The Touring & Automobile Club of the Islamic Republic of Iran (TACI) has conventionally operated as the government's tourism promotion agency. TACI is an independent administrative corporation under the umbrella of ICHTO, and it is composed of the Touring Department and the Automobile Department. Whereas ICHTO acts as the planning agency for government policies related to tourism and handicrafts, TACI is the implementing agency. TACI has roughly 150 employees in total and its main duties are as follows:

- (a) Review and registration of driver licenses for short-term foreign visitors who wish to drive in Iran
- (b) Road assistance (work similar to that conducted by JAF in Japan)
- (c) Planning, staging and running of rallies and other auto races
- (d) Running of booths by the Government of Iran at international travel exhibitions (duties corresponding to that conducted by a government tourism bureau)
- (e) Travel agency affairs
- (f) Management of hotels and Ecotourism lodges, etc. under the auspices of TACI
- (g) Promotion for the export and sale of Iran handicrafts

Moreover, out of approximately 990 Caravanserai throughout Iran, TACI has renovated four into facilities equipped with hotels, restaurants, handicraft shops, etc. These facilities introduce Iranian handicrafts, culture, nature, traditional cuisine and other resources that are not well known overseas.

(a) Budget

There is no government budget allocation, so TACI must operate on independent funding with revenue coming from license revenue and income from travel business. Because activities of the Touring Department and the Automobile Department are intertwined, it is difficult to make a clear distinction; however, approximately 70% of revenue is allocated to tourism. When displays are made at international travel exhibitions, TACI bears two-thirds of the cost, while the remaining third is borne by supporting private enterprises.

(b) Target and Priority Market

The main target markets are as follows: (i) Europe (Germany, France, and Italy), (ii) Neighbouring countries (Turkey, Iraq, and Oman), (iii) Russia, and (iv) Asia (China, South Korea, Thailand, Japan, Malaysia, and Indonesia)

TACI currently has representations in 18 countries including Japan, China, South Korea, Singapore, Malaysia, France, Spain, Germany, the United Kingdom, the Netherlands, Italy, Azerbaijan, etc., and it intends to open offices in 12 further locations by the end of the year (new offices to be located in UAE, Iraq, Tunisia, Egypt, Russia, Poland, Bulgaria, Canada, the United States, etc.). The representations in each country promote investment into Iran and attract tourists, etc.

(c) Promotional Materials

TACI prepared promotional materials in five languages such as English, French, Spanish, Arabic and Chinese before, but now TACI representative offices located in each country prepares it. Brochures prepared by the representative office in Japan are introduced with photos with tourist sites and local foods in Iran.

(d) Promotional Activities

In order to invite foreign tourists, TACI conducts displays at international travel exhibitions in France, Austria, Germany, Russia, Italy, Japan, etc., and as promotion activities in target markets, it conducts FAM tours catering to travel companies and media outlets. In 2017, it has already implemented or plans to implement FAM tours catering to South Korea, Austria, China, and Spain.

Concerning promotion of handicrafts, it displays products at international handicraft exhibitions in Italy, the Netherlands, Russia, and Japan (Tokyo Gift Show).

However, regarding the contents of these promotions, the contents is limited only about an introduction of famous tourist sites and products, and promotional activities based on the strategic themes for branding Iranian tourism to differentiate from neighbouring countries and to improve the competitiveness in the international tourism market have not been implemented.

Department of Environment

This is the equivalent of Japan's Environment Ministry. The Environment Department has jurisdiction over 10% of the national land area comprising 276 areas and entities earmarked for protection (national parks, nature reserves, bio reserves, and natural treasures).

Its main duties are as follows:

- Survey (concerning protected areas and entities, Ecotourism, and entities that require restoration)
- Transmission of information on nature protection (preparation of pamphlets, videos, etc.)
- Ecotourism
- Nature protection regulations (15 items; the basic thinking on national parks is similar to that in Japan)

Ecotourism initiatives, having the aim of preserving nature, were started 10 years ago. Ecotourism is practiced with emphasis placed on the benefits for local residents. The Environment Department has compiled a policy for the promotion of Ecotourism in the shape of "A National Strategy for Development of Nature Based Tourism in Iran".

JICA's training program on Planning and Management of Ecotourism was launched in 2017. This training is planned to conduct in Japan over three years, and the first training was conducted in February 2017.

Statistical Centre of Iran

The Statistical Centre of Iran started gathering data on domestic tourism and outbound tourism in 2008. From 2013, it conducted the National Tourism Survey, in which it extracted 18,000 households across the country and collected information through survey forms.

At the beginning of the said survey, the Statistical Centre collected data at quarterly intervals, however, since it found from analysis that there is little fluctuation throughout the year, it currently only conducts survey in the first half of the year (spring and summer). As a result, it is unable to grasp monthly fluctuations in numbers of tourists during peak seasons such as Nowruz, Ramadan and so on.

Moreover, over the expansive national land of Iran, even though destinations around Tabriz in the north of the country are popular as summer resorts, while Kish Island in the Persian Gulf and other destinations in the south are popular as beach resorts during the summer and as destinations for getting away from the cold during the winter, no data have been gathered concerning fluctuations in the number of tourists according to each area.

In particular, since data concerning fluctuations in the number of tourists according to month and area are basic information for deciding private sector investment in hotels, etc., tourism infrastructure construction plans and employment, there is much room for improvement regarding Iran's approach to tourism statistics.

Concerning statistics on amounts of tourism expenditure, the UNWTO held a workshop on introduction of a full-scale Tourism Satellite Account (TSA) in Iran in October 2015. Although the Statistical Centre of Iran was in attendance at this time, the TSA still hasn't been introduced and there is still no method for gathering statistics on tourism outlays by foreign tourists as of 2017.

Moreover, since Iran does not keep data based on guest cards when tourists check in to hotels, there is no way of understanding numbers of tourists according to area and month.

Incidentally, ICHTO manages tourism infrastructure data such as the number of hotels and beds and so on in each area.

2) Private Organizations

① Associations of Travel Agencies

(a) Iran Tour Operators Association

The Iranian Tour Operators Association (ITOA) was established in 1996 and its organizations comprise seven board members, two auditors, and seven consultants. It collaborates with the TPO (Trade Promotion Organization) and ICHTO in resolving various issues concerning the inducement of international tourists and tax exemption measures for tour operators, etc. It also conducts training to enable tour operators and travel companies provide services that meet international standards, while the Tabatabaee University, which specializes in tourism, offers advice to ITOA on legal systems, registration systems, etc.

Out of approximately 4,000 tour operators in Iran, 156 belong to ITOA. The annual membership fee is 260 USD. However, member companies offer additional assistance in cases deemed necessary for the association's activities.

ITOA targets countries in West Europe, the United States, Canada, Australia, and Southeast Asian countries such as Japan, South Korea, and China. The targeted countries are decided every year from September to October. ITOA stages displays, sometimes autonomously, sometimes with assistance from ICHTO, at international travel exhibitions staged in the target countries, and it also implements FAM tours⁶, tourism seminars, roadshows, etc. When ICHTO or the Trade Promotion Organization (TPO) stage FAM tours and the like, ITOA assists by providing tour guides and meals and partially subsidizing costs if such tours are held in its target markets.

Moreover, ITOA develops new tourism routes in Iran with a view to reducing seasonal disparities in inbound business.

Also, there are travel agents' associations in provincial areas of Iran that encourage members to attract foreign tourists and abide by basic rules and so on. The number of travel agents that specialize in inbound tourism is 15 out of 80 in Shiraz, 20 out of 300 companies in Esfahan, 10 out of 147 companies in Tabriz, and roughly 6 - 20% of all travel agents in other provincial cities. The remaining travel agents either specialize in outbound tourism or a combination of inbound and outbound.

② Associations of Tourist Guides

(a) National Guide Associations

As a national level organization, there is a NGO organization called Federation of Tourist Guide Association assembling 21 local guide associations in Iran which was established in 2013 to act in a consulting capacity with government ministries and offices with the aim of raising the status of guides. It has seven board members and two auditors, and the board members are elected in elections that are held once every two years.

Funding for the Federation comes from membership fees (approximately 150 USD per year) paid by the 21 member associations and sales from the *GILGAMESH*⁷ (Heritage & Tourism Magazine) research project requested by government officials and private sector enterprises.

The main activities of the Federation, conducted with the objective of improving the status of tour guides, include offering suggestions to government ministries and offices in tandem with hotel and tour operator associations, introducing tour guides to tour operators, offering suggestions to tourist

⁶ Familiarization (FAM) tours:

Invitational tours and sales that are predominantly conducted by the national government or local governments to sell or promote particular areas.

⁷ The inaugural edition of this magazine was issued in 2017 and Vol. 2 is scheduled to come out in October 2017. 2,500 copies are issued and the price is 10 USD per copy (350,000RIs). Samples are sent to tour guides in Canada, Germany, Turkey, Georgia, France, Italy, the United States, etc. who are interested in Iranian culture, etc. Guides, university professors, etc. are asked to provide written contributions and photographs for the magazine.

police and hotels for ensuring the safety of travellers, and so on. It also clamps down on unlicensed guides in order to protect official licensed guides.

(b) Local Guide Associations

As a local level organization, Tehran has a guide association, called the Iran Tourist Guide Association established 12 years ago and currently has more than 500 members. Board members are elected in elections that are held once every two years. The annual membership fee is 500,000 IRR. The association's members include guides who can speak English, German, French, Italian, Spanish, Chinese, Japanese, etc.

The main activities of the Association include improving the status of guides through consulting with the government to acquire social security insurance, etc., and capacity building, for example, training guides to deal with experts who visit Iran for investigative purposes from MIT, Stanford University, etc.

The Association implements seminars (15 - 20 times/year), workshops (15 - 20 times/year) and on-the-spot investigations (35times/year). The on-the-spot investigations are sometimes divided according to language, and sometimes they are implemented in tandem with seminars. Seminar fees vary according to the lecturers; however, the general charge is 150,000 IRR for Association members and 250,000 IRR for non-members. Priority is given to members regarding participation in seminars, but non-members can also participate if free spaces are available. The Association's education committee runs these activities.

There are also guide associations in major provincial cities of Iran other than Tehran such as Shiraz, Esfahan and Tabriz, and they register officially certified guides who can communicate in English, French, and Germany.

In Esfahan Province, approximately 900 guides are registered, and 675 guides of these are working in Esfahan City. There are roughly 1,200 registered guides in Fars Province, where Shiraz is located, and around 400 in East Azerbaijan Province, which contains Tabriz.

However, concerning the number of registered guides who are actually active, approximately 75% are active in Esfahan, which attracts a lot of foreign tourists all year round. However, in East Azerbaijan Province, where Tabriz is located and where there is a major disparity between the high season and off season, only around 50 out of 400 registered guides are actually active. Moreover, because newly registered guides find it difficult to obtain work, they are unable to build experience. Therefore, the provincial guide associations are faced with the issues of finding employment for guides and taking countermeasures during off-peak seasons.

③ Associations of Hotels

(a) National Hotel Association

As a national hotel association, the Iran Hotel Association established in July 1998 is an association of hotels located in all 31 provinces of Iran which cooperates with ICHTO. It implements workshops

and short-term training for hotel workers and managers, strives to raise the status of students learning about the hotel business, employees, managers and other stakeholders related to the hotel industry, offers advice on hotel construction and management and so forth. In addition, it conducts exchanges with overseas hotel associations, implements media-based marketing and promotions, conducts activities for raising awareness of the hospitality industry with the aim of offering better services in society, and promotes the advancement of information technology (especially reservation and software management) with a view to improving efficiency of hotel operations.

(b) Local Hotel Association

As a local hotel association, The Tehran Union of Hoteliers established in 1949 is an association of hotels located in Tehran which is a member of the Iran Hotel Association. It plays an important role in hotel development and business growth in Tehran Province. It prepares, modifies and revises applications for the issuance of hotel business licenses, gives notice of and delivers various documents, issues licenses, suspends the operations of operators that fail to comply with laws and supervisory committee regulations, and so on. Also, it sets the budget for the new accounting year, manages balance sheets with a view to reviewing and approving budget allocations, collects taxes on behalf of government agencies and local governments, levies membership fees and so on. It has been licensed by ICHTO to establish a hotel training college. Moreover, it cooperates with ICHTO in ranking and setting sale prices for hotels and apartment hotels.

In addition, some hotel associations can also be found in major provincial cities of Iran such as Shiraz, Esfahan and Tabriz.

In all of these cities, construction of hotels and *Bumgardi*⁸ is advancing. Occupancy rates reach almost 100% during high season; however, they fall to between 20 - 50% during off-peak seasons. Accordingly, associations are faced with the issue of equalizing occupancy rates overall. The hotel association in Shiraz is aiming to provide services based on market needs, for example, it encourages hotels to install bath tubs catering to Japanese tourists based on the findings of marketing surveys and so on.

3) Current Status of Public-Private Partnership in the Tourism Sector

While ICHTO oversees tourism development in Iran as the official agency, it was found that various conferences are organized between ICHTO staff and the private sector on the provincial level and that meetings are held regularly at least once a month in almost all cases, indicating that a certain degree of partnership is maintained.

In particular, in Tabriz, under the campaign called “Tabriz, the Capital of Islamic Tourism for 2018”, preparation of tourism materials and development of new tourism routes are mainly conducted

⁸ Bumgardi: Generic term describing accommodation facilities in private residences run by local citizens. Bumgardi may include lodging facilities that utilize historical structures and nomadic tents, restaurants that serve local cuisine and so on.

by the executive committee of Tabriz 2018 with the fund from private enterprises under public-private partnership.

① PPP System for the Conservation of Historical Buildings

In Iran, the PPP system for the conservation of historical buildings has been established. Hence, when private sector operators renovate nationally owned assets such as Caravanserai and traditional residences as investment undertakings, there are numerous cases where private sector investment is utilized under BOT⁹ (Build Operate and Transfer) contracts lasting around 20 years or where operating rights are assigned to the private sector under concession contracts.



② Promotional Activities by Private Organizations

Promotion activities by tour operators concerning target markets include participation in international travel exhibitions together with the Government of Iran. In such cases, the tour operators are given space inside booths run by tie-up overseas travel companies, or they run their own exhibits. Exhibits are mainly displayed in France, Germany, United Kingdom, Spain, Finland, China, Hong Kong, UAE and Japan.

Tour operators also independently implement FAM tours targeting countries where large business volume can be anticipated. Also, some tour operators prepare market-oriented brochures in Chinese, German, Italian, Russian and other languages.

Regarding brochures prepared by the tour operators, the contents includes introduction of tourist sites, local food, nature and itineraries, and some model routes are proposed according to the tourism resources such as ruins, culture, nature, nomads, etc.

However, as mentioned above, these materials does not promotes any products that represents the brand of Iranian tourism under the theme such as the Silk Road, and the product are not different from that in neighbouring countries.

⁹ BOT (Build Operate and Transfer):

BOT is a mode of PPP that private operators undertake construction costs and operation for a certain period, during which business profits are used to repay the investment, and then the facilities are returned to the government or local authority. For the government side, there advantage is that private sector funds are utilized to suppress the initial cost of facilities construction and reduce public works expenditure.

Tehran or Shiraz is often the gateway to Iran for foreign tourists. Accordingly, since tour operators in Tehran and Shiraz take the initiative in attracting foreign tourists, the inbound business in other areas is largely dictated by these tour operators. To overcome this situation, Yazd started to directly attract foreign tourists two years ago and now local tour operators in Yazd directly handles between 10 - 15% of tours to the city. Moreover, the travel agents' association of Yazd places exhibits at international tourism fairs in Spain and Germany, and it is also considering doing the same in Asia from now on.

Tour operators in Tabriz also place exhibits at international tourism fairs in Germany and Turkey in an effort to attract foreign tourists.

Efforts to attract incentive tours have only just begun in earnest; however, aggressive promotional activities are not yet conducted.

Moreover, tour operators that conduct domestic tours and overseas tours for Iranian customers conduct promotional activities through placing ads in *Hamshahri* (newspaper) and utilizing the internet and so on.

Concerning hotels in Tehran, long-established hotels do not conduct active promotional activities maybe because they have many repeat business customers. On the other hand, newly opened hotels aim to actively attend international travel exhibitions with a view to attracting international travellers.

In addition, there are TICs operated by travel companies and hotels with the approval of ICHTO. In Yazd and Tabriz, the TICs assist with local tour applications, hotel reservations, arrangement of tour guides and cars and so on.

However, there are also TICs operated by the private sector that are more concerned about selling their own tours and making a profit rather than grasping the needs of travellers, and there is doubt over whether they fulfil the inherent role of TICs.

4) Current Status of Public Participation in the Tourism Development

In Nain City, where hearings were conducted in the survey, efforts have been put into promoting public participation over the past 10 years, and local strategy meetings attended by 8 - 10 local citizens are now being held. Such initiatives are highly regarded and have resulted in the local mayor receiving the top mayor award in the province; moreover, the city was selected as the top outstanding city for urban development by the Ministry of Road and Urban Development. Judging from such developments, it seems that there is a growing emphasis on public participation in the decision-making process in not only tourism but local development in Iran.

Iran has a unique organizational philosophy known as “Heyat Omama¹⁰”. According to this, there are numerous Executing Committees (boards of trustee) in each area, and there are also NGOs and specialist agencies (consultants) that work on heritage protection.

As the most common form of public-private partnership, foundations that comprise intellectual and affluent sections of local populations offer financial support for the renovation of historical buildings. NGOs that conduct such activities to protect historical structures were confirmed in almost all the areas covered by the survey. Such activities are mainly advanced in cooperation with ICHTO, however, as in the case of Shushtar, there are also cases where NGOs invite subsidies and private sector sponsorship from overseas and autonomously conduct activities such as preparing tourism maps, implementing tours and publishing guidebooks.

(3) CURRENT STATUS OF LEGAL FRAMEWORK FOR TOURISM SECTOR DEVELOPMENT

1) Immigration Control (VISA System)

Law on Entry and Residence of Foreign Nationals in Iran was formulated in 1931 by Ministry of Foreign Affairs and revised several times. The Law is formulated for immigration of foreign citizens. According to the Law, visa is required to enter, stay and departure for private foreign citizen. There are two types of visa, that are tourism visa and entry visa. Currently, E-Visa system, which can be applied through the website, is introduced for the visa application. For the tourism purpose, 30 days visa is available either in embassy of Iran in each country or arrival airports (Tehran, Tabriz, Mashhad, Shiraz, and Esfahan). It is required to take entry visa to enter Iran other than tourism purpose. It is necessary to obtain work permit in advance to apply the entry visa either temporary or permanent. Therefore, it is impossible to apply the residence permit exceeding period of work permit. In the Free Trade Zone (FTZ), it is not necessary to take visa when entering directly to FTZ and departing from FTZ. Yet, it needs to get residence permit when staying more than 3 months in FTZ. Furthermore, it is required to take visa when departing from FTZ to other areas in Iran.

People from Azerbaijan, Bolivia, Turkey, Syria, Lebanon, and Georgia do not need to take visa to enter Iran while people from Israel are not allowed to enter Iran.

2) Private Sector Development

① Travel Business Law

As for travel business law, Act for Monitoring and Registration and Activities of Travel Agencies was formulated in 2001 by Ministry of Road and Transportation and Ministry of Culture and Islamic Guidance at the time. Ministry of Culture and Islamic Guidance prepared the draft of Act. There are 34 articles such as definition and standard of travel agency, application for starting up travel agency, screening, and approval.

¹⁰ Heyat Omama: a unique Iranian term that refers to a voluntary organisation that gathers for a specific objective. (According to the hearing with ICHTO, Human Resource and Welfare Department)

Rating and Licensing of Hotel, Guide, etc.

ICHTO issued the standard for grading of hotels. There are 110 items for grading from 1 star to 5 stars. It does not mean that all tourism departments in each province follow the grading system specified by ICHTO although famous tourism sites tend to follow the grading system.

Regarding the licensing system for guides, the national guide certification is issued by ICHTO for the graduates who passed the graduation exam of guide schools managed by ICHTO and the national qualification exam (general exam and special language exam).

Investment Environment

According to Doing Business 2017 by World Bank, investment environment in Iran is ranked at 120th. The topic of dealing with construction permits is quite high (27) while topics of protecting minority investors (165), trading across Borders (170) and resolving insolvency (156) are low. These low topics decrease the total investment environment ranking of Iran.

As for foreign investment, Iran's Foreign Investment Promotion and Protection Act (FIPPA) were formulated in 2002. FIPPA guarantees that FDI can receive right, conditions and convenience same as domestic companies. Tax exempt is set for mining and manufacturing, and some sectors. Priority sectors such as agriculture and fishery, mining, industry, water, electricity, gas, construction, transportation, communication, and service sectors are specified for FDI. Sub sectors among above sectors are set as higher priority sectors. In addition, Iran has 7 FTZ, which have preferential treatment such as exempt of cooperate and income tax. Even 100% foreign capital company is applicable in the FTZ. Thus, Iran has clear aim to attract FDI to the FTZ.

Incentives for Entrepreneurs (Financial incentives, Subsidies, etc.)

"Omid Entrepreneurship Fund" is the only state-run enterprise that provides small-scale entrepreneurship assistance for NGOs, individuals and other private sector groups in regional areas.

It has a loan budget of 7 million USD per year and obtains operating funds from government subsidies, general donations based on the Islamic spirit, and interest earnings on non-interest deposits from the private sector. Banks also provide similar services; however, this is the only state-run fund in the country. Whereas banks offer loans at an interest rate of 15% or higher, Omid Entrepreneurship Fund only charges 4%. It deploys representatives in each region, responding to local needs and offering assistance on the ground.

It offers assistance in roughly 65,000 cases per year (targets vary widely from individuals to NPOs and eligibility for assistance is decided by review). It supports young entrepreneurs fresh out of university, young people and women in regional areas, assists development of inventions, promotes local work creation along the lines of Japan's "one-village one-product" movement, and supports tourism, branding of native dress, farming and mining technologies, plant establishment and so on.

In terms of past performance, it has assisted 3,000 villages, etc. that possess archaeological remains. As a result, roughly 5 million people have visited such locations, helping generate work for local youth and women.

Also, it has supported employment of women in 1,500 villages in the country’s 31 provinces, and staged exhibitions in order to bring their products to market. Specific success stories in the past include tourism assistance for Sabish Village on the Caspian Sea (renovation of old homes into inns where local people in traditional dress serve food; such inns now have capacity for some 400 guests), support for cultivation of roses in Gaygan Village in Lorestan Province; assistance for nut and henna cultivation, and support for the development of handicraft products and so on.

Moreover, in the field of support for women in regional areas, it assists enterprises and stages workshops for individuals and groups with the aim of generating work as a measure to counter depopulation in regional areas. Beneficiaries can receive loans worth up to five times their own funds with a repayment period of 3 - 5 years, and they can receive an additional loan of an amount two times as much when they repay two thirds of the original sum. Through expanding village-based initiatives to wider areas, ICHTO also supports the enhancement of operating capacity and, as was mentioned earlier, it also supports not only product development but also sales and participation in exhibitions.

3) Tourism Resource Management

In addition to the abovementioned higher-level plans and tourism master plan currently being prepared, legislation pertaining to management of tourism resources is as follows: (i) National Rules and Regulations of the Cultural Heritage Organization, (ii) Environmental Protection, (iii) National Biodiversity Enabling Activity, and (iv) Land Use Plans.

(a) Legal Framework for Cultural Heritage Conservation and Registration

The following table shows categories of cultural properties in Iran.

Table 4-3: Categories of Cultural Properties in Iran

Category of cultural properties	Number of registered cultural properties	Remarks
Heritage - Tangible – Movable	Hundreds	
Heritage - Tangible – Immovable	Hundreds	
Intangible	Hundreds	
Natural	Hundreds	
National Heritage	3,200 sites	More than 100 new sites are registered every year.

Source: JICA Study Team based on hearing with ICHTO

The main historical buildings in Iran, both national and privately-owned assets, are registered and managed by ICHTO as nationally designated cultural properties. Many historical buildings such as traditional city residences have been purchased as nationally owned properties and renovated for use as government office buildings, museums and so on.

When conducting renovation and building work on privately-owned historical buildings that are registered as national designated cultural properties, it is necessary to apply to ICHTO in advance and undergo review to determine whether the conditions pertaining to conservation of historical buildings are satisfied.

Various restrictions are imposed on renovation and building work on historical buildings, however, some subsidization schemes are available; for example, ICHTO provides traditional building materials and so forth.

However, once privately-owned historical buildings are registered as privately-owned assets, it is no longer possible to freely extend or reform the buildings. As a result, the owners sometimes refuse to register their properties and the matter is taken to court in some cases. In reality, even in historical cities such as Tabriz and Qazvin, more and more traditional residences are disappearing and being replaced by modern reinforced concrete buildings.

(b) Ecotourism

ICHTO is striving to promote Ecotourism as a policy for tourism development related to national parks, etc., and the Ecotourism guideline (A National Strategy for Development of Nature-based Tourism) was formulated in 2014. Extremely strong protectionism in the business of Eco-lodge by using historical buildings had been a barrier to potential new entrants to the sector; hence, this guideline was announced with a view to simplifying the process for acquiring licenses and encouraging entry to the Eco-lodge business.

Furthermore, it is scheduled to offer financing worth 3.6 million USD from the entrepreneurship assistance fund with a view to creating employment. According to the numerical targets outlined in the sixth five-year plan, it is intended to increase the number of Eco-lodges to 500 villages and 2,000 sites all over Iran by 2020.

(c) Laws and Regulations for Townscape Control

In Iran, city planning height restrictions, etc. are imposed on buildings that face onto roads. Moreover, when conducting building works in Abyaneh and the historical quarter of Kandovan Village, it is compulsory to use local materials.

On the other hand, there are no legal systems, etc. concerning landscape preservation such as, for example, the Fuseau regulations¹¹ that have been introduced to Paris, France to set landscape axes based on historical buildings and ensure control of landscape over the entire city area.

¹¹ These regulations limit the heights of buildings located to the rear and in between historical structures, to ensure that views of historical buildings from around 50 locations in the city are not impeded. They were introduced in 1977.

(d) Laws and Regulations for Urban Planning in World Heritage Zone

Concerning development activities in World Heritage conservation zones, which have proved troublesome in Esfahan in the past, it is compulsory to conduct prior discussions and building confirmation with ICHTO, etc. when applying for confirmation of the building works, etc.

(4) CURRENT STATUS OF HUMAN RESOURCE DEVELOPMENT

ICHTO has Tourism Education Research Office that conduct study and research for human resource development of tourism sector. ICHTO is responsible for creation of short term training course. As for long term training course, University conducts to create the training course although ICHTO sometime collaborate with the University. Allameh Tabatabai University in Tehran has the tourism course. There are also universities and colleges that teach about tourism in provincial cities outside of Tehran.

The short-term training courses, prepared by ICHTO, has two courses such as 1) 4 courses, focusing on the specific topics such as tour guide, technical manager, cooking and hotel administration in 8 to 12 hours in each course, and 2) culture course, teaching basic of tourism for students 4 years ago by areas. According to tourism company plan, schools are developed in 31 provinces and 32 areas in Tehran. In addition, the schools plan to produce 12,000 graduates at the beginning year.

It is necessary to attend the training courses and pass the exam by the training institute for getting the jobs of the tourism sector such as guide, manager of travel agency and hotel staffs. Previously, ICHTO operated the training institute. Currently, private sector operates the training institute under the management of ICHTO. Bachelor and master of tourism-related faculties have the qualifications to take the exam by the partial exemption of the courses.

(5) DONOR ASSISTANCE FOR TOURISM DEVELOPMENT

As a result of the economic sanctions that have been imposed on Iran since 2011, assistance projects by the main multilateral donors such as the World Bank Group, Asian Development Bank (ADB), EU and so on have been suspended for long periods. In these circumstances, support for the tourism sector has largely been conducted by UN organizations such as UNESCO, UNDP, etc.

Past assistance by the Government of Japan includes a cultural grant aid project (2004) for supply of conservation and restoration equipment for the UNESCO World Heritage citadel of Bam in Kerman Province in the south of Iran following damage caused by an earthquake in December 2003.

Japan has also implemented environmental management in the catchment basin of Lake Urūmiyeh, and a technical cooperation project (2015) for formulation of a development plan for the sustainable development of Qeshm Island in the south.

As was mentioned earlier, improvement of transportation and transport infrastructure is an issue that requires urgent attention in Iran, and while the economic sanctions by Western nations have still not been totally lifted, China has announced its intention to support construction of high-speed railways. Moreover, since Iran has joined the Asian Infrastructure Investment Bank (AIIB), which was

established under China’s initiative, it is forecast that Chinese assistance will increase from now on. The following table shows conditions regarding assistance by donors.

Table 4-4: Assistance by Donor Organizations

Donor	Main Initiatives
Japan	Development survey for formulation of a recovery plan and a water supply and sewerage restoration project in Bam; supply of equipment for the conservation and restoration of the remains of Bam; technical cooperation project for sustainable environmental management in the catchment basin of Lake Urūmiyeh and Qeshm Island, etc.
UNESCO	In the “National capacity building for Iranian museum and cultural heritage site managers, law enforcement officials, government officials, experts, NGOs and community members on illicit trafficking of cultural property (2016 – 2017)”, UNESCO conducted a cultural heritage conservation capacity building project that also targeted ICHTO.
UNDP	Assistance is implemented in the field of Ecotourism as part of the UNDP’s Small Grant Programme. In the planning of Ecotourism, “The Ecotourism Thematic Working Group” was staged in accordance with the wishes of the Government of Iran, and the results of discussions were reflected in the contents of the plan.
UNWTO	With cooperation from ICHTO, in October 2015, a workshop was staged for formulation of a concrete action policy geared to establishing a travel and tourism satellite account (TSA) for improvement of tourism statistics in Iran. Also, the 6 th UNWTO Silk Road Taskforce Meeting was staged together with ICHTO in April 2016 with a view to developing tourism with related countries on the theme of the Silk Road. At this meeting, focus was directed to the following three pillars of the Silk Road Action Plan: 1) marketing and promotion, 2) destination management and capacity building, and 3) travel promotion, and it was agreed to establish achievable strategies and goals in each related country.

Source: JICA Study Team

1) Assistance by the Japanese Government

(a) Cultural Heritage Grant Aid for the Project to Supply Equipment for the Restoration and Preservation for Bam and its Cultural Landscape

The origins of Bam and its Cultural Landscape known as Arg-e-Bam date back to the Sasanian Empire (227 - 651), and it is said that the citadel acquired its current form during the Safavid dynasty (1501 - 1736). The citadel is completely preserved in the form it assumed during the Safavid dynasty and it constitutes the world’s largest structure made from earth. The citadel eloquently demonstrates the lifestyle that was followed not only by the ruling classes of that era but also the common people. However, following the earthquake that occurred on December 26, 2003, 80% of the citadel was destroyed; in particular, all of the parts that had been restored over the preceding 32 years collapsed. In response to this crisis, the Government of Iran designated the restoration and preservation of Arg-e-Bam as a top priority project and has been implementing restoration work since.

In these circumstances, the Government of Iran in 2004 issued a request to the Government of Japan for the provision of Cultural Heritage Grant Aid for the purchase of more efficient heritage restoration and preservation machinery. In response, heavy works machinery such as slope steps, excavators, forklift trucks, wheel loaders, etc. worth a total of 100 million yen was supplied. The equipment continues to be used for restoring the heritage.

(b) Comprehensive Plan for Sustainable Management of Water Resources in the Lake Urmia Watershed (in cooperation with the FAO)

Situated in the northwest of Iran, Lake Urmia is a tourism resource of the region and it is designated as a national park. The lake is a habitat for numerous endangered species of flora and fauna; however, due to a combination of decreased inflow of water resulting from agricultural development in the surrounding areas and large-scale development in the upper reaches of rivers that flow into the lake, reduced rainfall and increased evaporation brought about by climate change and so on, the surface area and water volume of Lake Urmia have declined seriously, making it urgently necessary to take countermeasures.

Implemented since 2015, this project intends to introduce water supply and drought management systems and promote the diversification of agricultural activities, etc. in the watershed of Lake Urmia.

(c) Community Based Sustainable Development Master Plan of the Qeshm Island toward Eco Island

The Qeshm Island is an economic and trade hub located in the Strait of Hormuz. It is also a habitat for endangered species of marine mammals and other fauna and a landing area for migratory birds. The Qeshm Island has the largest mangrove forests and coral reefs in the Persian Gulf, however, due to petroleum and gas developments and tourism development and so on, environmental pollution is advancing and its tourism resources are becoming depleted. This project, lasting three years from 2015 to 2018, aims to formulate a master plan with the objectives of improving the livelihoods of local residents while considering the local environment and protecting the local natural resources.

(d) JICA Training Course for Ecotourism

JICA's training program on Planning and Management of Ecotourism was launched in 2015. This training is planned to conduct in Japan over three years. In the first training session that was conducted in February 2017, 13 members from Iran spent 27 days in Japan and received training that mainly comprised classroom learning. In addition to representatives from the Environment Department, there were roughly eight members from the ICHTO Provinces Deputy, and representatives from the Forest Department, the responsible officer from the Qeshm Island, the Ecotourism officer of the Anzali Lagoon, and other Ecotourism officials.

(e) UNESCO Japanese Funds-in-Trust

Under the UNESCO Japanese Funds-in-Trust, a combined total of 1 million USD was offered to assist efforts for the restoration of the remains of Chogha Zanbil over two periods: 1988 - 2003 and 2003 - 2006. Also, the museum at the archaeological site of Haft Tepe was established under support from the Funds. Two Japanese researchers were involved on this occasion: Professor Yasuyoshi Okada (archaeology, Kokushikan University) and Professor Kunio Watanabe (civil engineering, Saitama University). In light of this background, the ICHTO employees that manage the two sites were extremely friendly to the Japanese Survey Team members.

(f) The Japan Institute of Architects (AIJ) and Japan Foundation

The Japan Institute of Architects (AIJ) and Japan Foundation are deploying exchange activities concerning local economic development on the theme of the Silk Road in a joint effort with local NGOs and ICHTO (Project representative: Professor Riichi Miyake (architectural history, Fuji Women's University). Between September and October 2018, it is scheduled for an international conference to be held in Tabriz, while an exhibition of handicrafts and activities will be planned from May 5 to 6, 2018 in Japan.

2) Assistance by Donors

(a) UNESCO

The Tehran office of UNESCO has 16 staff members (one expert plus support staff in each of five fields, including one Chinese expert and Iranian staff members). In addition, the Government of Iran has established Affiliated Regional Offices in charge of UNESCO affairs throughout the country. Based on a list of experts all over the world, experts in specific fields are invited as the need arises. For example, ICOMOS¹² experts are regularly dispatched to manage and monitor the World Heritage old city of Yazd, which was registered by UNESCO as World Cultural Heritage in 2017, from CRATERRE based within the National Superior School of Architecture in Grenoble. The United Nations offers a framework for cooperation by Iran and other countries. The framework for 2017 - 2021 is currently under construction.

Two workshops were staged last year. Managed by the ICHTO Cultural Heritage Deputy and Tourism Deputy, these workshops attracted managers and NGOs from around the country, while invitations were also extended to experts from Spain and WTO representatives. SWOT analysis was conducted on 22 World Heritage sites to examine ways of developing them as tourism destinations. Talks were also held on combining intangible heritage (cuisine, culture, etc.) with World Heritage sites.

Support activities by UNESCO mainly comprise two types: conservation and promotion.

Concerning promotion, there is a Silk Road tourism initiative, and the framework for 2017-2021 is currently in progress.

Concerning conservation, it is supporting development of tourism routes as tourism corridors. Not only is there a shortage of hotels, but in places like Shushtar and so on, even though they are major tourism resources, no explanations are given and visitors cannot understand what kind of places they are visiting. Not only in Iran but also in Central Asia in general, package tours tend to be expensive tours catering to small numbers. UNESCO hopes to assist Iran in becoming a destination for Silk Road tourism. Also, in relation to UNESCO's Creative City initiative, tour bus services are provided and other city tourism activities are conducted in Esfahan and Tehran. In addition, since last year UNESCO has offered assistance for the protection of underwater heritage to the ICHTO Cultural Heritage Deputy.

¹² ICOMOS: an international NGO that UNESCO entrusts the examination of registration of the UNESCO World Cultural Heritage

UNESCO views the current problems facing tourism in Iran as follows: (i) No clear routes connecting tourism destinations have been established, (ii) Improvement of security, (iii) Preparation of statistical data for grasping numbers of tourists and (iv) Management of the influx of tourists.

Another issue is related transcending the boundaries of departments and officers to strike a balance between protection and tourism. But the biggest issue is linked to PPP and establishing ways for linking private sector systems to ICHTO. For example, a competition to restoration project of historical buildings is staged every year under private sector investment from the viewpoint of finding ways to incorporate historical buildings such as caravanserai into tourism efforts. Taking the example of the Sasanid fort of Saryazd in the town of Mehriz in Yazd, attention is being directed to the promotion of PPP initiatives in privately developed resort facilities that are not so well known. Also, in the field of museum management, key issues are the preparation of appropriate inventories, management of collections, displays and so on.

(b) UNDP

Assistance for the Ecotourism field is conducted as part of the UNDP's Small Grant Programme. In formulating Ecotourism plans, reflecting the wishes of the Government of Iran, "The Ecotourism Thematic Working Group" is staged in cooperation with NGOs and the results of discussions are reflected in plans.

(c) UNWTO

UNWTO previously supported formulation of a tourism master plan (2000 - 2015), and currently, it plans to update the tourism master plan.

The tourism master plan that is currently under preparation is being formulated under the cooperation of UNWTO. A workshop geared to supporting establishment of a travel and tourism satellite account (TSA) for improving tourism statistics was staged in 2015 in Tehran with participation by ICHTO, the central bank, the Statistical Centre of Iran and the state immigration department. In 2016, the UNWTO Silk Road Taskforce Meeting was staged in Urmie with participation by representatives from 14 countries in order to determine priority items for the Silk Road Action Plan 2016-2017. In 2018, the 23rd general assembly meeting will be staged for the first time in Hamadan, and various tours are being planned to coincide with this.

Assistance from other Donors

Following the lead set by JICA, Thailand (TICA) and South Korea (KOICA) have commenced similar assistance. Thailand is supporting training for engineers and experts. Unlike JICA training, participants need to pay their own expenses on the ground; however, he says he learned much from advanced examples of Thai approaches to receiving tours and so on. KOICA conducts training that targets government officials.

(d) Other Assistance from the Overseas Private Sector

The Henkel Group of Germany, with financial backing from the private sector in Germany, is currently implementing a project to support the opening of an anthropological museum in Yazd by the art museum in Bonn and a museum in Berlin. As technical support, it dispatches curators to work on the historical exhibits. The museum is scheduled to be opened in 2020, and is anticipated will play a role as a core facility in the local cultural heritage-based tourism.

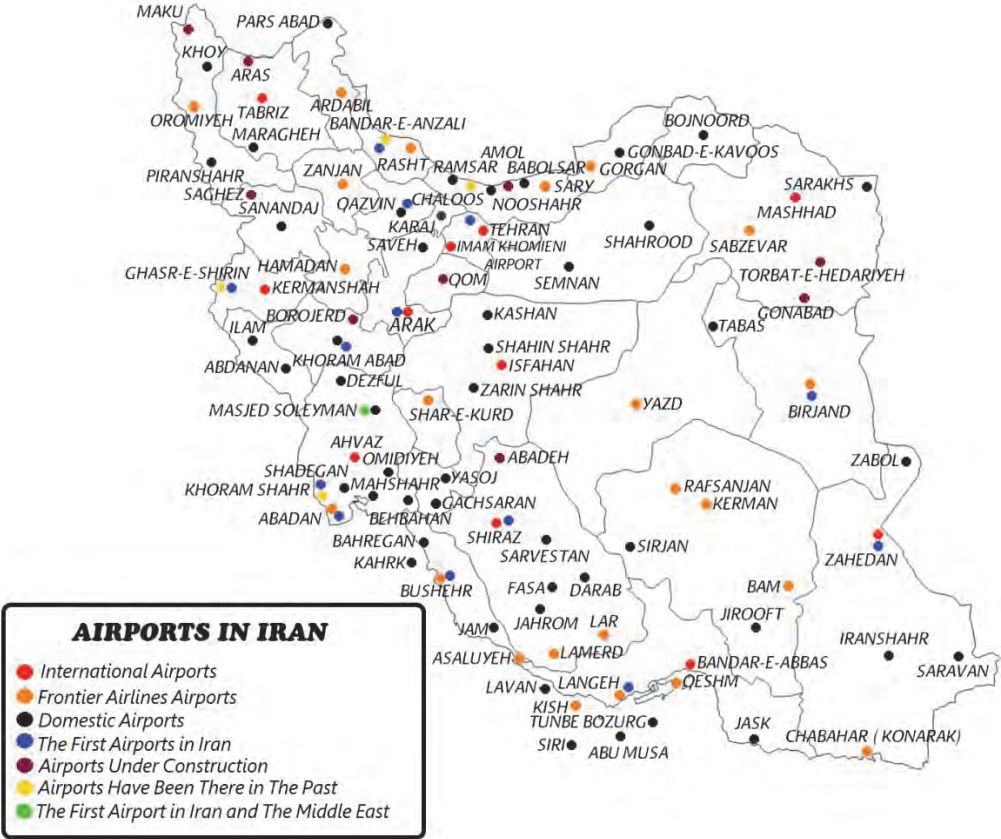
5. CURRENT STATUS OF TOURISM INFRASTRUCTURE IN IRAN

Looking at transport in Iran, prices of airlines, buses and railways are increasing, however, they are still comparatively cheap and contribute to the promotion of demand for tourist travel over the expansive national land area.

(1) TRANSPORTATION

1) Aviation

Iran has approximately 100 airports including 13 international airports such as Imam Khomeini International Airport, which is the gateway to Iran for international tourists, and Mehrabad International Airport in Tehran. These airports connect Tehran, which is the capital city and hub for international flights, to regional cities such as Shiraz.



Source: Wikipedia

Figure 5-1: Main Airports in Iran

Airports in Iran are under the jurisdiction of the Iran Civil Aviation Organization (CAO), which is under the umbrella of the Ministry of Roads and Urban Development (MRUD). The Iranian Airports Holding Company (IAC), which is wholly owned by the CAO and was established in 1988, is responsible for constructing and maintaining the country’s airports and conducting air traffic operations.

As of 2017, regular services connecting Imam Khomeini International Airport to CIS countries are operated by Aeroflot and Tajikistan Airlines; services connecting to Middle Eastern countries are

operated by Emirates, Qatar Airways, Etihad Airways, and Turkish Airlines; services connecting to Europe are operated by KLM, Lufthansa, and Alitalia; and services connecting to Asia are operated by Thai Airways, Air Asia, China Southern Airlines and others. From Japan, Iran Air previously operated direct flights; however, these were discontinued in October 2011, so the main routes now pass through Middle Eastern hubs such as Dubai and Qatar.

Iran's state-run airline Iran Air was established in 1944 and currently operates regular services to major airports in 59 cities including London, Paris, Frankfurt and other destinations in Europe. It also has plans to commence regular services connecting Asian hubs such as Bangkok and Kuala Lumpur. In addition to Iran Air, there are 15 airline operators such as Iran Aseman Airlines and Caspian Airlines that operate domestic services.

Concerning aircraft, it has been prohibited to export equipment aged eight years or less to Iran due to the economic sanctions, however, following the relaxation of sanctions, Iran signed a contract for the purchase of a fleet of new model Airbuses in 2016 and the renewal of aircraft is progressing. Frequent services are operated on domestic trunk lines, however, on many regional lines, schedules sometimes differ according to the day of the week and services are not operated on some days.

Airport terminals in the main cities have signage in Persian and English; however, traffic lines from check-in counters to boarding gates are difficult to understand. Foreign tourists are also inconvenienced by the fact that boarding gates are not informed until close to boarding times, sometimes the boarding information is given only in Persian, the information in English is unclear and so on.

Moreover, the domestic terminal and international terminal in Tehran are not in the same place. It usually takes around one hour to travel between the two; however, the journey can sometimes take more than two hours due to traffic congestion, making it difficult to plan times. The following table summarizes the air routes and airport terminals that were confirmed during this survey.

Table 5-1: Air Service

City	International routes	Domestic routes	Time from main cities	Service, quality, etc.
Tabriz	There are regular services from Istanbul and Hamburg. There are seasonal services from Baku, Dubai, Tbilisi, and Moscow.	Tehran, Shiraz, etc. have regular services.	Travel time between Tabriz and Tehran is approximately 1 hour.	Traffic lines from the check-in counters to the boarding gates are difficult to understand. Boarding information is difficult to understand.
Esfahan	There are regular services from Turkey, Iraq, Australia, and UAE. During the high season, in addition to the above, there are services from Georgia, Russia, Turkey (multiple cities), and Malaysia.	There are 47 services per week from Kish Island, 28 services per week from Tehran, 40 services per week from Mashad, 20 services per week from Tabriz, and 2 services per week from the Qeshm Island.	Travel time from Tehran is approximately 80 minutes.	Boarding information is difficult to understand.

City	International routes	Domestic routes	Time from main cities	Service, quality, etc.
Yazd	There are regular services from Iraq and Saudi Arabia. Regular services from Dubai and Qatar are desired from the viewpoint of industrial promotion.	There are regular services from Tehran and other main cities.	Travel time from Tehran is 70 minutes.	The departure terminal and arrival terminal are separated.
Shiraz	There are three airports in the Province, namely Shiraz Airport, Lal Airport, and Lamerd Airport. Direct regular services fly from 7 cities in UAE (2 cities), Qatar, Turkey, Austria, Iraq, and Oman.	There are regular services from Tehran and other main cities.	Travel time from Tehran is 90 minutes.	Boarding gates are not announced until just before the gates are opened. Boarding information is difficult to understand.
Ahwaz	Kuwait, Jeddah, Dubai	There are 1 - 2 services per day from Tehran.	Travel time from Tehran is 90 minutes.	Boarding gates are not announced until just before the gates are opened. Boarding information is difficult to understand.

Source: JICA Study Team

2) Road Condition

The 31 provinces of Iran, its capital city, main regional cities, villages and urban areas are connected by roads. The country has 88,227 kilometres of national roads, which are under the jurisdiction of the Ministry of Roads and Urban Development (MRUD). National roads are divided into four main categories, i.e. freeways, highways, main roads, and access roads, and there are also 215,000 kilometres of municipal roads (data as of 2015). Moreover, Iranian roads cross over national borders and connect with international roads in the north, west and east directions.

All freeways and high-speed roads are paved with asphalt. The main roads are also paved with asphalt and have good surface conditions, markings and guard rails. Approximately 28,000 kilometres of municipal roads are unpaved, however, surface conditions are good and it is possible for vehicles to gain access to remote provincial villages.

3) Bus

Iran has a well-developed network of long-distance inter-city bus services, and buses are the most frequently utilized means of transport between cities. Approximately 20 private sector bus companies operate services in the country. On the main inter-city routes, new Volvo VIP buses that are equipped with air conditioning and seats arranged in three-across rows offer a comfortable mode of travel.



Minibus services operate between regional cities and nearby towns and villages. Also, in Tehran, Tabriz and Mashhad, BRT systems that have dedicated bus lanes have been constructed.

Each major city has multiple long-distance bus terminals. Terminals have signage in Persian and English; however, English signs are limited to a few at some terminals. Bus boarding bays are numbered and have English signage, making them easy for foreign tourists to understand, however, there are some terminals where buses simply line up in the parking area and passengers have to rely on the calls of staff members to find the bus they need. Also, boarding areas for local buses and taxis into city centres are difficult to understand. Moreover, since long-distance bus terminals are often located away from city centres, when city traffic congestion is also taken into consideration, it is necessary to take a few hours for reaching them.

The following table summarizes the long-distance bus information and bus terminal conditions that were confirmed during this survey.

Table 5-2: Bus Service

City	Outline	Service, quality, etc.
Tabriz	A commercial city located in northern Iran, Tabriz is connected to Tehran, Turkey, Azerbaijan and so on. Travel time from Tehran is approximately 8 hours. Travel time to Istanbul (Turkey) is approximately 32 hours. Travel time to Baku (Azerbaijan) is approximately 16 hours.	At one of the terminals, almost all signs are in Persian, making it difficult for foreign travellers to understand. Conditions on the main roads linking the major cities (4 - 6 lanes) are good. Local roads around Takht-e Soleymān are worn out and need repair.
Esfahan	Located in central Iran, Esfahan is connected to major cities to the east, west, north and south, i.e. Tehran, Shiraz, Kashan, Tabriz, etc. There are four long-distance bus terminals in the city. Travel time from Yazd is 7 hours. Travel time from Tehran is approximately 6 hours. Travel time from Shiraz is approximately 7 hours. Travel time from Ahwaz is approximately 12 hours.	The information centre, waiting room chairs, shop, restaurant, toilets, breast feeding room and other equipment are adequate. There is also an adjoining hotel. The electric signboard displays bus company names, destinations, status, numbers of seats and so on in English and Persian.
Yazd	Having one long-distance bus terminal, Yazd is connected to Tehran, Shiraz, Esfahan, and Mashad. Travel time from Tehran is approximately 10 hours. Travel time from Shiraz is approximately 7 hours. Travel time from Esfahan is approximately 7 hours. Travel time from Mashad is approximately 16 hours.	The terminal is equipped to a certain extent with waiting room chairs, shop, toilets and so on. The terminal is equipped to a certain extent with waiting room chairs, shop, toilets and so on. Almost all signs are in Persian, making it difficult for foreign travellers to understand. Conditions on main roads and local roads are good.

City	Outline	Service, quality, etc.
Shiraz	<p>There are three long-distance bus terminals in the city.</p> <p>Around 10 bus companies run services between Shiraz and Tehran.</p> <p>There are also around 30 services between Shiraz and Esfahan.</p> <p>Services also link with the Persian Gulf and main cities in the southeast of Iran.</p> <p>Travel time from Esfahan is approximately 7 hours.</p> <p>Travel time from Yazd is approximately 7 hours.</p> <p>Travel time from Ahwaz is approximately 8 hours.</p>	<p>The information centre, waiting room chairs, shop, restaurant, toilets, breast feeding room and other equipment are adequate.</p>
Ahwaz	<p>The main bus terminal is located approximately 6km from the city centre, and there is a minibus terminal that operates services to Shush nearby.</p> <p>Travel time from Tehran is approximately 11 hours.</p> <p>Travel time from Shiraz is approximately 10 hours.</p>	<p>Since the city is surrounded by mountains, overland access to other tourist destinations is limited.</p> <p>Conditions on main roads and other local roads linking Khuzestan Province with other areas are not always good, so it takes time to get around.</p>

Source: JICA Study Team

4) Taxi

Taxis are also commonly used for getting around cities in Iran. There are three types of taxi in Iran: 1) government-approved shared taxis, 2) private *Ajans* taxis that are called by telephoning, and 3) white *Savari* taxis that are simply driven by individuals who only possess a driver's license (since Iran has no special license or vehicle registration systems). In addition, women-only taxis have started operating in Tehran and so on in recent years.

In the absence of taxi meters, fares are decided by negotiation, so taxis are not necessarily an easy mode of transport to utilize for overseas tourists.

Moreover, depending on the years of experience of drivers, since accessible areas in cities are limited, it can sometimes take more time than necessary to reach distant areas when the driver doesn't know the way. Furthermore, in Tehran and other major cities, traffic congestion is chronic, drivers rush into intersections, there is hardly any room between vehicles, there is a lot of sudden braking and so on; hence, the roads feel very unsafe for Japanese visitors.

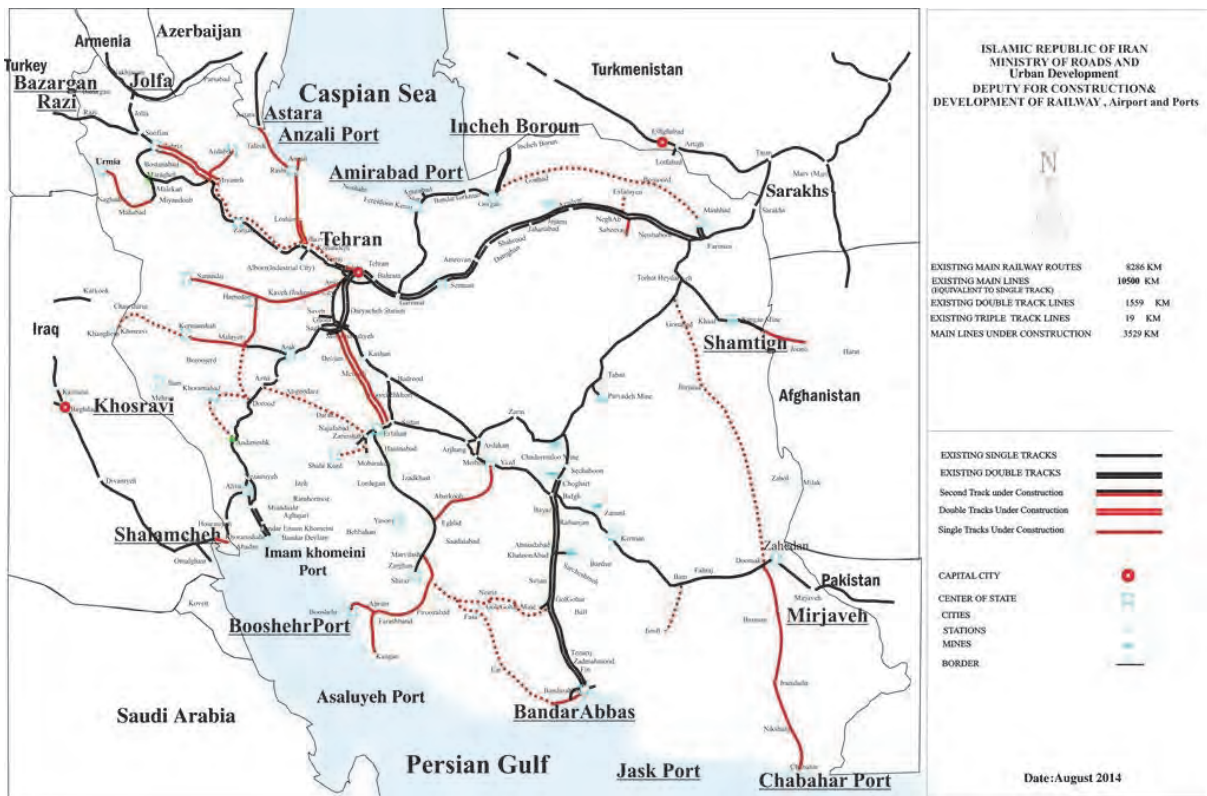
5) Railway

Railways in Iran, which have a combined length of approximately 13,600 kilometres (2015), are under the jurisdiction of the Ministry of Roads and Urban Development (MRUD). The Government of Iran is currently constructing an additional 7,500 kilometres of railways under the Vision 2025 (2005 - 2025) long-term national development plan that was announced in 2005. When this work is completed, Iran will have 20,000 kilometres of railways. Currently, 194 kilometres of railways are electrified; and 81.6% of mainline railways are single-track and 18.4% are double-track lines.

Except for 94 kilometres of broad gauge line on the border with Pakistan, Iranian railways adopt standard gauge of 1,435 millimetres.

As of 2017, railway passenger services are operated by 11 private sector companies including RAJA, Fadak and Safir.

Railway rolling stock had become deteriorated, however, it is now being replaced with new rolling stock made in China, and it is now possible to travel comfortably in new sleeper cars. There are also plans to introduce high-speed railways under Chinese assistance.



Source: Ministry of Roads and Urban Development (MRUD) HP (2014)

Figure 5-2: Railways in Iran

Also, in June 2017, the railway authorities of Iran, Azerbaijan, Georgia, Ukraine, and Poland gathered in Baku the capital of Azerbaijan to sign a protocol for an east-west transportation route project. This project aims to transform the freight transportation route between India and Europe from the ocean route that passes through the Suez Canal to an overland route passing through the Persian Gulf, Iran, Azerbaijan, and Georgia, and thereby shorten the transportation distances and times.

Concerning mass transit rail systems in cities, subway systems have been constructed in the capital Tehran, Esfahan, Tabriz, Shiraz and Mashhad, and subway construction plans are currently in progress in regional cities such as Ahwaz, Kermanshah, Qom and Karasi.

Railway stations in the major cities have signs in Persian and English for indicating toilets, ticket counters and other basic infrastructure. However, there are some stations where ticket counters are situated in difficult to find places outside of the station building; information on arriving and departing trains is only given in Persian and so on, making them inconvenient for foreign tourists. Printed timetables are not always available, so train information has to be obtained at ticket counters or information booths, however, sometimes the station staff can understand Persian only.

Moreover, railway stations are often located away from city centres, so it is necessary to allow ample time for transit in consideration of inner city traffic congestion. The following table summarizes the railway line and station conditions that were confirmed during this survey.

Table 5-3: Railway Service

City	Regular services	Travel time from major cities	Service, quality, etc.
Tabriz	There is a metro line running east to west in the city. A line connecting to Moscow is being prepared. There are regular services to and from Georgia, Iraq and Azerbaijan. Domestically, there are two trains between Tabriz and Mashad every day. There are two trains between Tabriz and Tehran every day.	Travel time from Tehran is approximately 13 hours. Travel time from Mashad is approximately 25 hours.	The station has an information centre, waiting room chairs, shop, toilets, and other equipment. Almost all signs are in Persian, and buying tickets is also difficult to understand for foreign tourists.
Esfahan	There are regular services to Tehran, Tabriz, Mashad, etc. All regular services with foreign countries go through Tehran and connect to Turkmenistan, Turkey, Baku, etc.	Travel time from Tehran is approximately 6 hours A high-speed rail link between Esfahan and Tehran that will take 100 minutes is being planned.	The station has an information centre, waiting room chairs, shop, toilets, and other equipment. Train numbers, destinations, times and so on are displayed in Persian, making it difficult to understand for foreign tourists.
Yazd	There are regular services to and from Esfahan.	Travel time from Esfahan is approximately 4 hours. Travel time from Tehran is approximately 6 - 8 hours.	Almost all signs are in Persian, and buying tickets is also difficult to understand for foreign tourists. The ticket counter is situated outside of the station building and is difficult to find.
Shiraz	There are regular services to and from Tehran and Mashad.	Travel time from Tehran is approximately 15 hours.	The station has an information centre, waiting room chairs, shop, toilets, and other equipment. The station has an adjoining meeting room. Train numbers, destinations, times and so on are displayed in Persian and English.
Ahwaz	There are 1 - 2 services per day from Tehran.	Travel time from Tehran is 14 - 17 hours	

Source: JICA Study Team

(2) INFORMATION AND TELECOMMUNICATIONS

Iran became the second Middle Eastern country to become connected to the internet in 1993, and nationwide ADSL services were commenced in 2004. Meanwhile, access to Western social networking sites such as Facebook and Twitter are controlled, and various other restrictions are placed on tourists. Free Wi-Fi spots for tourists are extremely limited and can only be found in international airports and some hotels and restaurants.

The mobile phone market is growing steadily: at the end of September 2015, the Mobile Telecommunication Company of Iran (MCI), which is a subsidiary of the Telecommunication Company of Iran (TCI), had a 57.9% share of the mobile phone market while the South African company MTN Irancell had a 39.9% share. The market is thus an oligopoly dominated by these two operators.

(3) OTHERS (Security, Sanitary and Medical Conditions)

Except for some areas on the borders with Iraq, Afghanistan, and Pakistan, Iran generally has good public order. In June 2017, a terrorist bombing by Islamic State (ISIL) caused 18 fatalities and roughly 50 casualties near the national diet office building and Mausoleum of Khomeini in Tehran.

As for the sanitary environment, water supply and sewerage systems exist in provincial cities and hygienic public water supply is available.

Air pollution caused by exhaust gases from vehicles is a serious problem in Tehran and other large cities, and conditions deteriorate even more in winter. The authorities sometimes advise people with respirators and weak hearts to refrain from going outdoors, and schools are sometimes closed due to the pollution.

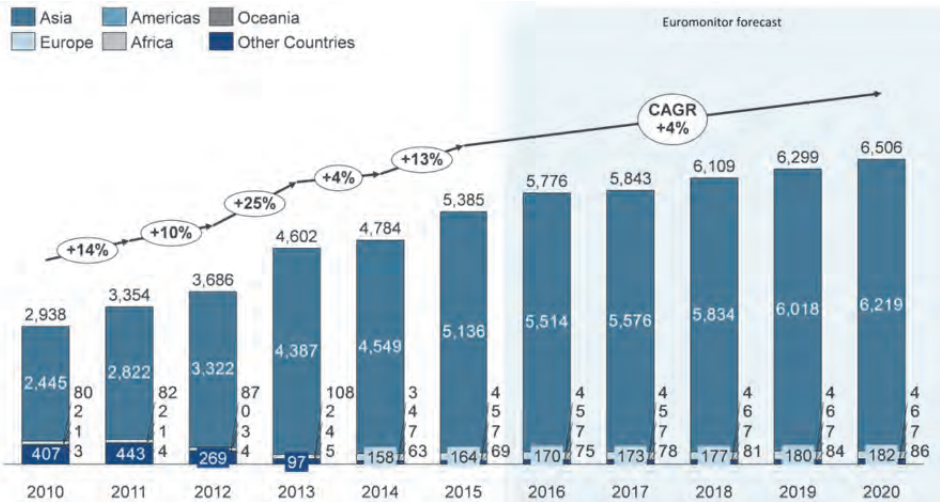
The standard of medical care is relatively high in Tehran and other large cities, and there are numerous hospitals equipped with high-level medical equipment such as CT, MRI, etc. The government is promoting medical tourism.

6. TRENDS OF TOURISTS IN IRAN

(1) TRENDS OF TOURISTS FROM FOREIGN COUNTRIES

The number of foreign tourists visiting Iran is increasing every year, growing from 2.93 million in 2010, to 4.76 million in 2013, and 5.23 million in 2015. Roughly half of the foreign tourists come from other Shia Islamic countries, however, numbers of visitors from Europe, North America, and East Asia have also been increasing in recent years, and more than 6.5 million¹³ foreign tourists are expected by the year 2020. On the other hand, the government of Iran has set the policy to extend the number of foreign tourists to 8.0 million by the year 2020. In terms of country of origin, except neighbouring Shia Islamic countries, most foreign tourists to Iran come from Germany, which accounts for approximately 29,000 per year, and this is followed by France, Italy, Russia, the Netherlands, the United Kingdom, Sweden, Austria, Spain, and Switzerland, indicating that tourists largely visit from European countries. The number of visitors from Japan was 8,393 in 2015 and this has been increasing steadily. Many package tours conducted in Iran entail traveling from the international tourist centre of Tehran to regional tourism destinations such as Shiraz and Tabriz using domestic flights, touring around the local tourist sites, and then moving onto the next tourism area.

On the other hand, travellers are confronted with various constraints when visiting Iran: for example, due to unstable political situation of neighbouring countries and negative image of former regime, the country has the image of being more unsafe than in reality; airlines and hotels are not very comfortable; international credit cards cannot be used due to financial sanctions; viewing of Western internet sites is controlled, and so on. Such factors impair Iran’s competitiveness in the international tourism market compared to nearby countries. In addition, the US Government’s policy of excluding persons with a travel history to Iran from application for visas is another factor that limits the growth of foreign tourists to Iran.

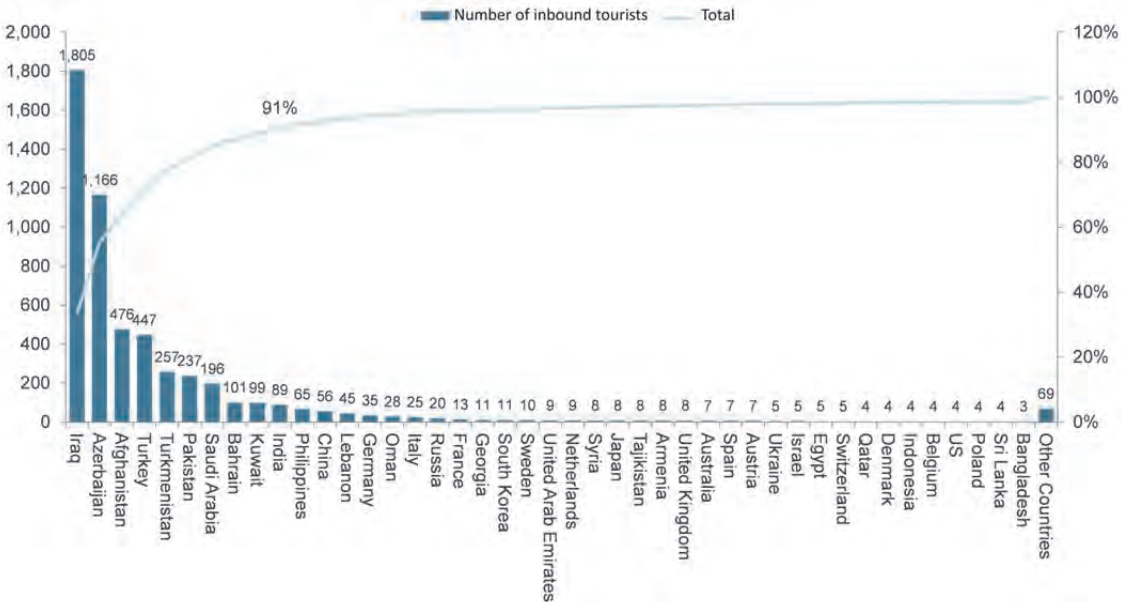


Unit: 1,000 people
 Source: Analysis by Euromonitor International

Figure 6-1: Past and Future Projected Changes in the Number of Foreign Tourists to Iran

¹³ Analysis by JICA Study Team based on the Data from Euromonitor International

Looking at the origins of foreign tourists to Iran, many tourists come from neighbouring Iraq and Azerbaijan; indeed neighbouring countries account for the top 10 sources and 90% of inbound foreign tourists, while foreign tourists from Western nations, which have high tourism consumption, are limited. Out of the foreign tourists entering Iran, 35% enter the country by air, 64% by land, and 1% by ship.



Unit: 1,000 people
 Source: Analysis from Euromonitor International

Figure 6-2: Foreign Tourists Going to Iran (2015)

(2) TRENDS OF JAPANESE MARKET

Total number of arrivals including tourism from Japan is 8,393 in 2015 and 10,395 in 2016. Total number of arrivals has increased recently. According to travel agencies of Japan, age group of tour participants from Japan is mostly more than fifties. Most of them are interested in rarely visited regions and world heritages. Furthermore, travel agencies make pamphlet, emphasizing not Iran but Persia and the Silk Road, and attract tourists since Iran may recall dangerous image to most of the Japanese. Currently, Japanese travel agencies organize and implement around 1-week tour for famous, historical, and traditional cities such as Tehran, Shiraz, Persepolis, Yazd, Esfahan, and Kashan.

(3) TRENDS OF TOURISTS BY TOURIST SITES

Total number of visitors to historical monuments was around 15 million in 2013. According to Iran Statistical Yearbook 2013, there are around 100 major historical monuments such as Mosque, castle, bathhouse and house. Popular historical monuments in Iran are summarized in the table below. More than 1 million people have visited Hafez Mausoleum and Sadi Mausoleum in Shiraz, and Takht-e-Jamshid in Marvdasht. There are also popular historical monuments in the Kashan, Esfahan, and Mashhad.

Table 6-1: Total Number of Visitors to Historical Monuments

Historical Monument	Place	2010	2011	2012	2013
Total	-	16,421	15,067	14,609	15,327

Unit: 1,000 person

Source: Iran Statistical Yearbook 1392

Table 6-2: Number of Visitors to Major Historical Monuments

Historical Monument	Place	2010	2011	2012	2013
Hafez Mausoleum (Hafeziyeh)	Shiraz	1,853	1,773	1,630	1,505
Sadi Mausoleum (Sa'diyeh)	Shiraz	1,362	1,413	1,426	1,015
Takht-e-Jamshid	Marvdasht	1,150	1,205	1,201	1,085
Majmue-ye-Abbas Abad (complex)	Mazandaran	6	20	10	3,200
Bagh-e-Fin(Paradise)	Kashan	1,207	917	1,094	804
Masjed-e-Emam (mosque)	Esfahan	254	334	219	189
Sheikh Ahmad Jam Mausoleum	Mashhad	576	727	408	N/A
Kakh-e-Ali-Qapu	Esfahan	431	384	343	242
Arg-e-Karimkhan (castle)	Shiraz	207	639	628	607
Qaleh-ye-Falak-ol-Aflak (castle)	LoRESTEN	323	314	370	189

Unit: 1,000 person

Source: Iran Statistical Yearbook 1392

Iran has many museums. Iran Statistical Yearbook 1392 refers to around 200 museums as the major tourism resources. Total visitors to museums in 2013 were 8.7 million. There are famous and popular museums in Shiraz, Esfahan, and Tehran.

Table 6-3: Total Number of Visitors to Museum

Museum	Place	2010	2011	2012	2013
Total	-	8,396	6,745	7,268	8,726

Unit: 1,000 person

Source: Iran Statistical Yearbook 1392

Table 6-4: Total Number of Visitors to Museum

Museum	Place	2010	2011	2012	2013
Cultural and Historical Complex of Golestan Palace	Tehran	N/A	513	627	673
Takht-e-Jamshid (Persepolis)	Shiraz	403	217	N/A	1,085
Chehel-Sotun	Esfahan	868	781	861	461
Niyavaran Palace	Tehran	203	247	921	792
Eco-museum of Rural Heritage Museum	Rasht	112	132	149	N/A
Nahavand Museum of History and Culture.	Hamedan	N/A	N/A	N/A	138
South of Sahand Anthropology Museum (Bonab)	East Azerbaijan	N/A	176	186	199
National Museum of Iran (Iran-e- Bastan)	Tehran	461	110	N/A	472
Azerbaijan	Tabriz	164	156	142	142
Hamam-e-Ganj-Ali- Khan(Bathhouse)	Kerman	222	318	249	231

Source: Iran Statistical Yearbook 1392

(4) TRENDS OF DOMESTIC MARKET

Looking at the domestic market in Iran, against a background of large population, relatively high income levels, empowerment of women, relative difficulty in traveling overseas, and difficulty in securing passage and visas for overseas travel due to the impact of international politics and so on, Iranian people like to travel domestically. Moreover, there is a high demand among pilgrims to travel to sacred religious sites such as Mashhad. In addition, some tourists visit in Iran for the health tourism. However, due to preferences for the traditional nomadic lifestyle and culture, many Iranians like to travel by car while camping in tents and cooking their own meals, and this means that domestic travel only has a limited economic impact on the tourism industry.

According to Statistical Center of Iran (SCI), 56% of household travelled in Iran more than once annually. Among them, 1.5% of household travelled abroad annually. Average accommodation cost of domestic travel is 16 USD. Average itinerary of domestic travel is 4 days and that of foreign travel is 12 days.

(5) SEASONALITY

Several stakeholders of tourism sector point out seasonal variation as the issue of tourism sector. Iran has the vast land with various climate zones. The different climate of each region affects the movement of tourists. Generally, spring is one of the high season for many regions because of good weather conditions and Nowruz holidays. Similarly, autumn is one of the high season due to the good weather.

The number of tourists among regions varies considerably in summer and winter seasons. In summer, north-west area including Tabriz becomes tourism high season due to the comfortable weather condition. However, temperature in central and south area including Yazd, Shiraz and Ahwaz would become more than 40 degrees in summer. Thus, it is not appropriate season of tourism for central and south area. In winter, number of tourists in Tabriz sharply drops due to cold winter and blocked mountain roads by snow.

Table 6-5 : High Season and Low Season in Each Area

Area	High season	Low season
Ahwaz	Winter (November-March)	Spring, Summer, Autumn
Esfahan	Spring, Autumn	Summer
Tabriz	Summer (April-September)	Winter
Yazd	Spring, Autumn	Summer
Shiraz	Spring, Autumn	Summer

Source : JICA Study Team based on the interviews in each area

As an example of the seasonal variation, hotel occupancy rate in each area between high and low season is shown in the table below. In each area, there is a clear difference between high and low season. Especially, occupancy rate becomes 100% in Tabriz while the rate reaches only to 20% in the low season. This seasonality greatly affects tourism industry such as hotel, guide, travel agency and

restaurant in each area. Therefore, the mitigation measure is one of the main issues for the tourism industry in Iran.

Table 6-6 : Hotel Occupancy Rate in Each Area

Area	High season	Low season	Note
Ahwaz	70%	40%	
Esfahan	100%	50%	
Tabriz	100%	20%	
Yazd	100%	40%	
Shiraz	N/A	N/A	Average annual occupancy rate of guest house is 60% - 70%

Source : JICA Study Team based on the interviews in each area

7. CURRENT STATUS OF TOURISM RELATED INDUSTRY IN IRAN

(1) AIRLINE COMPANIES

In addition to Iran Air, there are almost 20 airline companies in Iran including Mahan Air, Aseman Airlines and freight air transportation companies. Many of the airline companies were established prior to 2000, although ATA Airlines, Sepahan Airlines, Nasim Air, etc. only entered the market in the past 10 years. Airline companies in Iran generally change their service schedule in summer and winter; however, upcoming schedules are not announced until around one month before they go into effect. As a result, it is difficult for travel companies to organize tours because they cannot be sure that flight services will be retained in the next schedule until a few weeks before the new schedule goes into effect. The delayed announcement of flight schedules is thought to result from the shortage of aircraft in relation to demand, the high proportion of deteriorated aircraft and the resulting need to conduct time-consuming maintenance.

The following table shows the international routes of the main passenger airline companies¹⁴. Some airline companies operate services to Western Europe; however, many companies primarily operate services to nearby European destinations such as Turkey and the Caucasus and Gulf states. There are not many services connecting to Asia, however, some airline companies are considering establishing China routes targeting business customers and a Malaysia route catering to Muslim pilgrims and Iranians traveling overseas. Iran Air previously operated services to Japan; however, these were discontinued in October 2011.

As was mentioned above, since Iran faces shortages of aircraft, some airline companies are forced to use aircraft on international routes immediately after they have completed domestic services, and such conditions lead to frequent delays.

¹⁴ Some of the flights are still in the planning stage and are not actually operating. Moreover, services may differ between summer and winter.

Table 7-1: Main Passenger Airline Companies and International Routes in Iran

	Air craft	Domestic Flights	International Flights		
			No. of destination	Europe & North/South America	Middle East/Africa
ATA Airlines (2008~)	14	5	Georgia, Azerbaijan, Turkey	-	-
Atrak Air (1993~)	3	8	-	-	-
Caspian Airlines (1993~)	23	20	Armenia, Turkey, Ukraine	Dubai, Iraq(2), Syria, UAE	
Qeshm Air (1993~)	21	15	Bulgaria, Greece, Russia(2), Turkey(2)	Cyprus, Iraq(2), Syria, UAE	Hong Kong
Iran Air (1961~)	36	18	France, Germany(2), England, Italy(2), Netherlands, Turkey(2), Spain, Sweden(2), Venezuela, UK	Lebanon, UAE, Kuwait, Qatar	India, Pakistan
Iran Airtour (1973~)	5	19	-	UAE, Iraq	-
Iran Aseman Airlines (1980~)	37	37	Armenia, Turkey(2)	Afghanistan(3), Georgia, Iraq, Kuwait, Oman, UAE,	Tajikistan, Turkey, Russia
Kish Air (1989~)	10	21	Bulgaria, Turkey	Kuwait, UAE(3), Oman, Syria	-
Meraj Airlines (2010~)	8	10	Bulgaria, Georgia, Russia(3), Turkey(4)	Kuwait, Iraq(2)	India(2)
Mahan Air (1991~)	54	26	Azerbaijan, Armenia, Denmark, France, Germany(2), Italy, Russia(2), Turkey(2), Ukraine	Afghanistan, Iraq(3), Kuwait, Lebanon, Mauritius, Morocco, Syria, UAE	China(3), Kazakhstan, Thailand(2), Malaysia, India(2)
Nasim Airlines (2016~)	1	N/A		Newly established. TBA.	
Taban Air (2005~)	N/A	12	Armenia, Turkey	Iraq, UAE	Pakistan
Zagros Airlines (2005~)	19	14	Armenia, Azerbaijan, Georgia, Azerbaijan, Turkey(3)	Iraq(2), UAE	-

Source: JICA Study Team

(2) TOUR OPERATORS

Tourism enterprises are broadly divided into private investment enterprises and government-sponsored enterprises. The government-sponsored enterprises have affiliated hotels, travel companies, universities, etc. that monopolize businesses between them. Moreover, government-sponsored enterprises have close ties to government ministries and receive the rights to operate around government events and so on. There are an estimated 4,000 travel companies and tour operators in Iran, and around 50 - 60 of these companies generate their own business as opposed to seeking commissions by selling the products of other companies. According to hearings conducted with tour operators, because they are unable to accept all requests for reservations from overseas partner travel companies due to chronic shortages of hotel rooms and aircraft seats, only around 70% of reservations are translated into actual business. Accordingly, some tour operators have started handling their own inbound businesses and even overseas tours for Iranian citizens (outbound) in some cases.

In the current environment, the following kinds of cases arise: (a) when private sector travel companies place reservations with government-sponsored hotels, they must make the reservations through travel companies in the same group; (b) incentive tours that have been pioneered by private sector travel companies eventually end up flowing to government-sponsored enterprises; and (c) hotel room types that have initially been confirmed are sometimes switched to higher class rooms when customers check in and the tour operators are invoiced a higher rate by the hotels.

Concerning case (a), hotel confirmations in Iran are generally said to be slow (it sometimes takes more than one month), and this is thought to result from not only the chronic shortage of hotel rooms but also the dual structure of reservations. Moreover, because an upper limit is placed on the hotel rates that can be sold, this restricts the profits of private sector travel companies. Alternatively, because commissions are not paid by hotels and government-sponsored travel companies, the private sector travel companies have to add commissions, leading to inflated tour prices.

Moreover, in cases where hotels unilaterally change room types as in cases such as (c) above, tour operators are unable to bill the travellers or partner travel companies for the difference, and this again pressures the profits of the tour operators.

Meanwhile, it was found that tour operators do not give sufficient information about arriving travellers or explain job contents to guides. Moreover, numerous operators do not pay the standard daily allowances that are prescribed by the tour guides' associations. Such conditions are commonplace, leading to shaky trust between the tour operators and guides, and this can sometimes spill over into negative impacts for travellers. Accordingly, the relationship between tour operators and guides is a potential impediment to the promotion of tourism in Iran.

1) Tourism Products

Table 7-2 shows the main tourism products that are developed by tour operators. These utilize the diverse tourism resources of Iran and also include theme-based tours, experiential programs and tour products that include exchanges with local residents, for example, making Iranian cuisine, visiting nomadic peoples and so on.

2) Online Reservations

Online transactions by tour operators and travel companies targeting Iranian customers are increasing in the area of hotel and ticket reservations, etc. However, due to controls on overseas money transfers, little progress has been made in introducing online business in cooperation with overseas travel companies.

3) Domestic Tours

Iranian people tend to travel by private car when making nearby trips, however, when travelling longer distances within the country, they frequently join package tours that utilize chartered planes or railways (even chartered trains in some cases). Some travel companies operate on average 10 charter flights per day to the Qeshm Island, Mashhad and Shiraz all year round. Such package tours retail at prices ranging from 200 USD (outward and return flight, 2 nights in a 5-star hotel, and hotel pickup) to 300 USD (outward and return flight, 3 nights in a 5-star hotel, and hotel pickup).

Railway package tours are much cheaper than air tours: for example, a tour from Tehran to Mashhad costs 40 USD (outward and return train journey, 2 nights in a hotel, 1 night on a train, and

hotel pickup). Even though rail tours entail longer travel time, some travel companies conduct tours catering to approximately 40 Iranian pilgrims every other day.

Table 7-2: Examples of Tour Products for Foreign Tourists

Type of tours	Tour theme
Day tours	<ul style="list-style-type: none"> <One day> ▪ Snow and Ski ▪ Museums and Palaces in Tehran ▪ Nature in one place ▪ Feast and ceremonies ▪ By flight to Shiraz, Isfahan, Yazd, Kerman, Mashhad, Kish & Qehm island <Two days> ▪ Shiraz ▪ Isfahan ▪ Anzali & Masouleh ▪ Kerman ▪ Tabriz ▪ Mashhad ▪ Kermanshah ▪ Qazvin & Zanjan ▪ Ramsar ▪ Kish Island ▪ Mountain climbing ▪ Nature trekking ▪ Cave paving
Thematic tours	<ul style="list-style-type: none"> <From one week up to approx. 20 days> ▪ Cultural ▪ Tower of Silence ▪ Silk Road ▪ Spa ▪ Eco ▪ Caspian ▪ Nomad ▪ Desert & Safari ▪ Cycling ▪ Hand Craft ▪ Carpet ▪ Garden Route, etc.
*Agricultural tours	▪ Saffron & Barberry ▪ Rose Water ▪ Pistachio
*Culinary tours and cooking classes	▪ Persian Grand ▪ Northern and Southern Iran ▪ Culinary and Cooking classes in Tehran
*Cultural Heritage tours	▪ Iran Sufi ▪ Music of Northern and Southern of Iran ▪ Iranian Literature ▪ Cultural Heritage of Iran ▪ Iran Traditional Medicine
*Educational tours	▪ Architectural Survey ▪ Iranian Garden ▪ Earthen Architecture ▪ Archeology
*Religious tours	▪ Jewish ▪ Zoroastrian ▪ Christian ▪ Muslim Pilgrimage
Combination tour	▪ Iran & Uzbekistan ▪ Iran & UAE, etc.

Source: JICA Study Team

(3) HOTELS AND RESTAURANTS

Hotels can be found throughout the country, however, 5-star hotels catering to wealthy customers are limited to resort areas such as Kish Island and touristic cities such as Shiraz, etc.

Private sector investment is concentrated in Shiraz and Esfahan, where tourists can be expected to stay overnight. In Tehran, although ibis and NOVOTEL hotels have been constructed at Imam Khomeini International Airport, little progress is being made in hotel construction under overseas investment.

Meanwhile, although it is strictly against the law, accommodation of tourists for a charge in private homes is widely conducted, and this practice impedes the businesses of hotels in the 3-star category.

1) Hotels in Tehran

Hotels in Tehran mainly cater to business guests. For this reason, even three-star hotels have conference rooms that can hold around 100 persons and kitchenettes for long-term guests.

Many hotels are deteriorated; they have sticky windows and doors, old discoloured towels, poor Wi-Fi connectivity in guestrooms and so on, and they are reluctant to invest in new facilities. Moreover, due to the low precipitation, hotels have low water pressure in toilets and showers.

Moreover, because there are many customers throughout the year and it is a sellers' market, many hotels set high rates that do not match the level of services. Amenities in guestrooms are not complete and breakfast start times are sometimes delayed due to lack of preparation. In addition to such basic deficiencies, not many hotel workers can speak foreign languages; moreover, because safety boxes cannot be used, staffs are unable to immediately respond to requests for confirmation or provide other customer services when needed.

Although hotels implement their own training for employees, this is not performed to international standards.

2) Boutique Hotels in Regional Area

In Kashan and Yazd, residences of old wealthy merchants are being increasingly renovated and operated as boutique hotels that are popular with individual and small groups of tourists from mainly France, Germany and other European countries. Compared to hotels in Tehran, these boutique hotels generally offer a higher level of service.

Hotel reservations are sometimes made through Iranian tour operators; however, most reservations are made by email by individual persons living overseas. In such cases, because the travellers pay the hotel charges in cash after they arrive at the hotel, there are occasions where travellers with reservations do not appear on the day in question.

3) Bumgardi

In Iran, *Bumgardi* are private residence accommodation facilities that utilize historical structures, etc., and ICHTO plans to increase such facilities in future.



4) Restaurants

Tehran has a wide range of eating establishments including restaurants that have a high-class ambience, restaurants and tea houses that are furnished with traditional architectural features and decorations, modern cafes, etc. Meanwhile, in provincial cities, there are unique theme-based restaurants that are made by utilizing *Hammam*, ice rooms, and the private residences of merchants,

where one can sense the culture and history of Iran, and such restaurants can be appealing to foreign tourists.

On the other hand, even though restaurants have a high-class feel, waiters cannot always speak English and basic service levels are not always sufficient. Moreover, restaurants often serve cutlery and Nan bread in plastic bags, while yoghurt is often served as a starter in the packaged state bought from a shop. Such actions arise out of the consideration of restaurants not to let staff directly touch cutlery or let Nan bread dry out, however, from the viewpoint of foreign tourists, such items appear like processed foods straight from the factory.

			
Tea house with an old-style atmosphere (Tehran)	Modern café (Tehran)	Restaurant with a high-class feel (Tehran)	Restaurant with an old-style atmosphere (Tehran)
			
Restaurant renovated from a <i>Hammam</i> (Esfahan)	Restaurant using a traditional residence (Maybod)	A Sandwich store (Esfahan)	Nan served in plastic bag

(4) TOUR GUIDE

There are more than 7,000 qualified tour guides in Iran, however, only a few hundred of these actually conduct work. Guides are broadly divided into culture tourism guides or Ecotourism guides (targeting overseas or Iranian tourists depending on whether or not they can speak foreign languages), and there are also specialized guides in such fields as medical tourism, geo tourism, sports and so on.

Muslim pilgrims make up a large percentage of the foreign tourists that visit Iran, and there are also many tourists that visit from Europe. Accordingly, guides that are registered with the Iran Tourist Guide Association mainly speak English, German, French, Italian or Spanish, but there are not many guides who can speak Japanese, Chinese or other Asian languages.

Many of the Japanese-speaking guides previously lived in Japan before returning home to Iran, and there is a wide disparity in Japanese speaking ability and customer service between these guides. The Iran Tourist Guide Association conducts various training aimed at enhancing the knowledge and capacity of guides, however, many Japanese-speaking guides and guides who speak other languages do not have a clear idea about what it means to be a professional guide.

The guide associations in each province establish standards for daily allowances; however, some tour operators do not adhere to these standards. Accordingly, many guides are unable to make a living out of guide work and quit the job despite obtaining a license, while others treat it as a second job. In other cases, tour operators do not provide sufficient explanations to guides about the objectives that travellers have in visiting Iran, or they fail to inform travellers of changes in tour contents and leave the guides to deal with the resulting complaints from travellers. Such cases harm the motivation of guides, causing them to offer inadequate service to travellers or do their work with a bad attitude, and this can have a negative impact on tourism promotion in Iran.

(5) MICE

Tehran hosts international exhibitions that are run by the Iran International Exhibitions Company, which was established in 1959 and is a member of the UFI (Union of International Fairs) and BIE (Bureau International des Expositions). The Iran International Exhibitions Company has plans to stage 70 exhibitions in 2017, and more than 60% of these will be held between September and March.

The Shahr-e-Aftab International Exhibition Centre is currently under construction on a site located between the city centre of Tehran and Imam Khomeini International Airport, and part of the centre has already gone into operation. It is scheduled to stage 40 exhibitions at the Shafre-Aftab International Exhibition Centre in 2017, and more than 80% of these will be held between September and March. The Shafre-Aftab International Exhibition Centre is a complex facility that also contains a trade centre, hotel, park and so on; moreover, since it is located close to the airport, it is intended to mitigate some of Tehran's traffic congestion.

It can thus be seen that Iran is actively attracting exhibitions. Meanwhile, government-sponsored and private sector conventions are held in Tehran hotels, however, not much effort is put into attracting visitors, and reservations only arrive from conventional hotel guests. Also, tour operators and hotels are not making a great effort to attract incentive tours by enterprises.

8. CHALLENGES FACING DEVELOPMENT OF THE TOURISM SECTOR IN IRAN

As was described in Chapter 4 (1), Iran’s tourism sector development is charged with “increasing the number of inbound tourists to 8 million and earning foreign currency income of USD 4 billion by 2020”, and thereby contributing to the achievement of the four goals that are raised in the sixth five-year plan such as (i) GDP, (ii) Diplomacy, (iii) Job creation, and (iv) Expansion of internal demand. To achieve these goals, it will be necessary to establish a national tourism sector development plan and regional tourism development plans linked each other.

In this chapter, based on the assumption that such “Tourism development master plans (provisional)” on each level are prepared from now on, the issues that need to be solved are sorted in the following pages based on the results of analysis described from Chapter 2 to Chapter 8.

(1) ISSUES ON THE TOURISM INDUSTRY IN IRAN

1) Issues on Tourism Industry

Iran is increasingly attracting attention among foreign tourists as a new destination, and the number of tourists, arriving mainly from Europe and Asia, is increasing every year. In addition, tourism development in neighbouring Middle Eastern countries such as UAE and Qatar is accelerating, and competition in the international tourism market is increasing.

In spite of these circumstances, Iran does not have enough facilities such as tourist information (TIC) that provide information to foreign and domestic tourists, and materials such as tourist maps.

In addition, although the Iranian government is trying to develop human resources in the tourism industry, due to lack of human resources and mismatch with market needs, as a result, personnel with appropriate skills and expertise are not available. Table 8-1 shows the specific issues concerning the tourism industry in Iran that were confirmed in the Study.

Table 8-1: Issues on Tourism Industry

Item	Issues
Public transport modes	<ul style="list-style-type: none"> • Education on manners and English ability for staff in TIC • Improvement of English signage in railway stations and bus terminals • English timetables that can be distributed to international tourists • Improvement in reliability and pleasantness of aircraft and other public transport modes
Tourist information centres (TIC)	<ul style="list-style-type: none"> • Standardization of TIC services and materials • Improvement of TIC signs and guidance • Thorough provision of services during TIC open hours
Guides	<ul style="list-style-type: none"> • Training and education to an international-standard • Improvement of service to travellers upon gauging market customs and preferences • Improvement of the approach to guiding: from the dry textbook approach to the interesting story telling approach • Improvement of employment contracts with tour operators

Item	Issues
Travel agents / Tour operators	<ul style="list-style-type: none"> • Strengthening of inbound inducing capacity and ability to conduct overseas promotion of regional cities • Creation and promotion of products that exploit Iran's diverse tourism resources • Adherence to regulations on pay for guides, etc. • Adherence to tour guide items • Strengthening of organizing ability and thorough notification of schedule changes
Hotels	<ul style="list-style-type: none"> • Thorough understanding of the international standard of services among hotel managers • Employee education for provision of the minimum required services (including basic hospitality education) • Delay in ICT development for linkage with international markets • Improvement of services for travellers upon grasping market customs and preferences
Restaurants	<ul style="list-style-type: none"> • Thorough understanding of the international standard of services among hotel managers • Employee education for provision of the minimum required services (including basic hospitality education) • Improvement of services for travellers upon grasping market customs and preferences • Reflection of local colour in menus
Shops / Souvenir sellers	<ul style="list-style-type: none"> • Improvement in design, size and package of handicrafts and specialties • Appeal of handicrafts and specialties • Strengthening of English communication and English signage

Source: JICA Study Team

In addition, it is necessary to point out the two following external factors as problems that face Iran's tourism industry.

First, although there is healthy demand for domestic travel by more than 25 million travellers every year, there are extreme seasonal fluctuations and concentration of tourists to specific tourism destinations (Caspian Sea coast in summer and so on), leading to problem of regional disparity, and this has a major impact on the tourism industry in each destination.

Second, although economic sanctions related to the nuclear by the West were lifted in January 2016, the fact that persons travelling to Iran encounter visa restrictions when entering the United States due to the economic sanctions by the United States which still remains. Also, because dollar-based bank transfers cannot be made from overseas, hotel reservations cannot be settled via the internet, and credit cards cannot be used for making payments. These conditions place critical limitations on Iran's tourism industry.

2) Improvement of Institutional Framework for Tourism Industry Development

In order to implement the sequence of tourism development from the management of tourism destinations to branding on the national level, it will be necessary to improve the institutional framework for tourism development on the national level for resolving the issues that confront Iran's overall tourism sector and the private sector.

In particular, it includes improvement of institutional framework related to the tourism industry such as improvement of investment environment for foreign affiliated hotels, establishment of tourism promotion and activation fund and improvement of tourism statistics.

In addition, it also includes formulating a marketing strategy that targets an increase in foreign tourists after the rescission of economic sanctions by the Western countries, developing a legal framework to manage the tourism destinations, revision of the law concerning the formulation and approval of the national-level tourism development master plan which represents the national policy for tourism development.

(2) ISSUES ON DEVELOPMENT OF TOURIST SITES

1) Branding of Iranian Tourism

Despite the fact that Iran has many international cultural heritages, its competitiveness in the international tourism market is relatively low. In particular, inbound tourism tends to concentrate around the Golden Route such as Shiraz, Yazd and Esfahan; however, tour routes and public transport for bringing tourists to other destinations are not well established. As a result, Iran has lost an advantage to have valuable cultural heritage sites all over the country and consequently regional disparities in terms of the number of inbound tourists are becoming larger. This arises from the fact that no clear themes or stories for developing new tourism routes have been established; hence, to enhance future development of the tourism sector, it will be necessary to conduct branding of Iranian tourism based on themes that have keywords such as “Ancient Civilization”, “Persia” and “Silk Road” that appeal to various target groups around the world.

2) Development and Conservation of Cultural Heritage

Iran has more than 3,200 cultural heritage sites that are registered as National Cultural Heritage, as well as countless sites of unearthed cultural heritage. While the development and protection of such cultural heritage is an issue, much of the cultural heritage that has already been repaired and made presentable has no clear policy for maintenance and utilization.

Therefore, it is necessary to promote tourism development based on the preservation and utilization of famous cultural heritage such as UNESCO World Heritage, and at the same time, it is necessary to develop other heritages other than famous heritage under specific themes. In particular, by promoting development that combines cultural heritage with the local intangible cultural heritages such as history and traditional way of living, it is possible to develop tourist site as an area wide “Living Heritage” based on the cultural heritage.

By implementing the area wide tourism development integrated with the local community as mentioned above, it is possible to raise awareness of local residents for protection of cultural heritage and to promote participation of local residents to the tourism development.

3) Formation of an Image as “Safe Tourism Destinations”

Whereas Iran has high potential as a tourism destination, areas on the border with Pakistan and areas on the border with Iraq in Kermanshah and Ilam Province are designated as Level 4 “Evacuate and avoid all travel”. Also, other parts of the country on the borders with Iraq and Afghanistan as well as Sistan and Baluchistan Province are designated as Level 3 (Avoid all travel) (December 2017). Thus, Iran has areas that are designated as risk areas for travel and the image of a safe tourism destination is not necessarily well established among travellers.

It is difficult for the tourism sector to overcome this issue through its own efforts; however, when considering national policy, this issue should always be kept in mind in terms of its impact on promotion of tourism.

On the other hand, even if the area is inevitably designated as a "high risk area" according to the political/social reasons, it is also important to try to form the image as a “country where you can visit with safe” by establishing a risk hedge system at the destination based on the Public-Private Partnership (an emergency alert and security guard system to transfer tourists to safe areas).

9. REVIEW ON METHODOLOGY FOR TOURISM DEVELOPMENT

(1) POLICY FOR FORMULATION OF THE STRATEGY FOR DEVELOPMENT OF THE TOURISM SECTOR IN IRAN

As a result of the analysis of the issues mentioned above, for the future Iranian tourism sector development, a Tourism Master Plan Formulation Project (as tentative title) including following strategies will be proposed considering current situation that the vision and strategy for medium to long term tourism development have not been clarified in Iran. In particular, as mentioned above, tourism sector development in Iran has been charged the task to increase the number of foreign tourists to 8.0 million by 2020 and to earn foreign currencies of 4.0 billion USD.

In order to accomplish the task, first of all, it is necessary to increase the absolute number of foreign tourists by strengthening competitiveness of Iranian tourism in the international tourism market; and to invite the tourists to local tourist sites strategically and gradually.

As described in Chapter 6, according to the breakdown of the number of foreign tourists visiting Iran, tourists from neighbouring countries such as Iraq and Azerbaijan occupy the top ten countries and tourists from the top 10 countries accounts for 90% of total number of foreign tourists, and half of foreign tourists is from the Shia Islamic countries. This figure shows that Iran is recognized as a destination of religious tourism typified by the pilgrimage of Mashhad, as a sanctuary of Shia, in the international tourism market, but Iran is not recognized as a destination for visiting cultural heritage.

Therefore, among the issues on development of tourist sites described in Chapter 8, to strengthen the competitiveness of Iranian tourism in international tourism markets other than neighbouring countries by branding Iranian tourism based on the cultural heritage is the most effective measure that the tourism sector can address in the current situation.

- (a) To establish national brand, set themes that are appealing to the main overseas target groups to be induced in future, and implement tourism development according to each theme.
- (b) For (a), select tourism resources and tourism destinations according to the themes; set tourism destinations that integrate these resources and destinations considering spatial delimitation and administrative area, and then establish a framework for managing such tourism destinations including promotion.
- (c) Establish a framework for managing the hub cities, tourist sites and tourism resources that comprise the tourism destinations mentioned in (b).
- (d) Through comprehensively developing the national brand and themes described in (a), tourism destinations described in (b), and tourist sites and tourism resources described in (c), and promoting the created tourism products to the international tourism market, strengthen the Iranian tourism brand and competitiveness and realize economic development and employment creation in regional areas.

The following sections give more detailed analysis and examination based on the policy for setting issues and compiling strategy.

(2) SETTING THEMES FOR IRANIAN TOURISM BRAND

According to the above strategy, in order to increase the absolute number of foreign tourists visiting Iran and to invite tourists to local tourist sites strategically, first of all, it is necessary to set a theme to establish a brand of Iranian tourism.

By conducting tourism development with a specific theme, tourists can be invited from famous tourist site such as Persepolis to local tourist sites that have cultural heritage with same theme. Furthermore, it is possible to develop as a tourism destination by establishing wide area cooperation among different tourist sites under the same theme.

According to the strategy mentioned above, the JICA Study Team proposed two themes such as "Ancient Orient Civilization Corridor" and "The Silk Road" as a theme that contributes to establish an Iranian tourism brand. As detailed in follows, these two themes can attract tourists from Europe, the United States and Eastern Asian countries that the Iranian government has set as their main target countries, and in the international tourism market, it is a theme characterizing Iranian cultural heritage that Iran can differentiate their tourism from other countries.

Theme 1: Ancient Orient Civilization Corridor

Iran is situated on the periphery of the Mesopotamian civilization, one of the world's four great civilizations, which prospered in the watershed of the Tigris and Euphrates Rivers in Iraq some 3,000 years before the birth of Christ. Many cities and ziggurats that were strongly influenced by the Mesopotamian civilization were constructed in the Kingdom of Elam which prospered around the same time.

The archaeological site of Chogha Zanbil is now the only tourist sites in the world that tourists can visit and experience a heritage of Mesopotamian civilization period.

Also, in the area stretching from Ahwaz to Shiraz, there are numerous remains that date back to ancient Oriental civilizations: for example, cities that date back to the Achaemenid Empire such as Shush, Persepolis and Pasargadae, and cities from the Sassanid era such as Shushtar, Shapur and Firuzabad. This area thus has great potential for branding on an international scale.

In addition, Alexander the Great, born in 356 BC in Macedonia, one of Greece's urban states, is a hero who built the great empire across Egypt, Iran, Central Asia and India during his life of only 32 years as the only European country in the world history, and the name of Alexander is still one of the popular names (first name) for people in Europe and the United States.

In addition, Hellenistic culture brought by Alexander the Great has great influence on Oriental Buddhist art, such as the appearance of Buddha statues by fusion of Western Greek sculpture and Oriental Buddhism, Persian name of Alexander "Iskandar" also become an origin of a Buddhist god and

the city of Kandahar in Afghanistan, and the relationship between Alexander the Great and the East Asian countries is also deep.

In particular, Iran was a stage for the expeditions of Alexander the Great, who built a mighty empire and India, and there are remains of the ancient cities of Persepolis and Shush (Susa) and other fortresses related to the Alexander the Great are still remaining along the routes of his expeditions.



Source: Columbia University

Figure 9-1: Expeditionary Routes of Alexander the Great



Photographs: City Remains on the Expeditionary Routes of Alexander the Great

Theme 2: The Silk Road

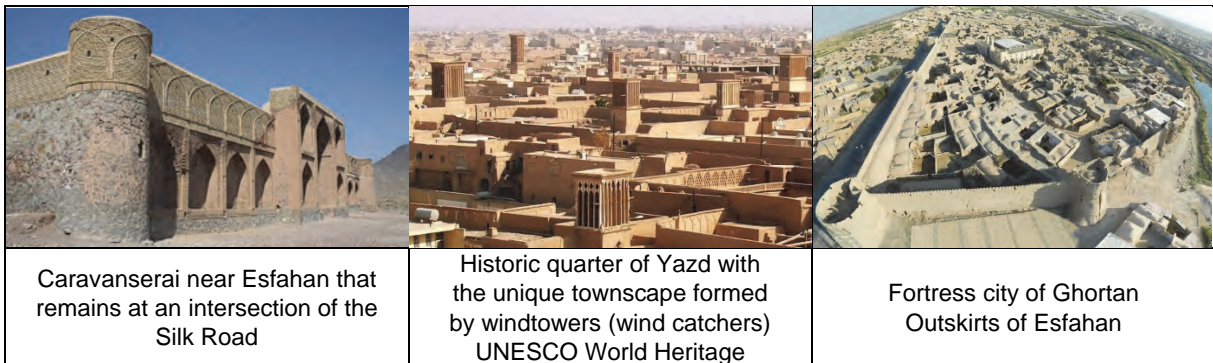
Moreover, Iran is situated at the intersection of the Silk Road over land and sea that connected China in the east with Rome in the west in ancient times and Asia with seafaring states such as Venice, Genoa and Amalfi at the gateway of east-west trade in Europe in the Middle Ages. Along the old roads that were used by caravans, there are numerous caravanserais that are the equivalent of *Hatago* inns in Japanese posting stations, as well as the remains of fortress cities dating back to the era of Islamic rule. In particular, the theme of the Silk Road is a particularly popular among history enthusiasts in Europe, America and Japan, as typified by a series of pictures on the theme of the Silk

Road by a famous Japanese painter Mr. Ikuo HIRAYAMA; UNESCO also provides assistance based on the this theme.



Source: UNESCO

Figure 9-2: The Silk Road



Photographs: Cultural Heritage remaining along the Silk Road Trade Routes

(3) SELECTION OF PRIORITY TOURISM DESTINATIONS FOR FUTURE ASSISTANCE BY JICA

After setting the above two themes of “Ancient Orient Civilization Corridor” and “The Silk Road”, priority tourism destinations will be selected for future JICA assistance to develop tourism resources according to the themes. The following table shows the results of classifying areas that were recommended by ICHTO as candidate priority destinations for future JICA assistance according to the themes.

Table 9-1: Candidate Priority Tourism Destinations Targeted for Future JICA Support

Tourism Destination	Outline
Theme 1: Ancient Orient Civilization Corridor	
<p>Ahvaz (World Heritage Chogha Zanbil, Shush, Shushtar and environs)</p>	<ul style="list-style-type: none"> Shush and environs are situated in the hot south, making it difficult to promote tourism all year round, however, the warm temperatures in winter give it an advantage. The area has good access and possesses infrastructure that includes railways, main roads and ocean routes. It is easy to visit for Iraqis, who account for most inbound tourists. These are famous tourism destinations that are representative of Iran. They are already visited by many tourists and have an established tourism infrastructure; however, the beneficial effects of tourism for local residents are insufficient. Challenges exist in terms of building relations with the local communities. All the historical sites are adjacent to the residential quarters of the local communities.
<p>Shiraz (World Heritage Shiraz, Persepolis, Pasargadae and environs)</p>	<ul style="list-style-type: none"> World Heritage Shiraz (Persian gardens), Persepolis, and Pasargadae are internationally famous tourism destinations that are representative of Iran. They have an established tourism infrastructure including hotels, etc. The World Heritage Site of Persepolis is already visited by many tourists; however, the economic benefits of this are not reaching the local residents. This area has been earmarked as a priority area for development in previous discussions between the Government of Iran and JICA.
Theme 2: The Silk Road	
<p>Tabriz</p>	<ul style="list-style-type: none"> The tourism infrastructure (airport, hotels, etc.) is well established and there are resources with extremely high potential (UNESCO Intangible Heritage -designated bazaar, the “Black Church”, Kandovan Village, etc.). In spite of this, recognition is low; hence it is thought that support by JICA could have a big effect. Another important factor is that, in the national awareness survey conducted in Iran, this region on the border with Azerbaijan was regarded as an attractive area and was ranked highest for “happiness and safety”.
<p>Yazd</p>	<ul style="list-style-type: none"> This is Iran’s newest World Heritage site following registration in July 2017. This is Iran’s first World Heritage site where an entire city has been designated as a historical structure and living heritage, where people practice traditional lifestyle in the old city. There are reports that domestic and international agencies are already engaged in various development projects, so it is necessary to confirm the support needs.
<p>Tehran (Qazvin, Zanjan, Semnan Province, etc.)</p>	<ul style="list-style-type: none"> Numerous Caravanserais are dotted along the overland Silk Road leading from Uzbekistan. Potential tourism resources that can be reached from Tehran in a day are dotted around this area, for example, the desert, jungles and pastoral scenery of Semnan Province, the ancient Safavid capital of Qazvin on the road to Tabriz, and so on. It is recommended that tourism be promoted in the area between Tehran and Zanjan (Zanjan Province). The distance from Tehran to Qazvin is 175km, and that from Qazvin to Zanjan is 135km, and these are appropriate distances for attracting tourists from Tehran. Day trips are possible. Various historical remains from different eras overlap with the Silk Road. In particular the World Heritage Soltanieh Dome has an Islamic architectural design and, despite a height of 47m, it has unusually low foundations that have allowed it to withstand earthquakes. This was originally constructed as a tomb; however, it was subsequently changed to a ceremonial facility. The surrounding area is also blessed with resources such as traditional irrigation facilities (<i>Qanat</i>); it is a marble production area, and there are also abundant Sasanid remains.
<p>Esfahan</p>	<ul style="list-style-type: none"> As a link between capital cities of the Islamic and Achmaenid eras, Esfahan offers diverse ethnic lifestyles and cultures. Tourism will contribute to the economic development and empowerment of the local ethnic groups. It also coincides with the theme of the Silk Road.

Source: JICA Study Team

Concerning the above tourism destinations selected according to the themes, detailed information will be studied in the field survey; potential and issues in each destination will be analysed; then a priority destination for targeting in a future JICA assistance project will be selected.

The assessment to select a priority destination will be conducted based on the following criteria.

Table 9-2: Assessment Criteria when Selecting a Priority Tourism Destination

Indicators	Sub-indicators	Items
Program Development	Tourism resources	<ul style="list-style-type: none"> Existing resources: number of World Heritage sites and number of visitors they attract, types and quality of intangible heritage, handicrafts, etc. Are there any museums? Are there any latent resources of note (quantity and quality)?
	Tourism infrastructure	<ul style="list-style-type: none"> Hotels (numbers according to star ratings, number of beds, number of employees) Restaurants (number of establishments, number of seats) Travel agents, etc. (Number of agents, number of employees, etc.) Information centres (Number)
	Tourism products	<ul style="list-style-type: none"> Situation regarding tours and programmes that utilize resources (existing and future products) Is the destination image formed?
	Tourism human resources development	<ul style="list-style-type: none"> Existence of tourism human resource training programmes by related government offices and agencies
Marketing	Accessibility	<ul style="list-style-type: none"> Modes of transport from main cities (existence of public modes of transport, condition of airports, roads, railways, etc.) : distances and times Condition of access roads to surrounding tourism resources that constitute the tourism area (good or bad, paved or unpaved) Safety and security risks for implementation of the JICA cooperation project (high or low)
	Demand	<ul style="list-style-type: none"> Current situation regarding demand (numbers, segments, trends) Contents of demand in surrounding tourism destinations (numbers, segments)
	Promotion	<ul style="list-style-type: none"> Existence and outline of local promotion activities (pamphlets, websites, etc.)
Commitment of Stakeholders	Public initiative	<ul style="list-style-type: none"> Personnel, systems, budget, etc. of the ICHTO regional branch that manages the tourism area concerned
	Public-private partnership	<ul style="list-style-type: none"> Existence and outline of local private sector organizations (unions of operators, NPOs, NGOs, etc.)
	Local Involvement	<ul style="list-style-type: none"> Level of local involvement in tourism development (high or low)
Impact	Economic Impact	<p>Current tourism programmes:</p> <ul style="list-style-type: none"> Positive: Programmes lead to employment creation, private sector investment, industry creation, etc. Negative: Programmes drive up land prices and labour costs and generate greater disparities, etc.
	Social Impact	<p>Current tourism programmes:</p> <ul style="list-style-type: none"> Positive: Programmes lead to conservation of heritage, rejuvenation of traditional industries, nurturing of pride, etc. Negative: Programmes detract from the value of heritage, make a show out of culture and so on
Feasibility	Relevance	<ul style="list-style-type: none"> Timing of Assistance at each development stage (programme development, programme improvement, marketing)

Indicators	Sub-indicators	Items
		<ul style="list-style-type: none"> Statistical data on socioeconomic development indicators such as income level, poverty rate, unemployment rate, GRDP, etc.
	Effectiveness	<ul style="list-style-type: none"> Consistency with superior plans and related areas (appeal to targets in Iran's marketing strategy, contribution to national branding, etc.) Segregation of synergistic effects with support by other donors

Source: JICA Study Team

(4) IDENTIFICATION AND OVERVIEW OF TARGET AREAS FOR ASSESSMENT

As a result of the tourism development potential survey, Qazvin which was classified in the destination of Tehran was the second capital of Safavid era, where a capital was relocated from Tabriz, and it was found that the city has many cultural heritage related to the Silk Road in the city .

Since the image of the destination can be strengthened by integrating Qazvin into the destination of Tabriz, Qazvin is included in the destination of Tabriz and eventually assessment of potential destination was conducted according to the five destinations such as 1) Destination of Ahwaz, 2) Destination of Shiraz, 3) Destination of Tabriz, 4) Destination of Yazd, and 5) Destination of Esfahan (see Figure 9-3).

As is shown in Figure 9-3, each destination is composed of a hub city and some tourism resources.

Taking general considerations of these destinations based on the typology analysis in Chapter 3, out of the five potential destinations, there are those that possess various types of tourism resources, such as Esfahan and Shiraz, while others are composed of similar resources, for example, Yazd and Ahwaz.

In terms of the sustainable destination management based on the various options of tourism resources, the former type is preferable; however, the latter type is sometimes better when it comes to establish a specific brand image of tourism destination. It is important to avoid adopting a brand strategy for diversification in cases of the former type, while to diversify tourism resources after establishing a specific brand image in cases of the latter type.

In addition, while Persepolis, Pasargadae and Chogha Zanbil already have attracted a lot of tourists, tourism resources have been isolated from the local communities. In this context, in cases such as Shush and Bishapour where tourism resources are located close to the local communities have high potential to develop CBT.

Therefore, in order to deal with issues such as regional economic development through tourism development and community based tourism management, the relationship between tourism resources and local communities shall be taken into account.



Legend : ● Archaeological Heritage ● Urban Heritage ● Town / Village Heritage ● Caravanserai
 Source: JICA Study Team

Figure 9-3: Distribution of Regional Tourism Hubs and Tourism Resources in the Five Destinations

(5) RESULTS OF ASSESSMENT FOR SELECTION OF A PRIORITY DESTINATION

Based on the results of the tourism development potential survey, the Strengths and Weaknesses of the five destinations were comprehensively analysed according to the criteria mentioned above.

The following table shows the results of performing comprehensive analysis of Strengths and Weaknesses in the five destinations according to the criteria.

Table 9-3: Strengths and Weaknesses of the Five Destinations

Theme	Tourism Destination	Basis for Assessment	
		Strength + / Weakness -	Assessment Perspective
Ancient Orient Civilization Corridor	Ahwaz	<ul style="list-style-type: none"> + This is the only destination in the world where people can see remains that are connected to the time of the Mesopotamian civilization. + Countless associated remains are being discovered and prepared. + Integration of ancient remains with living heritage - Avoidance during the summer due to the extreme heat (only October to March) - Concerns over security due to proximity to the border with Iraq - Poor overland access 	<ul style="list-style-type: none"> ↑ Branding is immature, and these top-class remains are not attracting enough visitors. ↑ Potential to become a hub of national branding ↑ Promotion of awareness of the value of the remains, human resources development, and tourism commodity development activities based on public-private cooperation between the ICHTO branch offices and numerous local NGOs ↓ Extreme decline in visitors during the summer
	Shiraz	<ul style="list-style-type: none"> + A group of sites comprising highly international ancient city remains and associated remains + The archetypal desert oasis city (gardens, fortress, etc.) - Opaque relations with the local community / enclosure-type tourism sites (Persepolis, etc.) 	<ul style="list-style-type: none"> ↑ Hard preparations are underway geared to World Heritage registration, and soft measures (education to promote awareness, human resources development) are also being taken (Bishopour) → A matured tourism sector ↓ There is no need for support to the main tourism sector.
The Silk Road	Esfahan	<ul style="list-style-type: none"> + A diversity of tourism resources, both tangible and intangible, related to the Silk Road + An established historical city brand and growth city image - Discontinuity and dispersion of sites - An overwhelming shortage of hotels 	<ul style="list-style-type: none"> ↑ Public participation initiatives have been continuing for 10 years (Nain) → It is necessary to proceed with hard-side development (Nain) → A matured tourism sector ↓ Historical communities have been prepared (Abyaneh) ↓ Even if the diverse peripheral sites are supported, the ripple effect on the huge tourism sector of the hub city will be minimal.
	Tabriz	<ul style="list-style-type: none"> + A massive bazaar evocative of the Silk Road (intangible heritage) + For Iran, this has been the gateway to Europe since early times. - Discontinuity and dispersion of sites - Avoidance during winter due to the extreme cold (road closures) 	<ul style="list-style-type: none"> ↑ Public-private cooperation geared to "Tabriz2018" is active. ↑ A diversity of cultural and natural tourism resources, both tangible and intangible ↓ Developing a story between Tabriz and other sites (brand and image formation) is difficult.
	Yazd	<ul style="list-style-type: none"> + Living heritage (famous confectionery) where people can truly sense the Silk Road + Old city and communities that compactly offer ancient city elements such as townscape, fortress, <i>Qanat</i>, towers, etc. + Partnership with Ecotourism sites (natural heritage) - Cars in the old city are a threat to safety 	<ul style="list-style-type: none"> ↑ It is effectively possible to establish a destination image based on similar sites. ↑ The living heritage with community townscape is already developed in hard terms (Meybod) ↑ CBT※Development support and Eco-museum support are effective.

Source: JICA Study Team

In addition, after examination of the contents of technical assistance that maximizes the potential of each destination by applying know-how of tourism development in Japan (master plan development, marketing, CBT development etc.), the impacts from the technical assistance are assessed as follows:

Table 9-4: Results of Assessment by the JICA Study Team concerning Selection of Priority Destinations

Theme	Hub City	Provisional Assessment for Screening Potential Areas (Assessment indicators are according to analysis of current conditions)						Radar Chart
		Program development (PG)	Marketing (MK)	Stakeholder Involvement (SH)	Impact (IP)	Feasibility (FB)	Total	
Ancient Civilization Corridor	Ahwaz	5	3	5	4	4	21	
	Shiraz	3	4	3	4	4	18	
Silk Road	Esfahan	3	4	3	3	4	17	
	Tabriz	4	4	4	5	4	21	
	Yazd	5	4	5	5	5	24	

Source: JICA Study Team

1) Destinations expected to have Limited Impacts

Out of the five destinations that were targeted by the potential survey, the support effect was deemed to be low in Esfahan and Shiraz, which are situated in an area known as the “Golden Route” of Iranian tourism. Reasons are that this survey revealed that: these destinations already attract many tourists as an icon of Iranian tourism; the tourism industry led by the private sector is already matured; Public-Private Partnership is advanced; and the order of priority as targets for JICA’s technical support is relatively low.

In particular, Esfahan is situated at the heart of Iran’s main transport network and functions as a hub of overland transport in Iran; hence it will be difficult for effects of support to emerge in this destination more than any other. It also has a wide range of cultural heritage, handicrafts and Ecotourism attractions, adequate accommodation options in the surrounding areas, and tourism infrastructure such as travel agents, information centres and guides that compares favourably to other destinations in terms of both quantity and quality.

As for Shiraz, concerning Persepolis, Pasargadae, etc., which is among the most visited tourist sites in Iran, tourism development is faced with an issue in that the economic benefits of tourism development are not being felt in the nearby communities. On the other hand, work is underway on a project to construct a suburban railway line between Shiraz and Persepolis for tourists visiting the ancient remains, and since it is forecast that the mode of tourism will become even more simplified when direct access is made possible between the airport and Shiraz city centre, it is deemed that support for surrounding communities at the present time will not necessarily lead to sufficient effects.

Moreover, the Fars Province ICHTO office, which has jurisdiction over Shiraz and Persepolis, has plans to conduct tourism development in sites other than the Golden Route between Shiraz and Esfahan. Concerning Bishapur, an ancient Sassanid capital, which is planned to be registered as UNESCO World Cultural Heritage in 2018, a project comprising tourism development and public awareness raising program is being advanced based on an international standard World Heritage management plan; hence, this destination is also deemed to have a low priority for technical assistance by JICA.

In this way, since Iran is already conducting autonomous tourism development in these destinations, they are deemed to have a low priority for future technical assistance by JICA.

2) Destinations expected to have High Impacts

Yazd, which is still in the tourism development stage despite of being situated on the Golden Route of Iranian tourism, is deemed to be a destination where the greatest impacts can be anticipated. Last year, the old city of Yazd was registered as an UNESCO World Cultural Heritage and numbers of tourists are increasing rapidly; hence it is anticipated that technical assistance is needed in accordance with this.

Towns that comprise groups of historic buildings made from mud-bricks are dotted around Yazd, and some of these include tourist sites where townscapes are already well-developed. Conducting technical assistance could be an effective means of establishing the image of “The Silk Road” destination over a consolidated area. Since the groups of historic buildings that demonstrate the desert way of living that has continued to the modern today has elements of living heritage, high economic impacts to the local communities can be anticipated through tourism development by utilizing historical buildings under the concept of the community based tourism (CBT).

Moreover, the traditional Persian *Qanat*, wind towers (wind catchers) and Pigeon Tower that are registered as UNESCO World Cultural Heritage, and historical buildings that are intrinsically linked to the living environment of semi-arid areas, also fit with Ecotourism initiatives combined with natural elements that are being promoted by ICHTO. Accordingly, high impacts can be anticipated from Eco-museum support that includes the natural environment among tourism resources.

Another potential destination along the Silk Road is Tabriz, which has long been the gateway between Europe and Asia. Tabriz also has the world’s biggest bazaar, which has been registered as

UNESCO World Cultural Heritage, and is a place where one can experience a diversity of cultures. Tabriz has been selected as the Capital of Islamic Tourism of the world for the year 2018 by the Organization of Islamic Cooperation (OIC), and Public-Private Partnership is being rapidly developed in line with the initiative of Tabriz 2018, and technical assistance to establish a framework for the Destination Management Organization (DMO)¹⁵ is envisaged.

On the other hand, since issues exist in that Tabriz has various tangible and intangible cultural and natural tourism resources; however they are dispersed in wide area, support for the formulation of a tourism development master plan and marketing strategy geared to building a story that links the tourism resources (branding) in and around Tabriz will be effective.

Concerning Ahwaz, high impacts can be anticipated under the theme of “Ancient Orient Civilization Corridor”. Khuzestan Province has high potential as the only destination in the world where people can see remains from the time of the Mesopotamian civilization in places such as Chogha Zanbil and Shush. On the other hand, Khuzestan Province is confronted by major handicaps: for example, it is geographically isolated from other tourism destinations; it becomes extremely hot in summers; there are security issues due to proximity with the border with Iraq; and construction of hotels, roads and other infrastructure has been sluggish. Accordingly, it has not been sufficiently integrated into the main tour routes that target foreign tourists. However, in Khuzestan Province, since activities to promote awareness of the value of heritage, train human resources and develop tourism products are being actively conducted based on Public-Private Partnership between ICHTO local offices and local NGOs, it is thought that technical assistance aimed at establishing wide-area DMO over the entire area will be effective. In Shush and Shushtar, remains and local communities are in close proximity, and the old town of Shushtar has high potential as living heritage. Synergistic effects can be anticipated from tourism development that treats the overall area’s nature, cuisine and livelihoods as a singular Cultural Landscape, and from Eco-museum support in Shushtar.

For the reasons described above, Yazd was selected as the priority destination with the highest anticipated impacts from JICA assistance, while Tabriz and Ahwaz were assessed as the next candidates.

Based on the assessment results, as a result of referring the matter to ICHTO, a policy having Tabriz as the priority destination was indicated together with the following comments:

- (a) Synergistic effects can be anticipated through implementing the JICA project against the backdrop of Tabriz 2018.
- (b) The number of tourists visiting the Golden Triangle (Esfahan, Shiraz and Yazd) is already increasing, and the Iranian side has already commenced initiatives in this destination; hence, it is possible to evaluate the priority of the destination for JICA support is relatively low.

¹⁵ Destination Management Organization (DMO):
DMO is an organization or corporate entities as the main body of making tourist destinations that cooperates and coordinates various stakeholders towards the creation of tourism destination based on a clear concept.

- (c) Considering the safety criteria prescribed by the Japanese Ministry of Foreign Affairs, lowered the order of priority of Khuzestan province due to the accompanying risks of implementing support.

Upon reflecting the above comments from ICHTO and the additional information behind such comments in the assessment results, the score for Tabriz was raised under the headings of Stakeholder involvement and Feasibility. Specifically, compared to the generous government support that is provided for the Golden Triangle, support has been slow in arriving at Tabriz and environs, however, since there is a sincere desire for assistance from JICA to help overcome the issues that confront improvement of the local economy based on tourism arising from “Tabriz 2018”, it was deemed that support in this destination could be highly effective. Moreover, the neighbouring countries of Turkey and Azerbaijan are also promoting tourism in areas close to Tabriz, and the Government of Iran also lays emphasis on promoting tourism development based on joint efforts with these countries; hence, it was found that there is an extremely high need to support tourism development in this destination.

Concerning Yazd, since the government has a policy and specific plan for support, the need for assistance was deemed to be low, so the scores for Marketing, Stakeholder involvement, and Impact were each lowered by 1 point. Also, due to safety concerns, the Feasibility rating of Ahwaz was lowered. Upon revising the assessment results in this way, Tabriz was finally selected as the priority destination.

Table 9-5: Assessment Results reflecting the ICHTO Comments

Theme	Hub City	Provisional Assessment for Screening Potential Areas (Assessment indicators are according to analysis of current conditions)					Total	Radar Chart
		Program development (PG)	Marketing (MK)	Stakeholder Involvement (SH)	Impact (IP)	Feasibility (FB)		
Ancient Civilization Corridor	Ahwaz	5	3	5	4	3	20	
	Shiraz	3	4	3	4	4	18	
Silk Road	Esfahan	3	4	3	3	4	17	
	Tabriz	4	4	5	5	5	23	
	Yazd	5	3	4	4	5	21	

Source: JICA Study Team

(6) ANALYSIS OF DEVELOPMENT ISSUES IN TABRIZ AND ENVIRONS

1) Issues in the Tourism Industry

East Azerbaijan Province including Tabriz is visited by 4 million domestic tourists and 450,000 foreign tourists every year, however, most tourists visit over a few months in the summer; hence one issue concerns equalizing seasonal fluctuations between the high season and the off-season. It is necessary to create tourism products to attract off-season travellers and equalize the business. Moreover, to increase the number of repeaters, another issue concerns the need to improve the quality of tourism services so that they satisfy international standards.

The following paragraphs describe specific issues in each business category of the tourism sector.

(a) Travel Agents / Tour Operators

There are 225 travel agencies in East Azerbaijan Province overall. In Tabriz, there are 147 such companies, 10 of which specialize in handling inbound tourists.

Until now, tour operators in Tabriz have conducted autonomous activities such as organizing exhibits at international travel exhibitions in Germany and Turkey and conducting FAM tours.

On the other hand, tour operators based on Tehran and Shiraz have until now been relied on to send many foreign tourists to the destination of Tabriz, however, such tour operators tend not to place much emphasis on developing tour products that entail overnight stay in Tabriz. When it comes to attracting foreign tourists to Tabriz from now on, rather than the major tour operators in Tehran and Shiraz, it is preferable that tour operators based on Tabriz appeal directly to foreign tourists.

In order to increase transactions with foreign travel companies, tour operators need to improve the quality of their services overall through, for example, arranging tour itineraries that meet customers' wishes, ensuring that arrangements are definitely implemented, presenting competitive estimates, offering good responses in emergencies and so on. It is necessary for tour operators to improve their general capacity in terms of external sales capacity, relationships with suppliers, ability to make arrangements, and communication ability.

As was mentioned above, an important role for tour operators is to create tourism products to attract off-season tourists and to sell such products to foreign business partners. In creating tourism products, it is necessary to have wide-area collaboration with local tourism industry businesses, tourism associations in Tabriz and environs, NGOs and so on. Moreover, painstaking efforts for proposing the developed products until they become established in the market will need to be made to realize the long-term merits for the overall area.

(b) Hotels

In Tabriz, there are three 5-star hotels, four 4-star hotels, three 3-star hotels, 15 2-star hotels, and seven 1-star hotels. Also, there are 25 apartment hotels, and there is one hotel that has been made by renovating a cave dwelling in Kandovan. Hotel ratings are based on review by the hoteliers'

association of East Azerbaijan Province under standards established by ICHTO. Currently, in East Azerbaijan Province, effort is being made to attract foreign-affiliated hotels through offering preferential corporation tax rates for up to five years.

Meanwhile, since overseas remittances are limited in Iran and transactions with overseas partners cannot be settled through banks, many hotels in Iran rely on domestic travel agents to supply customers. This is one of the reasons for the extremely low hotel occupancy rate of 20% in Tabriz except high season.



(c) Restaurants

There are 420 restaurants in Tabriz and 750 in East Azerbaijan Province overall. There are 260 restaurants registered with the Food Industry Association of East Azerbaijan. Since Tabriz and environs have long been an area of diverse cultural interchange at the gateway to the Silk Road linking Europe and Asia, the local cuisine is also diverse, although this is not widely known.

In restaurants, in addition to simply serving food, it is possible to create programmes for experiencing local cuisine, include local cuisine on menus and so on. Moreover, it is necessary to vigorously appeal the local diet and cuisine to tourists through compiling eating tour maps and so on.



(d) Souvenir and Handicraft Shops

Tabriz is world-famous as a carpet production centre and is registered as an international carpet city by the WCC (World Crafts Council). Tabriz also has around 90 handicraft workshops, while approximately 10,000 workers are engaged in the handicrafts sector. Tabriz is also known as a town of artisans, and its handmade shoes are very popular as Iranian said that “visit Tabriz to buy a pair of shoes”. Tabriz also produces silverwork, ceramics, leather works and various other handicrafts.

Handicrafts not only represent important tourism resources, but they can also present beneficial economic effects if sales can be promoted. In order to promote sales in foreign markets, it is necessary

to examine ways of devising sizes and designs that fit with market tastes while upholding traditional methods of making.



(e) Guides

There are 400 guides in East Azerbaijan Province, and according to the private guide association, *Anjoman Senfi Guide* (English name: Tabriz Tourist Guide Association), only 10 of these are at a high standard. The guides can speak English, French, German and Turkish, and there is one guide who can speak Chinese.

According to the guide associations, the general issues that concern guides are manners when it comes to dealing with foreign travellers, dress code, and need to improve the quality of guiding work. Moreover, there are also issues regarding the provision of employment opportunities in that orders tend to focus on the experienced guides, while new guides do not receive any work. Moreover, since tour operators do not pay guides the remuneration that is stipulated by the guides’ associations, the treatment of guides by tour operators is another issue that requires urgent improvement.

(f) TICs

In Tabriz, there are 23 TICs under the jurisdiction of ICHTO, and there are four permanently staffed offices in the airport and rail stations. In addition, 15 TICs are temporary facilities open only during the high season. One of the TICs inside the Tabriz bazaar has personnel who can speak eight languages, and it provides maps and tourism information.

To promote tourism over the entire area, it is important to strengthen the functions of the TICs, which act as service windows for tourists. For this reason, it is necessary to standardize TIC services and build the capacity of staff to make it possible for necessary information on nearby tourism destinations to be provided regardless of who the staff member is.



(g) Modes of Transport

(a) Airports

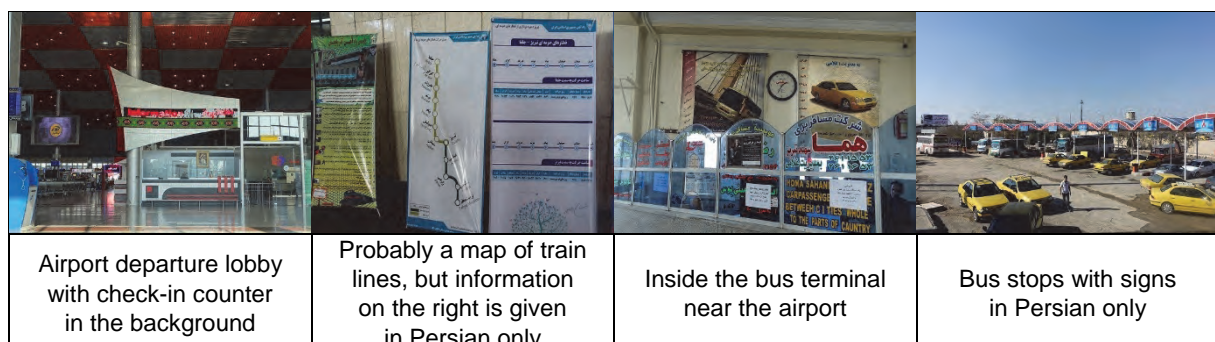
Tabriz has an international airport with regular international services flying to and from Istanbul and Hamburg. It is thus the northern gateway to Iran. Domestic services fly regularly between Tabriz and Tehran and Shiraz. Inside the airport terminal, basic signs are provided in Persian and English, however, traffic lines from the check-in counters to the boarding gates are difficult to understand and boarding announcements are also difficult. Also, the airport terminal has no free WiFi service and the internet can only be used by persons who have a valid SIM card for Iran. In order to enhance the convenience of foreign tourists, it is necessary to examine improvements in hard and soft terms, for example, installation of information signage from the check-in counters to the boarding gates, introduction of free WiFi and so on.

(b) Railways

Railway lines connect Tabriz to Tehran and Mashad with two services a day in both cases. Also, there are regular international services connecting to Georgia, Iraq and Azerbaijan, while working is currently underway on building a line to Moscow. Basic displays in Tabriz Station are shown in Persian and English, however, there is no English timetable. There are also railway lines to local destinations such as Qazvin, Zanjan, Maragheh and Jolfa, while other towns and cities are located along these lines. Since Tabriz Station is a gateway for individual travellers to visit such destinations, it is necessary to add TIC functions to the information booth at the station and to improve convenience for tourists through providing pamphlets and maps introducing nearby tourism destinations, providing English pamphlets, assigning staff who can speak English and so on.

(c) Buses

Tabriz has multiple long-distance bus terminals. The bus terminal close to the airport shows displays in Persian, while English displays are kept to a minimum. For individual travellers who go overseas, it is also necessary to provide route maps and timetables in English.



2) Issues on Development of Tourist Sites

(a) Destination Branding

Tabriz became the first capital city of the Safavid dynasty that prospered in the 15th century. The route along the Silk Road in Tabriz and environs has numerous diverse tourism resources that represents the diversity of cultural exchanges along the Silk Road; for example, Takht-e Soleymān, which is a holy site of the Zoroastrian religion from the time of the Sassanid, cities such as Maragheh, where a series of Islamic dynasties established their capital, Soltaniyeh and Qazvin, a monastery belonging to the Armenian Apostolic Church, and Nestorian (a primitive Christian sect) churches of the Assyrians. In particular, Tabriz has been the gateway between Europe and Asia and a hub for trading along the Silk Road since ancient times, and Tabriz Historic Bazaar Complex is registered as an UNESCO World Cultural Heritage.



Source: JICA Study Team

Figure 9-4: Main Cultural Heritage in the Destination of Tabriz

The ancient route of the Silk Road is currently used as a trunk road connecting Iran, Turkey, Armenia and Azerbaijan, and prosperous cross-border trade is conducted along it. Moreover, traditional Tabriz carpet, which is made by weaving lamb's wool from the Anatolian plateau and silk from China, is one of world famous Persian carpets brand deeply connected to the history and culture of the Silk Road.

In this context, the destination of Tabriz is the worldwide centre for cultural heritage linked to the history of the Silk Road, and they are an essential destination for understanding the history and culture of Iran.

On the other hand, tourism resources in and around Tabriz are scattered around a wide area covering five provinces. Until now, tourism development has not been conducted across the different provinces so, even though there is a lot of potential for cultural heritage tourism, this destination has had a low degree of recognition in the international tourism market and it hasn't been possible to brand the destination under the theme of the Silk Road.

(b) Tourism Products

Tabriz, which is the regional tourism hub in the destination, has been selected as the Capital of Islamic Tourism for 2018 by the Organization of Islamic Cooperation (OIC). Currently, under Tabriz 2018 (Tabriz, the Capital of Islamic Tourism of the world for the year 2018), positive activities geared to developing tourism products are being implemented, for example, creation of English language pamphlets and other materials for each tourism destination, development of new tourism routes and so on.

In addition, the East Azerbaijan Province, where Tabriz is situated, is divided into 21 counties, and five representative tour routes are developed between them and the provincial capital of Tabriz. Since the climate in Tabriz is especially mild and pleasant in summer, many domestic tourists come to get away from the heat in the south of the country. Moreover, the area around Tabriz includes the village of Kandovan, where traditional cave dwellings form a unique landscape and abundant natural resources such as the Mount Sahand (altitude 3,700 meters) and the Aras Valley on the border with Azerbaijan; hence, Ecotourism is also popular. In recent years, people are utilizing nomadic tents to develop private residence-type accommodation facilities (*Bumgardi*)

In particular, regarding the village of Kandovan, old villages are excavated in the neighbouring areas before the village was built in the limestone rocky mountain, and Kandovan also has attractive agricultural landscape that produces famous nuts and meats in the country. It has a high potential to develop CBT as a resort including local tourism resources such as food and handicraft.

However, tours for foreign tourists in the direction of Tabriz out of Tehran mainly entail two nights and three days visiting the UNESCO World Heritage site of Soltaniyeh Dome, Takht-e Soleymān, Kandovan, and the bazaar in Tabriz, however, tourism based in Tabriz has not been well established in the international tourism market.



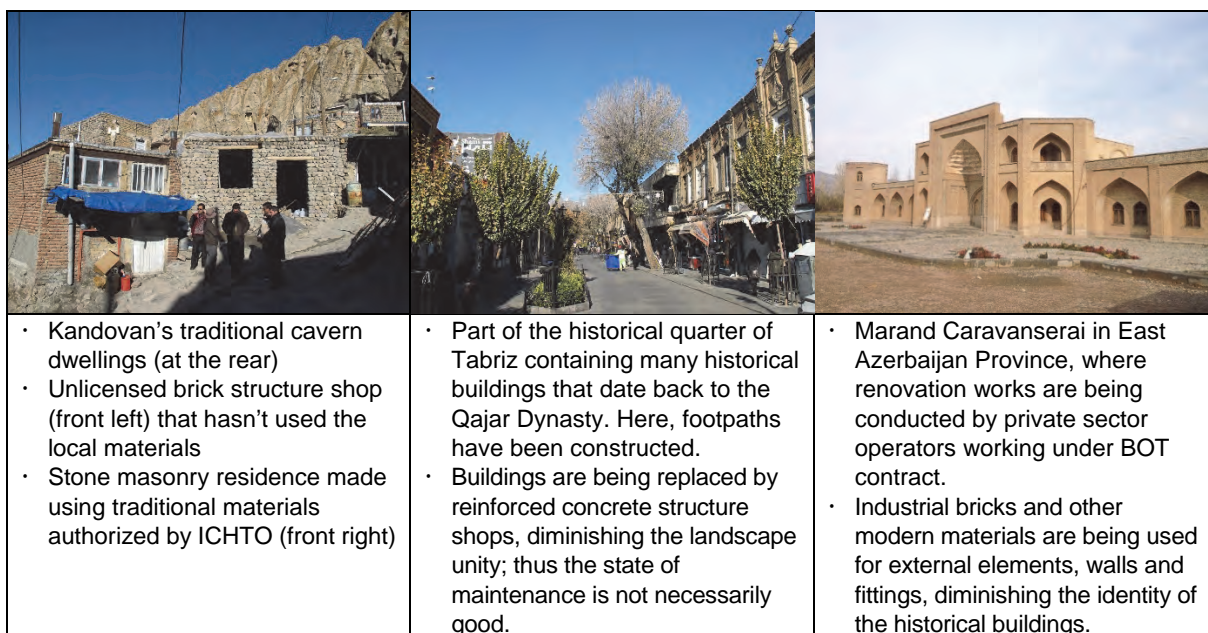
(c) Cultural Heritage Management

As was mentioned earlier, Iran’s main historical buildings are registered as national designated cultural properties under management by ICHTO. Moreover, a certain PPP system is already established in Iran: when private developers renovate historical buildings that are national properties into hotels, restaurants, etc., in many cases the historical buildings are preserved and renovated utilizing private sector investment under BOT or concession contracts. There are also cases of historical building preservation and renovation projects that combine contributions from private funds with the budget of ICHTO.

On the other hand, even in historical buildings that have been conserved and renovated under ICHTO supervision, decorative materials foreign to the original architectural style, for example, modern industrial materials and paint are used in exterior walls windows and doors, and this is causing many buildings to lose their historical identity. Cases of such technically inappropriate restoration have been observed in almost all areas in Iran.

In addition, the village of Kandovan is smaller than the Cappadocia in Turkey and the number of tourists in the high season has already exceeded the carrying capacity of the village.

Considering these situations, in Iran where tourism development is accelerating by economic growth in recent years, it is a matter of time that historic buildings will lose the value, and it is necessary to review the cultural heritage management system as soon as possible.



- Kandovan’s traditional cavern dwellings (at the rear)
- Unlicensed brick structure shop (front left) that hasn’t used the local materials
- Stone masonry residence made using traditional materials authorized by ICHTO (front right)

- Part of the historical quarter of Tabriz containing many historical buildings that date back to the Qajar Dynasty. Here, footpaths have been constructed.
- Buildings are being replaced by reinforced concrete structure shops, diminishing the landscape unity; thus the state of maintenance is not necessarily good.

- Marand Caravanserai in East Azerbaijan Province, where renovation works are being conducted by private sector operators working under BOT contract.
- Industrial bricks and other modern materials are being used for external elements, walls and fittings, diminishing the identity of the historical buildings.

(d) Public Participation

Concerning privately-owned historical buildings in historical cities such as Tabriz and Qazvin, there are cases where the owners refuse to register them as a National Heritage and such buildings are disappearing.




In the village of Kandovan, which has been registered on the provisional list of UNESCO World Cultural Heritage with a view to receiving official registration, and which has a population of 750 people living in 182 households, the landscape of the historical quarter is being greatly diminished by the spread of modern brick structures being built by residents who seek to move out from the inconvenient cave dwellings and into a more modern living environment.

Under these circumstances, ICHTO inscribed the village in the UNESCO tentative heritage list and in accordance with the guidance from ICOMOS, ICHTO has already commenced the procedure to relocate modern structures in the village outside the historical district.

Furthermore, in Kandovan, according to survey by ICHTO alone, there are 35 *Bumgardi* facilities, whereby local citizen lease out traditional cavern dwellings to visitors. When a *Bumgardi* is opened, ICHTO conducts review and issues an Ecotourism Certificate to facilities that meet the required standard, however, many of the *Bumgardi* facilities that have already opened do not meet the standard and the owners refuse the inspection by ICHTO.

In these circumstances, ICHTO has compiled a Community Based Ecotourism (CBET) development plan for Kandovan; moreover, with respect to the local communities, it conducts a customer relations management (CRM) seminar once a month to help prepare for receiving tourists and conduct tourism development activities. Also, regular meetings with residents are staged two or three times a month with a view to promoting awareness among the local communities.

Unless the owner of the historic building has any benefit, it is difficult to register and conserve the historic buildings of private property as the national heritage, it is necessary to promote tourism development through participial approach so that conservation of historical buildings will benefit the residents in the long term, and to preserve tourism resources by establishing a system that the residents can receive the benefits of tourism development and continuing to conduct awareness raising activities for residents to recognize the significance of the conservation.

		
<p>Scenery of the historical quarter of Kandovan. Modern brick-structure residential areas lie in the foreground of the traditional cavern dwellings.</p>	<p>Traditional cavern dwellings in the historical quarter of Kandovan Village. Dwellings were carved out of the limestone to escape attack by the Mongolian Empire during the Ilkhanate era in the 13th century.</p>	<p>Private residence accommodation made from a cavern dwelling (<i>Bumgardi</i>). The cavern dwellings of Kandovan also have water supply, sewerage and power supply</p>

(e) Assistance for Cultural Heritage Tourism Development

At a meeting with the Mayor of Tabriz during the third mission after selecting the Tabriz as the priority destination, following suggestion should be taken into account to examine the direction of future assistance for tourism development:

This region centered on Tabriz has historically become the gateway between Europe and Asia and has been developing as a major trading city in Persia.

However, under current situation of globalization, the comparative position as a trade city has already declined and management of the city will face difficulty in case the city only keeps traditional way as a trade city.

Until now, Tabriz has not conducted tourism development sufficiently, however, from now on, tourism development by branding the destination and formulating marketing strategy is necessary to develop commercial industries of Tabriz in the future.

There are plenty of potential tourism resources and stories in Tabriz and its surrounding areas like jewellery box; therefor tourism development will be conducted more consciously in the future.

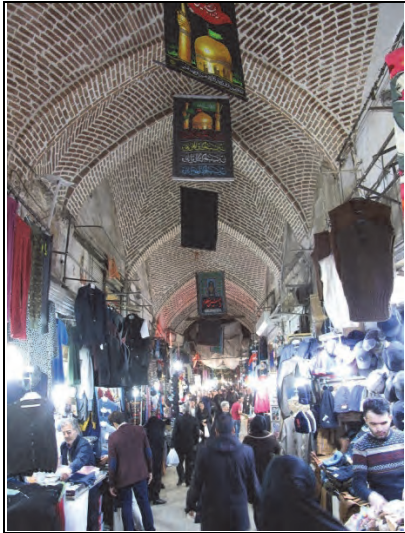
- January 21, 2018 At the Tabriz Mayor's Office -

In fact, Tabriz is beginning to develop tourism resources such as historical district and historic buildings in the city, and remains of ancient city in the suburbs. (Including support from a research group headed by Professor Riichi MIYAKE, Fuji Women's University, Architectural History)

In particular, the Tabriz Historic Bazaar Complex, which is inscribed in the UNESCO World Cultural Heritage list, has been used by citizens and it represents an example of living heritage. Since a factory tours of Persian carpets, one of world famous traditional handicrafts in Tabriz, are also provided to the tourists, and under the theme of The Silk Road, it is possible to develop various regional intangible cultural heritages as tourism resources by integrating them with tourism development.

Regarding the future assistance for cultural heritage tourism development in the destination of Tabriz, it is reasonable to adopt a strategy to invite the tourists to the hub cities such as Tabriz and Qazvin by developing tourism brand and infrastructure at first; and then send the tourists from hub cities to other tourist sites gradually.

In particular, in the destination of Tabriz, it is effective to apply a strategy to send existing business travellers in Tabriz to other tourist sites as the tourists and a strategy to attract alternative tourists by branding the destination under the theme of The Silk Road concurrently.



Tabriz Historic Bazaar Complex that is still used by citizens as a place of commerce and trade. (UNESCO World Cultural Heritage)



An atelier of the Persian carpet (In Tabriz city)



An old Tabriz carpet displayed at the Carpet Museum in Tehran. Motifs related to the Silk Road such as Soltaniyeh dome, Caravanserai, traditional garden house of Tabriz, etc. is weaved.

10. PROPOSAL OF THE FUTURE ASSISTANCE BY JICA

(1) RESULTS OF THE SURVEY AND FUTURE ASSISTANCE BY JICA

As the outputs of the Survey, the issues confronting tourism development in Iran's general tourism sector were configured as shown in Chapter 8; then, the results of survey and assessment of five potential survey destinations were presented in light of the said issues as shown in Chapter 9, and the destination of Tabriz was selected as the priority destination having the highest potential effect from supporting development upon holding discussions with ICHTO.

In proposing the future direction of JICA's assistance, first, (i) a list of future assistances geared to resolving the issues described in Chapter 8 is compiled; then, (ii) a plan of cooperation that entails implementing short-term support for formulation of a master plan for the destination of Tabriz is proposed. The destination of Tabriz is a wide area destination that includes five provinces, and the local diverse cultural heritage that located along the Silk Road has abundant potential in terms of international competitiveness; moreover, there is a good level of infrastructure comprising roads, public transport, etc. and tourism infrastructure comprising accommodation facilities, restaurants, etc. Moreover, a certain degree of progress is being made in terms of training tourism human resources such as local guides, etc.

However, this destination is confronted with various issues: for example, it has so far failed to establish a brand sufficient to gain recognition as an international destination; due to seasonal fluctuations, hotel operating rates during off-seasons are extremely low and so forth.

Moreover, phrases such as tourism resources and tourist sites cover a wide range of contents such as ancient ruins, old towns, single architectural heritage or groups of historic buildings in mountain areas, festivals, cuisine, traditional crafts and other intangible cultural heritage; moreover, relationships between tourism resources and local communities are diverse.

Accordingly, when conducting tourism development in this destination, it will first be necessary to establish a clear brand image that envelopes all these widely dispersed tourism resources, and then draw a "Tourism Development Vision" by which each individual tourism resource can display its appeal under the said image.

Next, out of the various tourism resources in this destination, several sites for pilot projects will be selected; the effects of introducing development approaches such as Ecotourism, Eco-museums, etc. will be verified, and a "Destination Management Plan" geared to sustainable tourism development will be formulated.

Upon doing this, it becomes possible to develop wide area tour route products that link such tourism resources and hub cities and formulate a "Marketing Strategy" linking the domestic and international markets with a view to resolving the previously mentioned issues.

As the conclusion, “Tourism development master plan (provisional)” project is proposed that consists of the three pillars of “Tourism Development Vision”, “Destination Management Plan” and “Marketing Strategy” to resolve the issues identified at the destination of Tabriz, which has been selected as the priority destination.

(2) FUTURE ASSISTANCES

As was mentioned above, guaranteeing the quality of the overall tourism industry is a pressing issue in Iran. Moreover, tourism statistics, which are the basis of tourism development, are not sufficiently maintained. In addition, there is no state-level policy framework (development plan or master plan, etc.) for the development of cultural heritage tourism, which is the main thrust of tourism in Iran, while issues also exist regarding the setup for preserving and managing tourism resources.

Therefore, proposals will be made ranging from improvement of policies and systems concerning the overall tourism sector of Iran to establishment of a framework for sustainable tourism development.

1) Assistances for Institutional Development on Tourism Industry in Iran

The proposals of longlist for issues of tourism industry in Iran are summarized in Table 10-1.

The proposals are applicable not only for the specific areas but also for improvement of the policy and system of tourism industry all over the country. Thus, in case of JICA’s assistance, experts and senior volunteers will be dispatched to ICHTO, Statistical Centre of Iran and other ministries.

Table 10-1: Assistances of Improvement of Policy and System for Tourism

Assistances		Objective organization
1	Assistance for improvement of tourism service quality	Tourism faculty in universities, tourism school, technical school
2	Assistance for improvement of travel agency’s service quality	ICHTO, Iran Tour Operator Association
3	Assistance for improvement of hotels’ productivity	Tourism faculty in universities, hotel school, technical school, ICHTO, Iran Hotel Association
4	Assistance for attractions of foreign affiliated hotels	ICHTO, Ministry of Economy and Finance Affairs, Ministry of Industry, Mine and Trade
5	Assistance for establishment of tourism promotion and activation fund	ICHTO, Ministry of Economy and Finance Affairs, Ministry of Industry, Mine and Trade
6	Assistance for improvement of tourism statistics	ICHTO, Statistical Center of Iran

Source : JICA Study Team

Detailed contents of each proposal are shown as follows:

(a) Assistance for Improvement of Tourism Service Quality

The assistance is for the installation of periodic trainings for the tourism industry such as hotel, restaurant, guide, and TIC. The periodic trainings will be implemented for correction of disparities in the quality of tourism sector. As a result of the trainings, tourism sector could provide above certain level of service.

(b) Assistance for Improvement of Travel Agency's Quality

The assistance is for formulation of the system that ICHTO and Iran Tour Operator Association could adequately instruct and manage the problematic travel agencies.

(c) Assistance for Improvement of Productivity of Hotels

The assistance is for improvement of hotels' service quality and activation of hotels. Assumed activities will be development of website in English, expansion of tourism information by hotel and tourism sector, and management improvement of *Bumgardi*.

(d) Assistance for Improvement of investment from Foreign Capital Hotel Chains

The assistance is to attract foreign affiliated hotels by economic special zone and the preferential tax system for meeting the demands of the high end foreign tourists. In addition, the assistance is for the promotion of competition of hotels in Iran and improvement of service quality based on the international standards.

As the preconditions of the assistance, the problems such as foreign currency settlement by USD, bank remittance from other countries, and credit card settlement should be solved.

(e) Assistance for Establishment of Tourism Development Fund

The assistance is to help establishment of the fund by PPP and preparation for the business plan. The fund invests in revitalization of historical sites and town for stimulation of new tourism demand and development of regional economy.

(f) Assistance for Improvement of Tourism Statistics

The assistance is to improve tourism statistics and analyse the basic tourism statistics such as seasonal variation and regional disparity for the introduction of scientific marketing.

2) Assistances for Improvement of Issues on Development of Tourist Sites in Iran

Table 10-2 shows the longlist of cooperation plans aimed at resolving the issues that confront development of tourist sites in Iran.

Through implementing these cooperation plans targeting five representative tourism destinations in Iran under the two themes of "The Silk Road" and "Ancient Orient Civilization Corridor", it is intended to establish the Iranian brand of cultural heritage tourism, increase the number of tourists visiting Iran, thereby achieve the four goals of the sixth five-year plan (2016 - 2020), such as (i) GDP, (ii) Diplomacy, (iii) Job creation, and (iv) Expansion of internal demand, and contribute to achievement of the tourism goal of "increasing the number of inbound tourists to 8 million and earning foreign currency income of USD 4 billion by 2020".

Table 10-2: Assistances for Resolution of the Issues on Development of Tourist Sites in Iran

Tourism Destination	Regional Tourism Hub	Tourism Resources (travel time from Regional Tourism hub)	Assistances
Theme 1: Ancient Orient Civilization Corridor			
Ahwaz (World Heritage Chogha Zanbil, Shush, Shushtar and environs)	Ahwaz	<ul style="list-style-type: none"> • Chogha Zanbil (2.0h) • Haft Tepe (2.0h) • Shush (1.5h) • Shushtar (1.5h) • Dezful (2.0h) 	<ul style="list-style-type: none"> • Tourism development master plan on the theme of Ancient Orient Civilization Corridor • Marketing support • Support for development of wide area DMO • Eco-museum support (support for development of cultural landscape comprising nature, cuisine and livelihoods, ICT development, guide training, installation of signs and other tourism infrastructure)
Shiraz (World Heritage Shiraz, Persepolis, Pasargadae and environs)	Shiraz	<ul style="list-style-type: none"> • Pasargadae (2.0h) • Persepolis (1.0h) • Bishapour (2.0h) 	<ul style="list-style-type: none"> • Formulation of a tourism development master plan that links ruins that utilize existing area brands to local communities • Eco-museum development support • Support for development of <i>Bumgard</i> in the suburbs of the hub city
Theme 2: Silk Road			
Tabriz	Tabriz	<ul style="list-style-type: none"> • Soltaniyeh (3.0h) • Qazvin (4.5h) • Kandovan (1.0h) • Takht-e Soleyman (4.0h) • Maragheh (2.0h) 	<ul style="list-style-type: none"> • Tourism development master plan on the theme of Silk Road • Marketing support • Support for development of wide area DMO and area DMO (old towns, Kandovan, etc.) based around Tabriz • CBT support in candidate tourism destinations
Yazd	Yazd	<ul style="list-style-type: none"> • Meybod (0.5h) • Mehriz (0.5h) • Sal Yazd (0.5h) 	<ul style="list-style-type: none"> • Tourism development master plan on the theme of Silk Road • Marketing support • Support for development of wide area DMO and area DMO (Yazd old town, Meybod, etc.) • Eco-museum support (ICT development, guide training, installation of signs and other tourism infrastructure)
Esfahan	Esfahan	<ul style="list-style-type: none"> • Kashan (2.0h) • Abyaneh (2.5h) • Nain (2.5h) 	<ul style="list-style-type: none"> • Eco-museum development in candidate tourism destinations (Kashan, Abyaneh, etc.) utilizing existing area brands under the theme of Silk Road • Support for development of area DMO organizations

Source: JICA Study Team

The approach that is common in conducting support as indicated in the cooperation plans targeting the five destinations are described below.

(a) Formulation of a Tourism Master Plan to establish Iranian Tourism Brand

This is an assistance to propose wide area routes that link the five tourism destinations under the two themes of “The Silk Road and “Ancient Orient Civilization Corridor” and to establish the brand of Iranian tourism in the international tourism market.

Under the theme of “Ancient Orient Civilization Corridor”, support will be provided for formulation of a wide area route tourism development master plan that leads from Shiraz including Persepolis and Pasargadae, which are already established brand as an icon of Iranian tourism, passes through Bishapour, which is planned to be registered as World Heritage in 2018, and connects to Ahwaz.

Also, under the theme of “The Silk Road”, support will be provided for formulation of a wide area route tourism development master plan that leads from Shiraz - Yazd - Esfahan, i.e. the Golden Route, passes through Tehran, and connects to Tabriz.

Through developing these new tourism routes, not only leads to regulate seasonal fluctuations of current domestic tourism and regional disparities, but also contribution can be made towards improving the negative image of Iran and boosting Iran’s diplomatic standing by promoting Iranian tourism.

(b) Formulation of a Marketing Strategy to the International Tourism Market

This is an assistance to identify the segments (nationality, age group, etc.) targeted for cultural heritage tourism and natural tourism through marketing and to formulate marketing strategy.

Senior tourists from the United States and European countries like Germany and France, and non-Islamic tourists from Asian countries such as China and Japan mainly visit Iran with the objective of cultural heritage tourism. On the other hand, American tourists in the 20s and 30s age group, and Australian tourists visit Iran to explore its deserts and nature.

(c) Establishment of a DMO Organizations in each Destination

This is an assistance to develop wide area DMOs centred on the regional tourism hubs in the five destinations and local DMOs in each tourist site.

In this way, it will be possible to build a setup of sustainable tourism development and deploy the benefits of tourism development to the whole area under PPP including the private sector and local communities; also, through promoting partnership between the wide area DMOs in another tourism destinations, it will be possible to effectively establish brand of Iranian tourism and conduct marketing and promotion to the international tourism market.

(d) Development of a Destination based on the Concepts of Eco-museum and Cultural Landscape

This is an assistance to develop Eco-museum and cultural landscape in the five destinations.

Through connecting several cultural heritages with worldwide potential in the destination and further developing it as an Eco-museum or cultural landscape linked to the living culture of the local community, it is possible to develop living heritage.

In order to develop living heritage, in addition to the development of Ecotourism and *Bumgardi* combining cultural heritage and natural resources currently being promoted by the Iranian government, by implementing human resource development such as guide etc., TIC improvement and development of tourism infrastructure such as signage, this is an assistance to increase the number of inbound tourists, to create employment for local people, and to establish a structure that economic impact of tourism development can benefit to the local people.

(3) SHORT-TERM COOPERATION PLANS

The project for formulating the master plan for the tourism destination of Tabriz, which was selected as the priority destination in the Survey, is proposed as shown below.

Project Name	Master Plan Formulation Project for the Tourism Destination of Tabriz in Iran
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1) Project Background

The history of the Islamic Republic of Iran (Iran) dates back to the Mesopotamian civilization before the birth of Christ. Reflecting this and other historical eras such as the Persian Empire and the Islamic Empire, Iran has 21 UNESCO Cultural Heritage sites and one Natural Heritage site. The number of tourists visiting Iran is growing every year, increasing from 2.93 million in 2010 to 4.76 million in 2013, and 5.23 million in 2015. The service sector accounted for 55.4% of Iran's GDP in 2015, while the tourism industry including hotels, restaurants and so on accounted for more than 20%. The service sector accounts for around 50% of all employed persons.

Meanwhile, the high unemployment rate in Iran is an issue that requires urgent attention. In recent years, unemployment has remained at 10% or higher.

Under these circumstances, the government has compiled the sixth five-year plan (2016 - 2020), in which it includes four goals, such as (i) GDP, (ii) Diplomacy, (iii) Job creation, and (iv) Expansion of internal demand and it contributes to increase the number of inbound tourists to 8 million by 2020.

Iran is thus blessed with an abundance of tourism resources as described above, but within these, the route along the Silk Road in Tabriz and environs has numerous examples of cultural heritage that point towards the diverse cultural exchanges that took place along the Silk Road; for example, the UNESCO World Heritage Tabriz Bazaar, Takht-e Soleymān, which is a holy site of the Zoroastrian religion from the time of the Sassanid, monasteries belonging to the Armenian Apostolic Church and so on. Tabriz

has been selected as the Capital of Islamic Tourism for 2018 by the Organization of Islamic Cooperation (OIC), and vigorous tourism promotion activities are being conducted under this based on public-private partnership and it is positioned as the priority area of tourism development by the Iranian government.

However, the destination of Tabriz is situated apart from the so-called Golden Route of Esfahan, Yazd and Shiraz and, even though the area has high potential for conducting cultural heritage tourism on the theme of the Silk Road, it has so far been unable to attract numbers of tourists commensurate to its resources. In East Azerbaijan Province, which includes the environs, hotel occupancy rates fall dramatically to 20% during off-seasons, and this impacts tourism revenue and employment throughout the year.

Furthermore, since no policy or strategy have been established to develop the destination of Tabriz as a whole, no strategic promotion of tourism resources has been implemented; the brand has not been sufficiently established in the international tourism market, and creation of new tourism products in cooperation with different regions has not been realized.

Main Development Issue	Although Tabriz and environs are regarded as a priority area for tourism development by the Government of Iran, the policy for medium and long term tourism development in the destination has not been established.
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2) Project Outline

In order to resolve the issues described above, a tourism development master plan targeting the destination of Tabriz will be compiled.

As an implementation structure, ICHTO is the executing agency, and it is assumed that the project will be implemented under PPP including local governments, private sectors, local NGOs and local communities.

As the overall goal, through compiling the master plan for this destination, it is intended to implement effective tourism promotion, increase domestic and international recognition as a tourism destination, and thereby realize growth of the tourism industry through increasing tourists and generating employment, etc.

Overall Goal	Regional industries, mainly tourism industry, in the tourism destination of Tabriz are revitalized.
Project Purpose	A tourism development master plan necessary for strategic tourism development in the destination, including Tabriz and its surrounding areas, will be formulated.

In order to achieve the said Project goal, it is necessary to set the following outputs.

Output 1	An implementation framework necessary for formulation and operation of a master plan in target area will be established.
Output 2	A draft master plan in the target area will be prepared by the implementation framework established in Output 1.
Output 3	Pilot projects are implemented based on the draft master plan prepared in Output 2, and the master plan will be finalized considering the results of the pilot projects.

In the tourism destination of Tabriz, several pilot projects such as ecological museum, community based tourism (CBT) and conservation of cultural heritage will be conducted; and a strategic tourism development master plan in the destination will be formulated by reflecting the results of the pilot projects. The outline of the project is shown in Table 10-3.

Table 10-3: Master Plan Formulation Project for the Tabriz Tourism Area in Iran

Project Name	Master Plan Formulation Project for the Tourism Destination of Tabriz in Iran		
Target Areas	Destination of Tabriz (5 provinces) <ul style="list-style-type: none"> • East Azerbaijan Province • West Azerbaijan Province • Ardabil Province • Zanzan Province • Qazvin Province 	Target Groups	Stakeholders concerned with tourism development in the destination of Tabriz (Local governments, Private enterprises, Local NGOs, Local residents, etc.)
Executing Agency	Iran Cultural Heritage, Handicraft and Tourism Organization (ICHTO) Counterpart department: International Affairs Bureau		
Overall Goal	Regional industries, mainly tourism industry, in the Tabriz destination are revitalized.		
Project Purpose	A tourism development master plan necessary for strategic tourism development in the destination, including Tabriz and its surrounding areas, will be formulated.		
Outputs	Output 1 An implementation framework necessary for formulation and operation of a master plan in target area will be established. Output 2 A draft master plan in the target area will be prepared by the implementation framework established in Output 1. Output 3 Pilot projects are implemented based on the draft master plan prepared in Output 2, and the master plan will be finalized considering the results of the pilot projects.		

Source: JICA Study Team

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APPENDIX 1: TOURISM DESTINATION ASSESSMENT SHEET

Tourism Destination Assessment Sheet: Ahwaz

Data Collection Survey on Tourism and Cultural Heritage in the Islamic Republic of IRAN Japan International Cooperation Agency (JICA)	Destination:	Ahwaz
	Code:	AW
	Sheet No.	1

(1) Programme Development

Sub-Item	Assessment Question	Survey Results
Tourism resources	World Heritage	3 sites: • Chogha Zanbil • Shush • Traditional irrigation facilities of Shushtar
	National Heritage	N/A
	Intangible assets	N/A
	Handicrafts	• <i>Kilim</i> , etc. • In Shushtar, there are workshops/handicraft stores that have been made by renovating caravanserai.
	Museums (locations)	Shush, Haft Tappe, etc.
	Other latent resources	• There are thousands of ancient ruins that have not yet been developed. Developing such sites will contribute to promotion of Iran's cultural heritage tourism, which is the objective of the Study.
Tourism infrastructure	Hotels	
	Numbers (by star-ranking)	Khuzestan Province total: 37 establishments, of which 8 are located in Ahwaz (Breakdown : 1★ : 1 establishment, 2★ : 1 establishment, 3★ : 5 establishments, 5★ : 1 establishment)
	Number of beds	Khuzestan Province total: 3,055 beds (of which 1,037 are in Ahwaz)
	Number of employees	N/A
	Remarks (service, quality, etc.)	• Shush has 4-5 restaurants and just 1 guesthouse (20 beds). • Shushtar has 3 hotels recently made by renovating historical buildings (1 establishment is undergoing repairs). • Overnight guests mainly come from France, Germany, Singapore, and South Korea. • Hotel occupancy rate: 70% in the high season, 40% in the low season
	Restaurants	
	Number (establishments)	N/A
	Number of seats	N/A
	Remarks (service, quality, etc.)	N/A
	Travel agents	
	Number (companies)	N/A
	Number of employees	N/A
	Remarks (service, quality, etc.)	N/A
	Information Centres	
	Number (locations)	None
	Remarks	—
Others		

		Number of tour guides: Khuzestan Province total 80 (of which 55 are in Ahwaz)
Tourism commodities	Tours and programmes that make use of resources (existing and not yet developed as commodities)	<ul style="list-style-type: none"> Shushtar experimentally tried river rafting as a new tourism activity over 15 days in March 2017. One of the aims is to encourage tourists to stay longer.
	Destination image	<ul style="list-style-type: none"> There are numerous ancient sites such as Chogha Zanbil that date back to ancient Oriental civilizations dating from the Mesopotamian civilization to the Achaemenid Empire.
Tourism human resources development	Implementation of tourism human resources development by related ministries or government agencies	<ul style="list-style-type: none"> 10-14 tourism volunteer guides (interpreters) have been registered and conferred licences. They receive around 15 hours of training (3 hours x 5 days). English-speaking guides are the most common, followed by guides who speak German, French, Korean, and Japanese. Guides around the ancient remains of Shush charge no fee, but those in Chogha Zanbil and other peripheral sites cost money. In Chogha Zanbil, training workshops are staged with a view to encouraging participation by local residents, and handicrafts woven from bamboo bark are being developed.

(2) Marketing

Sub-Item	Survey Results	
Access	Population (2016)	
	Khuzestan Province : 4,710,509 (Shush: 80,000, Shushtar: 100,000, village near Chogha Zanbil: 3,000 人)	
	Means of public transport to the tourism destination	
	Airlines	
	International airport	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Domestic airport	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Regular services (number of services, etc.)	<ul style="list-style-type: none"> From Tehran: 1-2 services/day Kuwait, Jeddah, Dubai
	Travel time from major cities	<ul style="list-style-type: none"> From Tehran: 1.5 hours
	Remarks (service, quality, etc.)	—
	Railways	
	Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Regular services (number of services, etc.)	<ul style="list-style-type: none"> From Tehran: 1-2services/day, Shiraz
	Travel time from major cities	<ul style="list-style-type: none"> From Tehran: 14-17 hours
	Remarks (service, quality, etc.)	—
	Roads (route buses, etc.)	
	High-speed roads	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Travel time from major cities	From Tehran: 10 hours, from Shiraz: 10 hours
Remarks ((road conditions, etc.)	<ul style="list-style-type: none"> Since this area is surrounded by mountains, overland access to other tourist locations is limited. The arterial roads and local roads leading to other areas of 	

		Khuzestan Province are not always good, so traveling takes time.
Safety		<ul style="list-style-type: none"> According to the MOFA Overseas Safety Information Homepage, the area of Khuzestan Province on the border with Iraq is designated as Level 3 (Avoid all travel), and it is stated that: "Movements of radical Islamic groups such as IS need to be monitored, and the security situation is unpredictable."
Demand	The tourism destination in question	
	Number of visitors	<ul style="list-style-type: none"> Foreign tourists: 4,300 people/year (2016) Domestic tourists: 123,000 people/year (2016)
	Segment trends	France, Germany, Switzerland, Japan
	Nearby tourist spots	
	Number of visitors	Shush: 2012-13: 80,000 (foreigners: 5,000) 2013-14: 270,000 (foreigners: 10,000) 2014-15: 160,000 (foreigners: 7,500) 2015-16: 132,000 (foreigners: 30,000)
	Segment trends	—
Promotion	Pamphlets, websites, etc.	<ul style="list-style-type: none"> Private sector promotion activities are implemented in the province's award-winning pamphlet. An NGO in Shushtar is conducting drama shows and making a tourist map. In Chogha Zanbil, preparations are underway to provide information via mobile app in the next 6 months. Also, a survey aimed at utilizing VR is underway.
	Outline	—

(3) Stakeholder Involvement

Sub-Item	Survey Results	
Public initiative	Existence of ICHTO regional branch	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
		Responsible person
		Contact information
	Number of employees	N/A
	Budget	N/A
Remarks	N/A	
Public-Private partnership	Existence and outline of local private sector organizations (unions of operators, NPOs, NGOs, etc.)	<ul style="list-style-type: none"> In Shushtar, there are NGOs that work on developing local tourism, while in Shush, there are organizations such as an association of tour guides that take part in public-private partnership to promote the DMO. Also, in Haft Tape, workshops are staged with participation from local residents. The local branch of ICHTO and local NGOs, etc. have already built cooperative relations to an extent.
Local Involvement	Level of local involvement in tourism development (high or low)	<ul style="list-style-type: none"> An NGO comprising residents of Shush organizes guides and ancient remains events, etc. and conducts tourism management in partnership with guides and ICHTO (at cost). In Shush and Chogha Zanbil, guides tours of ancient remains are conducted by the local NGO in Shush.

(4) Impact

Sub-Item	Assessment Question	Survey Results
Economic impact	Positive: Programmes lead to employment creation, private sector investment, industry creation, etc.	<ul style="list-style-type: none"> Private sector investment is conducted in hotels made from historical buildings and workshops made using caravanseraï and so on.

	Negative: Programmes drive up land prices and labour costs and generate greater disparities, etc.	—
Social impact	Positive: Programmes lead to conservation of heritage, rejuvenation of traditional industries, nurturing of pride, etc.	—
	Negative: Programmes detract from the value of heritage, make a show out of culture and so on	<ul style="list-style-type: none"> • Tourists who visit Shush only show an interest in the castle of the French expedition (World Heritage components). The appeal of remains that date back 4,500 years is not conveyed well, and it is unfortunate that tourists are more interested in a fortress that was built upon destroying remains 200 years ago

(5) Feasibility

Sub-Item	Survey Results		
Technical support	Stage of tourism development	<ul style="list-style-type: none"> • There is need for programme development of a wide area cultural landscape that links undeveloped heritage (apart from World Heritage) and support for marketing of handicrafts. 	
	Disparities between areas in terms of socioeconomic development	Income level	N/A
		Poverty rate (%)	N/A
		Unemployment rate (%)	12.7%
		GRDP (USD)	765,453 Billion Rial
Remarks	—		
Effectiveness & Appropriateness	Consistency with superior plans and related areas (appeal to targets in Iran's marketing strategy, contribution to national branding, etc.)	<ul style="list-style-type: none"> • There are plans to compile a tourism master plan, and support can be given regarding the division of roles of NGOs and groups, promotion, marketing, and introduction of overseas cases with respect to governance, necessary infrastructure, capacity building workshops and cultural events. • Concerning regulations for the protection of World Heritage, a buffer zone is established in Shushtar based on zone-separate city planning building regulations. In the residential district on the north side of Kaln, a height restriction of 4.5m is imposed. In the commercial district in the south, the building coverage ratio is limited to 40% and building heights are limited to 2 stories of 7.5m. 	
	Segregation of synergistic effects with support by other donors	<ul style="list-style-type: none"> • Assistance has been provided to Chogha Zanbil under the UNESCO Japanese Funds-in-Trust, so there is a high possibility of cooperation. Two Japanese researchers, namely Professor Yasuyoshi Okada (archaeology, Kokushikan University) and Professor Watanabe (civil engineering, Saitama University) took the initiative in this support for Chogha Zanbil. • Junko Taniguchi (UNESCO Tehran Office) held numerous workshops for the protection of cultural heritage around 2003 and was loved by all. • In 2000 and 2006, UNESCO held workshops on sun-baked bricks. This area periodically hosts workshops on sun-baked brick repair work that gather participants from around the world. 	

Tourism Destination Assessment Sheet: Esfahan

Data Collection Survey on Tourism and Cultural Heritage in the Islamic Republic of IRAN Japan International Cooperation Agency (JICA)	Destination:	Esfahan
	Code:	ES
	Sheet No.	1

(1) Programme Development

Sub-Item	Assessment Question	Survey Results
Tourism resources	World Heritage	<ul style="list-style-type: none"> • 5 sites (Imam Square, Fin Garden (Kashan), Ali Qapu Palace, Friday Mosque, Persian <i>qanats</i>, and 2 cases of intangible heritage. The combined total of 7 World Heritage sites/cases is the most of any province in Iran). • 2 sites (Nain, Abyaneh Village) have been registered on the provisional list of UNESCO World Heritage.
	National Heritage	1,800 sites
	Intangible assets	2 cases (polo game, <i>tar</i> music)
	Handicrafts	<ul style="list-style-type: none"> • In 2015, it was registered as a World Craft City by the World Crafts Council (WCC). • There are also numerous handicrafts in the nomadic area. • There are 299 handicrafts in Iran and 196 in Esfahan (in the world, there are 602). • Enamel ware, metal ware, inlay work, textiles, turquoise and other stone work, decorations, silverware, apparel, wax, carpets. • 4,000 artisans produce more than 60% of the handicraft wares in Iran (5,000 workshops). • Each of the 24 districts of Esfahan Province has a unique style of handicrafts in which local materials are used. • Nain is famous for producing high-quality Persian rugs.
	Museums (locations)	2 public, 50 private
	Other latent resources	<ul style="list-style-type: none"> • In addition to Abyaneh, there are numerous other tourist villages such as Gehim, etc. • There are natural tourism resources for ecotourism. The local vegetation is also abundant, and winter sports such as skiing can be enjoyed in the local mountains in winter. Since this area has historical and natural tourism resources, ecotourism is especially attracting attention in Iran in recent years. • In Balzane and Garumeh, visitors can also enjoy desert tourism.
Tourism infrastructure	Hotels	
	Numbers (by star-ranking)	<ul style="list-style-type: none"> • There are 75 hotels in the city. • There are two 5-star establishments and five 4-star establishments, and the remainder are 3-star and 2-star establishments. • Currently, 80 hotels are under construction and are scheduled for completion within 3 years. Of these, 5 establishments are expected to be 5-star hotels. • There are 105 hotels in the province. • Including all types, there are 400 accommodation facilities in Esfahan Province. • The operating rate is 100% in the high season and 50% in the low season.
	Number of beds	Approximately 25,000 beds (province overall)
	Number of employees	70,000
	Remarks (service, quality, etc.)	<ul style="list-style-type: none"> • Employees in 4-star and 5-star hotels can speak English. • Esfahan Province has 2 universities that teach tourism-related courses. There is 1 city Center University and

		<p>Naghashghan University.</p> <ul style="list-style-type: none"> The staffs who work in 4-star and 5-star hotels are mostly recruited from these 2 universities. Hotel rates are discounted during the low season.
	Restaurants	
	Number (establishments)	<ul style="list-style-type: none"> There are mainly 2 types of restaurants. There are 25 traditional restaurants under the jurisdiction of ICHTO. Numerous ordinary restaurants are operating. Also, there are class-style restaurants.
	Number of seats	N/A
	Remarks (service, quality, etc.)	<ul style="list-style-type: none"> Roughly 300 people are employed in traditional hotels.
	Travel agents	
	Number (companies)	<ul style="list-style-type: none"> There are 300 travel agents. Of these, 20 travel agents handle only inbound tourism, while the remainder are dedicated to outbound tourism.
	Number of employees	<ul style="list-style-type: none"> 3,000 people are employed.
	Remarks (service, quality, etc.)	—
	Information Centres	
	Number (locations)	<ul style="list-style-type: none"> There are roughly 10-15 information centres in the city.
	Remarks	—
	Guides	
	Numbers	<ul style="list-style-type: none"> There are 900 guides in the province overall. There are 675 guides in the city. Of these, roughly 75% are very active. In terms of linguistic ability, 60% or more of the guides can speak English; 50% can speak French, 50% can speak German, and few can speak Italian and Spanish. Guides who can speak Chinese or Japanese are very few.
	Remarks	<ul style="list-style-type: none"> Since Esfahan has a lot of tourists, the quality of guides here is relatively high compared to the rest of Iran. In terms of rank, 200 can be classed as A, 400 as B, and the remainder as C (the 25% of guides who are not very active). There are 2 types of guide: those who work in culture, and those who work in ecotourism.
	Others	
		—
Tourism commodities	Tours and programmes that make use of resources (existing and not yet developed as commodities)	<ul style="list-style-type: none"> Including World Heritage and National Heritage, there are 2,200 attractions. 1,580 nomadic peoples and handicrafts are registered among the national heritage. Some areas cannot be accessed due to poor infrastructure. There are 200 hands-on workshops.
	Destination image	<ul style="list-style-type: none"> Esfahan, which was the third capital of the Safavid dynasty, is located at an important point on the Silk Road, where the overland part of the Silk Road over the Anatolian plateau links with the ocean section. The UNESCO World Heritage Imam Square, where there are numerous bazaars that handle goods traded along the Silk Road, is one of Iran's two great iconic tourism resources (the other being Persepolis). This is an international tourism destination that attracts the most tourists in Iran. The image of a destination where one can sense history and tradition of the Safavid dynasty (Masjed-imam, etc.) and more, has been developed.

Tourism human resources development	Implementation of tourism human resources development by related ministries or government agencies	<ul style="list-style-type: none"> • ICHTO conducts training for tour guides, hotel staff and travel agents. It also conducts training for handicraft artisans. Trainees receive 72 hours of training in topics including quality improvement, marketing, promotion, etc. Beginner and expert courses are available. University teachers or experts work as lecturers. • In response to requests from taxi drivers and restaurants, ICHTO intends to widen private sector workshops to all private sector businesses. • There is a tourism university, and the students conduct workshops for ordinary citizens. • There are 7 technical colleges and 1 university, where 300 students study and 70 graduates are produced every year. • Private sector training is also conducted for local citizens (simple English conversation, etc.). • In Nain, so far 1,500 people have received handicraft training organized by ICHTO (carpets, <i>kilim</i>, etc.).
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(2) Marketing

Sub-Item	Survey Results		
Access	Population (2016)		
	Esfahan Province: 5,120,850 (2,000,000 in Esfahan City)		
	Means of public transport to the tourism destination		
	Airlines		
	International airport	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
	Regular services (number of services, etc.)	<ul style="list-style-type: none"> • There are 2 high seasons each year (April, and August-September). The inbound high seasons are March and September. • The other months are low seasons. • There are regular services to and from Turkey, Iraq, Australia, and UAE. • During the high seasons, in addition to the above, services are provided to and from Georgia, Russia, Turkey (numerous cities) and Malaysia. 	
	Domestic airport	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
	Regular services number of services, etc.)	<ul style="list-style-type: none"> • There are regular services as follows: Kish Island: 47 services/week, Tehran: 28 services/week, Mashhad: 40 services/week, Tabriz: 20 services/week, Qeshm Island: 2 services/week. 	
	Travel time from major cities	—	
	Remarks (service, quality, etc.)	—	
	Railways		
	Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
	Regular services (number of services, etc.)	<ul style="list-style-type: none"> • There are regular services to Tehran, Tabriz, Mashhad, etc. • All regular services with foreign countries go through Tehran and connect to Turkmenistan, Turkey, Baku, etc. 	
	Travel time from major cities	<ul style="list-style-type: none"> • From Tehran: 6 hours • A high-speed rail link between Esfahan and Tehran that will take 100 minutes is being planned. 	
	Remarks (service, quality, etc.)	—	
	Roads (route buses, etc.)		
High-speed roads	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
Travel time from major cities	<ul style="list-style-type: none"> • Located in central Iran, Esfahan is connected to major cities to the east, west, north and south, i.e. Tehran, Shiraz, 		

		Kashan, Tabriz, etc.
	Remarks (road conditions, etc.)	<ul style="list-style-type: none"> Arterial roads linking to the main tourism spots are in good condition.
Safety		<ul style="list-style-type: none"> According to safety information of MOFA, Esfahan Province is designated as Level 1 (Exercise caution).
Demand	The tourism destination in question	
	Number of visitors	<ul style="list-style-type: none"> There are 350,000 foreign tourists every year. The number is increasing. There are 2,800,000 domestic tourists every year who come from various major cities around Iran.
	Segment trends	<ul style="list-style-type: none"> The foreign tourists come from Germany, France, United States, Italy, Iraq, China, Spain, Switzerland, Lebanon, Turkey, Netherlands, Austria, United Kingdom, Belgium, and Australia. Most arrive on group tours. Esfahan is the most popular destination for honeymoons in Iran. Visitors generally stay around 3 nights.
	Nearby tourist spots	
	Number of visitors	<ul style="list-style-type: none"> Nain was visited by 30,000 people in 2016. Tourist spots near Esfahan include Kashan, Abyaneh, oasis city, Nain and so on. Many visitors make day-trips to Kashan and Nain while staying in Esfahan. Because the oasis city is further away from Esfahan, visitors stay there.
Promotion	Pamphlets, websites, etc.	<ul style="list-style-type: none"> There is a good selection of pamphlets, websites and SNS. In addition to the official site run by ICHTO, there are tourism websites run by private sector operators. Concerning SNS, Telegram and What's up are used among others. Nain ran an exhibit at the International Tourism Exhibition that was held in Qeshm Island. There is a website (www.naeincht.ir), so tourism information is good.
	Outline	—

(3) Stakeholder Involvement

Sub-Item	Survey Results	
Public initiative	Existence of ICHTO regional branch	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
		Responsible person
		Contact information
	Number of employees	500
	Budget	N/A
Remarks	4 departments: (1) Tourism Department (2) Cultural Heritage Department (3) Investment & Planning Department Handicraft Department	
Public-Private partnership	Existence and outline of local private sector organizations (unions of operators, NPOs, NGOs, etc.)	<ul style="list-style-type: none"> The Tourist Association holds meetings with ICHTO every week. Similar weekly meetings are held in each field. In Esfahan, a tourism promotion conference comprising 20 private groups and 5 administrative organizations holds meetings every month.

		<ul style="list-style-type: none"> • There are conferences that include fields in all private sectors, and discussions are also conducted on the tourism sector. • There are between 50-60 tourism-related NGOs in Esfahan Province overall.
Local Involvement	Level of local involvement in tourism development (high or low)	<ul style="list-style-type: none"> • In Nain, local strategy meetings attended by 8-10 local citizens are now being held. Such initiatives are highly regarded and have resulted in the local mayor receiving the top mayor award in the province; moreover, the city was selected as the top outstanding city for urban development by the Ministry of Road and Urban Development. Also, a strategic meeting that includes citizens is held once a month.

(4) Impact

Sub-Item	Assessment Question	Survey Results
Economic impact	Positive: Programmes lead to employment creation, private sector investment, industry creation, etc.	<ul style="list-style-type: none"> • The tourism industry comprising hotels, restaurants, and travel agents creates a lot of employment and contributes to local promotion.
	Negative: Programmes drive up land prices and labour costs and generate greater disparities, etc.	<ul style="list-style-type: none"> • There are hardly any negative impacts from tourism development. • There doesn't seem to be much friction between specific tourist spots and tourists either.
Social impact	Positive: Programmes lead to conservation of heritage, rejuvenation of traditional industries, nurturing of pride, etc.	<ul style="list-style-type: none"> • In Nain, residents have come to understand the significance of tourism through participating in initiatives for the past 10 years. This participation has also nurtured a sense of local pride.
	Negative: Programmes detract from the value of heritage, make a show out of culture and so on	<ul style="list-style-type: none"> • Many of the residents of Abyaneh run souvenir stores, and the local traditional way of life and culture are being eroded.

(5) Feasibility

Sub-Item	Survey Results		
Technical support	Stage of tourism development	<ul style="list-style-type: none"> • The centre of Esfahan is an international tourism destination that attracts more tourists than anywhere else in Iran. • On the other hand, nearby locations such as Nain, Kashan, Abyaneh, etc. are not realizing adequate tourism development despite being registered on the UNESCO provisional heritage list. Such areas have the potential to realize short-term effects through inducing tourists from Esfahan through tourism development, so there are high needs for support. • Moreover, traditional accommodation facilities (<i>Bumgard</i>) can be found against a backdrop of the Balzane Desert and other abundant natural resources. Through promoting such features, it is possible to support benefits for the local area. 	
		Income level	N/A
	Disparities between areas in terms of socioeconomic development	Poverty rate (%)	N/A
		Unemployment rate (%)	14.6%
		GRDP (USD)	514,973 Billion IRR

		Remarks	—
Effectiveness & Appropriateness	Consistency with superior plans and related areas (appeal to targets in Iran's marketing strategy, contribution to national branding, etc.)	<ul style="list-style-type: none"> • There are plans to increase accommodation capacity fourfold over the coming 5 years. • In 2007, it was a target of the Cultural Capital of Tourism World. • International Comity of Handicraft 2016 • Tour guides International Gathering 2016 	
	Segregation of synergistic effects with support by other donors	<ul style="list-style-type: none"> • In Nain, under a framework of cooperation between Iran's Ministry of Road and Urban Development and France's Tourism Ministry, 50 experts on conservation of historical buildings are dispatched. 	

Tourism Destination Assessment Sheet: Shiraz

Data Collection Survey on Tourism and Cultural Heritage in the Islamic Republic of IRAN Japan International Cooperation Agency (JICA)	Destination:	Shiraz
	Code:	SZ
	Sheet No.	1

(1) Programme Development

Sub-Item	Assessment Question	Survey Results
Tourism resources	World Heritage	<ul style="list-style-type: none"> • 4 sites (Persepolis, Pasargadae, Persian gardens (Elam Garden, Pasargadae)) • ICHTO is currently implementing preparing to have Bishapour (registered as UNESCO provisional heritage) and Tang-e-Chogan registered as World Heritage in 2018. • ICHTO is advancing development of Sassanid palaces in Sarvestan and Firuzabad.
	National Heritage	3,000 sites
	Intangible assets	<ul style="list-style-type: none"> • Gabe (wool woven carpets) are registered as World Intangible Heritage by UNESCO.
	Handicrafts	<ul style="list-style-type: none"> • Inlay ware, <i>Gabbeh</i> pile rugs, etc. • There are some 2,000 handicraft artisans in Fars Province overall (many are in this area). • ICHTO is increasing workshops and making it possible to sell local products in the city bazaars in an effort to create local employment.
	Museums (locations)	15 facilities (all in Shiraz)
	Other latent resources	<ul style="list-style-type: none"> • Some of the earliest human communities • Remains dating back to the Elamite, Achaemenid and Sassanid periods. There are 30/35 reliefs in Fars Province. • In Shiraz, there are numerous remains that date back to the Islamic period and after, and the historical quarter covering more than 360ha has buildings from the time of the Qajar dynasty. • There are also some 1,400 religious remains. • Fars Province has rich natural resources and there is a prosperous ecotourism sector. • Concerning medical tourism, too, Shiraz has advanced medical care facilities and outstanding doctors. • There is 1 eco museum, however, the contents differ from the definition of activities in France, where the term was coined. Here, this refers to a natural park that includes all aspects of ecosystems.
Tourism infrastructure	Hotels	
	Numbers (by star-ranking)	<ul style="list-style-type: none"> • There are 200 accommodation establishments in the province. Also, 19 hotels are currently under construction. • There are six 5-star establishments and 18 4-star establishments, and the remainder consist of 1-star to 3-star hotels. • There are 138 guesthouses, of which more than 10% cater to individual travellers. • There are 120 such establishments in Shiraz. These are on the same level as 1-star hotels, however, the facilities are adequate and guests can stay for between \$2-10. • The annual operating rate of guesthouses is 60%-70%. • There are 34 traditional hostels (<i>Bumgardj</i>), and another 100 establishments are currently being constructed. It is scheduled to build all of these in regional areas.
	Number of beds	18,000

	Number of employees	N/A
	Remarks (service, quality, etc.)	<ul style="list-style-type: none"> Since Japanese people prefer to have baths, hotels are being built with bath tubs. In this way, marketing is conducted to ensure that market demands are satisfied.
Restaurants		
	Number (establishments)	N/A
	Number of seats	N/A
	Remarks (service, quality, etc.)	—
Travel agents		
	Number (companies)	<ul style="list-style-type: none"> There are 80 travel agents in Shiraz. 15 of these cater to inbound tourists. In the province overall, there are 185 travel agents.
	Number of employees	N/A
	Remarks (service, quality, etc.)	<ul style="list-style-type: none"> The website is available in 7 languages.
Information Centres		
	Number (locations)	<ul style="list-style-type: none"> There are 2 information centres: 1 in Shiraz and another in the airport. The information centres are operated in cooperation with the private sector under ICHTO supervision.
	Remarks	—
Guides		
	Number	<ul style="list-style-type: none"> In Fars Province overall, there are 1,200 officially certified guides. There are 8 Japanese-speaking guides, 2 of whom are native Japanese.
	Remarks	—
Tourism commodities	Tours and programmes that make use of resources (existing and not yet developed as commodities)	<ul style="list-style-type: none"> Experiencing traditional hostels (<i>Bumgard</i>) (where guests can experience the local traditional cuisine and lifestyle) Medical tourism Ecotourism
	Destination image	<ul style="list-style-type: none"> In addition to Persepolis and Pasargadae, which was the capital city of the Achmaenid dynasty, there are ancient Oriental remains such as the tombs of kings at Naqsh-e Rostam. Situated on the ocean Silk Road between Hormuz and Shiraz in the Persian Gulf and Esfahan, Shiraz has numerous tourism resources that point to exchanges between diverse eras and cultures, for example, historical buildings from the Zand and Qajar dynasties. Activities are conducted with a view to unearthing a brand image related to the Silk Road of the ocean.
Tourism human resources development	Implementation of tourism human resources development by related ministries or government agencies	<ul style="list-style-type: none"> ICHTO conducts workshops for training handicraft artisans, and training in such fields as heritage and ecotourism. There are not enough guides who speak foreign languages, and there is not enough training either. ICHTO also conducts training of local guides.

(2) Marketing

Sub-Item	Survey Results	
Access	Population (2016)	
	Fars Province: 4,851,274	
	Means of public transport to the tourism destination	
	Airlines	
	International airport	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Domestic airport	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Regular services (number of services, etc.)	<ul style="list-style-type: none"> There are three airports in the Province, namely Shiraz Airport, Lal Airport, and Lamerd Airport. Direct regular services fly to and from 7 cities in UAE (2 cities), Qatar, Turkey, Austria, Iraq, and Oman.
	Travel time from major cities	<ul style="list-style-type: none"> From Tehran: 90 minutes
	Remarks (service, quality, etc.)	—
	Railways	
	Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Regular services (number of services, etc.)	N/A
	Travel time from major cities	N/A
	Remarks (service, quality, etc.)	N/A
	Roads (route buses, etc.)	
	High-speed roads	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Travel time from major cities	<ul style="list-style-type: none"> From Esfahan: approx. 5 hours From Yazd: approx. 5 hours From Ahwaz: 10 hours
Remarks (road conditions, etc.)	—	
Safety	<ul style="list-style-type: none"> According to safety information of MOFA, Fars Province is designated as Level 1 (Exercise caution). 	
Demand	The tourism destination in question	
	Number of visitors	<ul style="list-style-type: none"> In 2017, so far 330,000 foreign tourists have visited, up by 22% over the previous year. In 2016, the number of domestic and foreign tourists was 5,000,000, of which 4,500,000 were domestic tourists.
	Segment trends	<ul style="list-style-type: none"> Many of the foreign tourists come from Europe, Asia, China and Japan. There were 3,300 tourists from Japan in 2016. From Europe, many tourists come from Germany, France, Italy, the Netherlands, Austria and Norway. From Asia, tourists visit from China, Taiwan, Japan and South Korea.
	Nearby tourist spots	
	Number of visitors	<ul style="list-style-type: none"> On average, visitors stay for 3 nights
Segment trends	<ul style="list-style-type: none"> 90% of tourists conduct cultural heritage tourism. 	
Promotion	Pamphlets, websites, etc.	<ul style="list-style-type: none"> Promotional tools include pamphlets, websites, SNS, promotional videos, etc.
	Outline	N/A

(3) Stakeholder Involvement

Sub-Item	Survey Results	
Public initiative	Existence of ICHTO regional branch	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
		Responsible person
		Contact information
	Number of employees	<ul style="list-style-type: none"> Fars Province: 250 Shiraz: 180 (50 in Persepolis and Pasargadae) Research Centers: 4 (50 people employed in Persepolis, 12 in Pasargadae)
	Budget	N/A
Remarks	—	
Public-Private partnership	Existence and outline of local private sector organizations (unions of operators, NPOs, NGOs, etc.)	<ul style="list-style-type: none"> The province has organized a Tourism Committee. This comprises representatives from ICHTO, municipalities, and private groups under the government). A tourism exhibition will be staged in 2 weeks, and since Yazd, Esfahan, and Fars Province constitute the Golden Route, representatives will gather in Fars Province.
Local Involvement	Level of local involvement in tourism development (high or low)	<ul style="list-style-type: none"> Since residents already understand tourism, ICHTO has so far not staged any workshops to educate the local people.

(4) Impact

Sub-Item	Assessment Question	Survey Results
Economic impact	Positive: Programmes lead to employment creation, private sector investment, industry creation, etc.	<ul style="list-style-type: none"> The tourism industry comprising hotels, restaurants, and travel agents creates a lot of employment and contributes to local promotion.
	Negative: Programmes drive up land prices and labour costs and generate greater disparities, etc.	—
Social impact	Positive: Programmes lead to conservation of heritage, rejuvenation of traditional industries, nurturing of pride, etc.	<ul style="list-style-type: none"> There are some 2,000 handicraft artisans in Fars Province overall (many are in this area). ICHTO is increasing workshops and making it possible to sell local products in the city bazaars in an effort to create local employment. The number of <i>Bumgardi</i> hostels is being increased from 34 to 100 to promote sustainable tourism in the local area.
	Negative: Programmes detract from the value of heritage, make a show out of culture and so on	—

(5) Feasibility

Sub-Item	Survey Results		
Technical support	Stage of tourism development	<ul style="list-style-type: none"> The UNESCO World Heritage sites of Pasargadae and Persepolis, which can be reached in day trips from Shiraz, are internationally known tourism destinations that attract more visitors than anywhere else in Iran. 	
	Disparities between areas in terms of socioeconomic development	Income level	N/A
		Poverty rate (%)	N/A

		Unemployment rate (%)	11.4%
		GRDP (USD)	351,170 Billion Rial
		Remarks	—
Effectiveness & Appropriateness	Consistency with superior plans and related areas (appeal to targets in Iran's marketing strategy, contribution to national branding, etc.)	<ul style="list-style-type: none"> Fars Province Tourism Development Master Plan (2017–2022) ICHTO intends to get 3 locations, namely Sarvestan (Sassanid palace), Kazerun (Bishapour) and Firuzabad, registered as World Heritage, with a view to attracting tourists to other areas apart from Persepolis and developing tourism in the local area. 	
	Segregation of synergistic effects with support by other donors	<ul style="list-style-type: none"> In Azerbaijan and Marvdasht, exchanges with Japanese archaeologists were conducted up to 40 years ago and also in the last 4 years. Countries throughout the world have cooperated with unearthing and preservation activities in Persepolis for the past 16 years. Currently, a team from Italy is helping with this. 	

Tourism Destination Assessment Sheet: Tabriz

Data Collection Survey on Tourism and Cultural Heritage in the Islamic Republic of IRAN Japan International Cooperation Agency (JICA)	Destination:	Tabriz
	Code:	TB
	Sheet No.	1

(1) Programme Development

Sub-Item	Assessment Question	Survey Results
Tourism resources	World Heritage	<ul style="list-style-type: none"> • 3 sites (Armenian Monastic Ensembles, Tabriz Bazaar, the Blue Mosque) • Two of the 5 monasteries in the Armenian Monastic Ensembles, which are registered as UNESCO World Heritage, are located in East Azerbaijan Province. St. Stepanos Monastery is the most popular. • It is planned to apply for registration of Arasbaran Forest in the northeast as Natural Heritage. • The village of Kandovan has been registered on the provisional list of UNESCO World Heritage.
	National Heritage	1,790 sites (total number of registered cultural assets: 1,800 cases)
	Intangible assets	<ul style="list-style-type: none"> • Roughly 1,700 sites • Tabriz is registered as World Crafts City for its carpet making by the WCC (World Crafts Council).
	Handicrafts	• Carpets, silver ware, ceramics, leatherware, Batik, Varni
	Museums (locations)	25 public and private museums
	Other latent resources	• Religion and ceremonies, <i>azeri</i> music, ceramic intangible cultural assets, mountain resources, health tourism, etc.
Tourism infrastructure	Hotels	
	Numbers (by star-ranking)	<ul style="list-style-type: none"> • There are three 5-star establishments, four 4-star establishments, three 3-star establishments, 15 2-star establishments, and seven 1-star establishments. • In addition, there are 25 hotel apartments, and in Kandovan, there is one hotel made from a renovated cave dwelling.
	Number of beds	There are 8,500 beds.
	Number of employees	4,500 people are directly employed.
	Remarks (service, quality, etc.)	<ul style="list-style-type: none"> • Hotel ratings are based on ICHTO criteria and stringently reviewed by the association of hotels. Hotels under each star rating are ranked as A, B or C. • Foreign-affiliated companies are encouraged to invest in the hotel business. If hotels are built now, they receive tax exemptions for 5 years. This is a special measure by Tabriz for the event. • Summer is the high season for foreign and domestic visitors. • The operating rate is 40% on average, rising to 100% in the high season, but falling to 20% in the off-season. • ICHTO conducts hotel inspections every 3 months. When it finds that hotels do not meet rating criteria, it conducts guidance in the sequence of Warning→Suspension→Closing.
	Restaurants	
	Number (establishments)	<ul style="list-style-type: none"> • Tabriz has 420 restaurants; there are 780 in East Azerbaijan Province overall. • 260 restaurants are registered with the Food Industry Association of East Azerbaijan.
	Number of seats	12,000 seats
	Remarks (service,	• Out of the 260 restaurants that are registered with the Food

	quality, etc.)	<p>industry association of East Azerbaijan, 20% are top-class level, 40% are first-rate, 30% are second-rate, and the remaining 10% are third-rate.</p> <ul style="list-style-type: none"> Restaurants are required to provide 1 wheelchair space for every 100 seats and also have 10 children's seats. In Tabriz, there are restaurants that are made from renovated <i>Hammam</i> and ice rooms.
Travel agents		
	Number (companies)	<ul style="list-style-type: none"> There are 225 travel agents in East Azerbaijan Province overall, and 147 of these operate in Tabriz. There are 10 inbound tour operators.
	Number of employees	<ul style="list-style-type: none"> 1,500 people in East Azerbaijan Province overall.
	Remarks (service, quality, etc.)	<ul style="list-style-type: none"> The association of travel agents in Tabriz conducts guidance encouraging travel agents to abide by basic rules.
Information Centres		
	Number (locations)	<ul style="list-style-type: none"> Under ICHTO jurisdiction, there are 23 TICs in Tabriz. There are 4 permanently staffed offices in airports and stations. 15 TICs are temporary facilities operated only in high season, and there are 4 such TUCs in the city. From the private sector, the association of tour guides supports ICHTO.
	Remarks	<ul style="list-style-type: none"> The information centre in the Bazaar is permanently staffed with guides speaking 8 different languages, and it also provides maps and tourist information.
Others		
		<ul style="list-style-type: none"> In Kandovan, entrance fees are levied from tourists (100,000 Rials per vehicle) and some of the proceeds are donated to a fund for developing the tourism destination.
Tourism commodities	Tours and programmes that make use of resources (existing and not yet developed as commodities)	<ul style="list-style-type: none"> There are 3 main types of tours that utilize resources, i.e. culture, heritage, and mountaineering. In addition, there is a ski resort, tours where visitors can experience traditional nomadic lifestyle, religious tours such as those in Yazd, carpet-making tours and so on. There are also tours that feature intangible cultural assets such as <i>azeri</i> music, literature and so on. Since the medical care setup is established, there is also potential for health tourism from neighbouring countries. There are also city tours. These are currently operated by Tabriz municipal government, but they are scheduled to be transferred to the private sector in a few months. The main tours conducted in Tabriz target the Bazaar, Blue Mosque, half-day tours to Kandovan, St. Stepanos Monastery and so on. There are around 90 handicrafts workshops employing some 10,000 people.
	Destination image	<ul style="list-style-type: none"> Tabriz grew as a commercial city on the Silk Road linking Europe to the Anatolian plateau and Asia. Tabriz Bazaar, which grew as a market for the products traded between Europe and Asia along the Silk Road, has the largest building area in the world and has been registered as UNESCO World Heritage. Tabriz became the first capital city of the Safavid dynasty which prospered in the 15th century. It has the Blue Mosque (UNESCO World Heritage), which dates back to the Ilkhanate Dynasty, while the route along the Silk Road in Tabriz and environs has numerous diverse tourism resources that point towards the diverse cultural exchanges that took place along the Silk Road, for example, bridges, caravanserai, the Armenian Monastic Ensembles and so on). Even today, prosperous cross-border trade is conducted

		<p>along the arterial road that links Tabriz to Turkey, Armenia and Azerbaijan.</p> <ul style="list-style-type: none"> Moreover, the carpets that are made on the Anatolian plateau are deeply connected to the history and culture of Tabriz. The heritage, tradition and culture of Tabriz are also recognized as part of the destination image.
Tourism human resources development	Implementation of tourism human resources development by related ministries or government agencies	<ul style="list-style-type: none"> ICHTO conducts training on Technical Management, Tour Leadership, Ecotourism, and Hotel Management. This mainly consists of OJT (On the Job Training). Teachers from external universities are asked to serve as lecturers. Tabriz University has a Tourism Department, and it also teaches cooking courses. Education agencies for developing tourism human resources include 1 university and 5 technical colleges.

(2) Marketing

Sub-Item	Survey Results	
	Population (2016)	
	East Azerbaijan Province: 3,909,652 (Tabriz: 1,900,000)	
	Means of public transport to the tourism destination	
	Airlines	
International airport	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Direct services (number of services, etc.)	<ul style="list-style-type: none"> There are regular services to and from Istanbul, Hamburg, etc. Seasonal services are arranged from Baku, Dubai, Tbilisi, and Moscow. 	
Domestic airport	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Regular services (number of services, etc.)	<ul style="list-style-type: none"> There are regular services to and from Tehran, Shiraz, etc. 	
Travel time from major cities	<ul style="list-style-type: none"> Tabriz to Tehran takes approximately 1 hour. 	
Remarks (service, quality, etc.)	<ul style="list-style-type: none"> Aircraft are generally old. 	
	Railways	
Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Regular services (number of services, etc.)	<ul style="list-style-type: none"> There is a metro line running east to west in the city. A line connecting to Moscow is being prepared. There are regular services to and from Georgia, Iraq and Azerbaijan. Domestically, there are two trains between Tabriz and Mashhad every day. There are two trains between Tabriz and Tehran every day 	
Travel time from major cities	<ul style="list-style-type: none"> From Tehran: 13 hours From Mashhad: 25 hours 	
Remarks (service, quality, etc.)	<ul style="list-style-type: none"> The station has an information centre, waiting room chairs, shop, toilets, and other equipment. Almost all signs are in Persian, and buying tickets is also difficult to understand for foreign tourists. 	
	Roads (route buses, etc.)	
High-speed roads	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Travel time from major cities	From Tehran: 8 hours	
Remarks ((road conditions, etc.)	<ul style="list-style-type: none"> Arterial roads (4-6 lanes) linking Tabriz to other major cities are in good condition. The local roads around Takht-e Soleyman are badly 	

		deteriorated and are in need of repairs.
Safety		According to safety information of MOFA, West Azerbaijan Province is designated as Level 1 (Exercise caution).
Demand	The tourism destination in question	
	Number of visitors	<ul style="list-style-type: none"> There are 450,000 foreign tourists and 4,000,000 domestic tourists. The high season is from April to September, and other months constitute low season.
	Segment trends	<ul style="list-style-type: none"> Almost all foreign tourists come from European countries like Germany, France and Sweden. Travelers from Arab nations and Asia are in the minority. The foreign tourists visit on group tours and on individual trips. The number of tourists is increasing. It is 23% higher than 2 years ago. Reasons are that Tabriz is in the spotlight after being selected as the OIC (Organization of Islamic Countries) Tourism Capital for 2018, and the economic sanctions have been partially lifted. Tabriz is divided into 21 districts and there are 5 representative tour routes through these. All of these start from Tabriz and go through local cities. The domestic tourists visit from Mashhad, Shiraz and Tehran. In particular, since the summers in Tabriz are cool, lots of people visit to get away from the heat of the south.
	Nearby tourist spots	
	Number of visitors	Kandovan: approximately 100,000 people/year
	Segment trends	<p>The 5 representative tour routes around Tabriz and environs are as follows. Tabriz is included in all the routes:</p> <ol style="list-style-type: none"> 1. Tabriz-Kaleybar 2. Tabriz-Marand-Jolfa-Aras River 3. Tabriz-Maragheh 4. Tabriz-Bostanabd-Sarab 5. Tabriz-Mianeh
Promotion	Pamphlets, websites, etc.	<ul style="list-style-type: none"> There is a tourism website provided in Persian, English, French, German, and Turkish. In terms of SNS, Telegram is utilized to provide information. There are PR video clips. There are also lots of maps for tourists. The Tabriz Reporter is a booklet containing tourism information that has been prepared for Tabriz 2018. The booklet has been prepared in German, Turkish, Azerbaijani, and Russian.
	Outline	<ul style="list-style-type: none"> Tourist booklets, maps, guides, etc. are provided in English too, so a lot of tourism information is available.

(3) Stakeholder Involvement

Sub-Item	Survey Results				
Public initiative	Existence of ICHTO regional branch	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
		<table border="1"> <tr> <td>Responsible person</td> <td>Mr. Mortaza Abdar (Director-General of ICHTO East Azerbaijan Province)</td> </tr> <tr> <td>Contact information</td> <td>0914 415 8447 mortaza.abdar@yahoo.com</td> </tr> </table>	Responsible person	Mr. Mortaza Abdar (Director-General of ICHTO East Azerbaijan Province)	Contact information
	Responsible person	Mr. Mortaza Abdar (Director-General of ICHTO East Azerbaijan Province)			
	Contact information	0914 415 8447 mortaza.abdar@yahoo.com			
Number of employees	250 (including the ICHTO branches in the 21 districts of East Azerbaijan Province)				
Budget	<ul style="list-style-type: none"> Concerning the preservation and utilization of historical buildings, applications are made to ICHTO headquarters in each project. Under BOT contracts (around 20 years), caravanserai and 				

		<p>other historical buildings are renovated into hotels and restaurants using private sector funding.</p>
	Remarks	<p>4 departments:</p> <p>(1) Tourism Department</p> <ol style="list-style-type: none"> 1) Marketing & Promotion Section 2) Education Section 3) Supervision Section <p>(2) Cultural Heritage Department</p> <ol style="list-style-type: none"> 1) Archaeology Section 2) Technical Management and Renovation Section (30 employees) 3) Museum Management Section 4) Registration of Cultural Heritage Section <p>(3) Investment & Planning Department</p> <p>Planning Section</p> <p>Budget Planning Section</p> <p>Development Planning Section</p> <p>(4) Handicraft Department</p> <ol style="list-style-type: none"> 1) Training of Handicraft Section 2) Development of Implementation and Marketing Section 3) Business Support Section <ul style="list-style-type: none"> • The Supervision Section implements hotel inspections every month, every 3 months, and whenever complaints are received. • Renovation works on historical buildings are outsourced to external building contractors. • Supervision is consigned to university professors and consultants, while ICHTO conducts direct management in around 10% of cases. • 180 buildings in Tabriz are registered as historical buildings, and 128 are registered as National Heritage. • Concerning the preservation and repair of privately owned registered historical buildings, it is necessary to apply for confirmation to ICHTO. When using traditional building materials under certain conditions, there is a subsidy system whereby ICHTO provides the materials and so on.
Public-Private partnership	Existence and outline of local private sector organizations (unions of operators, NPOs, NGOs, etc.)	<ul style="list-style-type: none"> • There are 635 NGOs (handicrafts, environment, cultural assets protection, hotel trade, etc.). • There are some NGOs that are in opposition to ICHTO concerning the approach to preserving and repairing historical buildings. • 2 NGOs are active inside Tabriz Bazaar.
Local Involvement	Level of local involvement in tourism development (high or low)	<ul style="list-style-type: none"> • In Kandovan, training on CRM (Customer Relation Management) and environment is implemented monthly for local NGOs (residents). • Kandovan aims to achieve the harmonious co-existence of tourism and civic life. (C.f. Living Heritage whereby tourism and lifestyle are not separated, as in the case of Cappadocia) • Similar initiatives are also implemented in the village of Ushtubin. • ICHTO implements handicraft workshops for women and young people. Local municipalities and NGOs also implement workshops. • There are also cases of support by the Omid Foundation.

(4) Impact

Sub-Item	Assessment Question	Survey Results
Economic impact	Positive: Programmes lead to employment creation, private	<ul style="list-style-type: none"> • The tourism industry contributes greatly to employment and industry creation: hotels employ 4,500 people; travel agents employ 1,500, and there are 780 restaurants in the city.

	sector investment, industry creation, etc.	<ul style="list-style-type: none"> Tabriz ICHTO focuses more on social impacts rather than the economic impacts. It hopes to transform the image of Iran and Tabriz through tourism.
	Negative: Programmes drive up land prices and labour costs and generate greater disparities, etc.	<ul style="list-style-type: none"> There are communities that receive tourists, and measures are taken to mitigate friction arising with tourists. With respect to the local citizens, ICHTO conducts a customer relations management (CRM) seminar once a month to help prepare for receiving tourists and conduct tourism development activities.
Social impact	Positive: Programmes lead to conservation of heritage, rejuvenation of traditional industries, nurturing of pride, etc.	<ul style="list-style-type: none"> Tabriz 2018 is a major opportunity to promote tourism, and pamphlets and other materials are being prepared to promote this.
	Negative: Programmes detract from the value of heritage, make a show out of culture and so on	<ul style="list-style-type: none"> Construction of modern style buildings in Kandovan is threatening the historical townscape. Many of the cave dwellings of Kandovan are turned into souvenir stores, so the traditional lifestyle and culture of the local area are being lost.

(5) Feasibility

Sub-Item	Survey Results		
Technical support	Stage of tourism development	<ul style="list-style-type: none"> Tabriz is the symbolic city of trade along the Silk Road, and it is the ideal destination for displaying the diversity of Iran's history and culture. Despite this, it has failed to be branded as a tourism destination in the international tourism market; hence there is a high need to support the promotion of tourism. Under Tabriz 2018, there is growing momentum to develop the local tourism, and promotional activities including preparation of pamphlets and so on are being actively conducted under public-private partnership. Also, the area around Tabriz includes Kandovan, where cave dwellings form a unique landscape, while traditional hostels (<i>Bumgard</i>) that make use of Nomadic tents can be found against a backdrop of mountains and other abundant natural resources. Through promoting such features, it is possible to support benefits for the local area. 	
	Disparities between areas in terms of socioeconomic development	Income level	N/A
		Poverty rate (%)	N/A
		Unemployment rate (%)	East Azerbaijan Province: 10.8%
		GRDP (USD)	East Azerbaijan Province: 267,084 Billion IRR
		Remarks	—
Effectiveness & Appropriateness	Consistency with superior plans and related areas (appeal to targets in Iran's marketing strategy, contribution to national branding, etc.)	<ul style="list-style-type: none"> Under Tabriz 2018 (Tabriz, the Capital of Islamic Tourism for 2018), tourism development activities are being actively implemented, for example, preparation of tourism materials, development of tour routes and so on. 	
	Segregation of synergistic effects with support by	<ul style="list-style-type: none"> UNESCO and other organizations provide subsidies for training. The Japan Institute of Architects (AIJ) and Nippon Foundation 	

	other donors	<p>are deploying exchange activities concerning local economic development on the theme of the Silk Road in a joint effort with local NGOs and ICHTO (Project representative: Professor Riichi Miyake). Between September and October 2018, it is scheduled for an international conference to be held in Tabriz, while an exhibition of handicrafts and activities will be staged from May 5-6, 2018 in Japan.</p> <ul style="list-style-type: none"> • Synergistic effects are expected with the JICA project around Lake Urmia.
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Tourism Destination Assessment Sheet: Yazd

Data Collection Survey on Tourism and Cultural Heritage in the Islamic Republic of IRAN Japan International Cooperation Agency (JICA)	Destination:	Yazd
	Code:	YD
	Sheet No.	1

(1) Programme Development

Sub-Item	Assessment Question	Survey Results
Tourism resources	World Heritage	<ul style="list-style-type: none"> • 3 sites (historical town, <i>Qanat</i>, Persian garden (Pahlevan-pour Garden)) • 2 sites are registered as UNESCO provisional heritage (Meybod, Fahraj Friday Mosque)
	National Heritage	1,600 sites
	Intangible assets	—
	Handicrafts	<ul style="list-style-type: none"> • 30 types (curtains, <i>Termeh</i>, <i>lcot</i> (died cloth), ceramics, porcelain, etc.) • Handicraft artisans: 4,000
	Museums (locations)	20 locations in the province (4 in town)
	Other latent resources	<ul style="list-style-type: none"> • The qanat system that is installed throughout the town • Sacred sites and related remains of the Zoroastrian religion from the time of the Achaemenid and Sassanid Empires. • 4,000m mountains, and desert • A feature is the large number of hotels made from historical buildings in town • There are inns like the Zeinodin Caravanserai in the outskirts of town. Tourists can experience the local culture in traditional accommodations that use private residences (<i>Bumgardl</i>)
Tourism infrastructure	Hotels	
	Numbers (by star-ranking)	<ul style="list-style-type: none"> • There are 200 accommodation establishments but no 5-star hotels. One 5-star hotel is being constructed, but all current hotels are 4-star or lower.
	Number of beds	4,000 beds
	Number of employees	4,000 (accuracy is unclear)
	Remarks (service, quality, etc.)	<ul style="list-style-type: none"> • The annual operating rate is 55%. During the high season, which lasts for 6 months, it is 100%. Non-traditional hotels account for 70%. Operating rate during the low season is 40%. Guests stay for a single night on average. • There are plans to construct 36 hotels. When these are completed, there will be 10,000 beds. • Tax is exempted for 5 years when a hotel is built.
	Restaurants	
	Number (establishments)	<ul style="list-style-type: none"> • There are 60 traditional restaurants under the jurisdiction of ICHTO in the city and 120 in the province overall.
	Number of seats	N/A
	Remarks (service, quality, etc.)	—
	Travel agents	
	Number (companies)	There are 80 travel agents.
	Number of employees	N/A
	Remarks (service, quality, etc.)	<ul style="list-style-type: none"> • Travel agents started conducting business in Yazd 10 years ago. Up until 3 years ago, almost all travel agents were from Shiraz or Tehran. • The city started to directly receive tourists 2 years ago. 10%-15% of tourists arrive on tours directly organized by local

		travel agents.
	Information Centres	
	Number (locations)	<ul style="list-style-type: none"> There are 10 information centres in the city. All are run by private operators under the jurisdiction of ICHTO. There are 26 in the province overall. The QR codes at tourist spots have been developed by a private IT company and ICHTO. These can be read in 6 languages and are funded by ICHTO.
	Remarks	—
	Guides	
	Number	250 (around 20% are active)
	Remarks	<ul style="list-style-type: none"> Almost all guides can speak English and/or French. A few can speak Chinese.
Tourism commodities	Tours and programmes that make use of resources (existing and not yet developed as commodities)	<ul style="list-style-type: none"> Tours of the old town Experiencing traditional inns (<i>Bumgardli</i>) (private residence inns where guests can experience the local traditional cuisine and way of life) <i>Qanat</i> tours
	Destination image	<ul style="list-style-type: none"> Yazd developed as a trade city on the Silk Road. The city contains numerous tourism resources from various ages and cultures that intermingled around the Silk Road, for example, historical buildings from the Ilkhanate, Safavid and Qajar dynasties, and the historical quarter of Yazd was registered as UNESCO World Heritage in 2017. In particular, Yazd and environs have <i>Badgir</i> wind towers and unique <i>Qanat</i> irrigation facilities that are suited to semi-arid zones, while townscapes contain a lot of earthen structures. Hence, it is possible to form a unique destination image that is different from other areas.
Tourism human resources development	Implementation of tourism human resources development by related ministries or government agencies	<ul style="list-style-type: none"> ICHTO stages workshops geared to promoting employment of handicraft artisans. The science and technology university has 1,000 students learning ceramics, porcelain, metal craftwork, old decorations and carpets. Four tourism colleges conduct vocational training in tour guide work, services, interpreting, etc. and award ICHTO completion certificates. 1,000 students graduate every year. In a project funded by the Henkel Group of Germany, training for local residents is included.

(2) Marketing

Sub-Item	Survey Results	
Access	Population (2016)	
	Yazd Province: 1,138,533 人 (600,000 in Yazd City)	
	Means of public transport to the tourism destination	
	Airlines	
	International airport	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Domestic airport	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Regular services (number of services, etc.)	<ul style="list-style-type: none"> There are regular services with Iraq and Saudi Arabia. From the viewpoint of industry, it is desirable to see regular services established with Dubai and Qatar too.
	Travel time from major cities	<ul style="list-style-type: none"> From Tehran: 70 minutes
	Remarks (service, quality, etc.)	—

	Railways	
	Services	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Regular services (number of services, etc.)	There is a regular service with Esfahan.
	Travel time from major cities	<ul style="list-style-type: none"> • From Esfahan: approx.4 hours • From Tehran:6-8 hours
	Remarks (service, quality, etc.)	—
	Roads (route buses, etc.)	
	High-speed roads	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Travel time from major cities	<ul style="list-style-type: none"> • From Tehran: 10 hours • From Shiraz: 7 hours • From Esfahan: 7 hours
	Remarks (road conditions, etc.)	<ul style="list-style-type: none"> • Arterial roads and local roads are good.
Safety	<ul style="list-style-type: none"> • According to safety information of MOFA, Yazd Province is designated as Level 1 (Exercise caution). 	
	The tourism destination in question	
Demand	Number of visitors	<ul style="list-style-type: none"> • Six years ago, the number of foreign tourists (overnight guests) was 12,000. In 2016, the figure was 130,000 (overnight guests). The total number of foreign tourists in 2016 was 140,000. • The low season is June to August; the high season is from spring to autumn. • The number of domestic tourists is 1,111,000 during Nowruz (New Year), while the number at other times is 350,000. • Since Yazd is located in the centre of Iran, many people from different parts of the country spend one night there before traveling onto Mashhad, etc.
	Segment trends	<ul style="list-style-type: none"> • Foreign tourists come from France, Italy, Germany, Spain, Indonesia, and China. • Visits from Indonesia and China come for business, but they also come as tourists. • 65% of tourists visit on group tours; the rest travel as individuals.
	Nearby tourist spots	
	Number of visitors	<ul style="list-style-type: none"> • In the first half of 2017, 30,000 Iranians and 12,000 foreign tourists visited Meybod.
	Segment trends	<ul style="list-style-type: none"> • Many of the visitors to Meybod come from Germany, Portugal, Italy and China, while the number of Turkish visitors has been increasing recently. More than 80% of visitors come on group tours.
Promotion	Segment trends	<ul style="list-style-type: none"> • Advertisements are carried in pamphlets, websites and SNS. • Conservation of the historical remains is stressed in the advertising. • There are plans to compile the features of the old city of Yazd into a document. • Researchers and travellers from numerous cities visit from the scientific viewpoint to study Yazd as reference for their own cities. • In Meybod, ICHTO created a tourism map 50 years ago, and it is a pioneer of tourism in Iran.
	Pamphlets, websites, etc.	<ul style="list-style-type: none"> • Meybod implements promotion via its website (www.yazdcity.ir).

(3) Stakeholder Involvement

Sub-Item	Survey Results		
Public initiative	Existence of ICHTO regional branch	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
		Responsible person	—
		Contact information	—
	Number of employees	200	
	Budget	N/A	
Remarks	4 departments: (1) Tourism Department (2) Cultural Heritage Department (3) Investment & Planning Department (4) Handicraft Department • In addition, ICHTO has the Cultural Heritage Base as an organization for managing cultural heritage.		
Public-Private partnership	Existence and outline of local private sector organizations (unions of operators, NPOs, NGOs, etc.)	<ul style="list-style-type: none"> • Funding is split 50/50 between private sector investment and ICHTO. • There are 30 associations including NGOs. • Regular tourism development conferences are held 2 times a month between ICHTO, NGOs and the local community. • Meetings are held with residents in various areas. • Regular conferences are held 2 times a month between ICHTO and the private sector. • In Meybod, ICHTO has funded 50% of the cost of a project to renovate a post office designated as a historical building into a museum, while the remaining 50% is funded by an NGO fund composed of local prominent figures. • In Meybod, ICHTO offers subsidies of up to US\$10,000 to private sector projects for renovate historical buildings. • In Saryazd, under the supervision of ICHTO, Caravanserai has been rehabilitated and an international archery tournament has been staged using donations from local enterprises. 	
Local Involvement	Level of local involvement in tourism development (high or low)	<ul style="list-style-type: none"> • Since UNESCO emphasizes linkages with residents, ICHTO is also putting effort into this area. 	

(4) Impact

Economic impact	Assessment Question	
	Positive: Programmes lead to employment creation, private sector investment, industry creation, etc.	<ul style="list-style-type: none"> • The travel industry comprising hotels, restaurants, travel agents, etc., creates a lot of employment and contributes to local promotion.
Social impact	Negative: Programmes drive up land prices and labour costs and generate greater disparities, etc.	<ul style="list-style-type: none"> • Following registration as UNESCO World Heritage in 2017, efforts to conserve heritage have been gaining pace.
	Positive: Programmes lead to conservation of heritage, rejuvenation of traditional industries, nurturing of pride, etc.	—

(5) Feasibility

Sub-Item	Survey Results		
Technical support	Stage of tourism development	<ul style="list-style-type: none"> • Since Yazd was registered as UNESCO World Heritage in 2017, INCHTO has started various initiatives geared to developing tourism, for example, developing qanat facilities as tourism resources. • Despite Yazd being situated on the Golden Route between Shiraz and Esfahan, which attracts the most tourists in Iran, visitors only stay for 1 night on average; hence the area is not yet fully recognized as a destination for conducting extended tourism. • On the other hand, in the environs of Yazd, Meybod is registered on the provisional heritage list of UNESCO and there are numerous cities and villages that still haven't been developed but have high potential for tourism. Since developing such areas and attracting tourists from Shiraz and Esfahan could generate effects in the short term, there is high potential and needs for support. • Yazd and environs have <i>Badgir</i> wind towers and unique <i>Qanat</i> irrigation facilities that are suited to semi-arid zones, while townscapes contain a lot of earthen structures. Hence, it is possible to form a destination image that is different from other areas. • Also, there are traditional inns (<i>Bumgardî</i>) that are set against a backdrop of abundant natural resources such as desert and mountains, and support can be given to promote these and benefit the area. 	
	Disparities between areas in terms of socioeconomic development	Income level	N/A
		Poverty rate (%)	N/A
		Unemployment rate (%)	12.8%
		GRDP (USD)	152,730 Billion IRR
		Remarks	—
Effectiveness & Appropriateness	Consistency with superior plans and related areas (appeal to targets in Iran's marketing strategy, contribution to national branding, etc.)	<ul style="list-style-type: none"> • Yazd City has formulated a development master plan (2017-2022). 	
	Segregation of synergistic effects with support by other donors	<ul style="list-style-type: none"> • Other donors are not implementing any support projects in particular. • The Henkel Group of Germany, with financial backing from the private sector in Germany, is currently implementing a project to support the opening of a museum in Yazd by the art museum in Bonn and a museum in Berlin. As technical support, it dispatches curators to work on the historical exhibits. The museum is scheduled to be opened in 2020, and is anticipated will play a role as a core facility in the local cultural heritage-based tourism. It is also anticipated that cooperation can be realized with the JICA project. • ICOMOS experts are regularly dispatched to manage and monitor the World Heritage of Yazd from CRATERRE based within the National Superior School of Architecture in Grenoble. • Yazd University and a university in Hungary have signed an 	

		<p>agreement to cooperate in the promotion of medical tourism.</p> <ul style="list-style-type: none">• In addition, requests to conduct academic research and investigation have arrived from numerous research agencies.
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APPENDIX 2: TOURISM RESOURCE SURVEY SHEET

Data Collection Survey on Tourism and Cultural Heritage in the Islamic Republic of IRAN Japan International Cooperation Agency (JICA)	Code: TBZ-01
	Date: 10 / 11 / 2017
	Surveyor: Akira OHARA

1. Site Classification

Site Name	Kandovan		
Province	East Azerbaijan	County	Osku
GPS Coordination	38 S, 610013.00 m E, 4183757.00 m N		

2. General Description

Age of Foundation	A.D. 14 C	Dynasty	Ilkhanid
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Kandovan is a village in the Osku County of the East Azerbaijan Province. This village exemplifies manmade cliff dwellings which are still inhabited. The troglodyte homes, excavated inside volcanic rocks and tuffs similar to dwellings in the Turkish region of Cappadocia. In 2017, the village population is 750, in 182 families. The construction of contemporary houses in the village has become a threat to historical landscape. As a countermeasure, ICHTO conducts monthly training of CRM (Customer Relation Management) targeting residents of the village of Kandovan.



3. Status

Owner	Village of Kandovan		
	<input type="checkbox"/> State Ministry	<input checked="" type="checkbox"/> Local Government	<input type="checkbox"/> Private/Foundation
	<input type="checkbox"/> Private/Individual	<input type="checkbox"/> Local NGO	<input type="checkbox"/> Abandoned
	<input type="checkbox"/> Others ()		
Registration	<input type="checkbox"/> UNESCO World Heritage	<input checked="" type="checkbox"/> UNESCO World Heritage Tentative	<input checked="" type="checkbox"/> National Monument
	<input type="checkbox"/> Others ()		
	<input type="checkbox"/> Restored in	by	<input type="checkbox"/> Good
Conservation Status	<input checked="" type="checkbox"/> Fair	<input type="checkbox"/> To be Rehabilitated	<input type="checkbox"/> Ruin
	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Status Local NGO
Focal Group for Site Development	Name	N/A	
	Contact	N/A	

4. Access

Access	1.0	hours from the city :	Tabriz
Public Transport	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Mode of Transport Bus, TAXI
Road Condition	<input type="checkbox"/> Good	<input checked="" type="checkbox"/> Fair	<input type="checkbox"/> To be Improved
Accommodation	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	1 hotel, 35 Bumgardis in Kandovan

5. Facilities & Materials

Facility	<input checked="" type="checkbox"/> Car Parking	<input type="checkbox"/> Tourist Information	<input type="checkbox"/> Ticketing Office
	<input checked="" type="checkbox"/> Public Toilets	<input type="checkbox"/> Museum	<input type="checkbox"/> Others ()
Informative Material	<input checked="" type="checkbox"/> Brochure	<input type="checkbox"/> Map	<input type="checkbox"/> Explanatory Board
	<input type="checkbox"/> AV Guidance	<input type="checkbox"/> Others ()	
Information Language	<input checked="" type="checkbox"/> Persian	<input checked="" type="checkbox"/> English	<input type="checkbox"/> French
	<input type="checkbox"/> German	<input type="checkbox"/> Others ()	

Data Collection Survey on Tourism and Cultural Heritage in the Islamic Republic of IRAN Japan International Cooperation Agency (JICA)	Code: TBZ-03
	Date: 12 / 11 / 2017
	Surveyor: Akira OHARA

1. Site Classification

Site Name	St. Thaddeus Monastery		
Province	West Azerbaijan	County	Maku
GPS Coordination	38 S, 460572.00 m E, 4327132.00 m N		

2. General Description

Age of Foundation	A.D. 1 C	Dynasty	Pre-Islamic
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According to the tradition of the Armenian Apostolic Church, Saint Thaddeus evangelized the region of Armenia and Persia. Thaddeus suffered martyrdom in Armenia, according to the same tradition, and is revered as an apostle of the Armenian Church. The church dedicated to him was first built on the present site in A.D. 68. In July 2008, the Monastery was registered into the UNESCO World Heritage List, including two other Armenian monuments, such as the Saint Stephanos Monastery and the Chapel of Dzordzor.



3. Status

Owner	Armenian Apostolic Church		
	<input type="checkbox"/> State Ministry	<input type="checkbox"/> Local Government	<input checked="" type="checkbox"/> Private/Foundation
	<input type="checkbox"/> Private/Individual	<input type="checkbox"/> Local NGO	<input type="checkbox"/> Abandoned
	<input type="checkbox"/> Others ()		
Registration	<input checked="" type="checkbox"/> UNESCO World Heritage	<input type="checkbox"/> UNESCO World Heritage Tentative	<input checked="" type="checkbox"/> National Monument
	<input type="checkbox"/> Others ()		
Conservation Status	<input checked="" type="checkbox"/> Restored in	by ICHTO	<input type="checkbox"/> Good
	<input type="checkbox"/> Fair	<input checked="" type="checkbox"/> To be Rehabilitated	<input type="checkbox"/> Ruin
Focal Group for Site Development	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	Status
	Name	N/A	
	Contact	N/A	

4. Access

Access	2.0 hours from the city :		Tabriz
Public Transport	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	Mode of Transport: TAXI
Road Condition	<input type="checkbox"/> Good	<input checked="" type="checkbox"/> Fair	<input type="checkbox"/> To be Improved
Accommodation	<input checked="" type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	

5. Facilities & Materials

Facility	<input checked="" type="checkbox"/> Car Parking	<input type="checkbox"/> Tourist Information	<input checked="" type="checkbox"/> Ticketing Office
	<input checked="" type="checkbox"/> Public Toilets	<input type="checkbox"/> Museum	<input type="checkbox"/> Others ()
Informative Material	<input checked="" type="checkbox"/> Brochure	<input type="checkbox"/> Map	<input checked="" type="checkbox"/> Explanatory Board
	<input type="checkbox"/> AV Guidance	<input type="checkbox"/> Others ()	
Information Language	<input checked="" type="checkbox"/> Persian	<input checked="" type="checkbox"/> English	<input type="checkbox"/> French
	<input type="checkbox"/> German	<input type="checkbox"/> Others ()	

