

**Effective Governance
and Policy Instruments:**

**A Short Look to the
Turkish Case**

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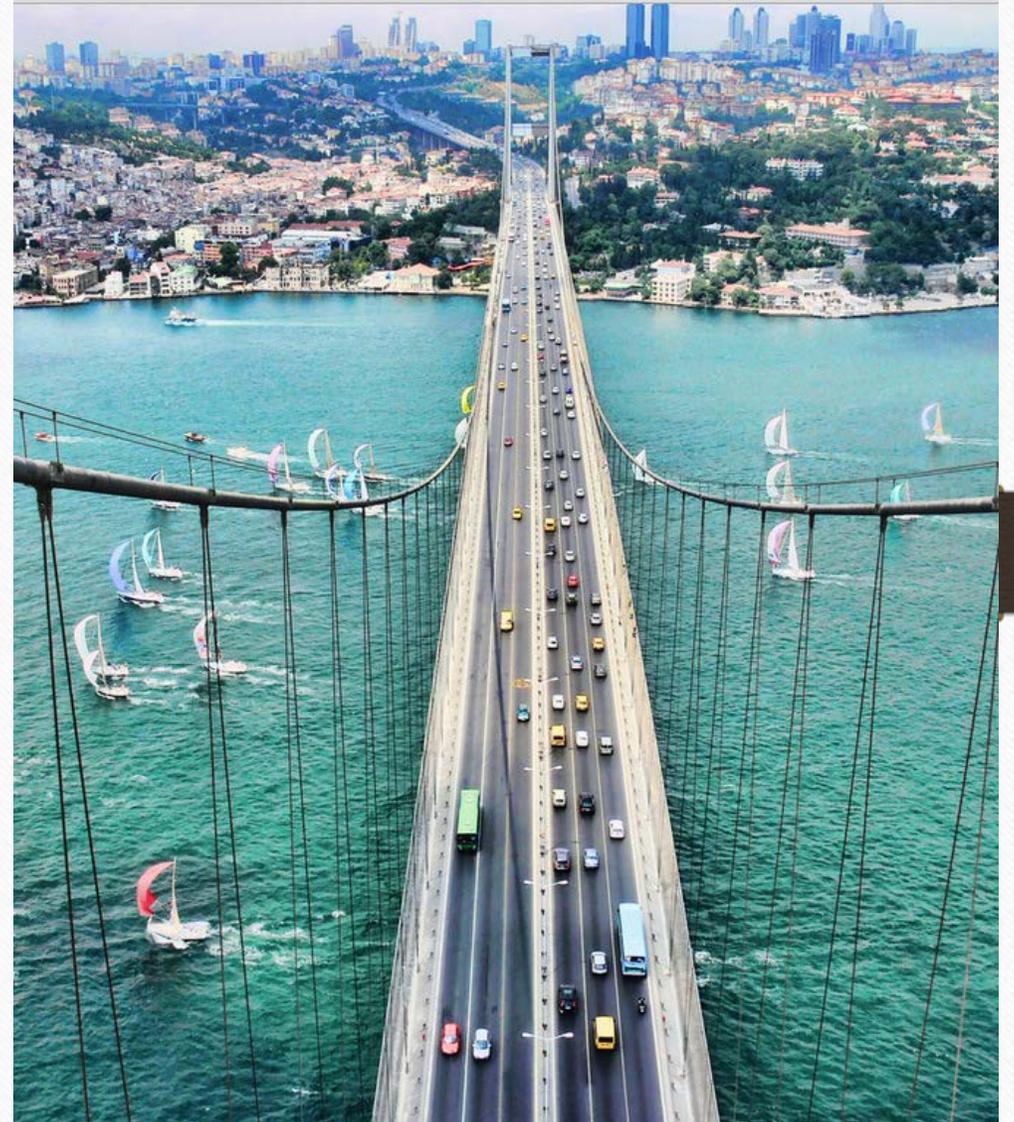
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Tailored and effective governance are key requirements for implementing sustainable tourism.

Governance is related to local and regional destination based politics.

The 4 strong points of effective governance:

- adopting new codes of the industry
- using new means of marketing
- keeping the product alive
- using an analytic approach

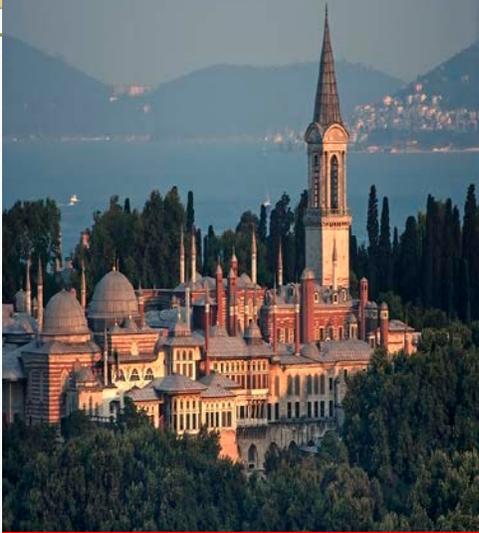


3 P's of Good Governance: PUBLIC PRIVATE PARTNERSHIP

But these 3 P's are more important:
PUBLIC PUBLIC PARTNERSHIP



TURKEY's Tourism Governance





TOURISM DEVELOPMENT IN TURKEY(1982-2007)

- The Tourism Encouragement Law of 1982 (subsidizing the private sector to invest in Belek region of Antalya)
- Increasing the service capacity of tourism (new hotels, airports, roads, human resources, recreation facilities etc.)
- Implementing KnowHow into projects, using new technology
- Attracting FDI(Foreign Direct Investment)



TOURISM DEVELOPMENT IN TURKEY(1982-2007)

- Aggressive Marketing
- New Markets
- Product chain enlargement
- Practicing a good governance model
(in collaboration with: ministry of FA, Economics, IA, Transportation, Development, Forestry, Work and Social Securities, Education etc.)



TOURISM DEVELOPMENT IN TURKEY(1982-2007)

Tourism Establishment Certificate



Travel Agencies
Association of Turkish Travel Agencies (TÜRSAB),1972
Law 1618 makes the membership of TÜRSAB compulsorily for TA's
Information Officer Certificate and Travel Agency Manager Certificate



Tourist Industry Investors
TYD Turkish Tourism Investors Association
Only the Investors who has more than 4 m. Investment portfolio in Tourist industry can be a member of TYD



Tourist property and marina operators
Associations
TUROB
TÜROFED
TUREB



Airline operators
THY national carrier and private air carriers (THY, TÖSHİD)



How did it work?

- 3 Regions getting special planning due to their unique products (Istanbul, Antalya and Cappadocia)
- Supporting the private sector while entering the market (e.g. Providing support to ecological and local products, women in jobs, education based projects, social responsibility projects)
- Promoting clean energy usage, clean seas





TOURISM DEVELOPMENT IN TURKEY(2007-2023)

- *Tourism Strategy of Turkey*, by Ministry of Tourism

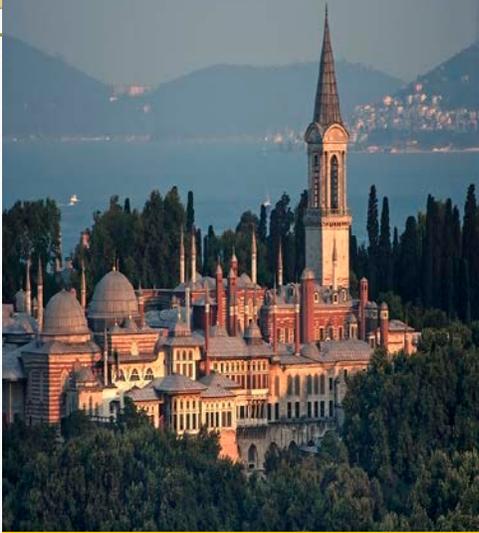
Vision: Place Turkey into top 5 Countries List, receiving higher numbers of Tourists and Revenues

Planning: Support an economic growth while reflecting the principles of sustainable tourism

Investment: Boost incentive schemes feasible and viable economic projects

Organisation: Implement good governance to ensure full and active participation of 3Ps and NGOs

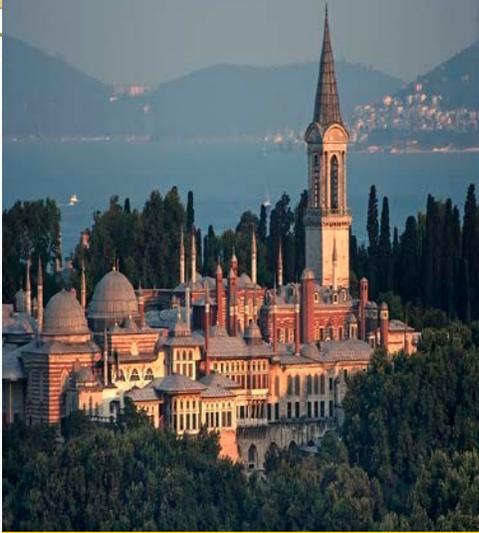




The Plan

- Domestic tourism (providing alternative tourism products)
- Research and Development
- Objectives:
 - ❖ new brandings
 - ❖ Sustainable R&D with stakeholders
 - ❖ Transportation and infrastructure strategy
 - ❖ Steering Committees
 - ❖ National Tourism Databank Unit
 - ❖ To ease private investment projects and minimize the public share in the cost

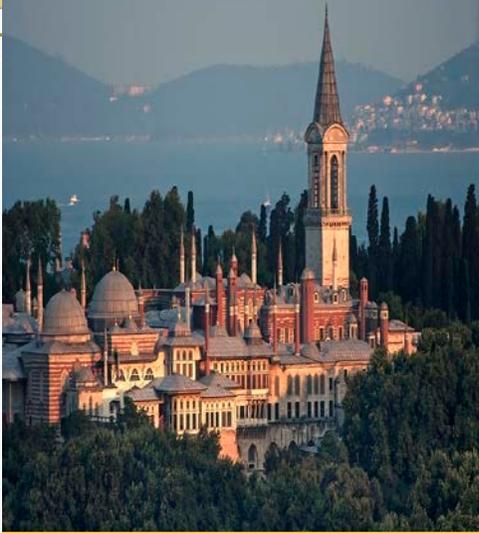




The Plan

- New marketing and promotion strategy: Destination Management
- To set up and introduce new education programs in tourism with measurable outcomes
- Service quality: Total Quality Management in every constituent of the travel industry
- City branding: new points of attraction for new travelers
- Tourism diversification: Health, Winter, Thermal, Golf, Spa etc.





The Plan

- Rehabilitation of the tourism regions:
 - ❖ Strengthening the infrastructure
 - ❖ Extending the tourism season
- Thematic zones and corridors
- Making the cities global brands



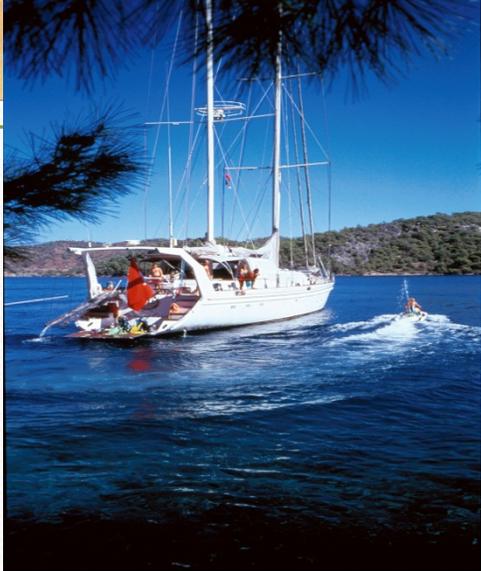


Implementation

Corporate structuring and governance will be shared by:

- National Tourism Council (and City Councils)
- National Planning Organisation
- Ministry of Culture and Tourism
- National Tourism Certification Service
- Domestic Tourism Research and Steering Unit





Implementation - Organisational Chart



TOURISM STRATEGY of TURKEY - 2023



The Facts

- 8160 Travel Agencies
- 4260 Hotels
- 1.612 Million Bed Capacity
- 21% of the Export Revenues
- 40% of the Foreign Deficit covered
- 890.000 Workers in the Industry
- 52 National Airports
- The Visitors: 1980 → 1,25M – 2014 → 41,4M



UNWTO DATA

- According to UNWTO; the number of foreign visitors to Turkey in 2014 brought the country to the 6th position in international ranking with respect to international arrivals, and to the 12th regarding tourism revenues.

RANK	COUNTRY	2014 TOURIST ARRIVALS*
1	FRANCE	83,7
2	USA	74,7
3	SPAIN	65
4	CHINA	55,6
5	ITALY	48,6
6	TURKEY	39,8
7	GERMANY	33
8	UK	-
9	RUSSIA	29,8
10	MEXICO	29,1
*MILLIONS		

NO	COUNTRIES	2014 TOURISM REVENUES*
1	USA	177
2	SPAIN	65,2
3	CHINA	56,9
4	FRANCE	55,4
5	MACAU	50,8
6	ITALY	45,5
7	UK	45,3
8	GERMANY	43,3
9	THAILAND	38,4
10	HONG KONG	38,4
12	TURKEY	29,6
*BILLION USD		

TURKEY AIMS TO REACH

- **50 million visitors**
- **\$ 50 billion annually by 2023**



Thank you

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