



COMCEC

**Standing Committee
for Economic and Commercial Cooperation
of the Organization of Islamic Cooperation (COMCEC)**

COMCEC TOURISM OUTLOOK 2016



**COMCEC COORDINATION OFFICE
August 2016**



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Preface

The COMCEC Strategy, adopted during the 4th Extraordinary Islamic Summit held in Makkah Al-Mukarramah on 14-15 August 2012, envisages Working Group Meetings as one of the main instruments for its implementation. Through the Working Groups, country experts get the chance of elaborating the issues thoroughly in the respective cooperation areas and sharing their good practices and experience. The Working Groups are established for each cooperation area defined by the Strategy, namely Trade, Transport and Communication, Tourism, Agriculture, Poverty Alleviation, and Finance.

The COMCEC Outlooks are prepared in each cooperation area of the Strategy with a view to exploring the global trends and current situation in the OIC Member Countries in the respective area and enriching the discussions during the Working Groups Meetings by providing up-to-date data.

The COMCEC Tourism Outlook 2016 is prepared by Ms. Aslı TAŞMAZ DADAKOĞLU, expert at the COMCEC Coordination Office, with the objective of providing general information on the status of tourism sector in the Member States. It dwells on the major issues with regards to tourism sector development in the light of international tourism trends, provides insights on the current status of the OIC Member States and makes comparative analyses with the different country groupings to demonstrate the situation in the Member States and thus the cooperation potential.

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1 Introduction

Tourism industry has experienced continued expansion and diversification, becoming one of the most rapidly developing industries in the world. From an activity maintained by privileged people only some decades ago, tourism today enables more than one billion people to move across international borders each year. Globalization of goods and services, increased leisure time, the technological and transport revolutions and rising middle classes, have positioned tourism as one of the world's leading growth tool. Competition between the tourist-receiving countries has been growing increasingly to obtain the highest share from the expanding international tourism market as a result of the enhanced transportation facilities and additional income allocated to travel expenses, in line with the improving level of welfare.

Tourism has continued to be a critical sector in both advanced and developing economies for economic development, poverty alleviation and sustaining employment. Improvement of the tourism sector contributes to employment, raises national income, and can improve a country's balance of payments. In this regard, tourism sector is an important driver of growth and prosperity and can play a leading role in reducing poverty particularly in developing countries and the Least Developed Countries (LDCs).

As a trade in services category, tourism ranks fourth after fuels, chemicals and food products. As a major source of foreign exchange and investment, tourism creates much needed employment and business opportunities. Tourism's unparalleled cross-cutting nature and multiple links to the other economic sectors, further positions it as an efficient multiplier in global development strategies. In parallel with these circumstances, there is a substantial emphasis on the tourism sector within the Organization of Islamic Cooperation (OIC). COMCEC Economic Summit held in 2009 has defined the tourism as one of the three priority sectors together with agriculture and transportation. In addition to this, tourism sector is identified by the COMCEC Strategy as one of the six cooperation areas (the other areas are trade, transportation, agriculture, poverty alleviation, and finance).

This Outlook 2016 aims to provide a brief account of the situation in the OIC Member Countries. In this respect, the major issues with regards to tourism sector development in the light of international tourism trends, the current status of the member countries and some comparisons regarding competitiveness of the OIC Member States will be analyzed.

2 The Importance of Tourism for Development

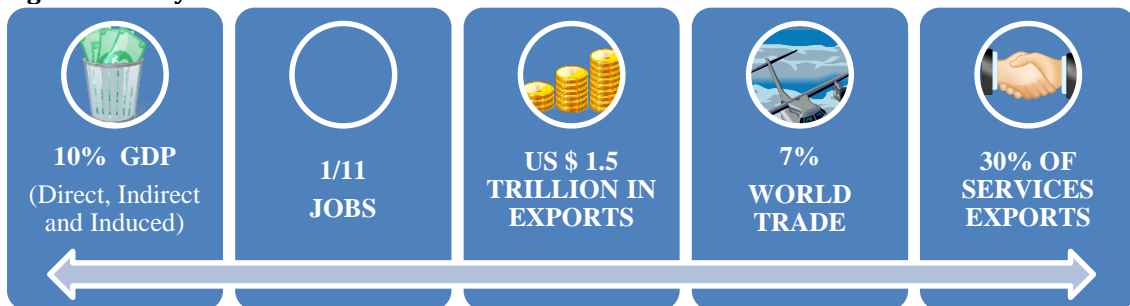
A strong tourism sector contributes in many ways to development and the economy. It makes both direct contributions, by raising the national income and improving the balance of payments, and indirect contributions, via its multiplier effect and by providing the basis for connecting countries, through hard and soft infrastructure—attributes that are also critical for a country’s general economic competitiveness.

Over the past decades, many new destinations have emerged, challenging the traditional ones of Europe and North America. For many developing countries, tourism is one of the main sources of foreign exchange income and the number one export category, creating much needed employment and opportunities for development. The main positive economic impacts of tourism relate to foreign exchange earnings, contributions to government revenues, generation of employment and business opportunities. Local tourism jobs and business opportunities help to reduce rural-urban migration, while opening doors to the young and fostering gender equality through job opportunities.

Based on the information from countries with data available, the World Travel & Tourism Council (WTTC) estimated that travel & tourism’s contribution directly to worldwide gross domestic product (GDP) was 3 % in 2015 and is expected to rise by 3.3% in 2016. With direct and indirect effects of more than 185 supply-side economic activities that have significant connections to tourism, its contribution to GDP is 9.8%, a total of US\$7.2 trillion, and is expected to grow by 3.5 to US\$7.4 trillion. It is also estimated that travel and tourism sector have attracted capital investment of US\$775 billion in 2015 (WTTC, 2016a).

It provided 107,8 million direct (3.6% of total employment) jobs in 2015 and direct contribution to employment is expected to rise by 2 % in 2016. Since tourism affects transportation, hotels and lodging, food & beverage, cultural and entertainment, banking & finance and promotion and publicity services, tourism’s contribution to employment tends to be slightly higher. In 2015, nearly 284 million jobs were supported in tourism related industries (WTTC, 2016a). Tourism’s contribution is estimated as 6-7% of the overall number of jobs or one in 11 jobs globally (UNWTO, 2016a). According to the WTTC, travel & tourism will support 370 million jobs which indicates 11% of total employment (WTTC, 2016a).

Figure 2.1 Why Tourism Matters?



Source: UNWTO, Tourism Highlights 2016 Edition.

According to the UNWTO, total exports earnings generated by international tourism in 2015 reached US\$ 1.5 trillion or US\$ 4 billion a day on average. International tourism represents 7% of the world’s exports in goods and services, up from 6% in 2014, as tourism has grown faster

than world trade over the past four years. Tourism exports account for as much as 30% of the world's exports of commercial services. Globally, tourism ranks third after fuels and chemicals and ahead of food and automotive products as an export category. However, in emerging economies, tourism ranks third after fuels and food category (UNWTO, 2016a).

In over 150 countries, tourism is one of the top five foreign exchange earners and in 60 countries it is the number one foreign exchange earner. In 23 of the 49 Least Developed Countries, international tourism is among the top three foreign exchange earners, and for 7 LDCs, it is their single largest revenue earner (UNWTO, 2012b).

It is known that tourism contributes in reducing poverty and empowering women, youth and migrant workers and provides new employment opportunities. There are three main pathways through which tourism affects poverty reduction. Firstly, the wages and earnings of workers or entrepreneurs who participate in the sector can be regarded as direct effects of tourism. Tourism is more labor intensive than other sectors, and uses a relatively high proportion of unskilled or semi-skilled labor. For advanced, diversified economies, the contribution of tourism to GDP ranges from approximately 2% for countries where tourism is a comparatively small sector, to over 10% for countries where tourism is an important pillar of the economy. For small islands and developing countries, the weight of tourism can be even larger, accounting for up to 25% in some destinations like in the Member Countries. Secondly, indirect effects occur through the tourism value chain which includes inputs like food and beverage, construction, transportation, furniture and many other sectors. Evidence suggests that in developing countries, the inter-sectoral impact adds an extra 60-70 % on top of the direct effects of tourism. Finally, dynamic effects of tourism occur on the livelihood strategies of local households, the business climate for small enterprise development or infrastructure in countries. Moreover, tourism tends to employ women and young people and enhance their economic positions (Ashley, C. and others, 2007).

A cross country study by the IMF showed that an increase of one standard deviation in tourism activity would lead to an annualized additional growth of about 0.5 percentage point per year, *ceteris paribus*, that means everything else being constant (IMF, 2009). Thus, particularly low income economies should view investing in its tourism industry as a means to stimulate growth over the long term and enabling the poor to share in economic gains.

3 Overview of International Tourism in the World

3.1 Key Tourism Trends in the World

The last six decades have witnessed extraordinary growth of tourism sector. In spite of the multiple challenges and shocks –from man-made crises, to natural disasters and economic crises, from which the world is still recovering– tourism, although vulnerable, has always bounced back, proving its resilience and capacity to rebound. The next two decades will be of sustained growth for the tourism sector. International tourist arrivals are estimated to increase on average by 43 million annually between 2010 and 2030 (Tourism Towards 2030, 2012).

The share of emerging economies in the international tourism market is increasing. This increase will be slightly higher than the rate achieved in the period 1995-2010. For the decade 2010-2020, increases will be more moderate in the first years and pick up in the middle of the period, and they will gradually slowdown. Over time, the rate of growth is slowing down gradually, from 3.7% in 2014 to 2.5% in 2030. This is the result of a combination of four factors (Tourism Towards 2030, 2012):

- The base volumes are higher, so smaller increases still add substantial numbers;
- Lower GDP growth, as economies mature;
- A lower elasticity of travel to GDP;
- Increasing transport costs.

Future arrivals will be spread more widely across the globe and travel between regions will continue to grow slightly faster than travel within the same region. The share of emerging economies in the international tourism will surpass the share of advanced ones. Many of the new arrivals will be to destinations in Asia, Latin America, Central and Eastern Europe, Africa and the Middle East. The future brings enormous opportunities for tourism to take centre stage in the political and economic agenda, seeking recognition for its contribution to economic growth and development. It also brings added challenges and responsibilities for tourism sector to take the lead in mitigating its potential negative impacts on host communities and the environment (Tourism Towards 2030, 2012).

According to Tourism Towards 2030; by 2030, 58% of international arrivals will be recorded in the emerging economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa (Tourism Towards 2030, 2012).

Asia and the Pacific will gain most of the new arrivals. South Asia will be the sub-region with the fastest growth in international arrivals. North-East Asia will be the most visited sub-region in 2030 (Tourism Towards 2030, 2012).

It is known that air transport industry has substantially reduced travel time and travel costs for longer haul travel. Air transport will continue to increase its market share, but at a much slower pace. The cost of air transport will cease declining, and is assumed to grow at an average annual rate of 1.1% per year from 2010 to 2030 (Tourism Towards 2030, 2012).

Conclusions with respect to the consumer profile and the trends of the next 20 years reached by assessing results of various studies conducted by the World Tourism Organization can be summed up as follows:

- Long-haul travel and overseas travel will increase and new destinations in relevant regions will gain importance.
- Electronic media (CD-ROM maps, Internet, web sites, etc.) will be increasingly more important for the purpose of choosing destinations and making reservations.
- In line with the increasing education and welfare level of individuals, the number of experienced traveler groups will increase.
- Preferences of tourists will become polarized and demand for innovation and variety will rise; the emphasis will be on comfort and adventure. For product development, 3S (i.e., sun-sand-sea) will be replaced by 3E (i.e., excitement-education-entertainment).
- In parallel with an increase in average human life expectancy, retirement period will be longer and people will have more time for vacation.
- Singles, and couples without children, and 65+ (“the third age”) groups are anticipated to constitute the larger percentage of the world population with more resource allocated to travel and entertainment. By the year 2030, the fastest increases in those 65 and older are occurring in developing countries, which will see a jump in those populations of 140 percent. By 2040, the global population is projected to number 1.3 billion older people—accounting for 14 percent of the total (Hammond R., 2011).
- Average working time will decrease and people will have more time for vacation.
- Consumers will be informed and protected within the framework of universal systems, and the influence of campaigns addressed to consumers for a lasting and balanced development of tourism will be stronger.

Horwart HTL has also identified 10 global trends which will influence mid- and long-term tourism development. Among these, first five of trends will have a major influence on demand in the tourism sector but will also impact the second set of trends, which concerns changing supply. Together, they represent forces which will shape the future of tourism.

According to this report, global population is aging and as a result *silver hair tourists'* segment is emerging -- with specific desires and needs in terms of customization, service consumption, security and desired products. The share of world's population over the age of 60 increased from 8% in 1950 to 12% in 2013. According to forecasts, this share will reach 21% by 2050. Silver hair tourists are an important tourist segment and are expected to spend more than all other age groups on holiday travels with a satisfactory disposable income, less home responsibilities, more time to travel and relatively good health. They require tailor-made services and prefer to build trust through face-to-face interaction with providers. They have different preferences and interests, expectations and needs, and their focus is often based on special interest. Health and wellness travel is popular among silver hair tourists (Horwart HTL,2015).

Figure 3.1 Tourism Megatrends



Source: Horwath HTL, 2015

In addition to aging population, generation Y (also known as Millennials) and generation Z, (known as iGen) are also an important market for tourism sector. These generations are technology driven age groups. Among these, millennials are expected to represent 50% of all travelers by 2025 and before that the entire tourism value chain is being adjusted to meet their lifestyle requirements. To meet their needs, tourism services will be more transparent and tech savvy, with a strong focus on empathy and customer connection. On the other hand, generation Z is believed to be totally different from generation Y in so much as they already have higher access to information, a more dynamic lifestyle, and a higher level of education, an accelerated adoption of change and faster spending (Horwart HTL,2015).

The increase in average income and the fall in levels of absolute poverty are resulting in a growing middle class. It is expected that the middle class will increase from 1.8 billion in 2009 to 3.2 billion by 2020 and 4.9 billion by 2030. Most of this growth is expected from Asia-Pacific and their characteristics will have a growing importance and impact on the tourism products and services (Horwart HTL,2015).

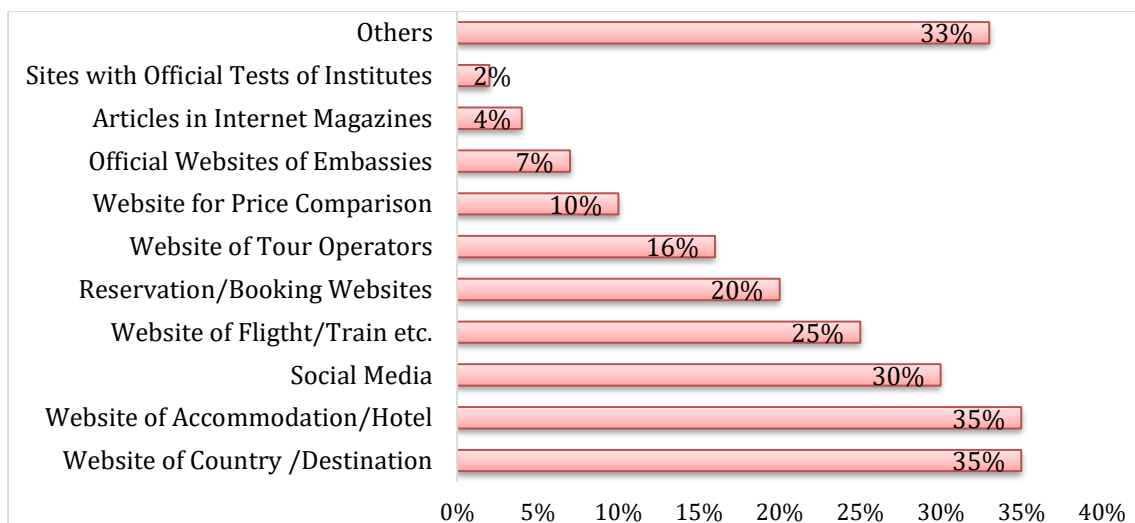
The weight of emerging destinations in the international tourism market is increasing. According to UNWTO; by 2030, 57% of international arrivals will be from the emerging destinations.

Governments around the world are facing numerous political issues that might influence tourism destinations. Today, there is more need than ever to secure political, economic and social stability in the countries. Political tensions, terrorism and civil riots impose a threat to the future of tourism in any destination. According to a research by WTTC, the impact of these crises on tourism and the length of time needed to return to previous levels differ widely depending on the type of crisis and diverse factors. Whether tourists are directly targeted or affected, which locations are involved, the extent of infrastructure damage, the time of the year, as well as the scale and tone of media coverage are the factors that affect the scale of their impact on tourism. In contrast to popular opinion, terrorism does not have the biggest impact, however political turmoil has a much more gradual impact, often lasts for a long time and is difficult to judge when it is over. To be successful, it is clear that crisis management is becoming a necessity for all

tourism stakeholders. Five-point crisis communications plan should cover clear information, consistency, openness and accessibility and sympathy for victims. Governments and authorities should ensure clear and effective communications (ITB, 2015).

Among supply side trends, tourism is strongly influenced by the progress of the technological revolution. The Internet has already changed the way tourists search, book and experience their travel. The whole industry has to adopt new technology trends and reshape the way they provide services. 75% of international travelers use online information sources to plan their trip. About 30% of these 'online' international travelers actively use social media when researching about their trip (ITB, 2015).

Figure 3.2 Internet Information Sources



Source: ITB World Travel Trends Report 2015-2016

International travelers focus on the most relevant social media for travel information rather than the biggest social media platforms. Review sites, travel blogs and travel forums are used much more intensively than general social networks.

Loyalty within tourism sector is expected to decline in future. There will be no more complicated sign-up forms in order to collect and no more risk of losing them over time. Physical loyalty cards are becoming popular and loyalty programs now have to be integrated into the tourist experience.

Health and healthy lifestyle will become increasingly important in tourists' decision making and tourism sector will offer products and services according to traveler's health and healthy lifestyle.

The sharing economy has showed incremental growth in recent years and is forecast to reach USD 335 billion by 2025, according to projections by PricewaterhouseCoopers. Tourism is one of the sectors that much of this growth occurred, as the fast paced growth of peer-to-peer and shared usage platforms is changing the tourism marketplace and giving people new options for where to stay, what to do and how to get around. Sharing economy platforms have adopted

different business models, some of which closely pattern traditional tourism activities, while others appeal to users' sense of community (OECD, 2016).

This rapid growth of the sharing economy is placing pressure on existing tourism policy frameworks. This requires a balanced, informed approach, which considers all interests. Tourist protection, safety and quality assurance frameworks are important factors to translate to the sharing economy model. Governments should make sure that they capture the opportunity to stimulate innovation and support the development of tourism, while addressing the challenges it poses for the traditional tourism sector and the impacts on society (OECD, 2016).

Governments are recommended to modernize policy and regulatory approaches, re-think policy incentives, better understand the policy environment and test new approaches, utilize the data, strengthen data collection and research on the impacts of the sharing economy on tourism and local communities (OECD, 2016).

Economic, social and environmental pillars have to be balanced in order to ensure the long-term sustainable development of tourism. Sustainable tourism development requires the participation of all relevant stakeholders.

3.2 International Tourist Arrivals

According to the UNWTO, international tourist arrivals grew 4.6% in 2015, equivalent to 52 million more arrivals and reached to 1.186 million tourists. Despite occasional shocks, international tourist arrivals have shown virtually uninterrupted growth – from 277 million in 1980 to 529 million in 1995 and 1.186 million in 2015 (UNWTO, 2016b). 2015 was the sixth consecutive year of above-average growth in international tourism following the 2009 global economic crisis. Despite ongoing geopolitical, economic and health challenges in some parts of the world, demand continued to be strong in most of the destinations.

Tourism flows were influenced by three major factors in 2015. These were the unusual strong fluctuations in exchange rates, decline in the price of oil and other commodities which increased disposable income in importing countries but weakened demand in exporting countries and increased global concern about safety and security in some destinations (UNWTO, 2016a).

Growth is expected to continue in 2016 according to the 2015 level and will be above the UNWTO's long term projections (for 2030: +3.8% a year on average between 2010 and 2020). International tourist arrivals grew by 5.3% between January and April 2016, meaning of 18 million more arrivals compared to same period of last year. UNWTO forecasts international tourist arrivals to increase by 3.5% to 4.5% over the full year 2016 (UNWTO, 2016a)

Table 3.1 International Tourism Arrivals and Tourism Receipts

	2000	2005	2010	2014	2015	2016*
Number of tourists (millions of people)	674	809	950	1.134	1.186	1.235
Annual change (percent)	8,1	5,9	6,5	4,2	4,6	3,5-4,5
Tourism receipts (billion dollars)	476	681	931	1.309	1.260	-
Annual change (percent)	-	-	9,4	5,1	4,4	-

* Forecast

Source: World Tourism Organization

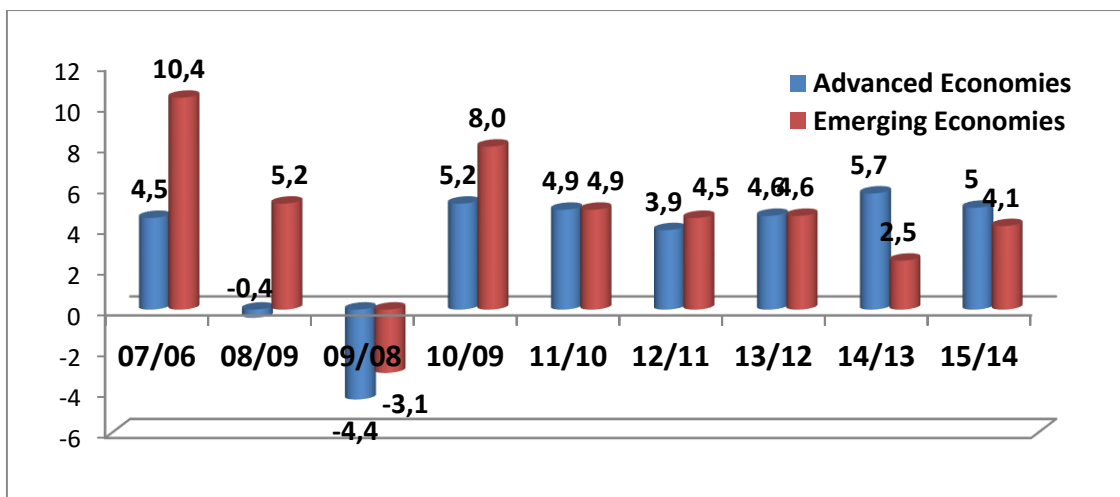
International tourism market has become characterized by wide geographical distribution and continuous diversification of destinations. New tourist-receiving markets have been emerging in the developing regions of Asia-Pacific, the Middle East and Africa and this rapid expansion of new markets has increased the competition in the tourism sector.

While many destinations share in the overall growth, results are more mixed than usual across destinations. According to the UNWTO, emerging economies (+4.1%) were below the advanced economies (+5%), with Americas (+5.9%) showing the strongest results in 2015. In 2015, international tourist arrivals to advanced economies were 653 million, while it was 533 million for emerging economies.

Results across emerging economy destinations were uneven in a context of lower commodity prices and weaker economic growth. In 2015, the economic scenario remained comparatively volatile with growth gradually picking up in advanced economies contrasting with a slowdown in emerging ones.

According to the Figure 3.2, it can be seen that the growth of international tourist arrivals in emerging economies is greater than advanced economies for the years 2007-2012. However, since 2013, advanced economy destinations showed relatively faster growth in tourist arrivals than emerging economy destinations.

Figure 3.3 Change in International Tourist Arrivals (%)



Source: World Tourism Organization, Tourism Barometer 2016 July & Tourism Highlights 2016

In terms of regions, the UNWTO stated that Americas (+5.9%) was the best performer in 2015 and the number of international tourists grew by 11 million to reach 1193 million in this region.

Table 3.2 International Tourism Arrivals by Region (Millions)

Tourist Arrivals	2000	2010	2013	2014	2015	Share (%)
World	674	949	1.087	1.134	1.186	100
Europe	386.4	488.7	566.6	580.2	607.6	51.2
Asia&Pacific	110.3	205.4	249.8	264.3	279.2	23.5
Americas	128.2	150.1	168.0	181.9	192.6	16.2
Africa	26.2	49.7	54.8	55.3	53.5	4.5
Middle East	22.4	54.8	48.2	52.4	53.3	4.5

Source: World Tourism Organization, Tourism Highlights 2016

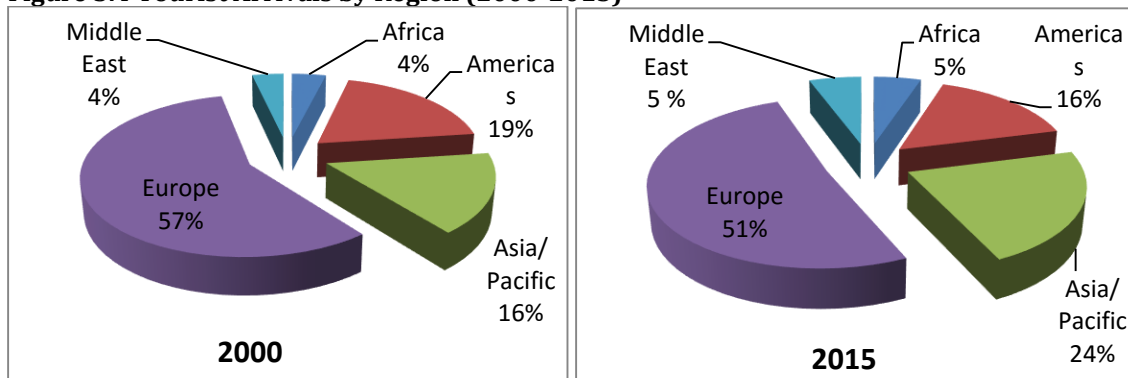
According to the Table 3.2, **Europe** (+4.7%), **Asia and the Pacific** (+5.6%), **the Americas** (+5.9%), Middle East (+1.7) showed continued growth in 2015 except **Africa** (-3.3%).

In 2015, Europe (+5%) led growth in absolute and relative terms supported by a weaker euro vis-à-vis the US dollar and other main currencies. Arrivals reached 608 million, or 28 million more than in 2014. Asia and the Pacific (+6%) recorded 15 million more international tourist arrivals last year to reach 279 million. International tourist arrivals in the Americas (+6%) grew 10 million to reach 193 million, consolidating the strong results of 2014. The appreciation of the US dollar stimulated outbound travel from the United States. International tourist arrivals in the Middle East grew by an estimated 5% to a total of 53 million, consolidating the recovery initiated in 2014. Limited data available for Africa points to an estimated 3% decrease in the number of international tourists.

Both subregions, North Africa (-8%) and Sub-Saharan Africa (-1%), recorded lower inbound figures as geopolitical factors continue to impact major destinations. The recent security problems have weighed down on tourist demand in the region, as have health concerns in the aftermath of the Ebola outbreak in a few West African destinations. Slower economic growth in countries depending on oil and commodity exports has also weakened intraregional demand.

To analyze the tourism trends in these regions, it would be beneficial to compare the results of the last decade. The figure below compares the shares of tourist arrivals by regions for the years 2000 and 2015.

Figure 3.4 Tourist Arrivals by Region (2000-2015)



Source: UNWTO, 2016

The figure demonstrates that there is a tendency of increase in tourist arrivals in Asia-Pacific Region and decrease in Europe and Americas Region.

According to *Tourism Towards 2030*, UNWTO's long-term outlook and assessment of future tourism trends, the number of international tourist arrivals is expected to increase by 3.3% a year on average from 2010 to 2030. This represents some 43 million more international tourist arrivals every year, reaching a total of 1.4 billion arrivals by 2020, 1.5 billion arrivals by 2023 and 1.8 billion by 2030.

International tourist arrivals in the emerging-economy destinations of Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East, and Africa will grow at double the pace (4.4 percent a year) of advanced-economy destinations (2.2 percent a year). The market share of emerging economies increased from 30% in 1980 to 45% in 2015, and is expected to reach 57% by 2030, equivalent to over 1 billion international tourists.

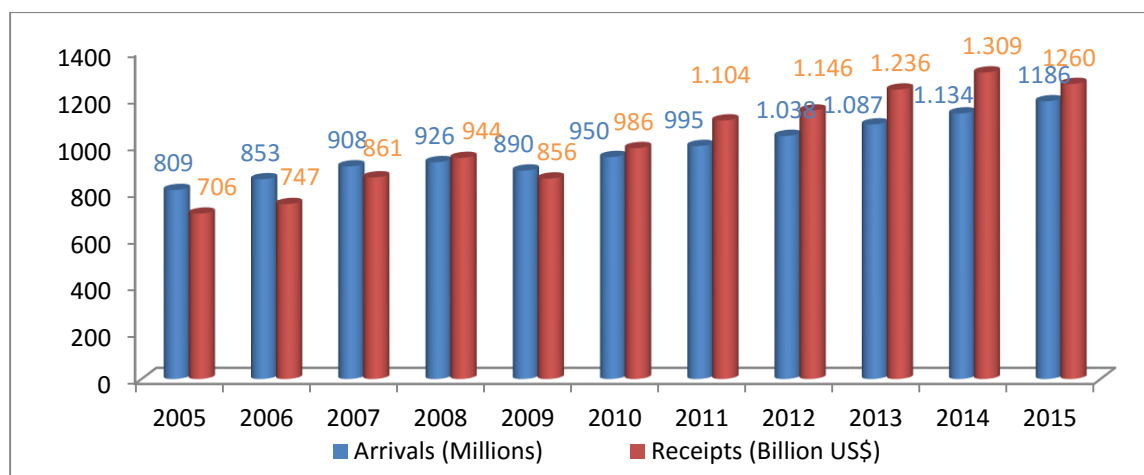
3.3 International Tourism Receipts

As an internationally traded service, inbound tourism has become one of the world's major trade categories. International tourism accounts for 30% of the world's export of services and 6% of overall exports and goods and services. International tourism receipts are the earnings generated in destination countries from expenditure by international visitors on accommodation, food and drink, local transport, entertainment, shopping and other services and goods. For the receiving country receipts count as exports and for many destinations tourism is a vital source of foreign currency earnings and an important contributor to the economy, creating much needed employment and opportunities for development. From the period 1980 to 2015, international tourism receipts increased from US\$ 125 billion in 1980 to US\$ 1,260 billion in 2015 (UNWTO, 2016 TH).

The Figure 3.5 shows the international tourism receipts as well as tourist arrivals for the period 2005-2015. International tourism receipts grew by 4.4 % in real terms (i.e. using local currencies at constant prices in order to adjust for inflation and exchange rate fluctuations) in 2015 by reaching to US\$ 1,260 billion. The unusually strong exchange rate fluctuations in 2015 significantly influenced receipts for individual destinations and regions expressed in current US dollars. As the US dollar appreciated against virtually all other currencies in 2015, earnings in local currencies converted to US\$ were in many cases lower than in 2014. In absolute terms, international tourism receipts in destinations around the world decreased by US\$ 49 billion.

In addition to receipts earned in the destinations (the travel item of the balance of payments), international tourism also generated US\$ 221 billion in exports through international passenger transport services rendered to non-residents in 2015. As such, total receipts from international tourism, including international passenger transport, reached US\$ 1.5 trillion in 2015. This means that international tourism contributes US\$ 4 billion a day to global export earnings.

Figure 3.5 International Arrivals & Tourism Receipts (2005-2015)



Source: UNWTO

Earnings in euro area destinations for instance rendered 16% fewer US dollars in 2015 compared to 2014. As a result, total receipts in absolute US\$ terms were US\$ 49 bn lower in 2015 (US\$ 1260 bn) than in 2014 (US\$ 1309 bn).

Advanced economy destinations (+3.1%) recorded somewhat slower growth in receipts than emerging economy destinations (+6.7%).

By region, the largest increase in receipts for the Americas was recorded as an increase +7.8% (i.e. constant price change) in 2015. It is followed by Asia and the Pacific and the Middle East both grew by 4%, while in Europe they grew by 3% and in Africa by 2%.

Table 3.3 International Tourism Receipts by Region (Billion \$)

Tourism Receipts	2000	2013	2014	2015	Share (%)
World	475	1,197	1,309	1,206	100
Europe	234.5	491.7	513.5	450.7	35.8
Asia & Pacific	86.7	360.7	420.1	418.3	33.2
Americas	132.8	246.4	288.0	303.7	24.1
Africa	10.8	35.1	36.1	33.1	2.6
Middle East	12.7	45.1	51.6	54.4	4.3

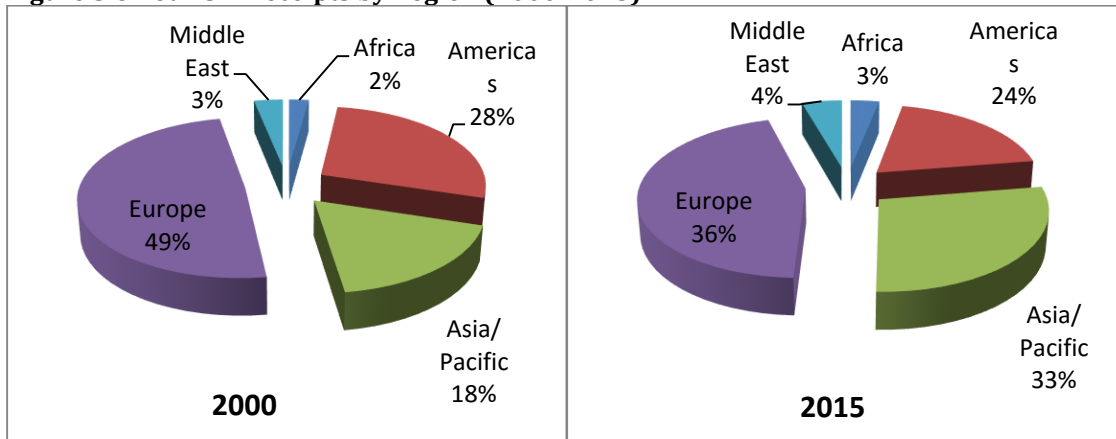
Source: UNWTO, Tourism Highlights 2002&2013&2016 Edition

According to the UNWTO; Americas, which accounts for 24% of international tourism receipts worldwide, shows the biggest growth and increased its tourism receipts by 8% in real terms to US\$304 billion. Many destinations benefited from the appreciation of US dollar, driving tourism demand for the United States.

In Europe, international tourism receipts grew by 3% in real terms to US\$ 451 billion, representing 36% of worldwide receipts. The weaker Euro in 2015 has boosted the region's

appeal to non-euro markets, and the recovery of many European economies has increased intra-regional tourism.

Figure 3.6 Tourism Receipts by Region (2000-2015)



Source: UNWTO, Tourism Highlights 2013 & 2016 Edition

Accounting for 33% of international receipts, in 2015, Asia-Pacific region earned US\$ 418 billion in international tourism receipts, this means an increase of 4% in real terms according to 2014.

In 2015, Africa continued to struggle with health and security challenges, as well as slower economic growth due to lower oil and commodity prices. By taking 3% of worldwide tourism receipts, this region earned US\$ 33 billion in international tourism receipts, meaning an increase of 2% in real terms.

International tourism receipts increased by 4% in real terms to US\$ 54 billion for Middle East which has a share of over 4% in worldwide receipts.

There is a tendency of increase in tourism receipts in Asia-Pacific Region and decrease in Europe and Americas region. Especially, market share of Europe in international tourism receipts decreased from 41% in 2014 to 36% in 2015.

4 International Tourism in the OIC Member Countries

In the light of the above mentioned overview of the trends in international tourism, this section aims to assess the performance and economic role of the international tourism in the Member Countries.

The OIC Member Countries are located in four continents on all over the world. Besides their geographical heterogeneity, the Member Countries do not constitute a homogenous economic group due to their different development levels. Most of the Member Countries are developing countries and 21 of them are the Least Developed Countries (LDCs).

Given this state of affairs, it is expected that tourism might play an important role in economic field regarding particularly sustainable development and poverty alleviation in the Member Countries.

According to WTTC, the direct contribution of Travel & Tourism to GDP in 2015 was \$213.3 billion (3.4% of GDP) in the OIC member states. This is forecast to rise by 3.5% to \$220.9 billion in 2016. The direct contribution of Travel & Tourism to GDP is expected to grow by 4.8% yearly to \$352.2 billion (3.5% of GDP) by 2026.

The total contribution of Travel & Tourism to Member States' GDP (including wider effects from investment, the supply chain and induced income impacts, see page 2) was USD551.2 bn in 2015 (8.7% of GDP) and is expected to grow by 3.8% to USD572.4 bn (8.8% of GDP) in 2016. It is forecast to rise by 4.9% pa to USD926.7bn by 2026 (9.3% of GDP) (WTTC. 2016).

Table 4.1 Estimates and Forecasts for Travel&Tourism Economic Impact in OIC Member States

COMCEC	2015 (\$ billion) ¹	2015 % of total	2016 Growth ²	2026 \$ billion ₁	2026 % of total	Growth ₃
Direct contribution to GDP	213.3	3.4	3.5	352.2	3.5	4.8
Total contribution to GDP	551.2	8.7	3.8	926.7	9.3	4.9
Direct contribution to employment⁴	15,393	2.8	1.7	19,980	2.8	2.5
Total contribution to employment⁴	39,716	7.1	1.9	52,203	7.3	2.6
Leisure spending	287.4	2.6	3.3	478.0	2.7	4.9
Business spending	89.9	0.8	5.3	142.2	0.8	4.2
Capital investment	99.1	6.3	5.2	175.7	6.9	5.4

¹2015 constant prices and exchange rates; ²2016 real growth adjusted for inflation (%); ³ annual real growth adjusted for inflation; ⁴000 jobs

Source: WTTC, Economic Impact 2016 Report-COMCEC

Travel & Tourism generated 15,393,000 jobs directly in 2015 (2.8% of total employment) and this is forecast to grow by 1.7% in 2016 to 15,657,500 (2.7% of total employment). This includes employment by hotels, travel agents, airlines and other passenger transportation services. It also includes, for example, the activities of the restaurant and leisure industries directly supported by tourists. By 2026, Travel & Tourism will account for 19,980,000 jobs directly, an increase of 2.5% pa over the next ten years. Total contribution of travel and tourism to employment in OIC member states is 39,716,000 jobs in 2015 (7.1% of total employment) (WTTC. 2016).

Leisure spending (inbound and domestic) in OIC member states generated 76% of direct travel & tourism GDP in 2015.

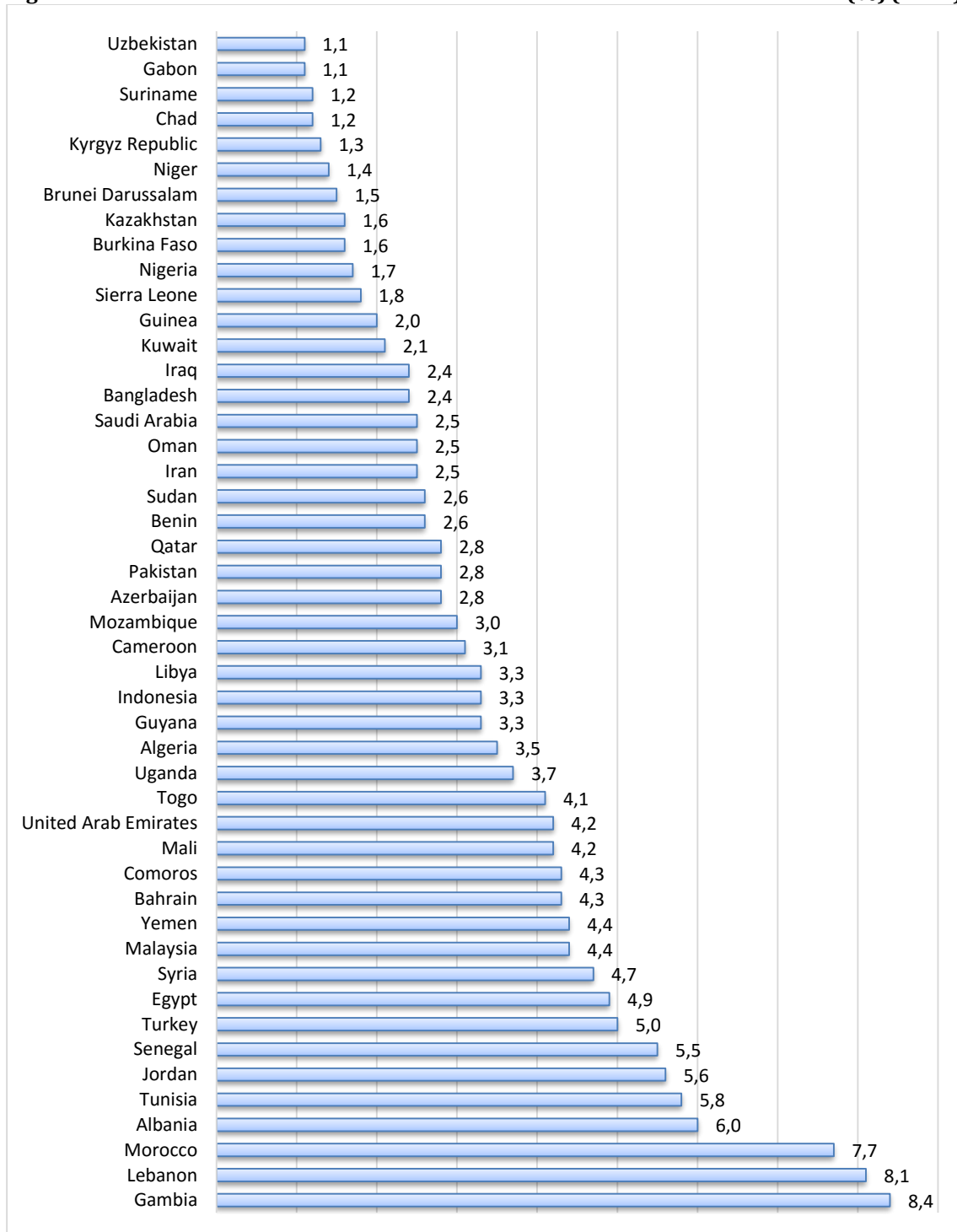
In Figure 4.1, direct contribution of travel and tourism to GDP can be seen for 47 member countries in 2015. This figure expresses the importance of travel and tourism for economies of member states. Meanwhile, this figure excludes Maldives, since travel and tourism's direct contribution was 52.4% in Maldives which makes the figure inapprehensible to analyze. As one of the small island developing states, Maldives is the most tourism-dependent country which relies on flow of tourists. This dependence on tourism in this kind of countries may make them more vulnerable, as the tourism sector is reputed to be unstable, particularly sensitive to economic fluctuations in the tourists' countries of departure and to international political events.

Many countries have embraced tourism as a way to boost the economy. According to the figure, GDP contribution of travel and tourism is relatively high in countries like Gambia (8.4%), Lebanon (8.1%) and Morocco (7.7%). As the tourism sector is reputed to be unstable, these countries are particularly more sensitive to economic fluctuations in tourism and to international political events.

According to the WTTC data for the year 2015, countries with little reliance on tourism as part of GDP include Uzbekistan and Gabon, travel and tourism makes up just 1.1 percent of total GDP in each. For economies of these countries, travel and tourism sectors seem not primarily important.

It is important to note that diversification in an economy is a sign of health, however if a country or region becomes dependent for its economic survival upon one industry, it can put major stress upon this industry as well as the people involved to perform well.

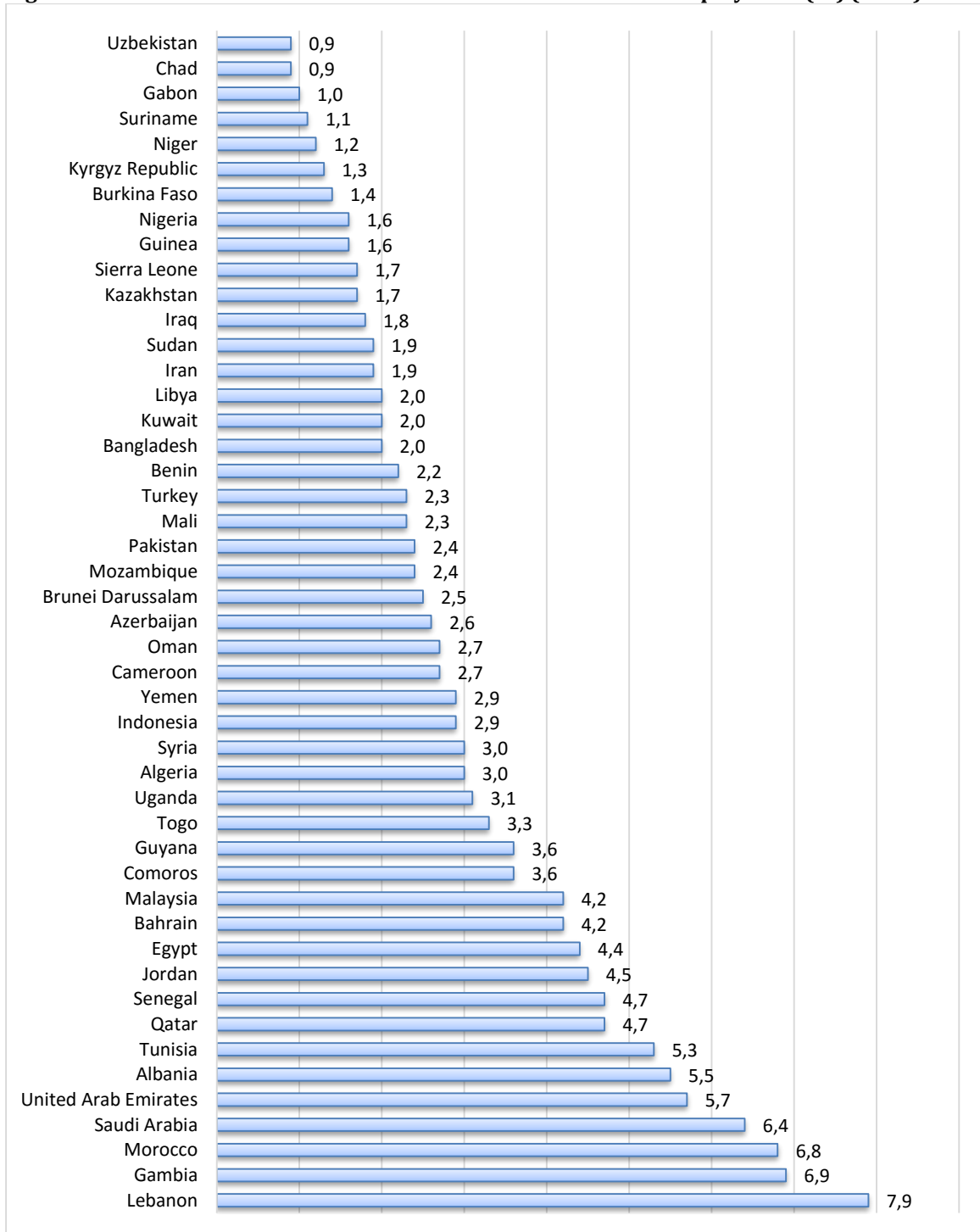
Figure 4.1 The Direct Contribution of Travel & Tourism to Member Countries' GDP (%) (2015)



Source: WTTC, Country Reports, 2016

In Figure 4.2, it can be analyzed direct contribution of travel and tourism to total employment of 47 member states excluding Maldives.

Figure 4.2 The Direct Contribution of Travel & Tourism to Total Employment (%) (2015)



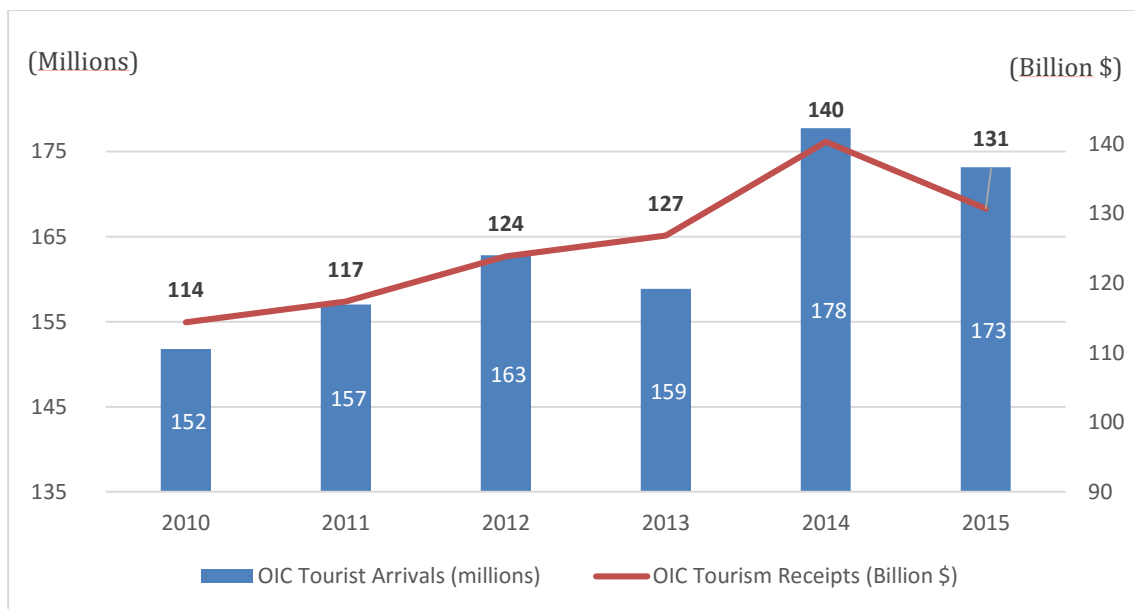
Source: WTTC, Country Reports, 2016

In 2015, Travel & Tourism directly supported 2.8% of total employment in 48 member states (See Appendix). Tourism continues to be an important economic sector capable of the creation of employment opportunities and poverty alleviation, particularly in developing countries and the Least Developed Countries.

According to WTTC, 30.2% of total employment depends on travel and tourism in Maldives for the year 2015. Direct contribution of travel and tourism was 7.9% in Lebanon, 6.9% in Gambia, 6.8% in Morocco and 6.4% in Saudi Arabia in 2015. Since tourism affects transportation, hotels and lodging, food & beverage, cultural and entertainment, banking & finance and promotion and publicity services, tourism’s contribution to employment tends to be slightly higher in these countries. However, in some countries like Uzbekistan, Chad and Gabon, travel and tourism does not generate employment and business opportunities unlike other sectors.

In Figure 4.3, international tourism activity in the member countries is shown in terms of both tourist arrivals and tourism receipts in recent years. For the number of tourist arrivals and tourism receipts of some countries, estimations are made to overcome the unavailability of the data problem. During the 2010-2014 period, shown in Figure 4.2, there was a trend of increasing tourist arrivals, however, in 2015 the number of tourist arrivals decreased from 178 million to 173 million in OIC Member States. The share in the total international tourist arrivals worldwide decreased from 15.7 percent to 14.6 percent in 2015.

Figure 4.3 Tourist Arrivals and Tourism Receipts in the OIC Member Countries



Source: adopted from UNWTO, 2016

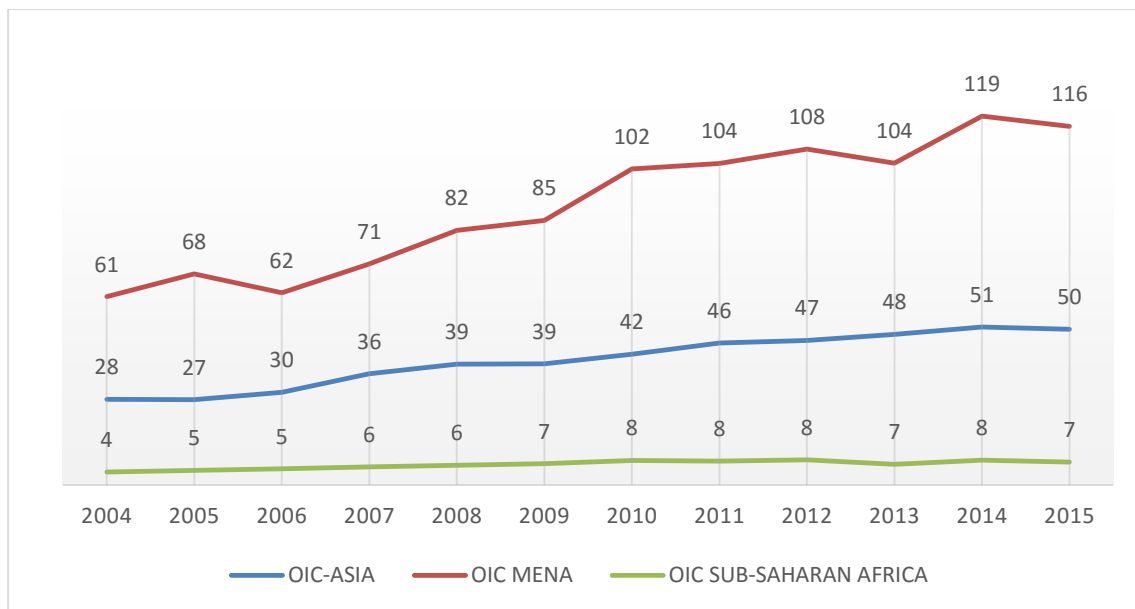
The number of tourism receipts of the member countries decreased from \$140 billion to \$131 billion in 2015, corresponding to a 10 percent share in world’s total tourism receipts. In 2015, unusually strong exchange rate fluctuations significantly influenced receipts for member countries expressed in current US dollars. As the US dollar appreciated against virtually all other

currencies in 2015, earnings in local currencies converted to US\$ were in many cases lower than in 2014. In absolute terms, tourism receipts in OIC member states decreased by US\$ 9 billion. Generally, a certain destination becomes more price-competitive when its currency depreciates relative to the currencies of its source markets. Similarly, it becomes less affordable, when its currency appreciates against the currencies of its visitors. An appreciating currency increases the purchasing power of a country's travelers abroad, but makes that destination itself less attractive to foreign markets against whose currencies it has appreciated.

It can be useful to analyze the trends by grouping the OIC member countries as OIC-MENA, OIC-Asia, and OIC-Sub-Saharan Africa, which are provided at Figure 4.4.

It can be seen that OIC-MENA has the biggest share among tourist arrivals in the member states. In this region, the number of tourist arrivals is forecasted to decrease from 119 million to 116 million in 2015 according to available data.

Figure 4.4 Tourist Arrivals in the OIC Sub-Regions (Millions)

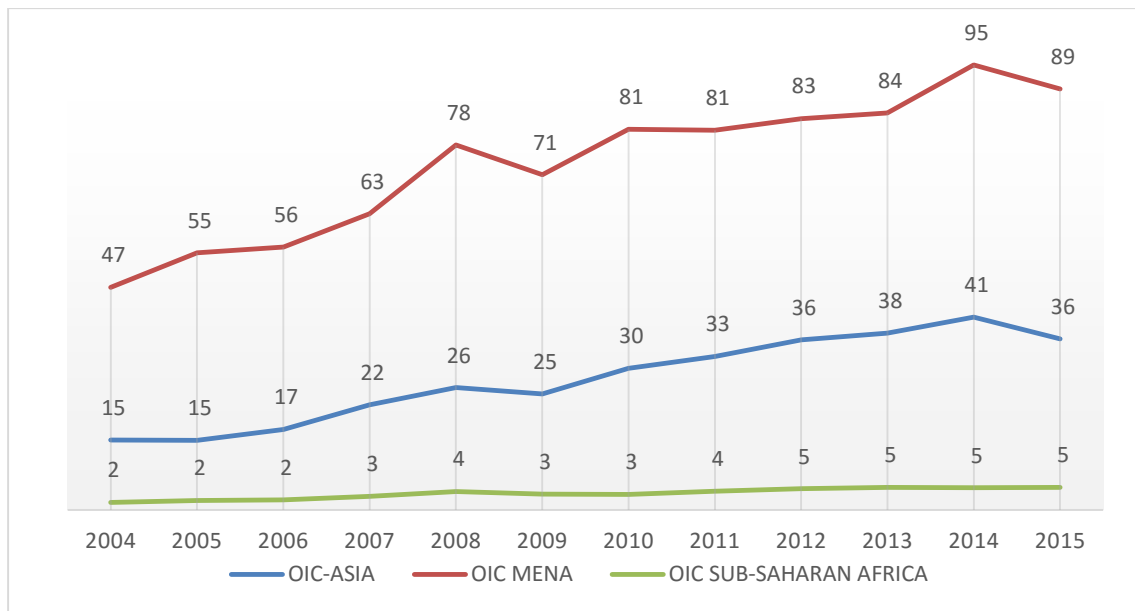


Source: UNWTO Tourism Highlights 2006, 2009 and 2016 Editions.

Figure 4.4 shows that OIC-Asia has experienced continued expansion in tourist arrivals for the period 2004-2014. However, in 2015, 50 million tourists travelled to OIC-Asia region. The OIC-Sub Saharan Africa constitutes the smallest portion of the international OIC Tourism.

Similar analysis can be made for tourism receipts in these groups. Figure 4.5 shows that tourism receipts in OIC-MENA is greater than the other two regions.

Figure 4.5 Tourism Receipts in the OIC Sub-Regions



Source: UNWTO Tourism Highlights 2006, 2009 and 2016 Editions.

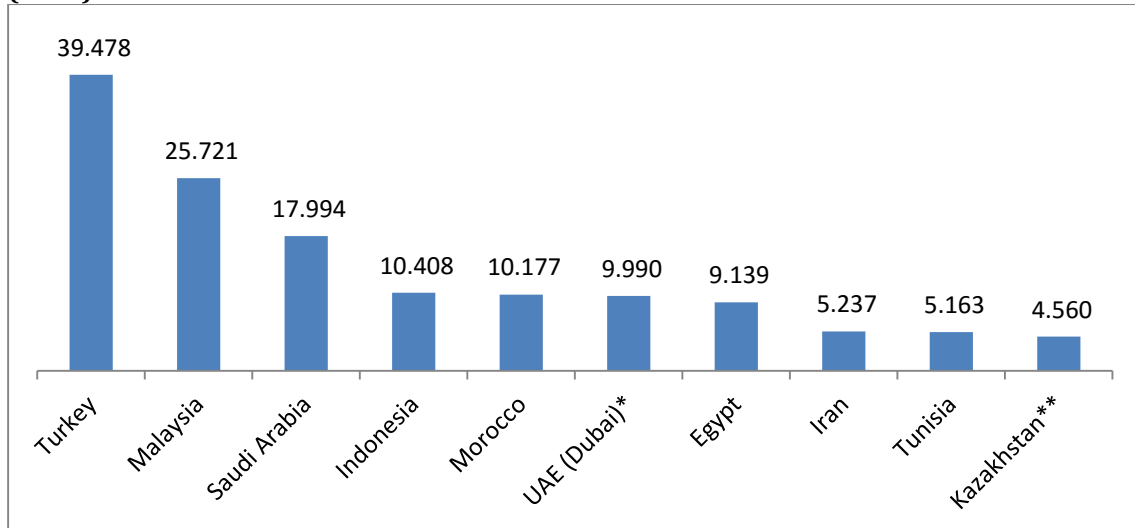
According to available data, tourism receipts in OIC Mena decreased from \$95 billion to \$89 billion in 2015.

It is important to note that exchange rate fluctuations can represent comparisons in total spending between countries, as well as changes in absolute terms over time. For example, if the US dollar appreciates versus the currency of one-member state, tourism spending in this country translates into a lower amount of US dollars from one year to another. This does not necessarily mean that spending was lower, but simply that the same amount of that country’s currency converts into less dollars.

The distribution of the tourist arrivals and tourism receipts among the OIC Member States has demonstrated the fact that international tourism in the Member Countries is concentrated in a few countries. In terms of tourist arrivals, Turkey, Malaysia, Saudi Arabia, Morocco, United Arab Emirates (UAE), Egypt, Indonesia, Tunisia, Iran and Kazakhstan were the top 10 international tourist destinations among the Member Countries in 2015.

As shown in the Figure 4.6, these 10 countries together hosted 137.9 million international arrivals in 2015. It is worth mentioning that among these countries, Turkey was also ranked 6th, and Malaysia was ranked 14th among the top world tourist destinations in 2015.

Figure 4.6 Top 10 OIC Tourism Destinations in International Tourist Arrivals (Thousand) (2015)



Source: UNWTO, Tourism Highlights 2016 & Republic of Turkey Ministry of Culture and Tourism

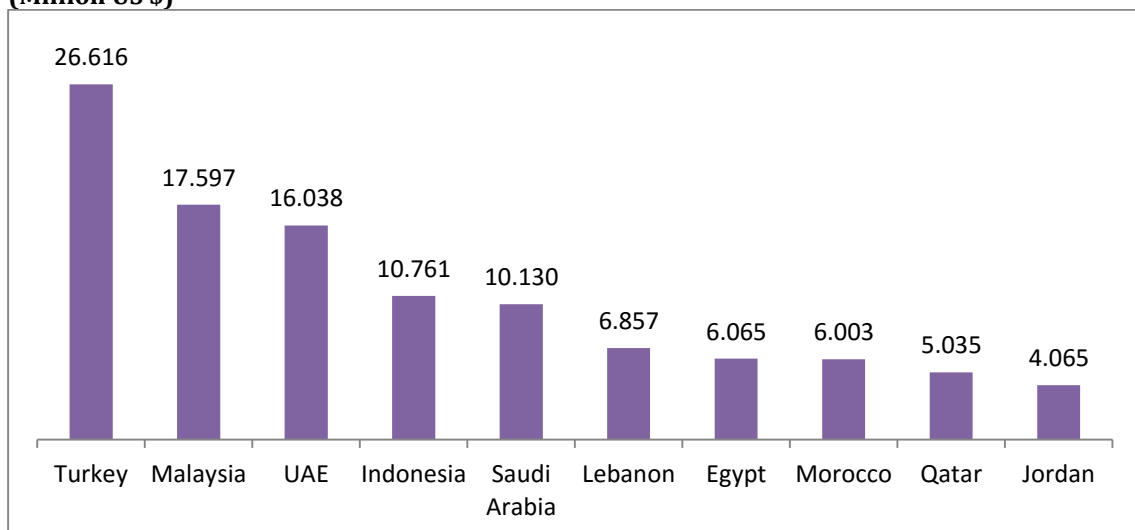
* 2013 data

**2014 data

Concerning the international tourism receipts, top 10 Member Countries, shown in Figure 4.7, earned US\$ 109 billion as international tourism receipts in 2015. It was US\$ 110 billion in 2014, but this does not mean that tourism receipts declined in real terms. Unusual strong exchange rate fluctuations lead to lower tourism receipts data in dollar terms.

It is also worth mentioning that among these countries, Turkey and Malaysia were also ranked 12th and 16th, respectively among the Top world tourism earners in 2015.

Figure 4.7 Top 10 OIC Tourism Destinations in International Tourism Receipts in 2015 (Million US \$)



Source: UNWTO, Tourism Highlights 2016

As in the case of OIC tourist arrivals, the Figure 4.7 indicates that tourism receipts in the OIC countries are concentrated in a small number of countries, almost the same countries of the main COMCEC tourist destinations. The remaining OIC Member Countries' tourist arrivals and tourism receipts data are given in Appendix (Table 1 and Table 2).

Turkey (-0.8%) hosted 39.5 million tourists in 2015. Since the recent developments, the country has suffered in terms of inbound arrivals in 2015. Therefore, necessary measures are taken by the government in order to recover the decrease in tourist arrivals.

Like Turkey, Malaysia reported decreases in arrivals due to declines in visitors from China, Australia, Singapore and Japan. Malaysia, as an important destination in the OIC Member Countries, realized 6.3% less arrivals in 2015. To overcome these decreases, Malaysia introduced online visa applications for its major markets. However, there is a highly positive outlook for Malaysia's tourism industry. Awareness of the country's many attractions is improving and international transport connections are expanding, making Malaysia much more accessible to potential visitors. As number of visitors to Malaysia increases over time, it is expected that investment in the hotel and accommodation sector will expand. Moreover, Malaysia Airlines and Emirates Airlines are launching a widespread code-share partnership in 2016, expanding Malaysia Airlines' access to European destinations and Emirates' access to various destinations in Asia (BMI Research, 2016).

Saudi Arabia recorded reported a small decline (-1.5 %) in tourist arrivals. Following the tragic loss of life in the September 2015 stampede during a Hajj ritual outside of Mecca, the government, having come under significant international criticism for its handling of the event, has committed to major investments in transport, safety and accommodation infrastructure in order to support the rapid expected expansion in international arrivals each year for religious pilgrimage. The government is reportedly considering easing visa restrictions to encourage more international tourism arrivals. Further, the outlook for sector has arguably brightened following the launch in April 2016 of the government's economic diversification strategy, dubbed Vision 2030. Religious pilgrimages remain the largest source of inbound tourism to Saudi Arabia and the government continues to invest in supporting infrastructure such as the 450km high speed rail network connecting Madinah with Makkah, King Abdullah Economic City and Jeddah which is due to open in 2016 (BMI Research, 2016).

Indonesia reported a solid growth with an increase of (+10.3%) in tourist arrivals. Indonesia recovered from the impact of large scale forest fires which started in July 2015 and also affected some of its neighbors, especially Malaysia and Singapore, where smoke and haze caused an important problem (UNWTO, 2016d). The tourism industry in Indonesia is growing rapidly, benefiting from proximity to major regional markets, an expanding luxury hotel sector and greater international air connectivity. Also supporting growth in the tourism sector is ongoing and widespread government led investment in transport infrastructure which is gradually improving accessibility across Indonesia's many islands. Indonesia's Tourism Ministry has announced new tourism policies aimed at increasing the volume of international visitors - aiming, for example, for 1mn Japanese tourists annually and 20mn visitors from the Middle East annually by 2019. In order to support this growth Indonesia has introduced visa free travel for visitors from 90 countries allowing a 30-day tourism stay for many markets including Saudi Arabia and India (BMI Research, 2016).

Morocco (-1%) posted weaker results, affected by a decrease in arrivals from its major source market France. It is expected that the strength of the euro against the Moroccan dirham, combined with the increasing number of low-cost airlines and routes between European countries and Morocco, will continue to drive up the number of inbound arrivals in the next five years. However, it is important for the government to provide adequate incentives for banks and private developers to invest in the Moroccan tourism industry, otherwise the country could lag behind in its plans to start developing tourism areas in order to take the pressure off more saturated ones.

Data from some destinations, however, is still pending, including the United Arab Emirates (Dubai) and Kazakhstan. United Arab Emirates did not report not only 2015 data but also 2014 data.

Iran reported 5.4% increase in tourist arrivals. The government has defined twelve areas in the Sixth Development Plan (2016-21) with solely focusing on tourism. Since desert-trekking appears to be a favorite hobby of western travelers, the authorities have resolved to create 2,000 ecotourism resorts by the end of the sixth five-year development plan (2016-21), nearly a third of which will be located in Lut Desert.

The government also expressed that Iran will unveil an investment package of 1,300 projects in the coming days to attract foreign investment and boost the badly-hit tourism industry (Dailymail, 2015 October).

In North Africa, international arrivals in Tunisia (-25.2%) and Algeria (-25.7%) declined considerably in 2015 as a result of some security problems. Tunisia's crucial tourism sector suffer from security issues, which result in weak tourist spending and delay the economic recovery. (BMI Research, 2016).

In order to compare the performance of the countries, major surplus on the travel balance would be a useful tool, since it shows that more foreign exchange stays in the country. Table 4.2 shows member countries by major surplus on the travel balance.

Table 4.2 Member Countries by Major Surplus/Deficits on the Travel Balance in 2013-2015 (US\$ billion)

	Tourism Receipts			Tour. Expenditures			Balance		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
Turkey	28.0	29.6	26.6	4.8	5.1	5.4	23.2	24.5	21.2
Malaysia	21.5	22.6	17.6	12.2	12.4	10.5	9.3	10.2	7.1
Morocco	6.9	7.1	6.0	1.3	1.4	1.4	5.5	5.6	4.6
Egypt	6.0	7.2	6.1	3.0	3.1	3.4	3.0	4.1	1.7
Indonesia	9.1	10.3	10.7	7.7	7.7	7.3	1.4	2.6	3.4
Kuwait	0.3	0.4	-	11.6	11.3	-	-11.3	-10.9	-
S. Arabia	7.7	8.2	10.1	17.7	24.1	20.7	-10.0	-15.9	-10.6
UAE	12.4	14.0	16.0	13.8	14.4	15.1	-1.4	-0.4	0.9
Qatar	3.5	4.6	5.0	6.6	8.7	8.2	-3.1	-4.1	-3.2

Source: UNWTO, 2016 Tourism Barometer Volume14, May 2016.

According to the Table 4.2, Turkey ranks as 5th, Malaysia as 15th, Morocco as 22th and Indonesia as 25th country by major surplus on the travel balance in international tourism market. In 2015, Turkey's tourism receipts were US\$ 26.6 billion, however Turkish citizens spent US\$ 5.4 billion in other countries. This means that US\$ 21.2 billion stayed in the country as a surplus on the travel balance. This surplus is very important for countries as a source of foreign exchange in their economies. It can be realized from the Table 4.2 that some countries have a tendency to spend more than their tourism receipts. It is obvious that the majority of these countries are the main OIC international tourism destinations and earners. It is also observed that the balance of international tourism of some member countries accounts for a high percentage of their international tourism receipts. For example, countries like Saudi Arabia, Kuwait and Qatar have deficits on travel balance.

As it can be noted, safety and security concerns are in the spotlight for OIC member states, and it is assumed that these issues will continue to cause difficulties in the years ahead. Governments should work hard to ensure the safety of tourists and to minimize the impact of security threats. Incidents like the sector observed in 2015 and 2016 should not stop people travelling around the world. The strength of the US dollar relative to other currencies is shifting the price competitiveness among destinations and will affect market share and rankings of destinations.

5 Muslim Friendly Tourism in the OIC Member Countries¹

With an increasing awareness and expanding numbers of Muslim tourists, tourism sector has started to offer special products and services in accordance with the Islamic principles, to cater the needs and demands of these tourists. With the growth of the Muslim travel market, different terminology and definitions are used to refer to this segment. Terms like Islamic Tourism, Halal Tourism, Shariah Compliant Tourism are examples of these usages. COMCEC selected “Muslim Friendly Tourism (MFT)” term to be more comprehensive and defined it as “activities of Halal conscious travelers, traveling for any purpose, which is permissible (halal)”.

MFT has become an important sub-category of tourism for Muslim travelers. A growing number of Muslim travelers have become recently more Halal conscious and prefer Muslim-Friendly services while having their vacation. In this respect, meeting the faith-based needs of the Muslim tourists (such as certified halal food, clean prayer and ablution facilities, iftar and sahoor services during the Holy month of Ramadan, recreational facilities with privacy and a decent environment for families, etc.) are very crucial.

The Muslim population and their spendable/expendable income is growing. According to a research, 1 out of 3 people born between 1990 and 2030 will be Muslim. Hence, the Muslim population is estimated to be 2.2 billion by 2030, which will be one of key catalysts for the growth of MFT (Pew Research, 2014).

In 2015, it was estimated that there were 117 million Muslim international travelers. This is projected to grow to 168 million by 2020, where the travel expenditure by Muslim travelers is expected to exceed USD 200 billion (CrescentRating, 2016).

According to Global Muslim Travel Index (GMTI) 2016, Malaysia has consistently been able to maintain its standing amongst the main three themes of (1) Family-friendly holiday and safe travel destination (2) Muslim-friendly services and facilities at the destination, and (3) Halal awareness and destination marketing. United Arab Emirates has overtaken Turkey to take the second spot, while Indonesia has improved its ranking to move to 4th place (CrescentRating, 2016).

The COMCEC Tourism Working Group is focusing on Muslim Friendly Tourism (MFT) in its three consecutive meetings. The 7th Tourism Working Group was held on February 4th, 2016, with the theme of “*Muslim Friendly Tourism (MFT): Understanding the Demand and Supply Side in the OIC Member Countries.*” A research report was prepared on the theme of the meeting, which mainly focused on creating awareness about MFT as well as the developments regarding the demand and supply side of MFT in the Member Countries. This report, as well as the Member Country representatives during the 7th Working Group Meeting highlighted some major challenges faced by the member countries.

¹ The 7th, 8th and 9th Meetings of the COMCEC Tourism Working Group will be held with the theme of Muslim Friendly Tourism. Thus, the Tourism Outlook 2016 includes this section as an introductory section for the meeting.

This report make the MFT definition identified six faith based needs such as halal food, Salaah (prayer), water usage family toilets, Ramadhan services and facilities, facilities with no non-halal activities and recreational facilities with privacy. The report also presented eight major challenges facing future growth of MFT in the OIC Member countries.

The eight challenges are listed as follows:

1. *Security concerns*; Majority of Muslim tourists travel with family and generally want more family-friendly activities such as shopping, sightseeing, theme park, nature reserve or museum. These travelers mostly prefer the safe and secure destinations.
2. *No proper identification of Halal food outlets*; A number of OIC member states have not developed a comprehensive identification process which could correctly inform tourist that the food offered at a particularly dining establishment is Halal.
3. *Limited support and participation from government to promote MFT*: In many OIC member states the government has not yet engaged the travel industry with the development of Muslim friendly tourism. Lack of incentives and motivation by the government to develop the tourism sector will curtail growth of the MFT market.
4. *Increasing competition from non-OIC countries*; Singapore, Japan and S. Korea for example are keenly targeting the Muslim tourist. In addition, Australia and Thailand are also seeking to attract the Muslim traveler. Halal dining establishments are available in many of the major cities of these countries.
5. *Islamophobia driven negative sentiments towards Muslim countries*: The recent incidences have resulted a negative sentiment against Muslims and Muslim countries.
6. *Resistance from some travel stakeholders to develop MFT*; Due to the negative sentiments portrayed by media when it comes to words such as Muslim, Halal, Shariah and Islam, even local travel stakeholders in some Muslim countries are resisting the development of MFT.
7. *Limited availability of attractions including theme parks*: A number of OIC member states does not have high quality tourism infrastructure. This has hampered the growth of not only Muslim tourism but also tourism as a whole.
8. *Low air connectivity*: A number of OIC member states are not on major airline routes to major cities of the world.

To overcome these challenges, the report also provides some policy recommendations on how OIC member states can help strengthen MFT environment through the nine key areas. These policy recommendations are given in Table 5.1. It is evident from the study that OIC member states need to accelerate the strategy development and execution in order to be leaders in the MHT market.

Table 5.1 Policy Recommendations to Improve MFT Environment in OIC Member States

<p>1. <i>Setting an overall MFT market goal to encourage growth in the MFT sector in OIC member states.</i></p>	<p>In order to encourage the member states to make MFT one of the main segments of tourist arrivals to the country, it was recommended to agree on a goal of attracting 100 million Muslim visitor arrivals to OIC destinations in 2020.</p>
<p>2. <i>Increasing awareness of the MFT market</i></p>	<p>Increasing awareness of the MFT market among the travel industry stakeholders by rolling out guidelines, workshops, training etc.</p>
<p>3. <i>Implementing and streamlining the basic MFT related services.</i></p>	<p>Some actions can be taken for meeting the need for provisioning of prayer facilities, Halal food outlets and water friendly toilets at Airports, Highway stops, hotels/resorts, attractions and other travel services.</p>
<p>4. <i>Maximizing the inherent strengths of OIC member states.</i></p>	<p>OIC member states have rich Islamic history, Islamic heritage and Islamic elements of providing hospitality. These inherent strengths can be utilized to provide visitors a unique experience.</p>
<p>5. <i>Capturing opportunities in the niche sub-segment within MFT.</i></p>	<p>There is a lack of supply for the sub-segment of Muslim visitor who are looking for facilities and services which do not have non-halal activities as well as recreational facilities and services which provide privacy. Some OIC destinations could look at getting a certain percentage of hospitality services catering to this need.</p>
<p>6. <i>Developing healthcare services and facilities for the Muslim market.</i></p>	<p>OIC member states could look at identifying strengths of healthcare services among the OIC member states, and develop specialized hubs of healthcare services.</p>
<p>7. <i>Developing an MFT alliance.</i></p>	<p>Travel agents and tour operators are able to play a key role in enabling the growth of the MFT market in OIC destinations. Launching of an alliance of Travel Agents/Tour operators in OIC countries targeting the MFT market was recommended.</p>
<p>8. <i>Developing an environment for innovation and entrepreneurship on MFT related products and services.</i></p>	<p>The environment in which tourism companies operate is rapidly changing and there is generally more volatility, uncertainty and complexity. As such it is necessary to develop an incubation setup to encourage start-ups and entrepreneurs to develop products and services for the MFT market.</p>
<p>9. <i>Developing unique MFT based destination positioning and marketing.</i></p>	<p>Currently very limited efforts have been made by OIC member states to reach out to the Muslim travelers with a clear MFT centric destination positioning. This is a broad area and requires the development of a comprehensive plan to position and promote the OIC destinations as the choice destinations for Muslims, especially the leisure travelers.</p>

The implementation of these recommendations will allow OIC member states to better position them in the MFT market and gain a higher share of the Muslim visitor arrivals.

The 8th Meeting will be held on September 1st, 2016, on “Muslim Friendly Tourism (MFT): Developing and Marketing MFT Products and Services.” An analytical study is prepared with the purpose of enabling all Muslim Friendly Tourism (MFT) stakeholders to develop high-impact MFT product development and marketing strategies and initiatives.

MFT products and services are starting to multiply and diversify. New players have entered the MFT market adding to the global supply of MFT products and services especially in the hotels and restaurants area. Additionally, new product offerings have been created recently to accommodate Muslim travelers’ needs including Muslim-friendly cruises, airlines and mobile travel applications. The study analyzes the products and services in the segment of food and beverage, accommodation, transportation, activities, travel services. Successful case studies are presented to give insight to member states which want to improve themselves in developing and marketing MFT products and services.

More and more businesses are willing to meet the demands for MFT products and services. Most of them try to enable products and services to be enjoyed by everyone, i.e. both Non-Muslims and Muslims and offer tourists from Muslim countries alternative choices of consuming MFT products and services. However, there is a need to develop more Halal tourism products and services to cater to dynamic and emerging market. For this aim, some airports are adding Halal certified restaurants and prayer spaces to attract Muslims. Some airlines started offering Halal Food on board at their flights. Furthermore, travel agencies and digital marketing platforms are also evolving according to growing needs of Muslims. Provided the fact that many OIC countries already have basic infrastructure and environment for catering to the requirements of the Muslim tourists, they can benefit more from the MFT market.

Despite the importance of the growing Muslim-traveler market for the OIC Member Countries, the report, as well as the Member Country representatives during the 7th Working Group Meeting highlighted some major challenges faced by the member countries. One of the major challenges underlined in this meeting was “Lack of unified and harmonized MFT standards”. In this respect, “Developing basic guidelines for improving the basic MFT-related services” was highlighted as a main policy recommendation in this meeting. For this reason, the upcoming meeting will be held on theme of “Muslim Friendly Tourism (MFT): Regulations for Accommodation Establishments in the OIC Member Countries”.

In tourism sector, products, facilities or services are assessed according to their level of conformity to identified requirements. These requirements are specified in various tourism regulations, such as legal acts, standards or guidelines. In conventional tourism quality standards, these requirements are determined in line with the tourists’ quality needs and expectations. These standards facilitate improving the overall quality of tourism products and services; promote competitiveness within the industry and provide valuable and reliable information on quality of products and services for tourists and travel industry. Moreover, when

there is no applicable standard in place, guidelines can serve as a set of criteria or requirements, which consist of recommended, non-mandatory controls that are used as a reference.

Muslim travelers have their own needs and requirements in line with their faith and these requirements sometimes may differ from the conventional tourists' needs. Especially in accommodation facilities, Muslim tourists have specific needs; such as certified halal food, clean prayer and ablution facilities, iftar and sahoor services during the Holy month of Ramadan, recreational facilities with privacy and a decent environment for families, etc. However as highlighted above, despite the increasing number of Muslim tourists and a huge demand for Halal/Muslim Friendly products and services worldwide, in some countries, there are no specific regulations for MFT, such as guidelines, standards or other regulations. In OIC Member Countries, among others, only Malaysia, Turkey and Indonesia have such MFT regulations. Moreover, in some non-OIC Countries, such as Thailand, Japan, Philippines, there are some initiatives for establishing MFT standards or guidelines.

According to many researchers, one of the main challenges in MFT sector is the lack of standards and regulations for MFT accommodation establishments (Abdul Hamid, 2010; Birchall, 2009; Henderson, 2010; Rosenberg & Choufany, 2009; Siddiqui, 2011). This challenge increases the costs of companies, since they have to follow different practices in this field. In addition to this, Muslim tourists also face with different practices of companies regarding MFT services. Therefore, developing MFT regulations in the OIC member states will greatly help to meet the needs of the Muslim travelers as well as companies to provide MFT services with better quality.

In summary, COMCEC tries to analyze MFT market for OIC member states in three segments. Firstly, the demand and supply sides of MFT in the OIC member countries are considered on a preferential basis. Secondly, developing and marketing of MFT products and services will be discussed among the OIC member states. Finally, last segment will be developing regulations for accommodation establishments to improve MFT among OIC member states.

6 Importance of Tourism Cooperation in the Member Countries

6.1 Tourism Potentials & Obstacles Faced in the Tourism Development and Cooperation in the Member Countries

OIC Member Countries have potential for the development of a sustainable international tourism sector with rich and diverse natural, geographical, historical and cultural heritage assets. OIC Member Countries' performances in tourism sector indicate that the share of the Member Countries in the global tourism sector is behind their potential and there is still a great deal of scope for realizing their potential.

It is known that both established and new destinations need to shape the adequate conditions and policies with regard to:

- Business environment
- Infrastructure
- Travel Facilitation
- Marketing
- Human resources

So the Member Countries can increase the social and economic benefits and minimizing negative impacts via utilizing the tourism potential.

Figure 6.1 Tourism Opportunities in the Member Countries



Tourism is a dynamic sector that is subject to political, social, environmental and technological trends, shaping tourist preferences, skill requirements of tourism related-jobs and structure of the tourism market. It is crucial for the Member Countries to better engage in the long-term global tourism market trends and to build sound tourism policies in order to improve competitiveness of the sector.

There are many challenges faced by the Member Countries for developing their tourism sector and making it internationally competitive. Challenges faced in the tourism development are diverse as each country has its own tourism features, level of development and national development priorities and policies. The challenges affecting tourism performance in the Member Countries ranges from, among others, insufficient tourism-related infrastructure and

investments, unskilled tourism workforce to low-capacity tourism administrations and lack of safety and security (COMCEC Progress Report, 2013), as shown in Figure 6.2.

In order to address the challenge of insufficient tourism-related infrastructure and investments, the quality and efficiency of tourism infrastructure and services need to be improved in conformity with the international standards. To develop tourism-related infrastructure in the Member Countries, private sector's resources can be utilized. In this respect, Public-Private Partnerships (PPPs) can be promoted and an enabling environment can be provided for attracting more FDI in the tourism sector. In the case of many Member Countries, these challenges still include the lack of technical know-how and the weak promotional activity.

Due to its labor-intensive nature, tourism sector requires a highly qualified workforce that has a direct effect on the quality of tourism services. Despite the fundamental awareness and basic perception of the economic importance of tourism as an industry and its positive impact as a potential source of foreign exchange earnings and employment, in many cases there is lack of trained tourism workforce. Thus, training programs and projects need to be developed for upgrading the quality of workforce in the member countries.

Figure 6.2 Challenges Affecting Tourism Performance in the Member Countries



These challenges should be addressed for the sustainable growth of tourism sector in the Member States. These are common challenges among the countries; however, each member state should specify the high-priority challenge considering its own conditions and try to solve the problems in the tourism sector.

The issue of developing consistent tourism strategies and policies is also one of the main challenges facing many Member Countries, which are still experiencing difficulties in developing integrated tourism policies. Effective administration, regulation and institutional frameworks are important issues to be improved for the tourism activities.

The absence or weak publicity promotion and mass media exposure due to the limited communication systems and technological services are also obstacles for tourism development in the OIC Member Countries. It is known that electronic media (CD-ROM maps, Internet, web sites, etc.) will be increasingly used for the purpose of choosing destinations and making reservations. Therefore, the COMCEC countries should improve their promotion through electronic media and other mass media.

6.2 Tourism Cooperation under the COMCEC Umbrella

Tourism cooperation could play a significant role in the socio-economic development of the COMCEC Member Countries, if properly planned and managed.

The COMCEC Economic Summit, held in İstanbul in 2009, has prioritized the cooperation in the field of tourism sector. Since then, the COMCEC has increased its efforts for enhancing cooperation among the Member States in this field.

In addition to ongoing activities such as Tourism Ministerial Meetings, workshops, seminars, tourism fairs, COMCEC encourages modalities that enable involvement of relevant stakeholders such as private sector and local communities in tourism activities. In this respect, the "OIC/COMCEC Private Sector Tourism Forum" was established in 2011 and convened its 1st Meeting on 7-8 December 2012 in İzmir, Turkey. The Forum annually brings together the private sector representatives of the member states operating in the field of tourism to share their experience and explore ways and means to enhance the cooperation in this field. The 2nd Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 16-17 December 2013 in İstanbul with the theme of "Effective Marketing Strategies for Promoting Tourism Destinations in the OIC Member Countries."

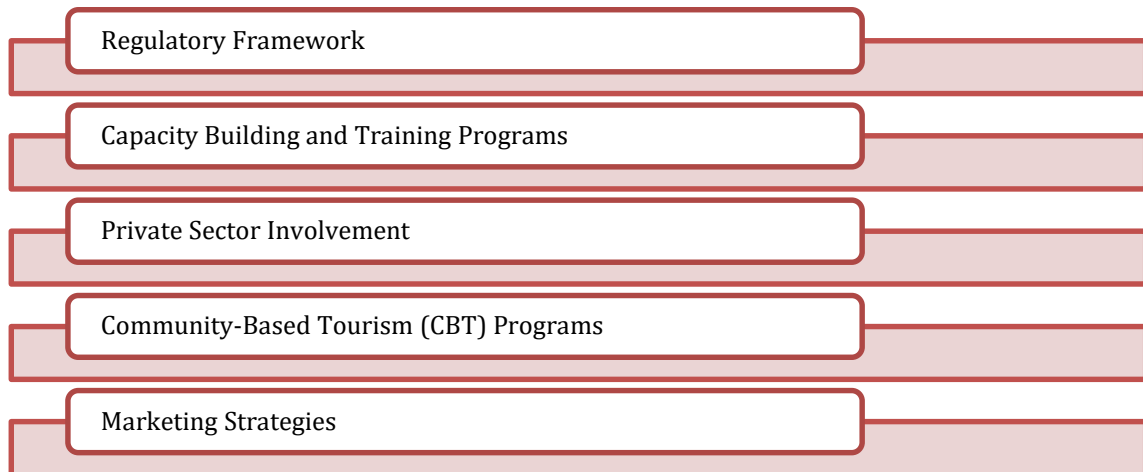
Moreover, the 3rd Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 29-30 January 2015 in İstanbul with the theme of "International Branding of Tourism Destinations in the OIC Member Countries." The Forum emphasized the importance of effective marketing and branding strategies for promoting the tourism destinations in the OIC Member Countries and highlighted that effective marketing and branding requires utilization of full range of tools available including digital marketing activities, social media, mobile phone applications, PR, etc. Furthermore, it is also underlined the importance of multi-stakeholder engagement as a critical success factor for tourism branding particularly through utilizing Public Private Partnerships and stressed the significance of joint endeavors such as joint promotion work, cultural tourism routes and joint tours and familiarization programs/trips to overcome the negative media image of Islamic Countries resulting from misguiding media coverage and problems like Islamofobia, Ebola, etc.

The 4th Meeting of the OIC/COMCEC Private Sector Tourism Forum was held on 14-15 January 2016 in İstanbul with the theme of "Promoting Muslim-Friendly Tourism (MFT) Products and Services in the OIC Member Countries." In this forum, the participants discussed the current state of international tourism in the OIC Member Countries as well as prospects and challenges in this regard. Moreover, the participants also deliberated on the global trends and policies in promoting MFT products and services and the challenges faced by the private sector in the Member Countries in promoting MFT products and services. The participants emphasized the importance of raising awareness about MFT, not only in the OIC Member Countries, but also in the Non-OIC world. In this regard, the participants highlighted the significance of the effective utilization of the existing mechanisms under the OIC/COMCEC, such as SMIIC's technical Committee on tourism, for enhancing cooperation in MFT.

Tourism has been defined as one of the six cooperation areas in **the COMCEC Strategy**, adopted by the 4th Extraordinary Summit held on 14-15 August 2012 in Makkah Al-Mukarramah, Saudi Arabia.

The Strategic Objective defined by the COMCEC Strategy is ***“Developing a sustainable and competitive tourism sector in the OIC Member Countries.”*** With a view to achieving this objective, the Strategy envisages five output areas, namely regulatory framework; training and capacity building programs; private sector involvement; community based tourism programs and marketing strategies.

Figure 6.3 Output Areas in the Tourism Section of the COMCEC Strategy



In order to achieve the objectives in the field of tourism, the COMCEC Strategy brings two new and well-defined implementation instruments, namely Tourism Working Group and the COMCEC Project Cycle Management (PCM).

COMCEC Tourism Working Group aims at providing a platform for the member states for elaborating issues thoroughly, sharing their experience and best practices and creating a common understanding to respond their common problems.

In this framework, the 1st Meeting of the COMCEC Tourism Working Group was held on April 25th, 2013 in Ankara, Turkey with the theme of *“A New Trend in Sustainable Tourism Development: Community Based Tourism in the OIC Member Countries.”* The Meeting was attended by the representatives of 15 Member States, which have notified their focal points for the Tourism Working Group. The relevant OIC institutions and some academicians have also attended the Meeting. The representatives of the Member States have shared their experiences, achievements and challenges in implementing the Community-Based Tourism (CBT) Programs in their respective countries. The Meeting has considered the Studies namely “Community Based Tourism: Finding the Equilibrium in the COMCEC Context” commissioned by the COMCEC Coordination Office and the “Tourism Outlook 2013” prepared by the COMCEC Coordination Office. The outcomes of the Meeting were published by the COMCEC Coordination Office with the document titled the “Proceedings of the 1st Meeting of the Tourism Working Group”, available on the COMCEC website (www.comcec.org).

The 2nd Meeting of the COMCEC Tourism Working Group was held on October 3rd, 2013 in Ankara, Turkey with the theme of *“Tourism Product Development and Marketing Strategies in the OIC Member Countries.”* The Meeting was attended by the representatives of 11 Member States,

which have notified their focal points for the Tourism Working Group and representatives of the COMCEC Coordination Office, SESRIC and Islamic Center for Development of Trade (ICDT) and some private sector representatives. The COMCEC Tourism Outlook and an analytical study namely “Tourism Product Development and Marketing Strategies” have been prepared and submitted to the Meeting. The representatives of the Member States have shared their experiences, achievements and challenges in tourism product development and marketing strategies in their respective countries as well as explore cooperation potential among each other. The Meeting highlighted that tourism product development and marketing requires effective collaboration among different stakeholders. It was stressed that because of its competitive nature, effective marketing requires utilization of the full range of tools available including among others PR activities, e-marketing, social media, etc. Some recommendations have been made for enhancing cooperation among the Member Countries in the field of product development and marketing. These were, among others, introducing award programmes, conducting joint exhibitions, developing joint tourism products, organizing exchange programs for experts and developing joint data base for tourism products among the Member Countries. Moreover, Proceedings of the Second Meeting of the Tourism Working Group, which reflects the outcomes of the Meeting was prepared and published on the COMCEC Website (www.comcec.org).

The 3rd Meeting of the COMCEC Tourism Working Group was held on March 4th, 2014 in Ankara, Turkey with the theme of “Enabling Tourism Investment Climate in the OIC Member Countries.” The Meeting was attended by the representatives of 14 Member States, which have notified their focal points for the Tourism Working Group and representatives of SESRIC, Islamic Center for Development of Trade (ICDT), International Finance Corporation (IFC) and representatives from private sector. The Representatives of the Member States have shared their experiences, achievements and challenges regarding tourism investments in their respective countries. Moreover, the Studies titled “Enabling Tourism Investment Climate: Challenges and Prospects for Tourism Investments in the OIC Member Countries” commissioned by the COMCEC Coordination Office and the “COMCEC Tourism Outlook 2014” prepared by the COMCEC Coordination Office were the main inputs for enriching the discussions during the Meeting. The presentations and deliberations made during the meeting highlighted that governments play a crucial role for creating an enabling investment climate for tourism investors. It was stressed that creating an enabling tourism investment climate requires utilization of the full range of tools and strategies including among others, provision of clear, updated information and prompt responses to investor inquiries, updated investment promotion websites, effective coordination among relevant stakeholders, providing infrastructure (including road networks, electricity, etc.), allocation of land for specific tourism projects, effective incentive packages, easy procedures and financial support for the local tourism SMEs as well as foreign entrepreneurs and utilization of alternative investment financing options such as crowdfunding.

The 4th Meeting of the COMCEC Tourism Working Group was held on September 4th, 2014 with the theme of “Enhancing the Capacity of Tourism Workforce in the OIC Member Countries for Improved Tourism Service Quality.” The participants deliberated on tourism workforce capacity, identify the challenges faced by the Member Countries as well as possible solutions to address these challenges. The Meeting provided opportunity to the Member Countries to learn

from each other's experience and good practices. During this meeting, Tourism Working Group discussed two policy options:

- Developing Tourism Workforce Development Strategies in the Member States and supporting the effective implementation of the existing ones
- The importance of enhancing the capacity of tourism workforce in the member countries.

The policy recommendations of the 4th Meeting of the Tourism Working Group were submitted to the 30th Ministerial Session of the COMCEC held on 25-28 November 2014 in İstanbul. The 30th Session of the COMCEC commended the efforts of the Working Groups towards approximating policies among the Member States in their field of competence and took note of the policy recommendations of the Tourism Working Group.

The 5th Meeting of COMCEC Tourism Working Group was held with the theme of "Travel Facilitation for Enhancing Mobility in the OIC Member Countries" on February 5th, 2015. In line with the recommendations of the analytical study and the responses of the Member Countries to the policy questions, which were circulated before the Meeting, the Working Group put forward two policy recommendations in the meeting:

- Encouraging visa facilitation among the Member Countries;
- Developing air linkages and increasing the airline capacity were highlighted by tourism working group.

The 6th Meeting of the Tourism Working Group was held on September 3rd, 2015 with theme of "Effective Tourism Marketing Strategies: ICT-Based Solutions for the OIC Member Countries." The Representatives of the Member States have shared their experiences, achievements and challenges on ICT-based tourism marketing in their respective countries. The Meeting has considered the Studies "Effective Tourism Marketing Strategies: ICT-Based Solutions for the OIC Member Countries" commissioned by the COMCEC Coordination Office and the "COMCEC Tourism Outlook 2015" prepared by the COMCEC Coordination Office. The Meeting has come up with a set of policy recommendations:

- Building and Strengthening a Skilled Workforce on ICT-Based Tourism Marketing in the Member Countries
- Enhancing cooperation between the government and private sector on ICT usage and diffusion in tourism marketing
- Developing comprehensive and effective digital marketing strategies in the Member Countries

7th Meeting of the Tourism Working Group was held on 4 February 2016 with the theme of "Muslim Friendly Tourism: Understanding the Demand and Supply Sides in the OIC Member Countries". The Tourism Working Group provided the opportunity to thoroughly discuss the main concepts and the general overview of Muslim-friendly tourism from a policy perspective.

In line with the recommendations of the analytical study, as well as the responses of the Member Countries to the policy questions that were circulated before the Meeting, the Working Group put forward the following policy recommendations:

- Developing basic guidelines for improving the basic MFT-related services.
- Increasing awareness about the MFT market among the travel industry stakeholders through standardizing terminology used in MFT, introducing market awareness and customer service training programmes and utilizing social media for promotion and marketing.

Similarly, the policy recommendations of the 7th and 8th Meeting of the Tourism Working Group will be submitted to the 32nd Session of the COMCEC to be held on 21-24 November 2016 in İstanbul.

Another instrument envisaged by the COMCEC Strategy that will strengthen tourism cooperation among member states is the COMCEC Project Funding. The Strategy has a viable funding mechanism through which member countries registered to the Tourism Working Group submit projects to be financed through grants by the COMCEC Coordination Office. The first project call was made in September 2013. Within the framework of the 1st project call under the COMCEC Project Funding, 2 projects in tourism sector were successfully implemented in 2014. One of them was “Cities of Common Cultural Heritage” project implemented by Azerbaijan Ministry of Culture and Tourism. There were 3 partner countries namely; Turkey, Uzbekistan and Kazakhstan in this project. The project aimed at creating a joint cultural tourism product and at the end of the project with the help of the analytical study prepared as an outcome of the project, cultural heritage routes were created. The other project was “Improving Statistical Capacities of Tourism Sector in COMCEC Mediterranean and Gulf Region” proposed by SESRIC. The project covered 6 member countries namely; United Arab Emirates, Jordan, Tunisia, Albania, Qatar, Oman. This project aimed at improving statistical capacities of the member countries in tourism field and entailed 8 training programs and one workshop in this respect.

The second project call under the PCM was made in September 2014. In this regard, within the scope of the 2nd Project Call, the project titled “Strengthening Community Resilience through eco-tourism”, proposed by The Gambia, was implemented in 2015 with two project partners, namely Senegal and Guinea-Bissau. Under this project, study visits to ten villages were conducted. Moreover, Ecovillage Design Education Programmes were held with the participation of 35 residents from these villages. At the end of this project, an Ecovillage Design Education Report was prepared.

The Third Project Call was made in September 2015. In this framework, the following two projects is being implemented in 2016:

- Short course on strategies in enhancing the tourism workforce in community-based tourism within the OIC Member Countries (proposed by Malaysia).
- Enhancing the capacity of craft producers in the OIC Member Countries (proposed by the Gambia).

The COMCEC Coordination Office will make the fourth call for project proposals in September 2016. More detailed information on the COMCEC Project Funding mechanism can be reached through the COMCEC PCM Website: (pcm.comcec.org).

7 Conclusion

Tourism industry has enjoyed continued expansion and diversification, becoming one of the most rapidly developing industries in the world. Tourism has evolved into a global phenomenon – one of the most important economic sectors and social activities of the time.

Tourism continues to be an important economic sector capable of attracting foreign direct investments and supporting sustainable economic development, the production of fairly distributed wealth, the creation of employment opportunities and poverty alleviation, particularly in developing countries and the Least Developed Countries.

According to the UNWTO statistics, 1.186 million international tourists travelled in 2015 with an average annual increase of over 4% since the year 2000. Tourism sector which already accounts for 9 percent of World GDP is one of the pillars that should be supported by governments around the world as part of the policies for stimulating economic growth.

From the period 1980 to 2015, international tourism receipts—which are the export value of tourism, including international passenger transport—increased from US\$125 billion in 1980 to US\$ 1,260 billion in 2015 (UNWTO, 2016a) denoting a solid increase in four decades. In real terms, this corresponds to an average growth of 4 percent a year, which has almost the same pace as tourist arrivals.

The sector faces some challenges every year and 2016 is likely to be no different. Three main factors influenced tourism flows in 2015; the unusually string exchange rate fluctuations, the decline in the price of oil and other commodities which increased disposable income in importing countries, as well as increased global concern about safety and security (UNWTO, 2016a).

However, the growth in tourism sector will continue at a stronger rate than last year, with the total contribution to GDP expected to increase by 3.5-4.5%. This growth will require OIC Member Countries to adopt a concerted and coordinated approach to planning and development between their industry, governments and educational institutions to ensure that they fulfill their potential in the years ahead.

In view of the modest share of the OIC Member Countries in international tourism market, it is evident that the inherent potential has not yet been fully realized and manifested itself in desirable levels. OIC Member States need to understand how they can strengthen the position of their tourism economies in response to current global economic challenges and remain competitive with emerging destinations, within a sustainable development context.

As in the case of OIC tourist arrivals, tourism receipts in the Member Countries are concentrated in a small number of countries, almost the same countries of the main OIC tourist destinations.

The share of international tourism receipts in the total exports of each member country indicates that tourism plays a significant role in the economies of member countries and constitutes an important source of foreign exchange earnings.

By the groupings in the OIC Member Countries, it is observed that OIC-MENA has experienced expansion in tourist arrivals for the period 2004-2015. In the same period, OIC-ASIA has experienced growth in tourist arrivals. OIC- Sub Saharan Africa constitutes the smallest portion of the international OIC Tourism. In terms of tourism receipts, OIC-MENA's performance has been greater than OIC- Sub Saharan Africa and OIC-Asia in the period 2004-2015.

In 2015, it was estimated that there were 117 million Muslim international travelers. This is projected to grow to 168 million by 2020, where the travel expenditure by Muslim travelers is expected to exceed USD 200 billion (CrescentRating, 2016). The COMCEC Tourism Working Group is focusing on Muslim Friendly Tourism (MFT) in its three consecutive meetings. The 7th Tourism Working Group was held on February 4th, 2016, with the theme of "*Muslim Friendly Tourism (MFT): Understanding the Demand and Supply Side in the OIC Member Countries.*" A research report was prepared on the theme of the meeting, which mainly focused on creating awareness about MFT as well as the developments regarding the demand and supply side of MFT in the Member Countries. This report, as well as the Member Country representatives during the 7th Working Group Meeting highlighted some major challenges faced by the member countries.

In addition to the demand and supply sides of MFT, COMCEC tries to analyze developing and marketing aspects of MFT products and services and developing regulations for accommodation establishments to improve MFT among OIC member states.

Safety and security concerns are in the spotlight for OIC member states, and it is assumed that these issues will continue to cause difficulties in the years ahead. Governments should work hard to ensure the safety of tourists and to minimize the impact of security threats. Incidents like the sector observed in 2015 and 2016 should not stop people travelling around the world. The strength of the US dollar relative to other currencies is shifting the price competitiveness among destinations and will affect market share and rankings of destinations.

Obstacles faced in the tourism development are diverse in the Member Countries as each country has its own tourism features, level of development and national development priorities and policies. The challenges affecting tourism performance in the Member Countries ranges from, among others, insufficient tourism-related infrastructure and investments, unskilled tourism workforce to low-capacity tourism administrations and problems in safety and security.

It is evident that if properly planned and managed tourism cooperation could play a significant role in the socio-economic development of the Member Countries. The COMCEC Strategy, provides a useful strategic framework for tourism development and tourism cooperation in the Member Countries with its new implementation instruments, namely, Tourism Working Group and Project Cycle Management mechanism.

To stimulate and promote tourism for economic growth, social progress and environmental sustainability, Member Countries should give priority to tourism sector in their national policies, foster competitive and responsible business models and practices, increase cooperation between the public and private sectors and enhance international cooperation including cooperation with the member countries.

APPENDIX:

Table 1: Tourist Arrivals in the OIC Member Countries (2003-2015)

Tourist Arrivals (000)	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
World (Millions)	689	760	805	851	911	929	894	952	995	1.035	1.087	1.134	1.186
Afghanistan													
Albania	557	645	748	937	1.127	1.420	1.792	2.417	2.932	3.156	2.857	3.341	3.784
Algeria	1.166	1.234	1.443	1.638	1.743	1.772	1.912	2.070	2.395	2.634	2.733	2.301	1.710
Azerbaijan	768	989	693	682	732	1.043	1.005	1.963	2.239	1.986	2.130	2.160	1.922
Bahrain	-	-	1237	-	-	-	-	955	-	1.014	1.069	838	-
Bangladesh	245	271	208	200	289	467	267	303	-	125	148	125	-
Benin	175	174	176	180	186	188	190	199	209	220	231	242	218
Brunei Darussalam	0	119	126	158	179	226	157	214	242	209	225	201	-
Burkina Faso	163	222	245	264	289	272	269	274	238	237	218	191	-
Cameroon	0	190	176	185	262	298	498	573	604	812	912	-	-
Chad	21	26	29	16	25	22	70	71	77	86	100	122	-
Comoros	21	23	26	29	15	-	11	15	19	-	-	-	-
Cote d'Ivoire	180	-	-	-	-	-	-	252	270	289	380	471	-
Djibouti	23	26	30	40	40	53	-	51	-	60	63	-	-
Egypt	5.746	7.795	8.244	8.646	10.610	12.296	11.914	14.051	9.497	11.196	9.174	9.628	9.139
Gabon	222	244	269	296	325	358	186	-	-	-	-	-	-
Gambia	89	90	108	125	143	147	142	91	106	157	171	156	-
Guinea	44	45	45	46	30	-	-	12	-	96	56	33	35
Guinea-Bissau	0	0	5	12	30	-	-	22	-	-	36	36	44
Guyana	101	122	117	113	134	130	141	150	157	177	200	206	207
Indonesia	4.467	5.321	5.002	4.871	5.506	6.234	6.324	7.003	7.650	8.044	8.802	9.435	10.408
Iran	1.546	1.659	1.889	2.735	2.172	2.034	-	2.938	3.354	3.834	4.769	4.967	5.237
Iraq	-	-	-	-	-	864	1.262	1.518	-	1.111	892	-	-
Jordan	2.353	2.853	2.987	3.225	3.431	3.729	3.789	4.207	3.960	4.162	3.945	3.990	3.763
Kazakhstan	2.410	3.073	3.143	3.468	3.876	3.447	3.118	3.393	4.093	4.807	4.926	4.560	-
Kuwait	94	91	104	185	293	259	297	207	269	300	307	198	-
Kyrgyz Republic	342	398	319	766	1.656	2.435	2.147	1.316	3.114	2.406	3.076	2.849	-
Lebanon	1.016	1.278	1.140	1.063	1.017	1.333	1.844	2.168	1.655	1.366	1.274	1.355	1.518
Libya	0	43	81	42	38	34	-	-	-	-	-	-	-
Malaysia	10.577	15.703	16.431	17.547	20.973	22.052	23.646	24.577	24.714	25.033	25.715	27.437	25.721
Maldives	564	617	395	602	676	683	65	792	931	958	1.125	1.205	1.234
Mali	110	113	143	153	164	190	160	169	160	134	142	168	-
Mauritania	-	-	-	-	-	-	-	-	-	-	-	-	-
Morocco	4.761	5.477	5.843	6.558	7.408	7.879	8.341	9.288	9.342	9.375	10.046	10.283	10.177
Mozambique	441	470	578	664	771	1.815	1.461	1.718	1.902	2.113	1.886	1.661	1.552
Niger	55	57	58	60	48	73	66	74	82	94	123	135	135
Nigeria	924	962	1.010	1.111	1.212	1.313	1.414	1.555	715	486	600	-	-
Oman	630	908	1.114	1.336	1.182	1.378	1.524	1.446	1.343	1.438	1.392	1.519	-
Pakistan	501	648	798	898	840	823	855	907	1.161	966	565	565	-
Palestine	37	56	88	123	264	387	396	522	449	490	545	556	432
Qatar	557	732	913	946	964	1.405	1.659	1.519	2.527	2.346	2.611	2.826	2.930
Saudi Arabia	7.332	8.599	8.037	8.620	11.531	14.757	10.897	10.850	17.498	14.276	15.772	18.260	17.994
Senegal	495	667	769	866	875	-	810	900	1.001	962	1.063	836	-
Sierra Leone	38	44	40	34	32	36	37	39	52	60	81	44	24
Somalia	-	-	-	-	-	-	-	-	-	-	-	-	-
Sudan	52	61	246	328	436	440	420	495	536	575	591	684	-
Suriname	82	138	161	154	167	151	150	204	220	240	249	252	228
Syria	2.598	3.399	3.571	4.231	4.158	5.430	6.092	8.546	5.070	-	-	-	-
Tajikistan	-	-	-	-	-	325	-	160	-	244	208	213	414
Togo	61	83	81	94	86	74	150	202	300	235	327	282	273
Tunisia	5.114	5.998	6.378	6.550	6.762	7.050	6.901	7.828	4.782	5.950	7.352	7.163	5.163
Turkey	-	16826	20273	18916	22248	24994	25506	31.364	34.654	35.698	37.795	39.811	39.478
Turkmenistan	8	15	12	6	8	-	-	-	-	-	-	-	-
Uganda	305	512	468	539	642	844	807	946	1.151	1.197	1.206	1.266	-
UAE (Dubai)	5.871	6.195	7.126	-	-	-	6.812	7.432	8.129	8.977	9.990	-	-
Uzbekistan	231	262	242	560	903	1.069	1.298	1.327	1.460	-	1.969	-	-
Yemen	155	274	336	382	379	404	434	1.025	829	874	990	-	-

Source: UNWTO Tourism Highlights 2006, 2009 and 2016 Editions.

Table 2: Tourism Receipts in the OIC Member Countries (2003-2015) (US \$ Millions)

Tourism Receipts	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
World (US \$ Billion)	533	634	679	744	858	941	853	928	1.030	1.075	1.159	1.309	1.260
Afghanistan	-	-	-	-	-	-	-	55	71	56	56	-	-
Albania	537	756	880	1.057	1.479	1.849	1.816	1.626	1.628	1.464	1.473	1.705	1.500
Algeria	112	178	477	215	219	474	267	219	209	217	250	258	-
Azerbaijan	70	79	100	201	317	382	353	621	1.287	2.433	2.365	2.432	2.309
Bahrain	1.206	864	1.603	1.048	1.105	1.166	1.118	1.362	1.035	1.051	1.165	1.197	-
Bangladesh	59	76	79	80	76	75	70	81	87	105	129	153	148
Benin	108	121	108	122	206	236	131	133	187	170	189	151	-
Brunei Darussalam	124	181	191	224	233	242	254	-	-	92	96	79	-
Burkina Faso	38	52	46	55	61	82	64	72	133	84	153	135	-
Cameroon	266	212	229	231	254	167	270	159	409	349	576	-	-
Chad	-	-	-	-	-	-	-	-	-	-	-	-	-
Comoros	16	21	24	27	30	39	32	35	44	39	49	51	-
Cote d'Ivoire	76	91	93	104	115	129	151	201	141	172	181	184	-
Djibouti	7	7	7	10	7	8	16	18	19	21	22	21	-
Egypt	4.704	6.125	6.851	7.591	9.303	10.985	10.755	12.528	8.707	9.940	6.047	7.208	6.065
Gabon	84	74	13	-	-	-	-	-	-	-	-	-	-
Gambia	58	51	59	69	87	80	63	74	83	88	-	-	-
Guinea	-	-	-	-	1	2	3	2	2	1	-	-	-
Guinea-Bissau	2	2	2	3	28	38	-	13	-	7	17	21	-
Guyana	28	27	35	37	50	59	35	80	95	64	77	79	65
Indonesia	4.461	4.798	4.521	4.448	5.346	7.375	5.598	6.957	7.952	8.325	9.119	10.261	10.761
Iran	1.266	1.074	1.025	1.452	1.486	2.202	2.012	2.438	2.381	1.114	3.076	3.483	-
Iraq	-	-	186	170	555	-	-	1.660	1.543	1.634	-	-	-
Jordan	1.266	1.330	1.441	2.060	2.311	2.943	2.911	3.585	3.425	4.061	4.117	4.375	4.065
Kazakhstan	638	803	801	838	1.013	1.012	963	1.005	1.209	1.347	1.522	1.467	1.625
Kuwait	328	398	413	508	530	610	354	290	319	425	298	369	499
Kyrgyz Republic	62	92	94	189	392	569	459	284	640	698	530	423	426
Lebanon	6.782	5.411	5.969	4.981	5.466	7.192	6.744	7.861	6.545	6.327	6.492	6.523	6.857
Libya	243	261	301	244	99	99	50	60	-	-	-	-	-
Malaysia	6.799	8.198	8.543	10.424	14.047	15.277	15.772	18.276	18.259	20.250	21.496	22.595	17.597
Maldives	402	471	287	512	602	664	608	1.713	1.868	1.951	2.333	2.696	2.567
Mali	136	142	149	175	227	286	192	283	267	142	178	212	-
Mauritania	-	-	-	-	-	-	-	-	-	48	41	37	29
Morocco	3.802	3.924	4.617	5.984	7.181	7.202	6.557	6.703	7.281	6.703	6.854	7.056	6.003
Mozambique	106	96	138	145	182	213	196	197	231	250	199	207	193
Niger	28	32	44	39	44	86	66	105	96	50	58	90	-
Nigeria	58	49	139	209	337	959	602	576	628	559	542	543	404
Oman	546	414	481	544	648	804	689	780	996	1.095	1.295	1.376	1.540
Pakistan	620	765	828	255	276	245	272	305	373	339	288	283	315
Palestine	152	115	119	89	212	269	410	667	795	581	789	603	-
Qatar	369	498	760	874	-	-	179	584	1.170	2.857	3.456	4.591	5.035
Saudi Arabia	3.418	6.486	6.111	4.961	5.228	9.720	5.995	6.712	8.459	7.432	7.651	8.238	10.130
Senegal	269	286	334	250	531	637	463	453	468	407	439	423	-
Sierra Leone	60	58	64	23	22	34	25	26	44	42	66	35	23
Somalia	-	-	-	-	-	-	-	-	-	-	-	-	-
Sudan	17	21	89	252	262	331	299	94	185	772	773	967	949
Suriname	18	52	96	109	73	83	64	61	61	71	84	95	88
Syria	877	2057	2130	2025	2883	3176	3757	6190	1753	-	-	-	-
Tajikistan**	6	10	9	11	17	24	20	32	-	-	-	-	-
Togo	26	25	27	23	38	44	68	66	79	111	125	125	-
Tunisia	1.935	1.970	2.063	2.275	2.575	2.932	2.773	2.645	1.914	2.227	2.191	2.359	1.354
Turkey	-	15.888	18.152	16.853	18.487	21.951	21.250	22.585	25.054	25.653	27.997	29.552	26.616
Turkmenistan	-	-	-	-	-	-	-	-	-	-	-	-	-
Uganda	185	268	382	346	398	498	667	784	960	1.135	1.334	791	1.149
UAE	1.438	1.593	3.218	4.972	6.072	7.162	7.352	8.577	9.204	10.380	11.564	13.969	16.038
Uzbekistan	48	57	28	43	51	64	99	121	-	-	-	-	-
Yemen	139	139	181	181	425	453	486	1.161	780	849	940	1.026	-

Source: UNWTO Tourism Highlights 2006, 2009 and 2016 Editions.

Table 3: Travel & Tourism Economic Impact for OIC Member Countries (2015 Data)

COMCEC	The direct contribution of Travel & Tourism to GDP	The direct contribution of Travel & Tourism to Employment (jobs)	% of Total Employment
Afghanistan	-	-	-
Albania	6	51.000	5,5
Algeria	4	327.000	3
Azerbaijan	2,8	118.500	2,6
Bahrain	4,3	31.500	4,2
Bangladesh	2,4	1.138.500	2
Benin	2,6	53.500	2,2
Brunei Darussalam	1,5	4.500	2,5
Burkina Faso	1,6	71.000	1,4
Cameroon	3,1	141.500	2,7
Chad	1,2	20.500	0,9
Comoros	4,3	6.000	3,6
Cote d'Ivoire	-	-	-
Djibouti	-	-	-
Egypt	5	1.110.500	4
Gabon	1,1	4.000	1
Gambia	8,4	49.000	6,9
Guinea	2	42.000	1,6
Guinea-Bissau	-	-	-
Guyana	3,3	10.500	3,6
Indonesia	3	3.468.500	3
Iran	3	476.000	2
Iraq	2,4	153.000	1,8
Jordan	6	72.000	5
Kazakhstan	2	150.500	2
Kuwait	2,1	54.500	2
Kyrgyz Republic	1,3	30.500	1,3
Lebanon	8	121.000	8
Libya	3,3	32.000	2
Malaysia	4	574.000	4
Maldives	52,4	47.500	30,2
Mali	4,2	78.500	2,3
Mauritania	-	-	-
Morocco	8	731.500	7
Mozambique	3	280.500	2,4
Niger	1,4	12.500	1,2
Nigeria	1,7	651.000	1,6
Oman	2,5	53.500	2,7
Pakistan	2,8	1.429.500	2,4
Palestine	-	-	-
Qatar	2,8	79.500	4,7
Saudi Arabia	3	727.500	6
Senegal	5,5	274.500	4,7
Sierra Leone	1,8	19.000	1,7
Somalia	-	-	-
Sudan	2,6	209.500	1,9
Suriname	1,2	2.000	1,1
Syria	5	152.000	3
Tajikistan	-	-	-
Togo	4,1	36.000	3,3
Tunisia	6	185.500	5
Turkey	5	600.000	2,3
Turkmenistan	-	-	-
Uganda	3,7	464.500	3,1
United Arab Emirates	4	330.000	6
Uzbekistan	1,1	141.500	0,9
Yemen	4,4	183.500	2,9

Source: WTTC, Travel & Tourism Economic Impact 2016, Country Reports, 2016

Table 4: Classification of the OIC Member Countries by Region

OIC-Sub Saharan Africa	OIC-MENA	OIC-Asia
1. Burkina Faso	1. Egypt	1. Guyana
2. Somalia	2. Jordan	2. Pakistan
3. Nigeria	3. Iran	3. Afghanistan
4. Mauritania	4. Bahrain	4. Kyrgyz Republic
5. Benin	5. Morocco	5. Malaysia
6. Cameroon	6. Saudi Arabia	6. Bangladesh
7. Chad	7. Libya	7. Azerbaijan
8. Cote d'Ivoire	8. Algeria	8. Indonesia
9. Djibouti	9. Albania	9. Kazakhstan
10. Gabon	10. Iraq	10. Maldives
11. Guinea	11. Lebanon	11. Tajikistan
12. Guinea-Bissau	12. Tunisia	12. Turkmenistan
13. Mali	13. Turkey	13. Uzbekistan
14. Mozambique	14. Yemen	14. Brunei Darussalam
15. Niger	15. Qatar	
16. Senegal	16. Oman	
17. Sierra Leone	17. Kuwait	
18. The Gambia	18. Palestine	
19. Sudan	19. United Arab Emirates	
20. Suriname		
21. Togo		
22. Uganda		
23. Comoros		

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- (48 OIC Member States' Reports are used including Albania, Algeria, Azerbaijan, Bahrain, Bangladesh, Benin, Brunei Darussalam, Burkina Faso, Cameroon, Chad, Comoros, Egypt, Gabon, Gambia, Guinea, Guyana, Indonesia, Iran, Iraq, Jordan, Kazakhstan, Kuwait, Kyrgyz Republic, Lebanon, Libya, Malaysia, Maldives, Mali, Mauritania, Morocco, Mozambique, Niger, Nigeria, Oman, Pakistan, Palestine, Qatar, Saudi Arabia, Senegal, Sierra Leone, Somalia, Sudan, Suriname, Syria, Tajikistan, Togo, Tunisia, Turkey, Turkmenistan, Uganda, United Arab Emirates, Uzbekistan, Yemen)