



Islamic Centre for  
Development  
of Trade



# Developing Sustainable Tourism in OIC Countries:

**Prospects for  
International Trade  
and Investment**

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## **Developing Sustainable Tourism in OIC Countries:**

### **Prospects for International Trade and Investment**

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## Acronyms

CAGR	Compound Annual Growth Rate
COMCEC	Standing Committee for Economic and Commercial Cooperation
EU	European Union
FDI	Foreign Direct Investment
GDP	Gross Domestic Product
GEF	Global Environment Facility
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GMTI	Global Muslim Travel Index
GSTC	Global Sustainable Tourism Council
ICCIA	Islamic Chamber of Commerce, Industry and Agriculture
ICDT	Islamic Centre for Development of Trade
ICTM	Islamic Conference of Tourism Ministers
IUCN	International Union for Conservation of Natural Life and Natural Resources
LOHAS	Lifestyles of Health and Sustainability
MOCAT	Ministry of Culture, Arts and Tourism
NMI	Natural Marketing Institute
OIC	Organization of Islamic Cooperation
PATA	Pacific Asia Travel Association
PPCP	Public-Private-Community Partnerships
PPP	Public-Private Partnerships
SDGs	Sustainable Development Goals
SESRIC	Statistical, Economic and Social Research and Training Centre for Islamic Countries
SMIIC	Standards and Metrology Institute for Islamic Countries
STI	Sustainable Travel Index
TTD	Travel & Tourism Development
UAE	United Arab Emirates
UNDP	United Nations Development Program
UNEP	United Nations Environment Program
UNIDO	United Nations Industrial Development Organization
UNWTO	The World Tourism Organization
USD	United States Dollar
WEF	World Economic Forum
WTTC	World Travel & Tourism Council

## Foreword



Mrs. Latifa El Bouabdellaoui  
Director General of Islamic Centre for  
Development of Trade (ICDT)

*"I strongly believe that the findings and conclusions of the report would provide evidence-based guidance in policy-making while raising awareness on sustainable tourism in OIC countries."*

It is with my immense pleasure that I present ICDT's report on "Developing Sustainable Tourism in OIC Countries: Prospects for International Trade and Investment" to you. It is the first dedicated report prepared on the topic of sustainable tourism with a specific focus on the OIC region that reveals a number of critical findings for all tourism stakeholders and policymakers. As this niche tourism market is expected to grow faster than the conventional tourism market in the next years and given its huge unleashed potential in OIC countries, sustainable tourism activities would stimulate economic growth and sustainable development while helping local communities and preserving nature.

It is important to highlight that the report not only looks at the state of sustainable tourism and evaluates the performance of the OIC region by using statistical indicators but also points out its great economic potential for the development of international trade and investment in OIC countries. Besides, the report carefully presents ten case studies from selected OIC countries from Africa, Arab and Asia regions namely The Gambia, Nigeria, Chad, Morocco, United Arab Emirates, Saudi Arabia, Türkiye, Malaysia, Guyana and Maldives. In this way, the report reveals that a group of OIC countries has already taken concrete steps and implemented successful policies for the development of sustainable tourism. Such efforts of OIC countries have already started to pay back and these countries have been placed

among the top sustainable tourism destinations in the world in several prominent indices. Moreover, an influx of tourists, who would like to respect the principles of sustainable and Muslim Friendly tourism, has generated billions of additional export revenue and promoted new investments in such destinations in OIC Zone.

To this end, I would like to invite all tourism stakeholders, policymakers, academicians, and practitioners in the OIC region to pay greater attention to sustainable tourism particularly in the post-COVID era, which will be shaped by the principles of responsible and sustainable tourism. I strongly believe that the findings and conclusions of the report would provide evidence-based guidance in policy-making while raising awareness on sustainable tourism in OIC countries.

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## Executive Summary



### *Sustainable tourism and sustainable development go hand in hand*

Sustainable tourism activities make significant contributions to environmental protection while ensuring travellers' expectations from the visit. Over the past few decades, it has emerged as a niche market in the world tourism market and many OIC countries have started to offer products and services in the domain of sustainable tourism to cater to the needs of responsible travellers.

Against this backdrop, this report analyses the current situation of sustainable tourism in OIC countries and reveals key challenges and prospects. It further looks at the nexus between sustainable tourism and international trade and investment. The report presents ten case studies from selected OIC countries namely The Gambia, Nigeria, Chad, Morocco, United Arab Emirates, Saudi Arabia, Türkiye, Malaysia, Guyana and Maldives to highlight some good practices and lessons learned that could also offer some guidance to other member countries.



### *The sustainable tourism market in OIC countries is estimated to range between USD 78 billion and USD 142 billion in 2019*

OIC countries have experienced substantial growth in international tourism both in terms of tourist arrivals and tourism receipts. International tourist arrivals in the OIC region hit 292 million in 2019 and tourism receipts reached USD 238 billion in 2019. OIC countries are not only attractive tourist destinations but also “spenders on tourism” that spent around USD 179 billion in 2019. The positive pattern in international tourism activities seen in OIC countries was hit severely by the COVID-19 pandemic which started to recover in 2021 and 2022.

Yet, estimates presented in the report that OIC countries, as a group, get a relatively limited share from sustainable tourism. The results reveal that the sustainable tourism market size in the OIC region ranged between USD 78 billion (conservative estimation) and USD 142 billion (moderate estimation) in 2019. Due to the COVID-19 pandemic, the market narrowed down and its size was estimated between USD 38.5 billion and USD 70.7 billion in 2020.





### *Fast-paced growth in the sustainable tourism market in OIC countries is expected in the post-COVID era*

The projections show that there will be a quick recovery in the global sustainable tourism market that the market size is expected to reach USD 334 billion by 2027, registering a Compound Annual Growth Rate (CAGR) of 14.3% from 2021 to 2027. OIC countries are expected to benefit from this fast-paced positive momentum in the sustainable tourism market and its estimated market size will range between USD 104 billion (conservative estimation) and 191 billion (moderate estimation) in 2027. Most of this additional growth in the OIC region will stem from new investments to be made in the sustainable tourism market. In particular, the large and fast-growing young population, rapid economic growth in OIC economies, the emergence of Halal products and services, the rise of digital connectivity and e-commerce, and the growing increase in ethical and responsible consumption are expected to drive the growth in the sustainable tourism market.



### *Boosting investments in sustainable tourism is essential to unleashing its potential in the OIC region*

OIC countries need to boost investments in this important sector in order to unleash their full potential and generate more export revenue through sustainable tourism activities. In this respect, Foreign Direct Investment (FDI) could play a significant role in boosting sustainable tourism-related investments and activities in the OIC region given their abundant natural resources and rich culture. In fact, some OIC countries have become important destinations for multinational companies in the domain of tourism.

For example, the UAE hosted 79 new tourism FDI projects over the period 2015-2019. With this performance, the UAE topped the list in the OIC region as well as has been placed among the top-10 performer countries in the world. Besides, more than 30 OIC countries have already listed “tourism” as a priority investment area and the national Investment Promotion Agencies (IPAs) have started to promote this sector in their promotional activities. Intra-OIC cooperation and new investment modalities like the PPPs could further stimulate investments in the area of sustainable tourism. Yet, OIC countries should address a number of challenges like standardization and certification issues, inadequate infrastructure, limited awareness of sustainability, and global uncertainties to get a higher share from the global FDI landscape, especially in sustainable tourism-related projects.



### *National and OIC-level policies could elevate the sustainable tourism market in OIC countries*

Both national-level, regional-level and OIC-level policies could help OIC countries to address these challenges and gaps in the domain of sustainable tourism. At the national level, ensuring coordination among stakeholders, and developing national strategies and human capital for sustainable tourism should be among policy priority areas. At the OIC cooperation level, it is critical to mainstream sustainable tourism in all relevant meetings and foras, holding dedicated events, preparing OIC-level action plans, and strengthening networking among sustainable tourism stakeholders could all give a positive impetus to the growth and development of sustainable tourism. In this picture, relevant OIC institutions like ICDT, SESRIC, SMIIC, ICCIA and IsDB Group could contribute to the efforts of the OIC in this niche tourism market through their activities and programmes in collaboration with governments and the private sector.



## Introduction

## Introduction

The Organization of Islamic Cooperation (OIC) composed of 57 Member States from four continents, is the second largest organization after the United Nations. The organization is the common voice of the Muslim world. As a group hosting more than 1.8 billion people, it has great potential for the development of international tourism. Just before the outbreak of the COVID-19 pandemic, international tourist arrivals hit 292 million in 2019 that generated international tourism receipts (i.e. export revenue) of USD 238 billion in 2019 (SESRIC, 2022). Given direct and indirect linkages, the sector also creates millions of jobs and helps the preservation and protection efforts of nature in the OIC region.

Sustainability, which is one of the priority areas in the action plans of the Organization of Islamic Cooperation (OIC), is related to the changes in production and consumption styles that are necessary to ensure that all people who live and will live in the future, can participate in social and economic development fairly within the current environmental limits. It is based on the conservation and development of resources. The continuous and conserved evaluation of resources, especially the preservation of renewable resources without exceeding the limits of renewal, forms the basis of the development philosophy that protects the environment (Our Common Future, 1987).

Regions and countries that pay more attention to environmental and social principles, which are among the sustainability principles, would be among top destinations of international tourism (Harris, 2000). By acknowledging this trend, an increasing number of OIC countries and the OIC has started to pay growing attention to the issue of sustainability in all sectors including tourism.

The OIC (2016) has included sustainability-related goals in its adopted OIC Programme of Action 2025. In many aspects, the priority areas of the said action plan of the OIC are in line with sustainable development goals such as cooperation, poverty reduction, employment, education, and environmental regulations. In this context, the development of sustainable tourism in the OIC region not only would be important for achieving the objectives of the OIC Programme of Action as well as attaining sustainable development goals. For example, sustainable tourism activities make significant contributions to environmental protection by reducing carbon gas emissions and environmental waste.<sup>1</sup>

<sup>1</sup> Sometimes it is called responsible tourism, eco tourism, ethical tourism, and green tourism.

In this respect, sustainable tourism has emerged as a niche market in many OIC countries over the past few decades. These activities have started to generate billions of tourism revenues and create job opportunities for local communities while respecting nature. Yet, not all OIC countries have invested much in this growing niche market such as due to limited awareness, know-how, and financial resources.

Against this background, this report analyses the current situation of sustainable tourism in OIC countries, reveals the challenges and opportunities, and examines its relationship with trade and investment. It further presents ten case studies from OIC Africa, Asia, and Arab regions to showcase rich experiences and lessons learned from these selected countries in developing sustainable tourism. Finally, in each chapter, a group of recommendations is presented to provide some guidance for policymakers regarding steps to be taken to develop sustainable tourism activities, generate more export revenue (i.e. tourism receipts), and attract more investment from the global market.





## Chapter 1:

# International Tourism in OIC Countries and Key Concepts in Sustainable Tourism

## Chapter 1. International Tourism in OIC Countries and Key Concepts in Sustainable Tourism

The tourism sector encompasses all socio-economic activities that are directly and/or indirectly related to the provision of goods and services for tourists. In this context, UNWTO identifies 185 supply-side activities with important links to the tourism sector. These activities include the services of various sectors such as transportation and communication, hotel and accommodation, food and beverage, culture and entertainment services, banking, and finance.

OIC countries have witnessed rapid expansion in their tourism sector in recent years. As a group, the OIC has emerged as an important player in the global tourism market in terms of tourist arrivals and tourism revenues. The recent positive developments in the tourism sector of OIC countries also reveal that there will be further growth in the number of tourists, exports revenue from tourism, and the number of enterprises that offer tourism supply with the gradual removal of pandemic-related restrictions in the OIC region.

Nevertheless, the rapid growth in tourism could be sustained if policies take social, economic, and environmental sustainability principles into consideration. Only in this way, sustainable development could be achieved. To this end, sustainable tourism, as a niche tourism market, has the potential to grow rapidly and even has the potential to transform the entire tourism sector in the future into a greener and more responsible one.

Against this backdrop, this chapter first presents an overview of international tourism in OIC countries in light of statistics. Then, it focuses on key concepts in sustainable tourism in terms of drivers of demand and supply, market size, and risk factors.

### 1.1 Key Concepts in Sustainable Tourism

#### The Concepts of Sustainability and Sustainable Development

The concept of sustainability was first included in the World Nature Charter document accepted by the IUCN (International Union for Conservation of Natural Life and Natural Resources) in 1982. The starting point of the concept is to prevent environmental problems that arise in parallel with economic and technological



developments and to protect the ecosystem. It aims to both make the most of the ecosystem and prevent damage. Sustainability is the continuation of a certain ecosystem or any system with continuity without interruption, deterioration, without being consumed by excessive use, without overloading the main resources (World Charter for Nature, 1982).

According to Middleton and Hawkins (1998), sustainability is a state of balance in which there is harmony between the activities of the human population and their natural, social and cultural environments.

Sustainability includes meeting the needs of the present without compromising the needs of future generations and protecting environmental quality with the effective use of natural resources. The goal here is to capture and maximize the harmony between people and the environment. The important point here is to investigate how this harmony can be achieved and developed. In order to ensure sustainability, it is necessary to form an ecosystem, create new social systems with effective public participation, protect the ecological base and provide solutions and environmental information systems and their organization. In other words, the basis of the understanding of sustainability is not only the elimination of human behaviours that harm the environment; harmonizing the mentality behind this behaviour with the environment. Therefore, sustainability is not a desired goal; it is a quest process (Our Common Future, 1987).

One of the main themes of sustainability principles is “environmental sustainability”. The unconscious and only economic use of natural resources by people will disrupt the balance of nature and the environment will suffer from this. As a result of industrialization and unconscious use of land by human beings, environmental problems such as global warming and related climate change, deterioration in ecological balance, air, water, food pollution, depletion of the ozone layer, and melting of glaciers have emerged. The idea of reducing and eliminating these effects caused by human activities on natural resources has led to the emergence of the concept of sustainability lately (SDG Knowledge Platform, 2022).

The rise of the concept of “sustainability” has led to the development and emergence of concepts such as sustainable development and sustainable tourism. Sustainable development is defined in the United Nations 1987 report as follows: “Meeting the needs of the present without compromising the ability of future generations to meet their own needs.” It contains two concepts (Our Common Future, 1987):

- The concept of “need”, especially the basic needs of the world's poor, which should be given priority above all else.
- The concept of the limitations imposed by technology and social organization on the ability of the environment to meet present and future needs.

Sustainability has three inseparable dimensions according to Harris (2000):

- Social dimension: It is people-oriented. A socially sustainable system is one that can ensure the adequacy and equal distribution of social services such as education and health, gender equality, political responsibility and participation.
- Economic dimension: It is related to the use of scarce resources. An economically sustainable system is a system that can produce goods and services on the basis of continuity, avoids sectoral imbalances that harm agricultural and industrial production, and ensures the sustainability of domestic and foreign debts at a manageable level.
- Environmental dimension: Biological and physical systems are expected to be balanced. The aim is to enable ecosystems to adapt to changing conditions. An environmentally sustainable system should avoid the exploitation of renewable resource systems or environmental investment functions and consume only sufficient non-renewable resources. This system also includes the protection of biodiversity, atmospheric balance and other ecosystem elements that cannot be classified as economic resources.

The environmental and ecology movement, triggered by the understanding of the extent of the damage to the environment in the 1960s, reached an international dimension in the 1970s, and the process that started with the Stockholm Conference in 1972 led to the establishment of the World Commission on Environment and Development by the United Nations in 1983. In 1987, Bruntland Report was published that explains the relationship between the environment and development and the concept of sustainable development (World Sustainable Development Summit, 2002).

The concept of sustainable development developed along with the Report on “our common future” organized by this commission in 1987. It became one of the leading phrases in the development discourse together with Agenda 21 and the United Nations Environment and Development Summit in Rio De Janeiro in 1992. Rio

Conference in 1992, Habitat II Summit in 1996, Millennium Summit in 2000, Johannesburg Summit in 2002, United Nations Sustainable Development Conference in 2012, United Nations General Assembly in 2013 and 2015, Paris Climate Change Agreement in 2015 and 2030 Sustainable Development Agenda in 2015 were among key developments.

### Sustainable Tourism Concept

The concept of “sustainable tourism” has emerged with the adaptation of the principles and strategies of the sustainable development approach to the tourism sector after the concept of sustainable development was introduced.

Sustainable tourism is a tourism movement shaped in line with sustainable development goals. Decisions and practices taken on international platforms show how important the principle of sustainability is. Goals and objectives can be carried out under the name of responsible tourism, ecotourism, and environmentally friendly tourism. In this context, there are responsible producers and responsible consumers in the tourism movement. It is a set of principles and processes adopted in order to prevent the environmental, social and economic damages of tourism and to carry out tourism activities by considering the sustainability principle.

#### 1.1.1. Drivers of the Demand and Supply

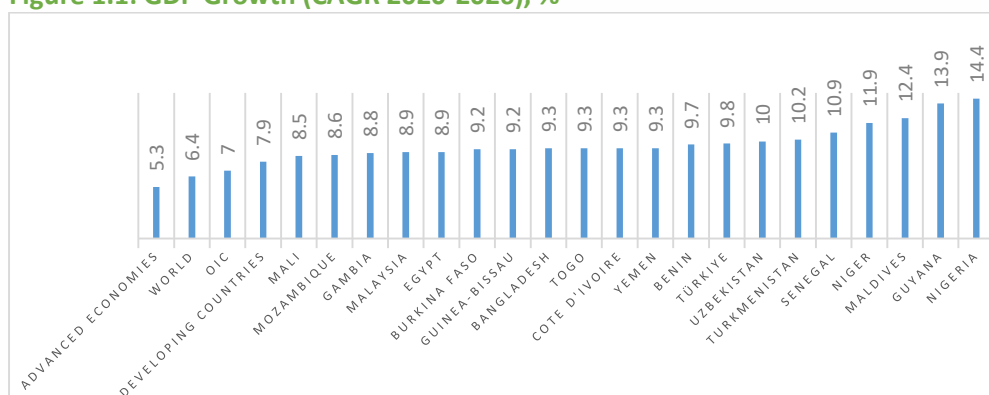
Sustainable tourism in OIC countries has a set of drivers both in terms of demand and supply side. The demand-side triggers can be summarized as follows:

**a) Large and Fast Growing Young Muslim Population:** The Muslim demographic is one of the strongest demand drivers of sustainable tourism that is covering almost 25% of the world's population. Muslims have been growing twice as fast as the non-Muslim population, and this trend is expected to remain the same over the next decade. Youth and young adults (ages 15-29) comprise 27.3% of the Muslim population in 2020, and this proportion is expected to increase to 30% of the world's youth population by 2030. It is often young generations pay more attention to the concept of environmental protection and sustainability as they have suffered due to global warming or carbon emission.

**b) Growing OIC Economies:** Despite the slowdown in global economic growth due to the pandemic, OIC economies are expected to grow faster than the rest of the world. The OIC group is expected to have 7% CAGR from 2020-2026 compared to the global average of 6.4% in this period based on IMF projections. Many OIC countries have been also growing faster than the IMF's emerging market emerging

and developed economies. In some OIC countries like Nigeria, Guyana, and the Maldives the GDP growth will exceed 12% over the period 2020-2026 (Figure 1.1).

**Figure 1.1: GDP Growth (CAGR 2020-2026), %**



Source: IMF

**c) Emergence of Halal Products and Services:** The demand and expenditure of Muslim consumers for Halal products and services have been increasing steadily. OIC countries with predominantly Muslim populations like Nigeria and Indonesia will experience strong growth in demand for Halal products and services. In particular, Muslim-Friendly Tourism activities, which also pay attention to the principles of sustainable tourism will see a surge in the next decades.

**d) Rise of Digital Connectivity and E-Commerce:** Digital connectivity plays a crucial role in enabling local and cross-border e-commerce. Indonesia, Malaysia, and Saudi Arabia are some of the OIC countries with the highest global e-commerce adoption above the global average of 76.8% and 55.4%, respectively (DinarStandard, 2022). Such trends are seen in many Muslim-majority countries and are expected to continue to grow in the post-COVID era which would stimulate the demand for sustainable tourism services.

**e) Increase in Ethical and Responsible Consumption:** Many of the values that support Islamic economics sectors are universal and appeal to consumers concerned with consumption ethics, health, and the environment. Demand for ethical and organic products has also increased due to the COVID-19 pandemic. A study of the IBM Institute for Business Value (2021) shows that six out of 10 consumers are willing to change their shopping habits to reduce environmental impact. More than 70% of those who believe the environment is very important will pay a premium of up to 35% for sustainable and environmentally conscious brands. The rise of ethical

consumerism has attracted many Halal brands, both Muslim and non-Muslim consumers such as Saffron Road, Iba Cosmetics, and multinational companies such as Unilever and L'Oreal, which currently offer Halal products.

On the supply side the following four factors could trigger the growth in sustainable tourism in the OIC region:

**a) Halal Certification Regulations:** Governments of OIC countries are increasingly scrutinizing the integrity of products imported into the bloc through Halal certification requirements. In many OIC countries, designated national bodies such as UAE's ESMA and EIAC, Saudi Arabia's SDA, and Malaysia's JAKIM monitor the industry and provide accreditation to Halal certification bodies. The Halal certification regulations, to a greater extent, cover the principles of sustainability such as set rules on how to manage and process waste. To this end, in the OIC group, sustainability in the tourism sector and in broader economic activities would be a key issue of concern among suppliers.

**b) National Strategies:** Many OIC countries attempt to diversify their tourism activities to maximize revenues and ensure the development of a sustainable tourism sector. To this end, a number of OIC countries like Morocco and Türkiye have prepared national strategies to develop a sustainable tourism sector. Some of these strategies focused more on the sustainability concept that could pave the way for the development of sustainable tourism activities and the emergence of new investors in OIC countries.

**c) Intra-OIC Cooperation:** Intra-OIC trade and tourism activities were on the rise before the outbreak of the pandemic. With the recovery of economic activities, it is expected to continue to grow. The pandemic has reduced the importance of global value chains and highlighted the importance of developing stronger ties with neighbouring countries and economic blocs to achieve sustainable development. In this respect, in the post-pandemic era, intra-OIC cooperation could be more important than ever. More OIC countries are expected to attempt to develop bilateral tourism activities, which could also enhance sustainable tourism activities such as by developing joint activities and programmes in this important domain.

**d) Role of Islamic Finance:** Islamic finance is the main driving force of the overall ecosystem. Capital continues to flow both between and within the OIC countries from early-stage financing to sovereign wealth levels. Mergers and acquisitions, government grants, and public-private partnerships are some of the ways that have helped private sector companies in the Islamic economy to grow. Environmentally

friendly and sustainable Sukuk, backed by the Islamic Development Bank (IsDB), and commitments from OIC member countries such as Indonesia, has been gaining greater popularity globally. The availability of Islamic financial assets and financial instruments has the potential to accelerate investments in sustainable tourism, particularly in the OIC region.

### 1.1.2. Other Factors Influence the Market Size

Over the last two decades, there has been an increasing interest in sustainability and corporate responsibility initiatives, sustainable lifestyles, green products and green issues in general. The growing interest in sustainable consumption and sustainable development has led to the need to define the sustainable lifestyle and its related market segments.

In 2007, the Natural Marketing Institute (NMI) conducted extensive research on consumer views on the role of sustainability, health, environment and social responsibility in the US market. The results showed that 41 million (or 13% of Americans) were named LOHAS consumers - Lifestyles of Health and Sustainability. The study also showed that interest in this market will remain so and sustainability concerns are not likely to decrease in the coming years (Natural Marketing Institute, 2008).

According to the Nielsen Company (2015) report, which conducted an online survey of 30,000 consumers in 60 countries in 2015, sustainability will continue to gain momentum worldwide. This is particularly the case in countries where increasing populations generate additional stress on the environment. An increasing number of consumers worldwide see sustainability actions as a necessity rather than an added value. The report concluded: "Consumer brands that commit to sustainability outperform those that don't." Companies that have proven their commitment to sustainability have sales growth four times higher than their competitors. The results confirm that the market for sustainable products continues to expand.

Interesting to note that according to the Nielsen Global Corporate Social Responsibility and Sustainability Survey 2015, 66% of global consumers are willing to pay more for sustainable brands. 73% of global millennials are willing to pay extra for sustainable offerings by 55% increase according to 2014 (The UAE as a Sustainable Tourism Destination, 2020).

According to the 2021 Sustainable Travel Report prepared by Booking.com, more than 29,000 travellers from 30 countries make sustainable travel. 48% of travellers

agree that the pandemic has changed their attitudes to make positive changes in their daily lives. The pandemic has made travellers want to travel more sustainably in the future (Booking.com, 2021). In 2021, 83% of travellers want to reduce their energy consumption, 79% want to use more environmentally friendly transportation, 76% want to reduce water use and 69% want to reduce the carbon footprint of their holidays.

The Global Muslim Travel Index (GMTI) has been prepared by MasterCard and CrescentRating since 2011 (Mastercard and CrescentRating, 2022). Since 2017, the criteria and sub-criteria have been developed to keep pace with the evolution of the Muslim travel market. In addition, general trends in the field of travel and lifestyle are taken into account. This year, keeping up with current trends, the ACES model has been developed to take into account the initiatives of destinations to drive sustainable tourism. Each of the key areas is evaluated using quantitative measures over a variety of criteria. Also, each criterion score is derived using several sub-criteria. More than 50 datasets are used to compile GMTI scores and according to the Global Muslim Travel Index 2022 report, the top 10 countries about the environment as follows: *Bahrain, Türkiye, Malaysia, Saudi Arabia*, United Kingdom, Andorra, Singapore, *UAE*, Italy, Luxembourg. Five of these countries are members of the OIC. And the environment criteria is defined as follows:

*“Environment is very important to facilitate travel within the destination. Sub-criteria in this category include that Muslim travellers do not have a safe space to stay away from religious and dress restrictions. The enabling climate and environment are the most important factors that increase the attractiveness of the destination. **Sustainability** is the new criterion added this year. This year's assessment measures destinations' efforts to eliminate plastic waste and reduce their carbon footprint.”*

The addition of sustainability in the Global Muslim Travel Index criteria and its 30% weight in the overall index reveals the importance attached to the environment and sustainability. More OIC and non-OIC countries are expected to take actions to get higher scores in the global ranking, especially by paying attention to the sustainability dimension such as by reducing plastic waste in accommodation facilities.

### 1.1.3. Risk Factors

Sustainable tourism, when properly planned and implemented promptly, can help to build up the environmental, social, and economic well-being of a tourism



destination. Financial support, a good transportation network, participation of the local population in the processes, skilled workforce, adoption of sustainability principles, branding in tourism, marketing and promotion, quality tourism supply, and coordination and supervision are some of the steps that need to be completed (Okonkwo, & Odey, 2017).

Failure to take action on these steps also poses a risk to the development of sustainable tourism in OIC countries. There are some risks/challenges to the development of tourism in OIC countries that could also slow down the growth of sustainable tourism. These include financing risk, planning risk, pandemic risk, security concerns, standards, government support, increased competition, Islamophobia, social events, and transportation (DinarStandard, 2022).

- *Financing risk:* Limited funding is available for startups working in travel technology. They struggle to attract investments. Investors focus more on health technology along with fintech.
- *Planning risk:* The implementation of sustainable tourism strategies faces many hurdles, including a lack of awareness of tourism stakeholders and prioritization of economic goals over environmental and social issues. Tourism can harm a destination's natural assets and the local community. The tendency of governments to focus on short-term goals requires prioritizing economic issues rather than social and environmental issues. Poor stakeholder engagement and support and insufficient resources to implement sustainability strategies are among the key challenges. The absence of important measures to ensure sustainability in the tourism sector can harm both the sector and the local people.
- *Pandemic risk:* Hygiene and safety requirements have eroded tourism businesses' revenues. Hygiene protocols related to COVID-19 are estimated to cost USD 9 billion per year for the hospitality industry. While larger brands can cut costs, this will be a burden for smaller hospitality businesses and other travel businesses.
- *Security concerns:* Traveling to several countries can include potential security and safety risk. Many countries have issued travel advisories requesting their citizens not to travel unless absolutely necessary. In this respect, security risks could be an important travel barrier.
- *Increased competition:* There is growing competition among destinations all around the world. Each country would like to attract more tourists. In particular, by catering to the needs of responsible travellers, more destinations offer

sustainable tourism activities. Those destinations with limited developed areas on sustainable tourism or having connectivity issues could not see surge in their tourist arrivals.

#### 1.1.4 Success Factors in Sustainable Tourism

For the development and success of sustainable tourism, wide participation and consensus of all stakeholders of the region is required. Sustainable tourism is a process that needs to be reached, monitored and measures must be taken. During the process, tourist satisfaction should be ensured, a meaningful and valuable experience should be offered to tourists, awareness should be raised about sustainability issues, and sustainable tourism practices should be encouraged. There may be some challenging conditions in front of sustainable tourism. Attention should be paid to the following factors to ensure the development of sustainable tourism (UNEP and UNWTO, 2005).

*a) Managing the dynamic growth in the number of tourists:* It is likely that there will be serious increases in the number of tourists in the coming years. This increase must be managed well in order not to harm the resources on which tourism depends.

*b) Climate change:* Climate change will have many damages such as coastal regions, winter tourism and water resources. Changes in temperature and precipitation will affect market attractiveness in many parts of the world. As the situation is critical, it is inevitable to take protective measures against the possible consequences of climate change.

*c) Poverty reduction:* The development of tourism provides a good opportunity to help reduce poverty because it creates a new source of income, often in rural areas where three-quarters of the world's poor live. It is also a labour-intensive activity and entry into the industry is easy. In this context, it is necessary to ensure that poor people benefit from visitor expenditures and are employed with the appropriate workforce.

*d) Conservation support:* Financing is needed to ensure the sustainability of cultural heritage and natural resource areas that need to be protected. Revenue-contributing steps such as entrance fees and permits for protected and cultural heritage sites need to be taken and expanded.

*e) Health and safety:* Health and safety are preventive conditions in the development of tourism. In order to ensure sustainability in tourism, measures should be developed for image, information management and security.

Achieving sustainable tourism also means taking an important step in local development. It is one of the strategies that should be adopted in order to ensure the social, environmental and economic sustainability of the destination.

There are successful steps taken by OIC countries which are aware of the aforementioned factors, within the scope of sustainable tourism. Some of these steps are as follows (DinarStandard, 2022):

- Sustainability is at the forefront of tourism and urban development in Saudi Arabia. Sustainability is at the heart of many of the megatourism projects Saudi Arabia has developed, including the USD 500 billion megacity of NEOM. Saudi Arabia has become the first country to pledge financial assistance to the Tourism Community Initiative, a global fund that aims to raise half a billion dollars in its first five-year phase. The Kingdom has already achieved one-fifth of that target by committing to USD 100 million after a memorandum of understanding with the Saudi Ministry of Tourism, the World Bank and UNWTO.
- In the UAE, Dubai's Urban Master Plan 2040 places a strong emphasis on sustainable urban development for the Emirate. Dubai's Roads and Transport Authority (RTA) has endorsed a long-term plan to achieve zero emissions from public transport in Dubai by 2050 (WAM, 2021).
- Gojek, Indonesia-based transportation, food delivery, digital payment and other services application, is committed to net zero carbon emissions.
- Pakistan has launched the 10 Billion Tree Tsunami Project with the support of the United Nations Environment Program (UNEP). The aim of the project is to plant 10 billion trees by 2023 to restore their ecosystems as the country is particularly vulnerable to the adverse effects of climate change.

International organizations also support sustainable tourism movements carried out in some OIC countries. The following examples highlight the availability of rich experiences in the OIC region in coordination with various organizations.

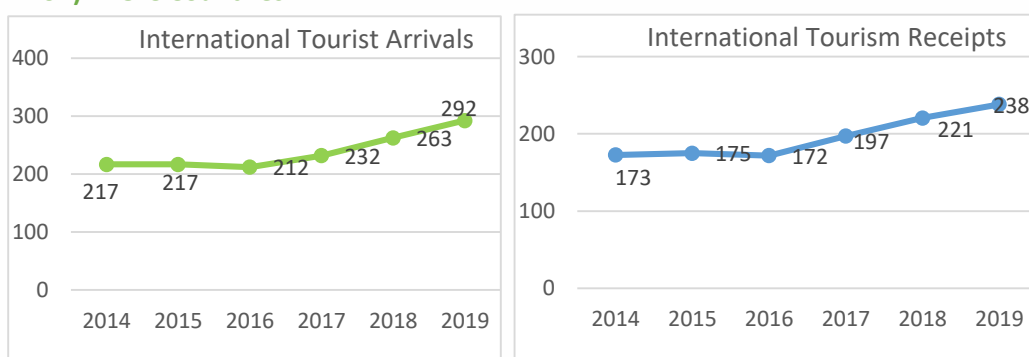
- Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) has been implementing a sustainable tourism project in coordination with the Tunisian Ministry of Tourism. It focuses on developing alternative tourism options related to culture, nature and sports as well as applying environmentally and socially sound approaches.

- United Nations Development Program (UNDP) has developed sustainable tourism routes together with a Turkish travel agency (Jolly) in Türkiye as part of the “My Heritage Türkiye” campaign. The campaign aims to benefit local economies and raise awareness of responsible tourism.
- Swisscontact has implemented a sustainable tourism program in Morocco to reduce poverty and provide new jobs, especially for youth and women.
- The EU funds a sustainable tourism project in Kazakhstan focused on developing the tourism industry while protecting the environment and people's cultural identity.

## 1.2 International Tourism in OIC Countries: An Overview

The number of tourists traveling abroad has increased significantly and steadily over the past few decades, and this activity has had a significant impact on the global economy, social structure, culture, and environment. Both the host country and the home country profit economically from international tourism. In line with the global trends, OIC countries have also experienced substantial growth in international tourism both in terms of tourist arrivals and tourism receipts. International tourist arrivals in the OIC region increased from 217 million in 2014 to 292 million in 2019 (Figure 1.2). Likewise, international tourism receipts climbed up from USD 173 billion in 2014 to USD 238 billion in 2019.

**Figure 1.2: International Tourist Arrivals (million) and Tourism Receipts (USD Billion) in OIC Countries**

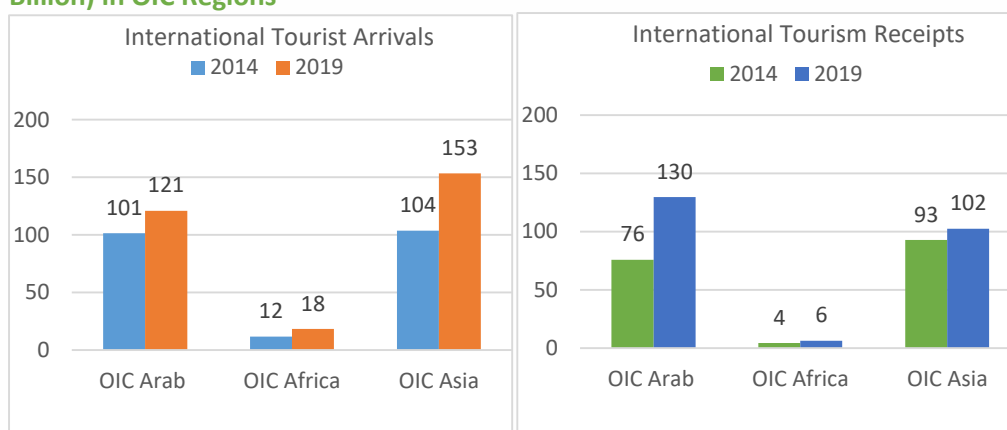


Source: UNWTO Tourism Barometers and World Bank

In terms of regional performance of OIC countries, there was a positive trend in all three regions namely Asia, Africa, and Arab over the period 2014-2019. In terms of arrivals, the OIC Asia region took the lead both in 2014 and 2019. In the OIC Asia region tourist arrivals hit 153 million in 2019. In other words, 52% of arrivals in the OIC region took place in the OIC Asia region in 2019. It was followed by the Arab

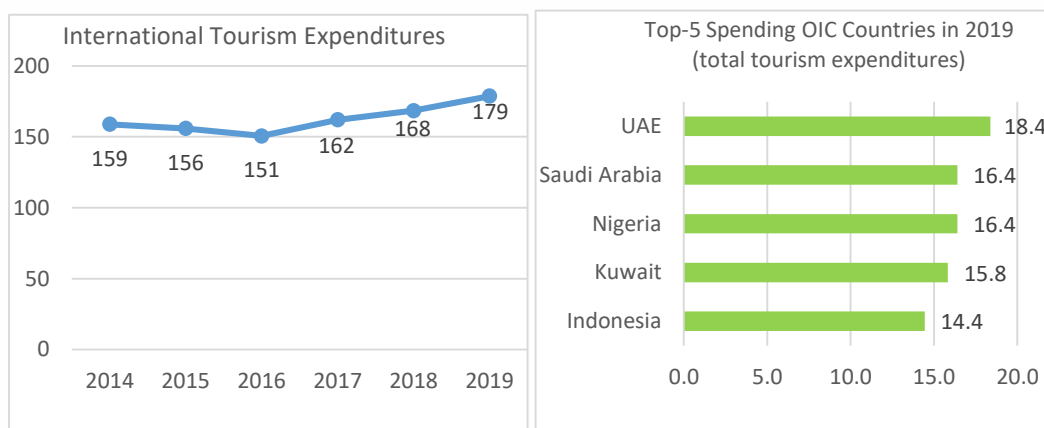
region by reporting 121 million arrivals. In the Africa region, tourist arrivals stayed rather limited lower than 20 million arrivals in the same year. In terms of tourism receipts, OIC countries in all regions portrayed a positive performance. The OIC Arab region had the highest tourism receipts in 2019 that reached USD 130 billion whereas it was measured at USD 102 billion in the Asia region. OIC countries in the Africa region could generate only USD 6 billion in 2019, which mainly stemmed from a limited number of tourist arrivals as well as limited diversification of services (Figure 1.3).

**Figure 1.3: International Tourist Arrivals (Million) and Tourism Receipts (USD Billion) in OIC Regions**



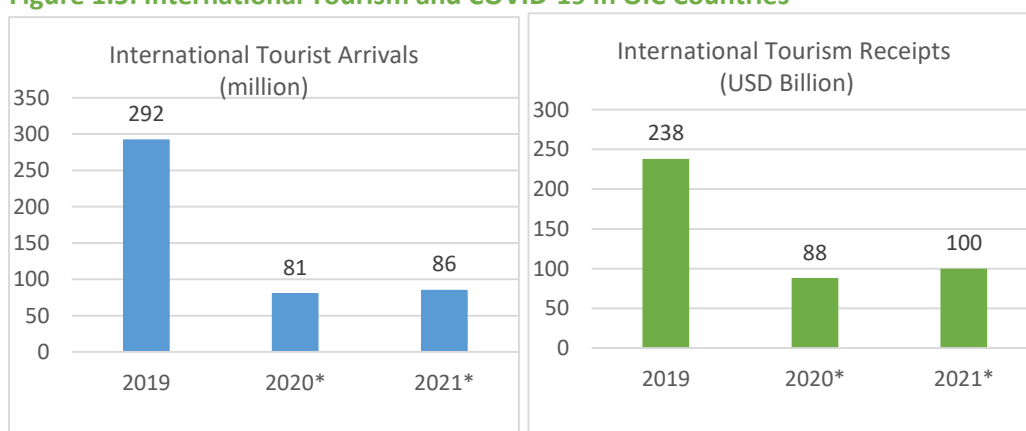
Source: UNWTO Tourism Barometers and World Bank

OIC countries are not only attractive tourist destinations but also “spenders on tourism”. An increasing number of people living in OIC countries are interested in international tourism. Consequently, international tourism expenditures in the OIC region went up from USD 159 billion to USD 179 billion in 2019 (Figure 1.4). Notably, the UAE (USD 18.4 billion) and Saudi Arabia (USD 16.4 billion) made the highest spending on tourism expenditures in 2019. Nigeria (from OIC Africa region) totally spent USD 16.4 billion on international tourism and was followed by Kuwait (USD 15.8 billion) and Indonesia (14.4 billion) in 2019.

**Figure 1.4: International Tourism Expenditures (USD Billion) in the OIC Countries**

Source: UNWTO Tourism Barometers and World Bank

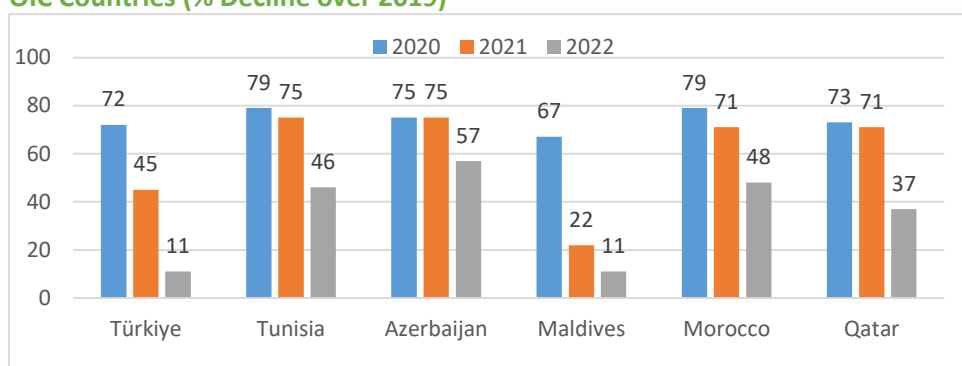
The positive pattern in international tourism activities seen in OIC countries was hit severely by the COVID-19 pandemic. The outbreak of the pandemic in 2020, as in other countries around the globe, has resulted in significant drops in arrivals and receipts in the OIC region such as due to restrictions on international travel and curfews. Based on the estimates presented in Figure 1.5, international tourist arrivals dropped from 292 million in 2019 to 81 million in 2020 in OIC countries. It slightly recovered in 2021 and reached 86 million. In a similar direction, receipts declined by USD 150 billion in 2020 and were recorded only at USD 88 billion. Recovery has started in 2021 and receipts reached USD 100 billion in OIC countries that also increasing hopes for full recovery in the sector in the post-pandemic period.

**Figure 1.5: International Tourism and COVID-19 in OIC Countries**

Source: Author's calculation from UNWTO. \* estimates. Assumption 1: OIC tourist arrivals declined by 72.3% in 2020 and 70.7% in 2021 as in the world. Assumption 2: OIC tourism receipts declined by 63% in 2020 and 58% in 2021 as in the world.

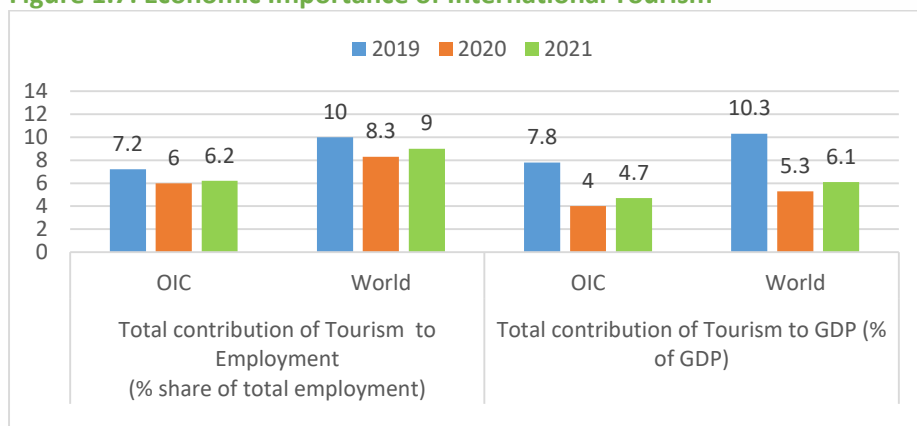
Not only estimates but also some actual data reported by a group of OIC countries support that the COVID-19 pandemic led to substantial declines in tourist arrivals. Many OIC countries from different regions like Türkiye, Tunisia, Azerbaijan and Morocco reported that tourist arrivals sharply declined in 2020, 2021 and 2022 as compared to 2019. For instance, in Morocco and Tunisia, it went down by 79% in 2020 as compared to 2019. In 2021, the decline was around 71% in Morocco in relative terms. Some recovery was recorded in 2021 and 2022 in a number of OIC countries. Yet, none of the six countries could reach their pre-pandemic levels recorded in 2019 as of 2022 (Figure 1.6).

**Figure 1.6: The Impact of COVID-19 on International Tourist Arrivals in Selected OIC Countries (% Decline over 2019)**



Source: UNWTO, International Tourism and COVID-19 Dashboard. Based on actual data from countries.

**Figure 1.7: Economic Importance of International Tourism**



Source: WTTC, 2022 (August)

As discussed above, given the multidimensional linkages of the tourism sector with other sectors and the positive pattern seen before the outbreak of the pandemic,



international tourism activities have become an important enabler of economic growth, exports, and job creation in the OIC region. In 2019, 7.2% of all jobs were created by the tourism sector, and 7.8% of the GDP was generated by this important sector in OIC countries (Figure 1.7). Yet, as compared to the world average, OIC countries could do better. For instance, around the globe, about 1 in 10 jobs was created in the tourism sector and 10.3% of the global GDP was created by the tourism sector in 2019. However, the pandemic has changed the relative importance of tourism activities for economies around the world and the OIC region. Yet, with the quick recovery in 2023 and 2024, it is likely that it will reach pre-pandemic levels and continue to be an engine of growth in many OIC countries. The growth in niche tourism markets like sustainable tourism activities will likely to accelerate the pace of recovery in the sector.

### 1.3 Conclusion

International tourism activities have become an important enabler of economic growth, exports, and job creation in the OIC region. Before the outbreak of the pandemic in all OIC sub-regions (Africa, Asia and Arab), there was a positive trend in international tourist arrivals over the period 2014-2019. It was a reflection of the activism of OIC countries for the development of tourism and to make it a sustainable component of their development efforts. Although the pandemic has affected this positive trajectory in tourism development of OIC countries, as in other parts of the world, niche tourism markets like sustainable tourism have a lot of potential.

Sustainable tourism is a tourism movement shaped in line with sustainable development goals. In this regard, the future of tourism development in the OIC region will increasingly take sustainable tourism principles into consideration in the post-pandemic period.

In particular, an overview of key concepts in sustainable tourism has revealed that OIC countries have certain advantages like an abundant young population and awareness on ethical consumption that could spur the development of sustainable tourism. However, OIC countries should also develop policies and enabling policies for the successful take off this niche tourism market.

Besides, OIC countries should pay more attention to raining, reskilling, and upskilling schemes aimed at equipping one's workforce with new and improved skills to operate in the Travel & Tourism sector. These efforts could help strengthen the

future readiness of the sector's workforce and help overcome the issue of talent shortages. It is essential that training programmes are provided on a regular basis and address both current and anticipated needs.

For instance, Singapore is proactively preparing its workforce to meet tomorrow's travel demand. In effect, Singapore's "SGUnited Skills" programme comprises a wide range of training courses that helps Singaporeans acquire in-demand and emerging skills across several sectors. The scheme aims to create around 100,000 jobs and various skill-building opportunities. As the nature of work and skills evolve, accelerated to an extent by the COVID-19 pandemic, effective policies and public-private collaboration, that have the potential to support educational programmes and apprentice-based training, are crucial to bridging skills gaps and developing a workforce that can help the sector thrive. In Switzerland, for example, 'dual' vocation, education, and training (VET) systems, in which students combine learning in school and workplace settings, are being used that the system is preparing a broad cross-section of students for careers in a range of occupations including high-tech, human services, traditional trades, and crafts <sup>10</sup>. Ultimately, these programmes are achieving success due to a shared vision among three key partners—the federal government, employer organisations and associations, and local municipalities.

The adoption of innovative technological and digital solutions can also help to overcome the issue of staff shortages by improving daily tourism operations as well as mobility and border security. This not only alleviates pressure on staff but also ensures safe and seamless travel and an enhanced customer experience. Specific technological solutions include streamlined digital experiences, cloud computing, and artificial intelligence. For instance, hotel establishments can better utilise real-time data on current and future occupancy to prioritise which rooms to service first whilst improving human resource management. Online room selection, kiosk check-in, and giving guests an opportunity to make service requests through their digital devices can alleviate pressure on daily operations while contributing to sustainability. Meanwhile, biometric technology can help make airport operations more efficient, with a faster passenger flow and effective safety and security features.

These examples indicate that a wide array of policies are already available in different countries around the globe that OIC countries could consider in shaping their future tourism policies and interventions. In this picture, enhancing intra-OIC cooperation could play a pivotal role in areas in terms of experience-sharing. The

development of intra-OIC cooperation is also likely to enhance the contribution of tourism activities to the economies of OIC countries.



## Chapter 2: State of Sustainable Tourism and Recent Trends in OIC Countries

## Chapter 2. State of Sustainable Tourism and Recent Trends in OIC Countries

This chapter looks at the state of sustainable tourism in the world and OIC countries. In this respect, first, it summarizes global key developments in the domain of sustainable tourism and then provides an overview of the recent trends in the world and in OIC countries. Before concluding, the chapter also highlights the efforts towards developing sustainable tourism in OIC countries.

### 2.1 Sustainable Tourism: A Worldwide Overview

#### 2.1.1 Global Key Developments in Sustainable Tourism

Tourism-induced destruction in the physical and socio-cultural environment has come to the forefront in destinations with the seaside, where mass tourist groups prefer package tours for vacation, relaxation, and entertainment. Ecological and socio-cultural negative effects caused by mass tourism movements, especially in coastal areas, have opened up alternative models of tourism to the discussion.

The alternative tourism movement can be considered as an effort to eliminate or minimize the negative consequences of mass tourism in destinations. Another alternative approach uses the concepts of sustainable and ecotourism, which were developed in the 1990s. Some authors state that sustainable and ecotourism is the most suitable tourism that can be developed in sensitive, natural, and cultural areas as it includes rural and cultural elements. However, there have been authors who stated that “sustainable tourism activities” also somehow cause destruction in the natural-cultural and social environment, if not well planned. Discussions show that a type of tourism that will not harm the natural, social and cultural environment is not possible, but it is possible and necessary to implement responsible tourism practices in order to minimize the impact.

The role of tourism in environmental protection was revealed by the Manila Declaration of the UNWTO. It has been mentioned that "not to leave tourism resources uncontrolled, not to engage in activities that will harm the social and economic life of the population living in tourism areas while meeting the tourism needs and to natural resources in historical and cultural areas that attract tourists, that all tourism resources are the heritage of human beings" and it has been stated that the protection of natural and cultural resources on an international scale is the aim of comprehensive tourism planning. After the Manila Declaration, the UNWTO

and UNEP jointly published a declaration. The idea put forward in this declaration is, “It is the basic condition to protect, develop and increase the quality of the elements that make up the environment of human beings in order to ensure the development of tourism; In return, the rational management of tourism can contribute to the development of the cultural and physical environment and to the improvement of the quality of life (Manila Declaration, 1980).<sup>2</sup>

UNWTO promoted sustainable tourism in the early 1980s; It has been defined as “tourism that addresses the needs of visitors, industry, the environment, and host communities, and takes full account of its current and future economic, social and environmental impacts”.

Sustainability principles draw attention to the economic, environmental, and socio-cultural aspects of tourism development and an appropriate balance must be struck between these three dimensions to ensure long-term sustainability. In order to achieve sustainable tourism (UNEP and UNWTO, 2005):

- Optimum use of environmental resources, which is a key element in the development of tourism, should be ensured by helping to protect natural heritage and biodiversity while basic ecological processes continue,
- Sustainable tourism should contribute to intercultural tolerance and understanding while respecting the socio-cultural authenticity of host communities, preserving their established and living cultural heritage and traditional values,
- Sustainable tourism should contribute to employment and income-generating opportunities, poverty reduction and long-term economic activity for all stakeholders in host communities.

There are sustainable development principles on the basis of sustainable tourism. In order for tourism to be sustainable in a region, it is necessary to make arrangements or planning in accordance with certain criteria. Although environmental resources have elements that differ according to each region, these criteria can be shaped around certain principles. The general principles of sustainable tourism that can be created accordingly are as follows (UNEP and UNWTO, 2005).

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<sup>2</sup> Please see Annex I on key documents and meetings that shaped the development of sustainable tourism.

- Providing a holistic perspective: Planning and development of tourism should not be done alone. It should be considered as a part of sustainable development. The over-dependence of the economy and society on tourism should be avoided and policies should be formed based on the effects and relations of the tourism sector within itself.
- Sustaining multi-stakeholder participation: Sustainable tourism requires cooperation. Everyone affected by tourism should have the opportunity to influence and take responsibility for the development and management of tourism.
- Long-term planning: Short-term approaches should be avoided and resources should be allocated accordingly and a long-term perspective encouraged.
- Addressing global and local impacts: For the sustainable development of tourism, policies should be developed for its local and global impacts.
- Promoting sustainable consumption: Sustainability is not just about supply. Sustainable behaviour and consumption model should be encouraged in the consumption dimension.
- Equality in sustainability and quality should be ensured: Sustainability principles and visitor satisfaction should be considered together and tourism should be considered as a comprehensive product.
- Reflecting all the effects on the cost: It should be acted within the framework of “the polluter pays” principle.
- Minimizing risk taking: Steps should be taken to prevent damage before it occurs, rather than suggesting it later.
- Adopting a lifecycle perspective: The effects of a product or service should be considered throughout its entire lifecycle.
- Considering functional alternatives: Steps that fulfil the same function and have a more positive impact on resources should be preferred.
- Respecting boundaries: Boundaries such as ecological resilience, resource capacity, community concerns and visitor satisfaction must be respected.
- Adapting to changing conditions: Tourism policies and plans should be prepared on the basis of factors such as climate change and global threats.



- Continuous observation: Performance evaluation and auditing should be carried out with continuous observation, and plans and policies should be prepared against changing situations.

UNEP and the UNWTO (2005) identified that sustainable tourism has 12 main objectives. These objectives are listed as follows:

- Economic Viability: To ensure the survival and competitiveness of tourism destinations and businesses.
- Local Economic Welfare: Maximizing the contribution of tourism to the economic well-being of the host destination.
- Quality of Employment: To increase the number and quality of the local workforce that is created as a result of tourism activities and supported by the sector.
- Social Equality: To ensure that the society receives an equal share of the economic and social benefits obtained from tourism activities.
- Visitor Satisfaction: To have all visitors provide a safe and satisfying experience without discrimination about the topics such as gender, race, etc.
- Local Control: Involving local communities in the planning and decision-making processes regarding the management and development of tourism activities in their region.
- Welfare of the Local Community: Maintaining and/or enhancing the quality of life of local people by providing access to resources and facilities and avoiding any form of social attrition.
- Cultural Richness: Respecting the cultures, traditions, differences and historical fabrics of the host communities.
- Physical Integrity: To protect and increase the quality of rural and urban landscape, and to prevent physical and visual deterioration of the environment.
- Biodiversity: To support the protection of natural areas, habitats and wildlife and to minimize possible damage.
- Resource Efficiency: To minimize the use of limited and non-renewable resources at all stages of development and operation of tourism facilities and services.

- **Environmental Cleanliness:** To minimize air, water and soil pollution, waste generation from tourism establishments and visitors.

### 2.1.2 Recent Trends in Sustainable Tourism in the World

Sustainable tourism is on the rise worldwide. Raising awareness about sustainability is one of the most important consumer travel trends (UNWTO, 2017). Global Data's 'Top trends in sustainable tourism' 2017 report also highlight that the sustainability and the rise of responsible travellers are among top key trends around the globe. These travellers are more likely to choose eco-tourism holidays and support businesses and brands that are committed to social values and respect the environment (The UAE as a Sustainable Tourism Destination, 2020).

According to Global Data's Q4-2016 consumer survey, 35% globally are likely to book eco-tourism vacations, which is part of sustainable tourism. The countries that show the most interest in eco-tourism are Malaysia (76%), China (67%) and Türkiye (65%). The higher the household income of the respondents, the more likely they are to book an eco-tourism vacation. While 16% of Americans with a household income between USD 20,000 and USD 34,000 book an eco-tourism trip, this ratio is 57% in those with an income exceeding USD 150,000. It is estimated that the worldwide ecotourism industry was valued at USD 181.1 billion in 2019 and will reach USD 333.8 billion by 2027 (Lock, 2021).

Although it is not possible to provide accurate estimations on the size of the global sustainable tourism market, the emerging recent trends on the sustainability concept and some estimations (as reported in Lock, 2021), it becomes evident that the market size will grow very rapidly in the post-pandemic period. Yet, not all countries and regions could benefit from the positive momentum equally. Available national policies and incentives could shape which countries and regions could see higher growth and get a higher share in the global sustainable tourism market.

## 2.2 Sustainable Tourism Market in OIC Countries

Given the increased connectivity among countries and reduced transport costs, a growing number of people travel abroad. This holds true in the case of OIC countries. In fact, this fact has been reflected in the positive pattern seen in international tourist arrivals and tourism receipts in the OIC group over recent years as discussed in Chapter 1.2 of this report.

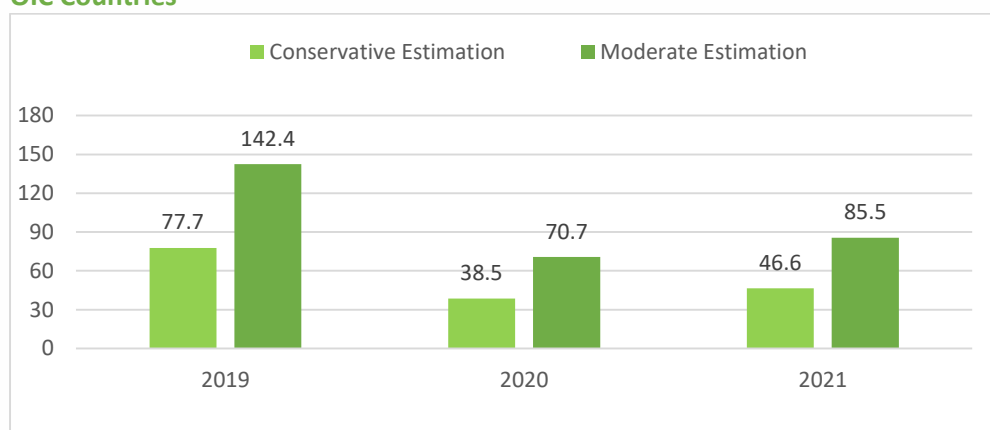
Sustainable tourism is a relatively new concept for many OIC countries. It has several implications for local people and development. For instance, tourism is a heavy user of precious resources such as water for bathrooms, pools, golf courses, and spas, leading to water supply and management challenges that can lead to conflict with local communities over resources (Euromonitor International, 2021). Therefore, in order to address the environmental concerns of various stakeholders, policymakers have started to include the issue of sustainability in tourism policies over recent years both in OIC countries and around the world.

Besides, a growing number of tourism service providers in cooperation with national tourism stakeholders have started to offer special services to cater to the needs and demands of these tourists in a number of OIC countries. Yet, official statistics are not available as there is no “agreed” definition and “official” statistical definition on sustainable tourism. Yet, it is estimated that billions of additional tourism receipts could be generated in this niche market by unleashing the potential in the OIC region.

As a first attempt to understand the potential of the market, Figure 2.1 and 2.2 present some estimations of the size of the sustainable tourism market in the OIC region. Figure 2.1 reflects two estimations made by using a conservative and moderate approach to reveal the market size of the sustainable tourism market by considering its direct and indirect contribution to GDP.

The conservative approach assumes that 12% of international tourism-related GDP in the OIC region stemmed from sustainable tourism activities as shown in Vig and Deshmukh (2021). The moderate estimation approach considers the findings of Wehrli et al. (2011) and assumes that 22% of international tourism-related GDP in the OIC region stemmed from sustainable tourism activities. The estimation results reveal that the sustainable tourism market size in the OIC region ranged between USD 78 billion (conservative estimation) and USD 142 billion (moderate estimation) in 2019. Due to the COVID-19 pandemic, the market narrowed down and its size was estimated between USD 38.5 billion and USD 70.7 billion in 2020. A secular recovery was observed in 2021 thanks to the removal of certain travel restrictions and consequently, its size is estimated between USD 46.6 and 85.5 billion.

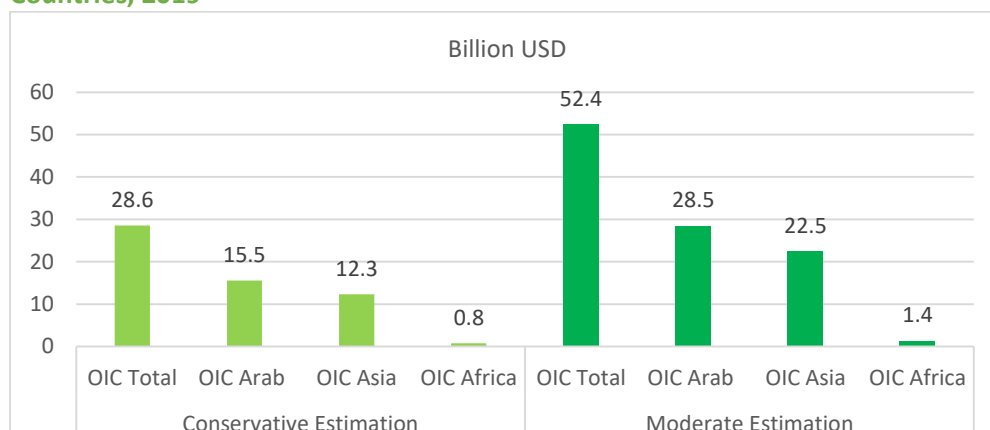
**Figure 2.1: Estimated Market Size of Sustainable Tourism Market (USD Billion) in OIC Countries**



Source: Author's estimations based on WTTC figures on the contribution of international tourism to GDP in the OIC region. Note: 12% (conservative) and 22% (moderate) of international tourism-related GDP in the OIC region stemmed from sustainable tourism activities is the assumption used in the estimations.

In a similar fashion, by considering international tourism receipts, Figure 2.2 presents two estimations to provide an overview of the total tourism receipts generated by sustainable tourism activities in OIC countries. Accordingly, the total tourism receipts in the sustainable tourism market was estimated between 28.6 billion (conservative estimation) and USD 52.4 billion (moderate estimation) in the year of 2019. At the regional level, OIC Arab region took the lead in terms of tourism receipts generated by sustainable tourism activities, which ranged from USD 15.5 billion to USD 28.5 billion. It was followed by the Asia region (between USD 12.3 billion and USD 22.5 billion) and the Africa region (between USD 800 million and 1.4 billion) in the same year.

**Figure 2.2: Estimated Receipts from Sustainable Tourism Activities in OIC Countries, 2019**



Source: Author's estimations by using UNWTO tourism receipts' figures. Note: 12% (conservative) and 22% (moderate) of international tourism receipts in OIC region stemmed from sustainable tourism activities is the assumption used in the estimations.

The estimations reveal that sustainable tourism could offer many OIC countries to develop more diversified tourism services, host more international visitors, attract more investors from abroad, record increased tourism receipts, and boost export revenue if properly planned.

It is important to underline that OIC countries have been affected by the changes since the outbreak of the pandemic. Some negative trends in the market size can be attributed to the pandemic-related restrictions. Yet, it is undeniable that there is an increasing interest in sustainable tourism. Sustainability is at the forefront of tourism recovery at both the government and industry levels. The downturn in tourism during the pandemic has given governments and the industry an opportunity to assess the negative impacts of tourism on the environment and local communities (DinarStandard, 2022). To this end, the rise of sustainable tourism in OIC countries will help them to recover losses recorded in the tourism sector in recent years stemming from the pandemic. Yet, to achieve the development of a niche sustainable tourism market, OIC countries first and foremost need to understand the potential of the market and identify existing challenges and prospects for growth. Accordingly, they should invest in sustainable tourism-related infrastructure and develop marketing and promotion campaigns in targeted tourism markets. In this way, they could get a higher share of the global sustainable tourism market, which is growing rapidly.

## 2.3 Efforts towards Developing Sustainable Tourism in OIC countries

### a) Tourism Ministers Conferences

At the OIC level, the General Secretariat and Government Authorities pay a special attention towards the diversification of tourism products and tapping into the new niche markets.

During the 11<sup>th</sup> Session of the Islamic Conference of Tourism Ministers (ICTM) organized on 28-29 June 2022 in Baku – Republic of Azerbaijan under the theme “The Role of Local Communities in Tourism Development”, delegates put emphasis on the tourism potential and rich cultural heritage of OIC countries and stressed the need for enhancing bilateral and multilateral cooperation among Member States, increasing investment, enhancing capacities through sharing knowledge and expertise and for promoting Islamic culture and heritage at regional and international level.

On this occasion, the Conference adopted several resolutions as well as the Baku Declaration in which OIC countries:

- Recognize the important role of tourism for intercultural exchanges, preservation and popularization of Islamic historical and cultural heritage, promotion of better knowledge and mutual understanding among civilizations, as well as the role the tourism can play in overall improvement of the image of Islam;
- Recognize the strong interlinkage between tourism and many other sectors of national economies, as well as the vital role the tourism can play in integrating the economies of the Member States;
- Reiterate the relevance of sustainable tourism to the actualisation of OIC poverty eradication strategies and policies and as a potential contributor to sustainable development;
- Implement projects aiming at sustainable tourism development of coastal and other areas in Member States;
- Incorporate tourism development in the national development plans of the Member States in order to ensure the peoples’ right to travel and to leisure recognized by the international community;
- Create a favorable environment and elaborate investment projects of intra- and inter-regional scope in the sector of tourism and related activities and fulfill their realization, inter alia, through wide dissemination of necessary information for

broader attraction of relevant OIC and international financial institutions and private sector for partnership in their implementation;

- Establish and implement policies at all levels aimed at sustainable human resource development in the area of tourism and promote greater exchanges among the relevant educational institutions of the Member States,

- Call upon Member States, IsDB Group and other funding institutions, bilateral and multilateral development assistance bodies, enterprises and institutions of the private sector and concerned OIC institutions to actively participate in the Second Donors' Conference to be organized in 2023 in a bid to mobilize resources for the implementation of the Regional Project on Sustainable Tourism Development in a Network of Cross-Border Parks and Protected Areas in West Africa;

- Call upon the Member States to actively participate in tourism fairs and exhibitions held in OIC countries in order to promote development of the tourism market;

- Welcome the initiative of ICDT to elaborate studies on sustainable tourism and health tourism with a view to building member countries resilience following the negative effects of Covid-19 pandemic on the Tourism sector;

- Welcome the offer of the Islamic Republic of Pakistan to host First OIC Forum on Sustainable Tourism, in collaboration with OIC General Secretariat and ICCIA;

- Recommend paying special attention to policy of promotion and development of youth tourism, including establishment of national committees on youth tourism in the Member States, and creation of necessary affordable facilities towards this end;

- Recommend strengthening policies for the development of health, eco, rural, cultural and other types of tourism that would embrace the principles of sustainable tourism, contribute to conservation and protection of natural and cultural heritage, and serve economic and social development of and poverty reduction in local communities of the Member States;

- Decide to explore the possibility of involving the private sector organizations of the member states to participate in the infrastructural development projects in the newly liberated territories of the Republic of Azerbaijan;

- Call upon the relevant OIC subsidiary, specialized and affiliated organs or institutions and invite the private sector to support the development of tourism for the sake of its greater contribution to economic and social development of the Member States.



## **b) The Regional Project on Sustainable Tourism Development in a Network of Cross-Border Parks and Protected Areas in West Africa**

OIC General Secretariat in collaboration with ICDT and SESRIC launched this project in order to develop West African parks and protected areas, attract more visitors and reduce poverty in this region.

The cross-border Parks and protected areas concerned by this project are: Djoudj - Diawling (Senegal/Mauritania); Niokolo Koba - Badiar (Senegal/Guinea); Gambia River Basin - Kayanga - Geba - Koliba - Corubal (The Gambia/Guinea Bissau/Senegal); Rios Kogon - Korubal - Nunez (Guinea Bissau/Guinea); Pinselli - Outamba - Kilimi (Sierra Leone/ Guinea); Bafing - Faleme (Mali/Guinea); W (Benin/Burkina Faso/ Niger).

Besides, following the validation of the Project's feasibility Study in 2009 at the UNWTO Headquarters, a Donors Conference was organized in 2011 in Senegal. Other meetings and workshops were also held at ICDT and SESRIC Headquarters in 2014, 2016 and 2019.

ICDT in collaboration with SESRIC will continue to support this project which needs more involvement from funding institutions in the Islamic world and regional and international development partners to reach its full potential and positively impact the socio-economic development of West African Countries. In this context, ICDT plans to organize in collaboration with SESRIC and all stakeholders the upcoming Steering Committee Meeting to discuss the preparations of the Donors Conference to be organized in 2023.

The "Regional Project on Sustainable Tourism Development in a Network of Cross-border Parks and Protected Areas in West Africa" is today a unique opportunity to develop Sustainable Tourism in West Africa following the negative impact of COVID-19 pandemic on the economy and the tourism sector in this region.

## **c) Capacity building programs**

ICDT's program for the development of the Tourism sector in member countries (TOURDEV) which comprises the organization of the Islamic Tourism Fairs, trainings aiming at building member countries resilience and enabling them to diversify their touristic offers and investment forums to incite the private sector and development agencies to finance more tourism projects in OIC countries. This program also includes the elaboration of studies to explore the opportunities of new tourism markets and publish tourism statistics in collaboration with SESRIC, ITC, UNCTAD, WTO and UNWTO.

Following the COVID-19 pandemic, which has negatively affected OIC Economies and more particularly the Tourism Sector, ICDT and SESRIC organised under this project a Training Webinar on Managing and Marketing Protected Areas, on 21-22 February 2022 via the Zoom platform. The objective of this training is to strengthen the capacities of the member countries in terms of management and marketing of protected areas in the context of COVID-19 pandemic.

Besides, to enable member countries to tap into the opportunities offered by the sector, ICDT and SESRIC organized on 1-2 June 2022 an online Training Webinar on the Prospects of Sustainable Tourism in OIC Countries. The objective of this training is to sensitize tourism authorities and operators on the potential of sustainable tourism and to reinforce their capacities in this field.

SESRIC, COMCEC and SMIIC programs on tourism development are also important to raise awareness the key role played by tourism to enhance trade in services in Member Countries.

## 2.4 Conclusion

Sustainable tourism is a niche market that pays utmost attention to the preservation of the environment. The environmental problem lies at the top of the issues that are emphasized at international summits and conferences. This problem has recently become a common problem of the world and some measures must be taken to ensure the continuation of scarce resources as well as to support growth in the tourism markets. When we think that tourism is a sector intertwined with the environment, the dire situation that arises affects tourism on a large scale. The decisions taken at the international summits/foras must be implemented in order for sustainable development to be mentioned in tourism.

States and stakeholders have great responsibilities for the implementation of these decisions. It is necessary to protect, develop and maintain the resources owned. It is necessary to be an individual and society with sustainability awareness and reflect it in practices in order to achieve this. The Earth is one and it is very important to be aware of this, to understand the value of scarce resources, and to have this awareness.

There is a clear change in mindset to resist returning to a volume-driven travel and tourism model. Instead, stakeholders are rallying together to 'build back better' through value creation from sustainable tourism. As momentum grows in the run-up to COP26, consumers, travel brands, destination marketing organizations, and governments continue to align their desires to avert the climate emergency. Embracing environmental and social initiatives, giving back to local communities,

and spearheading positive outcomes must be championed and integrated into the visitor experience to create shared value, pride, trust, and loyalty. Sustainability will differentiate and elevate the experience for consumers while driving competitive advantage and agility to guarantee long-term success.

Sustainable tourism is a relatively new concept for many OIC countries. It has several implications for local people and development. Yet, estimations revealed that it has a growing role in the tourism sector of OIC countries and broader economic activities in these countries. For instance, its estimated market size in the OIC region before the outbreak of the pandemic ranged between USD 78 billion (conservative estimation) and USD 142 billion (moderate estimation) in 2019. Given its growing importance, both at the national level and intra-OIC cooperation level several steps were taken to support its development. In particular, many OIC institutions including ICDT have organized a wide range of activities including capacity-building programs to promote “sustainable tourism” in the OIC region.

There is a real risk that threatens all biodiversity and our planet. According to the World Wildlife Fund, there has been a decline of 68% in wildlife populations over the past 50 years. Therefore, governments must take responsibility to protect the planet and its species, which is instrumental also for the development of sustainable tourism activities. The issues related to the protection of nature and preserving species go beyond national borders, an intergovernmental joint strategy is needed especially in the OIC region. To this end, it would be beneficial to develop an OIC-level strategy or roadmap to improve the protection of nature and preserve species in the OIC region; linking the findings with a sustainable tourism model. Such a roadmap could encourage and facilitate the exchange of national good practices and successful policies. The study could help mapping biodiversity in the OIC region and reveal key areas/regions with high potential for the development of sustainable tourism activities. The findings of this strategic study could also be used to develop an OIC-level “sustainable tourism guide” in the future.



### Chapter 3: Experiences of the Selected OIC Countries in Developing Sustainable Tourism

## Chapter 3. Experiences of the Selected OIC Countries in Developing Sustainable Tourism

This chapter provides an overview of the experience of ten selected OIC countries on sustainable tourism from three geographic regions of the OIC namely Africa, Arab, and Asia. The selected case countries analysed in the chapter are as follows: The Gambia, Nigeria, Chad from Africa region; Morocco, United Arab Emirates, and Saudi Arabia from the Arab region; and Türkiye, Malaysia, Guyana<sup>3</sup>, and Maldives from Asia region. In all ten selected case countries firstly a situation analysis is presented. Then, the country's selected initiatives and programmes in the domain of sustainable tourism were documented in order to showcase national efforts. Lastly, investment opportunities and lessons learned from the country's experience in sustainable tourism are summarized.

### 3.1 Selected Countries from OIC Africa Region

#### 3.1.1 The Gambia

##### Analysis of Current Situation

The Gambia, located in West Africa, is a country that is keen to promote fair, sustainable and ethical tourism practices. The country has recently adopted a tourism strategy that focused on avoiding the negative effects of mass tourism.

The Gambia is a leader in Sustainable Tourism ventures and can proudly boast of being the second country in the world to develop a Responsible Tourism Policy. There is a positive investment trend in tourism supply in the relatively unexplored country. Besides, Banjul International Airport undergoes a comprehensive renovation for boosting international tourism. There are also attempts to diversify tourism in the country. Gastronomy tourism, cultural tourism and ecotourism are among key niche areas to be developed (Reinstein, 2019).

One of the most important elements for ecotourism in the Gambia is the "Gambia River National Park" which teems with wildlife and is home to around 600 bird species, as well as manatees, hippos, crocodiles and cunning colobus monkeys. Another successful project is the Chimpanzee Rehabilitation Project. It is located in

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<sup>3</sup> Guyana is located in South Americas. Yet, in many OIC related studies, as in this report, it is grouped in the Asia region.

the heart of the Gambia River National Park and is home to more than 100 free-living chimpanzees on different islands.

Consisting of several smaller islands as well as the island known as Baboon Island, the park is one of the most important wildlife sanctuaries in the Gambia. Although no one is allowed to set foot on Baboon Island, it is possible to see chimpanzees on boat tours. There is also other wildlife and birds in the area. The Chimpanzee Rehabilitation Project includes an eco-camp with four twin-bed safari tents (Reinstein, 2019).

The Gambia is also home to 259 acres of rainforest known as the Abuko Nature Reserve. The reserve is an ideal first stop for bird watchers and animal enthusiasts. It is known that there are 50 types of tropical trees in Abuko. An estimated 290 bird species live in the forest, including pied kingfisher, African paradise flycatcher, and willow warbler. There is also a research centre in the area, called Darwin Field Station, which focuses on conserving Gambia's biodiversity (Reinstein, 2019).

While the country's wildlife is magnificent, what truly sets the Gambia apart is its people and culture. Increasingly, homestays and cultural tours are offered here. For example, Ndemban offers a glimpse into rural Gambian life with homestays, dance and singing, open campfire cooking classes, and traditional batik tie-knit craft classes. During their stay in Ndemban, visitors have opportunities to roast cashews, work with the women in the garden, prepare lunch, pick fruit, visit the local market, help their homestay family with their daily chores and even run communal village chores (Reinstein, 2019).



*Logo and motto of The Gambia Tourism Board*

Source: [visitthegambia.gm](http://visitthegambia.gm)

In the Sustainable Development Report prepared by the United Nations, the Gambia ranked 122<sup>nd</sup> in overall performance as a result of its successful practices. The country score obtained a score of 60.2. The international diffusion index score was



96.6. According to the report, the Gambia has been doing well in “Responsible Production and Consumption”, “Climate Action and Peace”, “Justice and Strong Institutions” (Sustainable Development Report Gambia, 2022).

Blessed with expansive sands and a fascinating river ecosystem, named home to around 560 bird species, the Gambia is a thriving tourist destination and is one of the successful countries in Sustainable Tourism initiatives. It is one of the countries developing Responsible Tourism Policy in the world. It is evidenced by the number of global awards won by various individuals and organizations. Award-Winning Eco Lodges and Associations (Responsible Tourism, 2022):

- Makasutu Cultural Forest-Sunday Times Best Eco Lodge Award 2008.
- Association of Small Businesses in Responsible Tourism (ASSET)- First Choice Holiday Award for Best in Poverty Reduction, 2005.

### Initiatives on Sustainable Tourism

The Gambia has developed successful initiatives and collaborations on sustainable tourism. The Collaborative Actions for Sustainable Tourism (COAST) Project is a successful example. It was implemented in nine African countries (Cameroon, the Gambia, Ghana, Kenya, Mozambique, Nigeria, Senegal, Seychelles, and Tanzania) over a five-year period (January 2009-June 2014). The project was developed to reduce the harmful effects of tourism practices on coastal ecosystems. It is a project financed by the Global Environment Facility (GEF) jointly with the UNWTO, UNEP and UNIDO (Sustainable Coastal Tourism in the Gambia Lessons from Kartong, 2014).

The main objective of eco-tourism project activities developed under the COAST project for the Gambia is to develop new and sustainable community-based tourism activities, to promote the development of SMEs in line with ecotourism development goals, and to create tourism opportunities for the poor in Kartong communities. Kartong has many tourist activities such as bird watching, bird watching observatory (close to 260 recorded bird species), and a unique river ecosystem around the Hallaine River and Folonko Crocodile Pond.

Within the scope of the project (Sustainable Coastal Tourism in the Gambia Lessons from Kartong, 2014):

- With the new waste management routines in the population adopted under the coordination of Kartong Responsible Tourism Association (KART), a noticeable reduction in waste in Kartong has been achieved.



- 25 members from tour operators, hotel managers, private sector and NGOs attended the 'Biodiversity' training held in Kartong.
- COAST Project cooperated closely with KART Association. 9 lodges, 7 restaurants, 1 honey cafe and 3 souvenir shops have registered to KART to cooperate to provide tour guide services.
- Supported ecotourism activities and the development of products in new tourism quality. Cycling tours, cooking classes, arts and crafts trainings, forest walks and bird watching trainings were organized (Sustainable Coastal Tourism in the Gambia Lessons from Kartong, 2014).

Another example of a successful initiative in sustainable tourism in the Gambia is “Footsteps Eco Lodge” accommodation. Footsteps Eco Lodge is a small Gambian accommodation facility in Gunjur that houses hundreds of birds and some of the most stunning scenery in the Gambia. The business has created its business processes by adopting sustainable tourism principles. The building, employment, and operations of the business depend on the policy of being “Good, Honest and Right”. Activities are carried out without noisy generators and are entirely powered by solar energy. Only energy-efficient products are used. All prices are fair and sustainable working conditions and fair trade terms are adopted for local farmers and workers. Employment is provided only from the local village and the purchase is made from the local. Compost toilets are installed in each room and are odourless. All lodge resources can be recycled on site. Staff training, fair wages, solar water heating in the guest rooms and kitchen of the lodges, water from showers and sinks, and water recycling are available. Finally, all fresh products are grown in Footsteps or sourced locally without the use of pesticides. The meats, fish and shellfish used in the restaurant are locally sourced and are of the highest standard. The business also encourages other businesses to act in the same responsible way (Footsteps Eco Lodge, 2022).

Another project example in sustainable tourism is the “Sande ECO-Resort” project. The Sandele development project is located on land owned by the Kartong people. After 25 years, it will be handed over to the people of Kartong. Within the framework of the project, 70% of all employees will be provided from Kartong region. Part of the profit will be donated to village development projects. In the project, which is carried out according to the ethical principles of sustainability, local personnel are trained and employed and local materials are used wherever possible. It was built using ecological construction techniques. Their vision is to create a centre of excellence in terms of responsible tourism and sustainability and to offer

luxury and tranquillity, quality, first-class service, and superior cuisine in a way that maximizes the benefit to the local community (Responsible Tourism, 2022).

A final successful example is a project developed for the city of Janjanbureh. Janjanbureh will be developed as a second “sustainable tourism destination” by establishing its own identity, making it its own tourism centre with a comprehensive education focused on youth, especially in the fields of agriculture, services, and tourism. It will develop cultural tourism experiences and services through Community Based Tourism (CBT), including two traditional villages off the island through the Gambia Youth Empowerment Project, a four-year project that will benefit from €11 million from the EU Emergency Trust Fund (Janjanbureh and Sustainable Tourism, 2017).

### Investment Opportunities

According to the Gambia Tourism Board, The Gambia was Renowned as the ‘Smiling Coast of Africa’ and the Gateway to West Africa, the country remains an attractive tourism destination given its unique geographical position and strategic location combined with the proximity to Europe and English as its official language.

The country is endowed with numerous investment opportunities in the tourism value chain. With the unprecedented increase in tourism arrival numbers over the years coupled with the robust government strategy to boost tourism and increase arrivals to half a million by the year 2020. This aspiration provides investment opportunities for further enhancement of the tourism product suite along with new **investment opportunities** in:

- maritime infrastructure – notably marinas
- development of new 4 star and 5 star hotels
- upgrading of budget hotels to 3 stars and 4 stars hotels
- eco-tourism
- recreational parks
- integrated resorts
- community, culture and heritage tourism
- river cruise excursions
- eco-village and community based tourism
- bike trails
- bird watching and recreational fishing
- golfing.

With the untapped potential in the tourism industry, there is urgent need for further strengthening of the industry with investments in the value chain. The Government of the Gambia, through the Gambia Investment & Export Promotion Agency, has a number of incentives to encourage and facilitate investments in the tourism industry, including tax breaks and allocation of land for investment under a lease scheme. Given the importance of the tourism industry for the Gambian economy, new tourism investments and projects could significantly boost economic growth and employment in the country.

### Lessons Learned

The Gambia is a country that is aware of its natural, cultural, and social values. In this context, country strategies are also adopted within the scope of the responsible tourism approach and a set of initiatives were implemented. It is evident that successful steps have been taken in the country where project activities are carried out through successful international collaborations with the support of national and local authorities. Yet, there is still a need to diversify tourism products and increase interest in ecotourism in the country. Regional development activities could be carried out by taking principles of sustainable tourism. With the spread of sustainable tourism offering over 12 months and the country has a lot to offer in this niche tourism activities. In this context, the cooperation among stakeholders among local people, tourism agencies/authorities, and international organizations is very critical. If successful steps continue, the sustainable tourism market in the Gambia can reach greater heights.



*A picture from the Gambia; a view from boat tours in the river*  
Source: visitthegambia.gm

### 3.1.2 Nigeria

#### Analysis of Current Situation

Nigeria is rich in natural areas and biodiversity, making it an ideal destination for sustainable and ecotourism in particular (Mohammed, 2022). Nigeria has a lot to offer in different regions and states in the country.

Nigeria has the potential to make a significant contribution to ecotourism and wildlife conservation due to the abundance of the wildlife-sustaining natural environments. This can be achieved by raising appropriate awareness of the importance of each stakeholder in micro and macro ecosystems, especially among communities close to reserves and national parks. The economic standard of living and the demand for farming seriously affect the biodiversity of Nigeria's National parks, and natural reserves. Local communities also heavily deplete the flora by cutting down trees for fuel and timber. The current and future government needs to show greater commitment to environmental protection in general and protected area management in particular. In the 1980s, the federal government formulated the “National Conservation Strategy”, establishing the Natural Resources Conservation Council and subsequently the National Parks system that is among the early examples in Africa (Mohammed, 2022).

The Nigerian National Tourism Policy is to develop sustainable tourism and open Nigeria as an important tourism destination in Africa mainly by benefitting from diversity in the country with a view to marketing and promoting domestic and international tourism. The main objectives of the National Tourism Policy are (Oloidi, 2019):

- Preserving and promoting Nigeria's cultural heritage as a resource for local socioeconomic development;
- Promoting community and public partnerships in tourism development;
- Creating foreign exchange income, increasing income distribution, reducing poverty and providing employment;
- Promoting Nigeria as a desirable tourism destination;
- Promoting geopolitical integration, healthy international cooperation and understanding;
- Ensuring environmental sustainability in the development of tourism resources.

In the Sustainable Development Report, Nigeria ranks 139<sup>th</sup> in overall performance with a score of 54.2. According to the report, Nigeria has been doing very well in its

objectives of Responsible Production and Consumption and Climate Action (Sustainable Development Report Nigeria, 2022).

Nigeria has abundant areas for the development of sustainable tourism. Yet, some of these areas are more advanced in the area of sustainable and ecotourism such as Sambisa animal reserve, Hadejia and Nguru wetland, and Kamuku National Park.

Located in the Nigerian Borno and Yobe States, the Chad Basin includes the Sambisa animal reserve and Hadejia and Nguru wetlands. It is a suitable shelter for migratory birds with a total of 377 recorded species. Located in Cross River State, Cross River National Park is the largest rainforest in Nigeria and the oldest surviving forest in Africa. It has the highest tropical biodiversity in Africa. Twenty percent of the world's total known butterfly species live in the Cross River.

Kamuku National Park is another key destination for sustainable tourism. Kamuku is located in Kaduna State where the vegetation is a savanna forest, inhabited by a wide variety of birds and many mammals such as elephants, ox antelopes, mountain reeds, hyenas, and jackals. The Okomu Forest Reserve in Edo State is the second largest rainforest in Nigeria and is a great place for bird and primate watching as it is largely undisturbed. Yankari in Bauchi State is the premier animal sanctuary, first opened to the public in 1962. It has the largest elephant population in West Africa as well as many endangered species such as the leopard (Mohammed, 2022).

### Initiatives on Sustainable Tourism

Nigeria organizes different tourism activities to attract tourists including those who are interested in responsible tourism. Some of these events include the Calabar Christmas Carnival, the Obudu Mountain Race, and the Leboku Festival (Okonkwo, & Odey, 2017).

Tourism is important for sustainable development in Nigeria. In particular, sustainable tourism has significant effects on sustainable development such as providing jobs for local people, increasing their household income, supporting the production and trade of handicrafts, and increasing public revenue. Moreover, it helps the eradication of poverty, the promotion of gender equality, the sustainability of socio-cultural life, environmental sustainability, trade, and partnership for economic growth and development. In Nigeria, tourism has important contributions to sustainable economic development. Statistics show that the tourism sector created 1,818,500 jobs in 2017 and it is expected to increase by 3.6 percent annually to 2,598,000 jobs in 2027 (Bukola and Olaitan, 2018).

## Investment Opportunities

The diversity of Nigeria's tourism resources along with economic liberalisation policies provides investment opportunities in various areas as follows:

- Heritage/Cultural Tourism Resources Development of slave trade relics
- Establishment of museums and preservation of monuments
- Eco-tourism, including Wildlife Tourism Resources
- Development of hiking trails and Jeep tracks in the national parks
- Development of picnic and camping sites at strategic locations within the trail circuit system in the national parks
- Building of tourist lodges
- Building of reception centres at Natural/Physical Attractions
- Provision of cable bus system to take tourist through the very rugged but scenic terrain of the mountains especially in Kanyang, Obudu and Mambilla Plateau Construction of lodge cabins for expedition tourist and rangers.
- Establishment of hotels and resorts near waterfalls, springs, caves and temperate climate areas such as Obudu, jos and Mambila Plateau.

Beach Tourism Potentials Establishment of boating and sport fishing facilities:

- Development of water transportation Provision of educational facilities for water skiing and swimming
- Establishment of holiday resorts along the coasts.
- Development of Amusement parks, entertainment facilities and shopping services
- Development of arts and crafts which constitute symbol of the people's cultural values and love for nature.

Nigeria has a political stability, vibrant economy, skilled workforce, and presents an enabling environment for investors. Besides, the country offers certain investment-related incentives that could further attract foreign investors in the tourism industry. It could become among top-destinations in Africa in upcoming years both in terms of number of visitors and new investment projects.

## Lessons Learned

Nigeria is rich in terms of a sustainable ecosystem given its natural and animal reserves. Considering the social, economic, and environmental contributions of tourism, if Nigeria can achieve its tourism activities in line with the principles of sustainable tourism, it will be a key destination in Africa. Adopting sustainable tourism principles and preparing and implementing tourism strategies in this context are the most important steps to be taken. The process can be carried out successfully with the participation of local people and regional stakeholders. Development of a skilled labour force, the establishment of coordination and control mechanisms and promotion activities are other steps to be taken.

If sustainable tourism activities are planned and implemented correctly, it can be a very important step for the environmental, social, and economic well-being of a tourism destination. National parks and preserved areas that are open for eco and responsible tourism show that tourism activities help local people and generate resources for preservation efforts. Yet, more needs to be done in such areas by extending financial support, establishing a good transportation network, ensuring participation of the local population in the processes, and full adoption of sustainability principles (Okonkwo & Odey, 2017).



*A picture from Nigeria; a view from Agbokim Waterfalls*

Source: fmic.gov.ng

### 3.1.3 Chad

#### Analysis of Current Situation

Chad is a landlocked country on the southern edge of the Sahara in Central Africa. It is one of the largest countries in Africa in terms of the total land size. Yet it is one of the most sparsely populated countries on earth (measured in terms of inhabitants per square kilometres. More than three fourth of the inhabitants (76%) belongs to the rural population (Akdağ and Bako, 2015).



The full potential of international tourism in Chad is yet to be unleashed. Before the outbreak of the COVID-19 Pandemic, the country hosted 81,000 international tourists from all countries. Given its sparse population structure and vast geography, the country has a lot to offer in terms of sustainable and ecotourism. Moreover, the country has six neighbouring countries in Africa. This is a great opportunity for cross-border travellers and tourists interested in national parks and responsible tourism.

The north of the country is desert and will appeal to lovers of trekking and hiking in the desert. The flagship of trekking in northern Chad is the Ennedi massif. The desert becomes a less austere, giving way to the Sahelian zone. It forms the transition between the Sahara and the wetter zone. Continuing further south, the landscape gradually gives way to the savannah. The rainfall is more important here. In the extreme south of the country, the forest also becomes increasingly dense. In this southern region, the traveller in search of ecotourism can visit Zakouma Park. This park is home to a large population of large African mammals: elephants, roan antelopes, hartebeests, buffaloes and giraffes. Using a true logic of responsible tourism, the development of the park allows the creation of jobs for inhabitants (Flockeo, 2022).

The Guera Mountains have a great tourist attraction and an increasing number of travellers are interested in their landscapes and cultures of local communities in the country.

Overall, Chad has become a model for conservation excellence, for the rehabilitation of their outstanding protected areas and leveraging their progress to drive sustainable socio-economic development (African Parks, 2022).

### Initiatives on Sustainable Tourism

Chad pays a special attention to the development of tourism. In particular, national parks and protected areas constitute a great potential for the development of sustainable tourism in Chad. In this respect, Chad has signed a revised agreement with conservation non-profit African Parks for the management of the Greater Zakouma Ecosystem, an amendment to the existing mandate, which extends until 2027. Signed on 7 June 2022, the revised agreement is a major commitment to nature and sustainable development in Chad that could help to realize the full potential of the nation's exceptional protected areas. The agreement for Zakouma further demonstrates Chad's unwavering commitment to the vision of developing sustainable tourism (African Parks, 2022).

In addition, Chad spares no efforts for development of tourism and become a major destination hub for tourists and investors in Africa. In this context, Chad is set to get help from the World Tourism Forum Institute in attracting more visitors to the

country. The Ministry of Tourism Development, Culture, and Crafts signed a deal with the World Tourism Forum Institute in 2020 for the purpose of boosting the number of tourists and investments in the country (Anadolu Agency, 2020). The head of the World Tourism Forum Institute mentioned that after reaching 300,000 tourists in the short term, the number of visitors to Chad is expected to hit 4 million within the next five years.

### Investment Opportunities

Tourism in Chad is a relatively small industry that has great potential to take off. Located in the centre of Africa, Chad has the privilege to gather all the characteristics of this fascinating continent. On the geographical level, it hosts savannas, and deserts strewn with broken reliefs. Chad presents an incomparable range of tourist potentialities. Chad offers particularly great potential for Saharan tourism due to its landlocked nature, including a wealth of outstanding natural and cultural heritage. In particular, a major area of desert tourism in Chad is the Borkou-Ennedi-Tibesti (BET) region that has could offer significant opportunities for tourism investors. For instance, the country has been present at different tourism exhibitions and had outstanding visibility at several tourism fairs and exhibitions. This helps the country to attract more investors as well as to build up a positive image.

Amongst others, the Lake Chad zone alone constitutes a tourist monument with its channels surrounded by tall grasses to the observation of fauna, thousands of birds, and herds of hippopotamus. Such tourism development areas have the potential to attract investors, particularly hoteliers. A number of investors in Chad are interested in the development of safari tours and fishing tourism within the sustainable tourism domain. Yet, many areas have remained still underexploited in Chad due to the geographical remoteness (inner areas) and limited transport infrastructure. Overall, the country has a lot to offer for investors as it is ready for the development of a wide array of tourism products and activities in sustainable tourism and beyond.

### Lessons Learned

The tourism sector in Chad is a developing one. The country has taken a number of important steps to speed up its development in a sustainable way. The Chad government has been taking great strides towards the growth and diversification of the country's travel products, improving infrastructure and travel accommodation, as well as investing in programs to attract tourists. The forecasts show that the country could easily attract millions of additional tourists in upcoming years if proper policies put in place. In particular, the country pays special attention to the protection of national parks and better marketing and promotion of its touristic destinations. To this end, the country has already started to bolster its partnership

with several regional and international stakeholders. In particular, the activities of “National Office for the Promotion of Tourism, Crafts and Arts-Chad” plays critical role as the one-stop agency with a comprehensive mandate list.



*A picture from Chad; a view from Zakouma National Park  
Source: Bukela Africa*

## 3.2 Selected Countries from OIC Arab Region

### 3.2.1 Morocco

#### Analysis of Current Situation

Morocco is a country that hosts many different tourism opportunities with its beaches, mountains, and deserts. Tourism in Morocco is part of the national sustainable development agenda. The principles of “sustainability” for tourism have been adopted in the country. One of the aims is to enable rural communities to stay in their own regions, and to offer accommodation opportunities and a rural lifestyle different from urban tourism in order to preserve the richness and diversity of tourism. In this context, investment incentives are offered. Import duty has been abolished on sustainable equipment. 100% of activities such as digging wells and planting olives are covered. It is one of the countries that decided to limit all CO<sub>2</sub> emissions. Also, in Morocco, it is forbidden to irrigate golf courses with water from the city. In this context, water from wastewater treatment plants can be used. It is planned to increase the share of renewable energies in total generation capacity to 52% by 2030. The country also has a large solar farm in Ouarzazate and a wind farm in Tarfaya (El Gharbi, 2021).

Morocco considers itself a model country for green energy. It has been mentioned that Morocco can be a key player in North Africa's growing trend toward renewable energy. Morocco is also committed to balancing its environmental footprint during

this transition period. In 2008 Morocco has adopted the National Waste Management Strategy, a comprehensive policy plan to achieve a 100% nationwide professional waste collection rate by 2030. This strategy also aims to build consolidated landfills in all major Moroccan cities, expand domestic waste management master plans to cover all municipalities of the country, and educate Moroccans on the importance of recycling and reusing. Morocco continues to seek innovative solutions to waste management, even in garbage. It pays the Moroccan people 2,260 MAD (250 USD) per month to select and sort recyclable and resalable waste. Morocco plans to invest around USD 35 billion in climate-sensitive industries, including water, agriculture, and forestry, over the next decade to protect its citizens from the effects of climate change (Tyson, 2021).

In the Sustainable Development Report, Morocco ranks 84th in overall performance as a result of its successful practices. The country score obtained a score of 69. According to the report, Morocco has a quite good condition in terms of Clean Water and Sanitation, Responsible Production and Consumption, and Climate Action (Sustainable Development Report Morocco, 2022).

### Initiatives on Sustainable Tourism

Since ratifying the United Nations Environment Convention on Climate Change in 1997, Morocco has successfully taken environmental responsibility steps that also support “sustainable tourism” activities. The country was the first African country to host the COP7 (Conference of the Parties) summit in Marrakech, which contributed to the implementation of the Kyoto agreement in 2001. In 2016, it was re-elected to host COP22. This is also one of the positive steps taken by Morocco for global environmental awareness (Visit Morocco, 2022).

In 2006, Morocco prepared the Moroccan Declaration on Responsible Tourism to promote tourism that respects the environment and people. Since the declaration was signed by more than 60 cities, responsible tourism toward people and the environment has been promoted in the country. In order to support tourism enterprises' orientation toward responsible tourism, the Ministry of Tourism initiated the "green key" for hotels and "blue flag" incentive labels for beaches in 2008. It has also initiated “Blue Belt” initiatives in order to revive the fishing industry (Visit Morocco, 2022).

One of the successful steps Morocco has taken in the name of sustainability is the international cooperation project with Switzerland. The project aims to improve existing jobs, provide income and new jobs and reduce poverty for youth and

women within the scope of sustainable tourism programs in Azilal and Beni Melal provinces.

Within the scope of the project, which will be completed between 2020-2024. Within the scope of the program, improvements in the technical skills, tourism services, and sustainability of the stakeholders have already been addressed, while the renovation process of six guest houses has been completed and 34 guest houses are at the point of completion (Swiss Contact, 2020).

### Investment Opportunities

Morocco is an attractive destination not only for tourists but also for investors given its strategic geographical position. The country plays a role as a bridge between East & West and North & East. It is home to a well-skilled and abundantly young population. Located at the crossroad of cultures, an African hub with more than 40 connections to the continent and less than three hours' flight from the main European capitals, Morocco is a safe, stable and secure destination with a GDP averaging 3.6 percent growth since 2010. Morocco has ideal climate all year long, a rich and diverse culture, and stunning landscapes. As such, the tourism sector has long been a crucial economic driver in the country.

The political stability of the Kingdom is another reason why many investors are interested in expanding their plans in the Moroccan tourism industry. Morocco has plans to achieve development but in a sustainable way, hence paying the utmost attention to the environment. In this context, the country welcomes investors in the tourism sector that are willing to realize sustainable investment projects. Morocco has ambitious plans to increase both the quantity and quality of hotel supply in coming years and market its tourism products in new destinations like China. The opening up for new markets, diversification of existing tourist segments, and introduction of products like eco-tours will all likely boost new investments in the tourism sector. The country's recent tourism FDI performance is astonishing. According to FDI Intelligence (2022), Morocco achieved to host 20 new FDI projects in the tourism sector over the period 2017-2021, which made it one of the leading destinations in the entire MENA region. In particular, the slowdown of the COVID-19 pandemic in 2022 and a fast-paced recovery in the tourism sector could accelerate the realization of new tourism investment projects in the country. The availability of a well-developed transportation network plays a positive role in attracting tourism investments to Morocco.

## Lessons Learned

Morocco has taken many successful steps for the development of sustainable tourism. The country put forward a holistic perspective for lasting success in sustainability. In order to achieve successful take-off of sustainable tourism, the country paid special attention to cooperation between stakeholders. Also, other aspects like coordination, marketing, promotion, and awareness were taken into consideration in developing such policies. The inclusion of all responsible stakeholders, including local people, could further the success of sustainable tourism in Morocco. Better marketing of “Morocco” as a destination of sustainable tourism could help the country to attract more tourists from all over the world.



*A picture from Morocco; a view from Tetouan beach side*

Source: visitmorocco.com

### 3.2.2 United Arab Emirates (UAE)

#### Analysis of Current Situation

United Arab Emirates (UAE) has a rich natural environment that offers a unique mix of diverse topographies. The UAE is largely an arid country with vast sand deserts, but it also has dunes, oases, mountains, valleys, beaches, mangroves, and salt plains. Each feature is home to a variety of flora and fauna. This diversity attracts visitors to the UAE. The UAE includes four ecosystems that are the desert ecosystem, mountain ecosystem, coastal and marine ecosystem, and wetland ecosystem. It is rich geography that combines many tourism activities such as desert safaris, mountain climbing, underwater landscapes, diving activities and bird watching. Tourists coming to the region can participate in ecotours and experience different tourism experiences together through private tour operators and hotels, as well as special environmental groups (Ecotourism in the UAE, 2021).

Over the last two decades, the concept of sustainable/eco/green tourism has evolved significantly, targeting travellers seeking tours with a minimal negative impact on the environment. According to international studies, ecotourism



currently accounts for more than 20 percent of total tourism activity in the world. The UAE is one of the prominent countries in this regard (Ministry of Climate Change and Environment, 2020).

In the Sustainable Development Report, the UAE ranks 85th in overall performance as a result of its successful practices. The country's score was 68.8. According to the report, the UAE is doing well in the following dimensions: Ending Poverty, Quality of Education; Clean Water and Sanitation, Industry, Innovation, and Infrastructure (Sustainable Development Report UAE, 2022).

### Initiatives on Sustainable Tourism

A three-phase national project titled "Natural Wonders of the UAE" was initiated by the Ministry of Climate Change and Environment (MOCCAE) in July 2018 in order to protect the natural reserves in the UAE and to put forward the principles of conservation and use within the framework of sustainability principles. The project aims to promote eco and sustainable tourism across the seven emirates and position the UAE as a leading ecotourism hub. Within the scope of the first phase of the project, it was aimed to raise awareness about 43 nature reserves of the UAE, which constitute 14 percent of the UAE's territory. Under the theme of the project, the Ministry has launched an ecotourism microsite, an application called Eco Tourism UAE available on iTunes and Google Play, and an e-Book process. These resources include information, images and videos highlighting the rich biodiversity in the country's protected areas. The Ministry plans to cooperate with travel agencies and airlines to include these sites in promotional packages for the UAE (The National Ecotourism Project, 2020).

The UAE has more than 5,036.24 square kilometres of protected areas. Some of these natural reserves are Marawah Marine Biosphere Reserve and Al Yasat Marine Reserve in the Emirate of Abu Dhabi; Ras Al Khor Wildlife Sanctuary and Dubai Desert Reserve in the Emirate of Dubai; Wadi Al Helou, Meliha and Wasit Nature Reserve in the Emirate of Sharjah (Ecotourism in the UAE, 2021). An area of 25,000 hectares in the Maleiha district of Sharjah has been transformed into a major eco-tourism destination that will reflect the regional culture, history and eco-system with the project launched in 2013. The Project which is a joint venture between the Sharjah Investment and Development Authority (Shurooq) and the Sharjah Environment and Protected Areas Authority (EPAA), includes leisure facilities and accommodations such as hotels, resorts, restaurants and cafes, and expert tours in the protected areas of the Visitor Center and Maleiha in addition to accommodation



facilities (Shahbandari, 2013). The area includes Shees Valley, Buhais Geological Park, Kalba Reserve, Al Hefaiyah Mountain Conservation Center and Kalba Bird of Prey Center, and many other areas where visitors can spend time (Sharjah Regions, 2022).

Another prominent sustainable and ecotourism area in the UAE is Abu Dhabi. There are terrestrial and marine protected areas in Abu Dhabi. Terrestrial areas include Al Bida'a Reserve, Al Dilmaweya Reserve, Al Ramlah Reserve, Qasr Al Sarab Reserve, Arabian Oryx Reserve, Al Ghada Reserve, Al Wathba Wetland Reserve, which is very important for the flamingo population, Jabal Hafit National Park, Yaw Al Dibsa Reserve, Al Houbara Reserve, Badaa Hazza Reserve, Barqa Al Suqoor Reserve, and Al Tawi Reserve. Marine protected areas include Al Saadiyat Marine National Park where the endangered Hawksbill Tortoise is, Al Yasat Marine Reserve, Mangrove Marine National Park, Marawah Marine Biosphere Reserve, Bul Syayeeef Marine Reserve and Ras Ganada Reserve (Sheikh Zayed Protected Areas Network, 2021).

There are also cooperation steps taken within the framework of sustainability principles in the UAE. Abu Dhabi: Environment Agency-Abu Dhabi (EAD) held a workshop with representative stakeholders from institutions and government agencies to consult on the Abu Dhabi Biodiversity Conservation Policy (Gulf News, 2022).

Dubai hosted 7.3 million visitors last year. City tourism's mission is to strengthen Dubai's economy by providing world-class experiences supported by sustainable principles. As part of these efforts, the Dubai Sustainable Tourism Association delivered 18,000 hours of training to its stakeholders and partners in 2021. The study, commissioned by the Center for Sustainability through Research and Education for Expo 2020 Dubai, also showed that eco-tourism is of increasing importance for travellers to Dubai, as 44 percent of visitors view sustainability as an "important concept influencing their behaviour". In this respect, sustainability principles are important. It is the Al Marmoom Desert Conservation Reserve, a vast area containing 10 percent of Dubai's total area and the largest unfenced nature reserve in the UAE. It is also home to 200 native bird species, 158 migratory bird species and endangered species. Dubai is committed to supporting ecotourism and environmental protection. UAE will host the climate summit COP28 in 2023, which will discuss opportunities to create a more sustainable and progressive economic future (Lootah, 2022).

The Dubai Sustainable Tourism (DST) Initiative was established to increase the sustainability of the tourism sector and contribute to the broader clean energy and sustainable development goals that Dubai has set out to achieve (Dubai Sustainable Tourism, 2016). Dubai Tourism and Commerce Marketing Department (DTCM) has adopted a sustainability approach to ensure the continued development of sustainable tourism to be implemented through the Dubai Sustainable Tourism (DST) Initiative. DST has developed an interactive web-based digital guide with initiatives that are easy to implement and very cost effective. A sustainability guide in 12 steps has been prepared. These steps provide practical information and adoption measures to help reduce the hotel's operating cost and improve sustainability practices and guest experience. Energy saving, efficient water systems, education, waste management, reduction of chemical waste consumption, green reward system and awareness are among these steps (Dubai Sustainable Tourism, 2017). Another sustainability step is standards. Launched by Dubai Sustainable Tourism on January 1, 2019, "Sustainability Requirements" aim to improve the environmental performance of the hospitality industry through a set of policies and standards designed to ensure compliance with the DTCM Classification System.

With this approach, it has been determined that accommodation businesses that implement appropriate management processes reduce their energy and water consumption costs by more than 20 percent, reduce solid waste and wastewater disposal costs by more than 15 percent, improve the quality of the tourism ecosystem in which they operate, and provide improved staff motivation and community relations. In addition, various greenhouse gas reduction programs and campaigns have been launched to facilitate the implementation of standards in the hospitality industry, allow for a structured monitoring process, and improve reporting mechanisms (Dubai Sustainable Tourism, 2019).

### Investment Opportunities

According to FDI Intelligence (2022), the UAE hosted 87 new tourism FDI projects over the period 2017-2021 that put the country among the top-10 performing countries in the world. With this performance, the UAE was the best-performer country in the OIC region in terms of the number of new tourism FDI projects. This figure also reflects that the UAE has a lot of opportunities for investors in the tourism sector while providing an enabling environment for the development of such investment projects.

The UAE has become a hub destination for tourism activities in the MENA region. The good connectivity of the country coupled with the well-established and effective infrastructure makes the UAE one of the most attractive tourism hotspots in the MENA region and beyond. The noticeable performance of the UAE in various sectors such as technology, transport, sports, education, and health has supported its position of being an international tourism hub. The political stability and wise leadership in the country have enabled the UAE to develop global reputation and respect. The development of certain tourism types like MICE, sports and health in the country will likely pave the way for enhancing the development of the tourism sector. In particular, the UAE has paid special attention to the protection of the nature and development of sustainable tourism projects. To this end, development of innovative sustainable tourism projects will also be a priority area for potential investors.

The country has been hosting several global exhibitions, fairs, and roadshows that will continue to motivate potential investors to develop new projects in the country. For example, recently EXPO 2020 Dubai welcomed 24 million visitors from around the globe. Such spectacular events help the UAE to attract more investors. In particular, shopping tourism, MICE, eco-tourism, desert tourism, gastronomy tourism, and health tourism are among the key niche tourism markets with great potential in the UAE.

### Lessons Learned

UAE has a significant ecotourism potential. Developed strategies and policies reveal that the country has acknowledged the importance of this niche tourism market. Successful collaborations, projects, international activities, and developed standards & practices are indicators of this fact. The UAE takes serious steps and plans for sustainable development and sustainable tourism. The country is expected to continue to further its cooperation with international and national stakeholders and implement activities with the active participation of local people and stakeholders. The development of national standards/requirements on sustainability and steps taken towards the implementation was another success factor that helped the UAE to emerge as a key destination in the global sustainable tourism market.



*A picture from the UAE; a view from Abu Dhabi panorama*

Source: visitabudhabi.ae

### 3.2.3 Saudi Arabia

#### Analysis of Current Situation

Saudi Arabia with its 34.8 million population is one of the leading economies in the OIC region. While it is being placed among world's top oil producer countries for many years, the Kingdom is also very rich in terms of culture, nature and heritage that makes it an important destination for travellers. In particular, each year, the Kingdom attracts millions of Hajj and Umrah visitors from all countries. Just before the outbreak of the COVID-19 pandemic, for instance, the country attracted more than 20 million international tourists in 2019. More than 13 million of these international tourists originated from other OIC countries in the same year, according to the UNWTO.

Saudi Arabia is set to become a major tourist destination in the Middle East and beyond. Saudi Arabia has launched the "Vision 2030" in 2016, which is one of the most impactful global projects toward socio-economic and sustainable development. The Vision document foresees that by 2030, 10% of Saudi Arabia's GDP will come from tourism, making it a hub for exploration, wellness, and cultural immersion. Besides, sustainability has been at the heart of Vision 2030 since its inception. The Kingdom aims to reach Net Zero by 2060.

Projects involved within the scope of Vision 2030 will create 1 million new jobs, 100 million total visitors consisting of 45 million domestic tourists and 55 million international visitors. The tourism vision presented in the "Vision 2030" is an exemplary case of setting ambitious targets towards developing a sustainable tourism sector that could help diversification of economic activities in Saudi Arabia (Vision 2030, 2022).

The 2030 Vision for tourism in the Kingdom will combine luxury hospitality and environmental conservation and revitalisation efforts in order to achieve the target of bringing 100 million visitors per year by 2030 (Vision 2030, 2022).

### Initiatives on Sustainable Tourism

While building up new attractive tourism destinations for domestic and international tourists, Saudi Arabia pays utmost attention to the principles of sustainability as the Vision 2030 is a sustainable vision for the future of Saudi Arabia; with sustainability at the heart of everything the Kingdom does, from policy development and investment to planning and infrastructure. The projects and investments have been possible due to the Ministry of Tourism working closely with the Tourism Development Fund, the Saudi Tourism Authority and the Tourism Development Council.

The Vision 2030 (2022) document presents some key projects in the domain of tourism like AMAALA, Soudah Development, the Red Sea Project and AIUla.

Designed to evolve and elevate the very best in travel, AMAALA, located along Saudi Arabia's northwestern coast, is a global wellness ultra-luxury destination that focuses on transformative personal journeys inspired by wellness, arts, culture and purity of the Red Sea. The 4,155 square kilometer year-round destination will offer 3,000 hotel rooms across some 25 hotels, as well as private residential villas, apartments and estate homes, alongside high-end retail establishments, fine dining, and wellness and recreational facilities (Amaala, 2022).

AIUla is a place of extraordinary human and natural heritage, a living museum of preserved tombs, sandstone outcrops, historic developments and monuments. This truly unique destination is transforming as a global tourist experience under the direction of the Royal Commission for AIUla. The region encompasses more than 200,000 years of unexplored human history including the Nabataean city of Hegra, Saudi Arabia's first UNESCO World Heritage Site. The Royal Commission for AIUla's long-term plan is shaped by a sustainable, sensitive and responsible approach to urban, economic, and heritage development, preserving the area's remarkable natural and historic character whilst opening AIUla as a special location to live, work and visit (AIUla Project, 2022).

The mountainous area of Soudah has cool temperatures all year round and is a popular destination for the domestic tourism market. Featuring sweeping valleys, thrilling hiking trails and the serene views of mountains nestled among refreshing rain clouds, Soudah Development will protect the distinctive natural resources of the region and celebrate its unique cultural heritage to create a destination that has both local and international appeal. Soudah Development will lead the development

of a luxury mountain destination that provides diverse immersive cultural experiences and celebrates natural assets. This new visitor destination will offer an array of investment opportunities to local and international parties. Soudah Development is an integral part of the Public Investment Fund's contribution to Vision 2030's goals of enhancing and developing new sectors in the Kingdom including tourism and entertainment (Vision 2030, 2022).

The Red Sea Project is an ambitious and exciting tourism and hospitality project that sits over 28,000 square kilometres of pristine lands and waters and includes a vast archipelago of more than 90 islands and will set new standards in regenerative tourism and sustainable development, creating unique travel experiences and unforgettable memories. With sustainability at its core, the project supports renewable energy and water conservation and re-use.

### Investment Opportunities

Saudi Arabia is distinguished for the variety of investment opportunities in relation to the diversity of its geography. The Kingdom is home to thirteen provinces, each having its own investment rules accommodating its economic recourses, developmental plans, and needs. The extensive area of the Kingdom and the diversity of its opportunities is also another reason for investment since this gives the investor a chance to select the province that suits the commercial plan, products, and services. For example, coastal regions are those with a seafront such as Jeddah in the western region and Dammam in the Eastern Province. Each enjoys coasts with entertainment facilities and aesthetic sculptures. Both are considered to be the most important centres of tourist attractions.

One of the goals of the Ministry of Tourism is “development, promotion and enhancement of the tourism sector in the Kingdom, along with the facilitation of development obstacles as an important resource of the national economy”. Amongst others, the Ministry (previously Saudi Commission for Tourism and National Heritage) has a mission to plan on the provincial and national levels, developing the institutional structure of the tourism sector based on building active partnerships between the public and private sectors, developing the appropriate tourism regulations required to organize the role of the private sector, and developing a supportive environment for tourism investment.

Tourism investments are considered to be the focal point of tourism development in general, since investments provide economic income and job opportunities, in addition to improving basic and secondary eco-tourism facilities. In this regard, the Ministry has extended its support, guidance, and service to tourism investment in all possible ways for its significance in achieving the vision and objectives of the

national strategy for tourism development. The public authorities in the Kingdom has a plan for the development of eco-tourism such as by matching tourism demand and supply, encouraging tourism investments, encouraging small tourism enterprises, and unifying classification criteria and applying unified quality indicators.

The public authorities work in cooperation with the stakeholders including the private sector on the national and provincial levels, the development and execution of some tourism activities that are related to natural sites (e.g. deserts, mountains, valleys, oases, caves, sands, and seas). Some promising ecotourism activities include camping, diving, hiking, desert safaris, and relaxation in general. Besides, the Kingdom offers numerous opportunities for tourism investors in the following areas:

- a) Shopping Tourism
- b) Health Tourism
- c) Culture and Heritage Tourism
- d) Muslim-Friendly-Tourism

On top of that, according to FDI Intelligence (2022), Saudi Arabia welcomed 21 new tourism FDI projects over the period 2017-2021, which reflects the attractiveness of its tourism sector from the perspective of investors.

### Lessons Learned

Saudi Arabia has a well-developed tourism and hospitality sector. For many years, the Kingdom welcomes international visitors from all around the world. Yet, the Kingdom has launched a new vision for achieving sustainable development. The preparation of the Vision 2030 document plays an important role in the transformation of the tourism sector toward a sustainable one and develop new destinations. Moreover, the document pays special attention to ensure new investments in identified areas for tourism development while observing the principles of sustainability (e.g. considering the environmental impacts).

Overall, the Kingdom of Saudi Arabia has completed a number of important steps to become a leading tourism destination. The Kingdom's new vision and efforts in the domain of tourism has a lot to offer and include several good practices that other OIC countries could consider such as identification of key tourism areas of development, mobilizing investments, and setting ambitious and achievable targets while paying utmost attention to the principles of sustainability.





*A picture from Saudi Arabia; a view from AlUla*

*Source: vision2030.gov.sa*

### 3.3 Selected Countries from OIC Asia Region

#### 3.3.1 Türkiye

##### Analysis of Current Situation

Türkiye has adopted a human-oriented sustainable development approach. The sustainable development approach has been integrated into the relevant legislation and strategy documents, including development plans and all national policies. Since the United Nations Conference on Environment and Development in Rio Summit (1992), this approach has been included in all development plans since the 7th Development Plan. In this context, the Presidency of Strategy and Budget coordinates the processes of implementation, monitoring, and reporting of sustainable development goals across the country.

Türkiye has aimed to present the current status report in order to identify the achievements, challenges, and achievements related to sustainable development within the scope of Rio+20 preparation processes. The goal is to identify the relevance, opportunities, and challenges of the green economy concept for Türkiye in order to achieve sustainable development, and to reveal the priority and vision for the green economy.

According to the “Sustainable Development Goals Evaluation Report” published in 2019, it has been mentioned that Türkiye has made progress in sustainable development goals and has developed many projects. In the Sustainable Development Report Türkiye (2022), the country ranks 71st in overall performance as a result of its successful practices. The country score is 70.4. According to the report, Türkiye does well in the development goals of Ending Poverty; Industry, Innovation and Infrastructure; Responsible Production and Consumption, Partnerships for Purposes.

In the Eleventh Development Plan (2019) prepared by Türkiye for the years 2019-2023, it has been mentioned that the institutional strategic plans and documents will be prepared in accordance with the objectives in order to achieve the sustainable development goals, and an institutional coordination mechanism will be established to monitor and improve the process.

In line with technological developments and changing consumer trends; diversifying tourism, increasing service quality, increasing income and accommodation durations, realizing destination-oriented sustainable tourism plans, increasing the number and quality of environmentally friendly facilities, and observing the protection-utilization balance are among the tourism objectives and targets in the planning (Eleventh Development Plan, 2019).

### Initiatives on Sustainable tourism

Türkiye has become an important tourist destination given its eco, green, and sustainable tourism initiatives.

Türkiye Tourism Promotion and Development Agency joined the Global Sustainable Tourism Council (GSTC) as a member in 2021. In this context, cooperation has been made for the first time in order to develop a “National Sustainable Tourism Program” and it has been an exemplary step towards sustainability Türkiye has been the first country in the world to establish cooperation in this context.

In 2022, a Presidential circular on the establishment of the National Sustainable Development Coordination Board has been published with the goal to increase cooperation among public institutions in practices related to the Sustainable Development Goals (SDGs) (National Sustainable Development Coordination Board, 2022). At the first stage, National Program Criteria will be determined and audit firms will receive training. The first phase will be operational in 2023. The second phase will be carried out gradually in 2025 and the program will be completed by meeting all international standards in 2030.

Besides, Türkiye certified 12,018 facilities with the Safe Tourism Certificate program, which became operational in 2020. Accommodation facilities will be held to both safe and sustainable standards within the scope of the program, and sustainable practices will be implemented gradually from April 2022 (TGA, 2022).

Concrete steps that started with the “Green Star”, an environmental label given within the scope of "Sustainable Tourism" and "Environmentally Friendly Accommodation Enterprises" initiated by the Ministry of Culture and Tourism in

2008, have now turned into the zero-emission target planned to be realized in 2053. "Climate Change Adaptation Strategy and Action Plan" prepared by Türkiye in 2011 has been updated according to 2053 targets (Green Transformation, 2022). Since 2008, within the scope of the "Green Star" program, 2375 stakeholders have benefited, 2456 sustainable development-oriented studies have been carried out and 1498 certificates have been awarded (Green Star, 2022).

The "Future is in Tourism" platform was established in cooperation with the Ministry of Culture and Tourism of Türkiye, UNDP, and Anadolu Efes. The purpose of the platform is to expand the sea-sand-sun-oriented tourism movement with the support of experiential tourism and to create a local development model that will cover all four seasons. The targeted outputs of the program are to create 5 new alternative tourism routes, to provide employment and mentorship support for at least 50 women entrepreneurs, to train 500 people, and to raise awareness for the protection of nature. Within the framework of the program, more than 20 hostels were established in Uzundere between 2007 and 2013, hiking and cycling routes were created, many non-governmental organizations serving tourism were established, and local festivals were organized. In the same year, tourism trainings were given to more than 5000 people in 27 provinces. Funding, planning, training, technical support, consultancy, and communication support were given to three projects each year between 2013-2021 (Future is in Tourism, 2022).

With the "Kars Cheese Route Project", Türkiye's first mapped and registered cheese route was created. There are six stops within the scope of the route created in 2020. These are four dairy farms and Türkiye's first cheese museum, Ekomuze Zavot and Kars Cheese Museum. With the "Village Scented with Lavender" project, it was aimed to provide income for the local people, revive rural tourism, and to activate entrepreneurship and employment potential in Kuyucak Village of Isparta, which provides 93% of Türkiye's lavender production. In this context, trainings were given and international collaborations were established. With the "Troy Culture Route" project, a cycling and walking route from Troy to Asos was created. The 120-kilometer route includes 21 settlements, 16 archaeological sites, and 7 historical sites. "Eastern Anatolia Tourism Development Project (DATUR): The project was realized between 2007-2012. Within the scope of the project, it was aimed to reveal the tourism potential of Çoruh Valley. With more than 20 home boarding, the bed capacity was increased to 150. 4 non-governmental organizations were established and employment was provided for youth and women. Activities such as Bird

Watching and Gastronomy Festival were organized to raise awareness of the region to the international level. It was also declared a “cittaslow” in 2016.

“The Journey of Linen in Ayancık project” aimed to train masters in order to revive the art of making linen thread and cloth, a traditional product in Ayancık, Sinop. With the “Come, become a Missile” project, 44 women received tourism training in order to revive the disappearing sericulture and bring it into tourism and 25 women were employed. Crafts, handicrafts and meals prepared by women were offered for sale at Koza Home. With the “Women Will Light the Lights of Perşembe” project, a nature and experience route was created so that women entrepreneurs could sell local products and become economically stronger, and a mansion was valued for this purpose.

With the “Discover Your Own Butterfly” project, training was given to increase the ecotourism potential of Saimbeyli district, Adana which hosts approximately 160 butterfly species. With the “Local Tastes of Edremit with Pomegranate Woman” project, 40 women entrepreneurs were trained in Edremit, Balıkesir, and local flavors made with olive oil were promoted, branded and transformed into products. With the project "Stonemasonry in Göbeklitepe, the Oldest Temple of the World", 21 people received stonemasonry training with the aim of bringing cultural values to tourism.



*A picture from Türkiye, a view from the coast of Kas, Antalya*

## Investment Opportunities

Development of sustainable tourism in Türkiye has mainly emerged on two axes: supportive public policies and private sector dynamism. To this end, Türkiye foresees that new tourism investments could further support the development of this tourism market line with its 2023 targets. Türkiye implements a wide array of policies for the development of sustainable tourism and stimulate incentives. These include:

- Some incentives are being provided for the private sector to increase its contribution to the economy.
- Investing in regions outside the coastal areas are being encouraged by developing projects that allow the diversification of tourism and its spread throughout the year and throughout the country.
- Depending on the priority tourism types (cultural, thermal and winter tourism) and development levels, sectoral incentive mechanisms are being developed at the regional level.
- Quality livable environments will be created by reconsidering and planning the existing tourism regions within the perspective of sustainability.
- The development of tourism will be supported by sustainable environmental policies.
- By promoting sustainable tourism, public, private and non-governmental organizations will be conscious of eco-tourism, rural tourism and agro-tourism.
- A planning approach that includes the principle of community-oriented and sustainable tourism, supports economic development and is applicable at the physical level will be put forward.
- Buildings that protect and use natural resources within the framework of sustainability principles by depending on the principle of ecological and economic efficiency will be supported.
- The tourism sector is being guided towards supporting sustainable development. It is aimed to increase the competitiveness and diversity of regional attractions in terms of tourism supply/investments, to provide technical and consultancy assistance to medium and small-sized enterprises, and to work on increasing the demand in the domestic market in order to ensure regional development.
- Planning activities regarding alternative tourism opportunities will continue in order to improve the seasonal and geographical distribution of tourism and to



create new potential areas by taking into account the changing consumer preferences in foreign markets.

- In order to develop nature-oriented tourism types such as eco-tourism and highland tourism in the country, tourism infrastructure for this purpose will be improved with new investments.
- For development of sustainable tourism, some planning studies will be conducted.
- A series of action plans will be prepared for the emergence of agro-tourism, adventure tourism, cave tourism and sports tourism activities in cooperation with the public, private sector and non-governmental organizations.

Overall, Türkiye aims to support the development of sustainable tourism with providing guidance/incentives for prospective investors, improving regulatory framework and diversifying tourism activities/zones.

### Lessons Learned

Türkiye has taken bold steps to develop sustainable tourism such as by bolstering cooperation with international and national stakeholders as well as developing national-level initiatives. The inclusion of local people and stakeholders also contributed to the success of many projects in the domain of sustainable tourism in the country.

A lesson learned is that it is essential to comprehensively evaluate the objectives of policies with a holistic perspective, in a systematic and coordinated way to be successful in sustainable tourism. In this context, additional practices, policies, and strategies should be identified and sustainable tourism solutions should be developed in cooperation with relevant institutions and organizations in Türkiye to further the development of the niche market. Processes should be carried out effectively with the involvement of the private sector, public, and non-governmental organizations, local people, and all relevant stakeholders. To this end, the welfare of the local people should be taken into consideration and plans should be made considering the physical capacities of identified areas/national parks and tourism development zones.



*A picture from Türkiye, a view from Şirince village*

Source: gosustainableturkiye.com

### 3.3.2 Malaysia

#### Analysis of Current Situation

Malaysia is a major tourism hub strategically located in Southeast Asia. Malaysia hosts different types of tourism with its natural, cultural, and historical heritage. It has a strategic advantage due to its location. Located in the centre of Southeast Asia, Malaysia is an affordable location for middle-income tourists (Nair and Thomas, 2013). The tourist flow and potential tourism market are heterogeneous. In this respect, managing tourism practices for a heterogeneous group of tourists and implementing sustainable tourism policies is a complex process.

Malaysia has adopted the Pacific Asia Travel Association (PATA) code for environmentally responsible tourism. PATA is an association that was established in 1951 to promote travel in the Pacific Asia region and within Malaysia by national tourism offices, airlines, hotels, tour operators, travel agencies, and other companies operating in tourism. Supporting the responsible conservation and restoration of natural, social, and cultural resources is among its main objectives. The Association adopted a code for environmentally responsible tourism in 1991 that has been prepared in accordance with international environmental standards and regulations (Pata Code, 2022).

Besides, Malaysia has developed many policies and actions for environmental problems and to reduce the footprint of tourism activities in an attempt to support responsible and sustainable tourism. Some of these policies include: “The Protection of Wildlife Act” in 1972, “National Parks Act” in 1980, “The National Forestry Act” in



1984, “The Fisheries Act” in 1985, “Environmental Quality Order” in 1987 and “the establishment of Marine Parks Malaysia Order” in 1994 (Siti-Nabiha et al., 2008).

In the Sustainable Development Report, Malaysia ranks 72nd in overall performance as a result of its successful practices with a score of 70.4. The report states that Malaysia is doing well in terms of Ending Poverty and Decent Work and Economic Growth (Sustainable Development Report Malaysia, 2022), which are also key factors for the development of successful sustainable tourism initiatives.

### Initiatives on Sustainable Tourism

Malaysia's sustainable tourism policy and legislation is in line with "Agenda 21". The Malaysia Tourism Policy was prepared in 1992 to accelerate the development of the tourism industry. The policy defined ecotourism as a type of tourism that needed to be expanded and sustained. Three years later, in 1995, the “National Ecotourism Master Plan” was prepared and entered into force in 1996. With this plan, it is aimed to prepare a general framework that will help develop the ecotourism potential in the country. As a result, many forest reserves, wildlife reserves, sanctuaries, tourism destinations, and wetlands in Malaysia have been declared protected areas. In order to ensure success in ecotourism plans and to maximize sociocultural, economic, and environmental benefits, the private sector, local communities, and various levels of government have planned and carried out joint efforts. The Ministry of Culture, Arts and Tourism (MOCAT) acts as the coordinating officer to lead the implementation of the National Ecotourism Plan (Nair and Thomas, 2013).

MOCAT has prepared the 2016-2025 National Ecotourism Plan to review the work, achievements and shortcomings of the action plan prepared in 1996, and to propose policies, strategies and action plans to improve the planning, management, protection, and promotion of ecotourism areas. The focus of the plan is to propose international collaborations for ecotourism, local and international investments, incentives, thematic areas for attractions and synergies between conservation and ecotourism, ecotourism marketing, and ecotourism clusters. The problems identified for ecotourism within the scope of the plan were evaluated under five headings (MOTAC, 2016):

1. *Ecotourism investments*: It has been determined that the incentives do not meet the needs of the investors. Funding is difficult for SMEs and local communities, and there is a lack of promotion of potential investments. In this context, a professional business environment should be created for investors, and investors should be attracted by emphasizing the strengths of ecotourism and by financial incentives.

*2. Synergy/co-operation between ecotourism and conservation:* Local communities benefit little from ecotourism and its contribution to these areas is limited. Local nature guides also need to develop their experience and interpretation skills for ecotourism, which is a special interest in tourism. In this context, the role and effectiveness of the national ecotourism committee should be increased. Cooperation between tourism stakeholders should be developed. A community-based ecotourism network should be established in Malaysia. Trainings on the subject should be increased, ecotourism regions, home boarding should be protected and developed.

*3. Privileges in the field of ecotourism:* There is no clear protocol for tourism privileges. Natural area tourism managers have deficiencies in education and there is no privilege strategy for these areas. In this context, a protocol should be prepared and capacity should be developed for commercial and community partners.

*4. Ecotourism marketing:* There is a mismatch between the promotion of ecotourism and the target segments. However, there is an increasing trend towards ecotourism. Innovation must be encouraged in order to market ecotourism. In this context, accessible ecotourism elements should be emphasized and tourist flow should be benefitted from. Special interest ecotourism types should be encouraged. Youth tourist groups should be focused on within the scope of target marketing activities. Annual national seminars should be organized. National ecotourism awards should be organized.

*5. Ecotourism product development and destination management:* The areas of ecotourism need to be developed. There is a need to develop supportive services in these areas. Cooperation between stakeholders needs to be increased. Ecotourism clusters and themes should be designed. A total of 60 ecotourism clusters, 6 of which are detailed, were created in the plan.

Despite having some problems, as explained above, the sustainable tourism market in Malaysia is pretty advanced that was acknowledged. For example, within the scope of the Malaysia Agenda 21 applications, many businesses have been awarded the “Green Globe Award”. Kuala Lumpur International Airport was designed considering economic, environmental, and socio-cultural factors and has a right to get this award. Examples of hotels and resorts that were granted the Green Globe award are Holiday Inn Glenmarie, Kuala Lumpur; Crowne Plaza Mutiara, Kuala Lumpur; Holiday Inn Melaka; Kuala Lumpur Convention Centre; Kuala Lumpur

International Airport Hotels; Holiday Inn Resort, Penang; Melia Kuala Lumpur; and Club Med Malaysia.

One of the examples of sustainable tourism success in Malaysia is the Bario region, which is successful with its community-based tourism approach. Bario is a region that consists of 13-16 villages and is located at an altitude of 1000 meters above sea level. Tourism in the region has become the main activity of the local economy. It includes many types of tourism, including cultural tourism, ecotourism, adventure tourism, and convention tourism. The growth of tourism in the region is directly proportional to the socio-cultural and economic development of the community (Nair and Thomas, 2013).

Another example of success is Sabah, one of Malaysia's 14 regions and the second largest. Sabah's example of success is called the home-boarding approach. Homestay in Sabah is a valuable project of eastern Malaysia with a socio-economic multiplier effect. With the project, a unique opportunity has been presented to the tourists who want to experience the authentic culture. Ethnic cuisine and local people and visitors are not guests but part of the house.

### Investment Opportunities

Malaysia has been exerting efforts to stimulate investments in tourism. Tourism and hospitality investments in Malaysia has become an important driver of new investment projects and offer various opportunities for other sectors given interlinkages. To this end, the Ministry will create special tourism investment zones to stimulate tourism in Malaysia. There are some strategies developed in this context. These;

- The 2020-2030 National Tourism Policy focuses on increasing international and national partnerships and ensuring the sustainability and resilience of tourism.
- Creating special tourism investment zones with attractive incentives will enable the development of high-value, creative tourism and cultural products and services. This will encourage public-private partnerships and increase private investment.
- MOTAC is working with the Malaysian Investment Development Authority (MIDA) to identify and develop these regions. In this context, financial assistance will be provided to tourism infrastructure.

In terms of niche tourism markets, Malaysia has a lot of offerings and prospects for new investment projects including health tourism, sustainable tourism, Muslim-Friendly-Tourism and MICE.

### Lessons Learned

Sustainability principles have been adopted for all types of tourism. Malaysia has an action plan adopted with international standards within the scope of the National Ecotourism Policy. Successful cooperation is essential for the development of sustainable tourism and Malaysia has taken successful steps for the development of ecotourism in Malaysia by establishing cooperation among many government institutions, non-governmental organizations and the private sector, including the Wildlife and National Parks Department, Forestry and Fisheries departments, Malaysia Tourism Center (MaTIC).

In addition to already implemented successful projects and steps, there are also further actions that need to be taken. Malaysia can achieve further by implementing identified policies specifically for the priority regions determined and local cooperation should be ensured as a priority. Awareness should be created and training should be given on this subject to all relevant stakeholders for the development of sustainable tourism. In terms of protecting biodiversity, the balance between protection and use should be considered and should be included in tourism planning.



*A picture from Malaysia; a panorama view from Putrajaya Wetlands Park*  
Source: itc.gov.my

### 3.3.3 Guyana

#### Analysis of Current Situation

Located between Brazil, Venezuela, and Suriname, Guyana is a country of that spans 214,970 square kilometres. It boasts an impressive repertoire of unique landscapes, cultures and experiences. About 75% of Guyana is covered by forests. It is one of the most important destinations with biodiversity in the world. With its unique and unspoilt rainforests, Guyana has more than 3,000 wild animal species and more than 6,500 plant species. Along with wild animal species and biodiversity, it is an important attraction centre for tourism (Lundt, 2022). It has the beach where endangered sea turtles nest (Mattai, 2021). The country has a thriving value for sustainable and ecotourism.

Sustainable tourism has been placed among national development priorities in Guyana. State institutions continue their investments in line with this goal. Key stakeholders such as Ministries and the National Government provide institutional support and funding to support local communities and tourism. The government of Guyana recognizes that they have the characteristics of a global ecotourism destination. The process is supported by training and incentives for the development of tourism facilities and tourism (Lundt, 2022).

Guyana is one of the global tourism destinations due to its unique ecotourism opportunities. It is listed as one of the top nine sustainable tourism destinations. This has proven with the awards that the country has received. Guyana was named “World's No. 1 in Ecotourism” and one of the top ten sustainable destinations at ITB Berlin, the world's leading travel and trade fair, in March 2019.

In Guyana, more than 70% of the population lives in rural areas dependent on agriculture. The fact that agriculture is less profitable has caused the young population to turn to mining, the timber industry or cities. Community-based tourism can be an important source of income and employment in rural areas where there are few sources of income. Various initiatives of local people can be supported and an important source of income can be created with traditional handicrafts, job opportunities and eco-accommodation opportunities within sustainable tourism activities (Lundt, 2022).

#### Initiatives on Sustainable Tourism

The establishment of the Guyana Tourism Authority (GTA) was an important milestone for development of tourism in the country. GTA is a semi-autonomous

organization tasked with promoting tourism, which was established under the auspices of the Ministry of Industry and Trade. The goals of the GTA are to support and develop the local economy, communities, focus on economic development and protect the natural and cultural heritage. In line with these goals, GTA has partnered with a private organization to develop routes for a global market. Investments have been made under this partnership, including supporting Warapoka's local communities, training programs for guides, wildlife conservation certifications and food safety. Public-private sector partnership is an important step in this framework (Lundt, 2022).

Guyana won the “Best of Sustainable Tourism” award at the Latin American Travel Association (LATA) in London Awards on 10 June 2019. It won the Silver Award for "Best Adventure" in the International Travel and Tourism Awards on November 5, 2019 (Walrond, 2021).

The best ecotourism activities and attraction points in the country are as follows (Mattai, 2021):

- The activities of the Iwokrama International Center, which was established as a non-profit organization in 1996, are the best examples of this. The organization's goal is to protect and manage 3,710 square kilometers of forest reserve. The organization aims to advance scientific research on the region and develop relationships with indigenous communities. In this context, one of its functions is ecotourism. Visitors can stay at the Iwokrama River Lodge, which is located within the conservation area and have the opportunity to go boating, fishing, lodge accommodation, swimming, and see the petroglyphs nearby. There are also opportunities to set up camp or hike to the summit of Turtle Mountain.
- Another ecotourism activity is located in the Surama district, a 13-kilometer-long Native American village in Guyana's North Rupununi region. Surama is a village surrounded by the Pakaraima Mountains, forest and savannas, and the Burro Burro River. Activities such as wilderness experience, bird watching, guided walking activities, river tours and village tours can be carried out in the village. The village accommodation Saruma Eco-Lodge has been ranked as one of the best accommodation in Guyana in the National Geographic. In the same year, it was granted to the Caribbean Excellence Award in Sustainable Tourism of the Caribbean Tourism Association.
- Kaieteur Falls and National Park is a famous attraction point. Kaieteur Falls is 741 feet high and 450 feet wide. It is the tallest single drop waterfall in the world. It is the first protected area established in Guyana and one of the first in all of South America. The park is home to a number of rare species such as the

- Cock-of-the-rock bird and the miniature Golden Frog. In 2017, more than 30 new species were discovered in Kaieteur National Park, including the Blue Tarantula.
- Shell Beach is a 90-mile stretch of coast in northwest Guyana. It is the nesting point for four of the world's eight species of sea turtles.

### Investment Opportunities

Guyana has a number of investment opportunities for the development of tourism. As an emerging economy in its region and a member of the OIC from Latin America, the tourism industry of the country is attractive for many investors. Some of the opportunities within the tourism industry in Guyana can be summarized as follows:

#### ***Potential Locations for Investment***

- Region 2&3 -Beaches, resorts, falls, lakes, historical sites
- Soesdyke-Linden – Region 10 – River front investment ideal
- The Rupununi – Region 9 – Gateway to the Savannahs

#### ***Existing attractions and activities Kaieteur Falls Park***

- Single largest free fall waterfall in the world by volume of water poring over it.

#### ***Development area as a major tourist destination***

- Recreational facilities and activities
- Rafting
- Boating
- Tennis
- Horseback riding
- Hiking
- Kayaking
- Mountain biking
- Golf

#### ***World Class Eco-Lodges or Resorts***

- To be developed in the interior

#### ***Niche Market Products***

- Investments in the infrastructure, facilities and services to support market segments
- Bird watching
- Yachting
- Deep -sea or river fishing

#### ***Hospitality services***

- Development of world class hotels
- Restaurants
- Eco-Retreats

#### ***Development of business services***



- Convention services
- Catering
- VIP Transportation
- Communications

#### ***Eco-Retreat Amenities***

- Nature trail
- Animal Reserve
- Bird Trailing
- Water Park
- Agri-Tourism and Culinary Fusion
- Entertainment
- Natural Wellness Spa
- Gift shop/Indigenous/Artesian boutique

#### ***Transportation Services***

- Expansion of scheduled and chartered air services
- Expansion of boat and car rental services

#### ***Craft Industry***

- Expansion of craft production

#### ***Development Project***

- Development of International Drag Racing

With the slowdown of the COVID-19, the tourism industry in the country is expected to revive quickly in the post-pandemic period. Given the wide range of tourism development projects/areas (as listed above), the country has the potential to welcome new investors that could contribute development of sustainable tourism projects.

### **Lessons Learned**

Although Guyana has made many investments and breakthroughs in tourism, it is still a developing tourism market. There are notable developments that speeded up the development of sustainable tourism in Guyana such as modernization of Cheddi Jagan International Airport, widening of roads, creation of the Guyana Tourism Authority, Creation of Guyana Investment Office (Go-Invest), improvement of airstrips, the construction of Princess and Marriott hotels. International marketing and promotion campaigns of the GTA have helped the country to raise awareness of the country. The tourist destinations in the country has been becoming become competitive in terms of price and quality.

Guyana has valuable opportunities for sustainable tourism with its natural and biological diversity, local cultures and ecotourism opportunities. The nature of the

country is very rich that stimulates its potential for development of sustainable tourism. However, there is still a need for improvement in cooperation, training, accommodation, infrastructure and service standards. In this framework, legislation and policies should be developed, regulations should be made, and cooperation and coordination should be ensured (Wenner, & Johnny, 2015). The accommodation capacity is still relatively small and service standards need further improvements in Guyana that would also help to increase profit margins.



*A picture from Guyana; a view from Kaieteur National Park  
Source: guyanatourism.com*

### 3.3.4 Maldives

#### Analysis of Current Situation

Maldives is located in the Indian Ocean. Stretching for 800 kilometres from north to south, the Maldives consists of approximately 1200 islands clustered within 26 coral islands. It hosts thousands of attraction areas of tourism with its blue lagoons and lush vegetation. There are more than 100 privately owned and privately run resort islands. Privately owned resorts that offer different islands and two different perspectives of life and services provided by local businesses are the elements that make up Maldives tourism.

Guests in Maldives have opportunities such as local island visits, underwater sports, resort islands, small boat tours, SPA and yoga trips, and wildlife boat tours. In particular, some local islands offer unique Muslim-friendly and eco-friendly tourism opportunities (Mack, n.d.). In particular, its untouched nature, beaches and warm climate make the Maldives an attractive destination for sustainable tourism.

The tourism sector is the largest contributor to the Maldivian economy with a share of more than a quarter of the national income. The tourism sector has grown at a rapid pace since the inception of the industry in 1972.

Tourism is the engine of growth in the economy of the Maldives. For instance, 82% of international export earnings of the country came from tourism activities in 2019 (before the outbreak of the pandemic), according to the UNWTO.

By the end of 2019, tourist arrivals reached 1.7 million. Although there was a decline in arrivals in 2020 due to the COVID-19 pandemic, tourist arrivals surpassed expectations after the borders were opened in July 2020. Maldives is one of the highest performing tourist destinations in the world since international borders opened for travel in 2020. The government has targeted to add 35,000 new beds to the sector by 2023, and the focus of this expansion is on diversification and localization.

### Initiatives on Sustainable Tourism

The Maldives predicts that if the possible negative effects of climate change are not reduced, the country may be under the threat of extinction in the coming years. (Kearney, 2021). In this regard, the Maldives Parliament adopted the “Climate Emergency Law” recently to prevent the rise in sea levels and the destruction of the environment. Within the scope of renewable energy, solar and wind energies are in an important position to achieve this goal. These initiatives also help development of sustainable tourism activities in the country.

The Government of Maldives particularly pays attention on solar energy within the scope of sustainability principles. It has announced plans to build one of the world's largest solar power plants to reduce its carbon footprint and create renewable energy sources. In order to provide renewable energy, it is aimed to establish a solar energy system on different islands throughout the country. This plan of Maldives is supported by the World Bank financing and includes the installation of solar energy systems on 14 islands as part of its carbon neutral goals (Kearney, 2021). The Maldives aims to achieve the zero carbon target by 2030.

The increasing demand for touristic destinations in the Maldives has increased the volume of garbage produced and has put pressure on infrastructure for the management of water and solid waste that the country has. In this regard, Maldives Ministry of Environment carries out "Environmental Improvement and Waste Management Project" in order to achieve success in waste management. The project is financed by the Asian Development Bank (ADB). The project has been prepared with the aim of establishing a modern waste collection, transfer and disposal system, improving waste management systems, building institutional

capacity for sustainable service delivery, and raising public awareness of reducing environmental impacts, recycling behaviours and reuse. Physical and non-physical investments are designed to rein in the effects of climate change and disasters and to create a cleaner environment in Maldives as it is one of the countries that has a low elevation in the world (Smailes, 2022).

The public authorities, local communities and the tourism industry stakeholders in the country have implemented numerous initiatives and activities to address the ecological impacts of tourists and limit damage to the environment. Conscious steps are taken to create environmentally friendly and sustainable products. Successful examples are as follows (Smailes, 2022):

- Collection points for plastic bottles prepared for recycling,
- Bottling water in glass bottles so that it can be reused,
- Using natural insecticides to reduce the use of toxic chemicals,
- Solar energy and solar panels,
- Research, production and rehabilitation activities for coral reefs,
- Educational programs for guests about sustainable living, ocean conservation and local fauna and flora,
- Community initiatives (Check Project and NGO programs) to support their local islands,
- Green practices and sustainable initiatives recognized by Green Globe, Earth Check and Conde Nest,
- Sustainability Laboratories that transform plastic waste into souvenirs,
- Gardens, hydroponic fields, farm fields and orchards.

Sustainable tourism in the Maldives is on the rise thanks to activities of tourism enterprises in the country. There is an orientation towards sustainability in tourism services in the Maldives. Resorts are responsible for preserving the marine life that surrounds their islands. In this context, they have committed to stop the use of plastic products that may harm marine life. Another exemplary step is the coral reef restoration project. The most exclusive and most luxurious resorts run entirely on solar power (Kearney, 2021). Fushifaru Maldives is one of the leading companies that can be considered as an example in this regard. The enterprise, which was opened in 2017, carries out exemplary activities using the coral spreading project, afforestation activities within the framework of the "Plant Your Own Tree" program, smart lighting, advanced energy and water management system and environmentally friendly materials in order to achieve the zero waste goal. It has adopted the principles of sustainable management in its business activities and policies (Fushifaru Maldives, 2022). Sustainability initiatives are not limited to

businesses in resorts. A growing number of local tour operators have started to preparing packages based on sustainability (Smailes, 2022).

The public sector in the Maldives promotes sustainability in tourism, which enables tourism providers to partner with key organisations like “Green Fins”, a global initiative to reduce the environmental impact of marine tourism, The “Manta Trust”, a UK-based, non-profit and independent organization for the protection of manta rays and their habitats, education, research and rehabilitation of sea turtles in the Indian Ocean and “Parley”, an international NGO working to promote recycling and reduce plastic waste on the Maldives islands (Smailes, 2022).

Non-governmental organizations and resorts take part in educating local people on sustainability in the Maldives. Within the scope of such programs, many activities like reef and beach cleaning, renewable energy resources development activities, trainings on responsible fishing are carried out regularly on the local islands (Smailes, 2022).

### Investment Opportunities

In the Maldives, the tourism industry is the engine of growth. To ensure the running of this critical industry, investments play a crucial role. In particular, investments ranging from high-value developments based on the one-island-one-resort concept, yacht marinas, luxury accommodation and hotels and relatively smaller investments in the guesthouse sector are now open for foreign investors.

Investments that would expand culture and wellness tourism, ecotourism, MICE and adventure tourism have high potential. Investment in tourism real-estate including the development of integrated tourism development projects, holiday homes and private islands, is also an option with great potential, for foreign investors seeking opportunities to invest in the Maldives.

The biosphere reserves and protected areas of the Maldives with their rich and diverse marine and terrestrial fauna and flora and their unique features offer great potential for investments in ecotourism and research-based tourism.

Potential investors also have the prospect of investing in the tourism sector with the Maldives Fund Management Corporation (MFMC). MFMC will invest in luxury tourist establishments, city hotels and other real property assets in Maldives, including development projects such as private islands, holiday homes, floating residences, yacht marinas and integrated tourism projects.

Opportunities are also open to invest in distressed tourism projects that are in various stages of development.



## Lessons Learned

Maldives is one of the countries that has created high awareness of sustainable tourism and has stepped into successful practices. Maldives has taken several steps to involve all tourism stakeholders, non-governmental organisations and local communities in its journey to develop sustainable tourism. In recent years, tourism projects, activities and policies in the country are being shaped by taking sustainability principles into consideration. In this context, the Maldives should continue to have effective cooperation among various stakeholders including public, private sector, non-governmental organizations, regional organisations and local people. Besides, the Maldives has completed a set of sustainable tourism projects and training programmes over the recent years that positively affected its success in tourism.

The Maldives consists of sand collections and islands. It is vulnerable against climate change. It will be among the first countries to be affected by the impact of rising sea levels and coral bleaching as a result of global warming (Smailes, 2022). In this regard, policies to ensure sustainability of tourism activities in the country is critical. Therefore, the Maldives pays utmost attention to the protection of its islands and beaches.



*A picture from the Maldives; a view from Amaya Kuda Rah Maldives Resort*  
Source: visitmaldives.com

## 3.4 Conclusion

A set of OIC countries from the OIC Arab, Africa and Asia regions, as analyzed in this chapter, have achieved to develop their national plans and strategies that enabled them to get a better position in the global sustainable tourism market. These OIC countries identified a set of actions and key performance indicators. These plans helped them to facilitate achieving measurable objectives in the domain of

sustainable tourism. As a result, over the years, they have started to get higher shares in the global tourism market.

A growing number of OIC countries have taken many sustainability-conscious steps to develop sustainable tourism. Yet, further steps must be taken to scale up investments and develop new policies in this niche tourism market. When the situation of sustainable tourism in the OIC countries is examined, it becomes evident that cooperation and solidarity are the backbones of success in this domain. To this end, local, national and international cooperation is essential for the successful take-off of this niche tourism market. In this context, social, environmental, and economic sustainability can be achieved by ensuring the participation of local people.

Developing promotion & marketing strategies, mapping challenges, and designing future plans and strategies are among the key issues that policymakers should take into consideration. In this respect, the organization of events like forums, workshops, meetings, and fairs could also play a critical role to raise awareness, promoting investments, and networking among stakeholders.

Some OIC countries are also rich in terms of holding dedicated training programs on sustainable tourism. For example, in 2007, The “Future is in Tourism” platform was established in Türkiye in collaboration with United Nations Development Program (UNDP) and Anadolu Efes. Within the framework of the program, tourism training was given to more than 5000 people in 27 provinces (Future is in Tourism, 2022). The Indonesian Ecotourism Foundation (Indecon) and the United Nations came together to promote local 'ecotourism' in the West Nusa Tenggara (NTB) and East Nusa Tenggara (NTT) regions in Indonesia. In the UAE, Dubai is aiming to develop sustainable tourism with a mission to strengthen Dubai's economy by providing world-class experiences supported by sustainability principles. As part of these efforts, the Dubai Sustainable Tourism Association delivered 18,000 hours of training to its stakeholders and partners in 2021 (Lootah, 2022).

Developing intra-OIC cooperation could further sustainable tourism development in the OIC region. To this end, special consideration must be given to the preparation of a “Strategy at the OIC level” with a view to stimulating intra-OIC cooperation, particularly in the domain of sustainable tourism. To this end, some resolutions could be considered and adopted in the next sessions of the COMCEC and ICTM. All relevant institutions and views of OIC countries should be considered in the development of such a guiding strategy at the OIC level. The experiences of other regional and international organisations could be also considered in developing such an OIC-level strategy to benefit from lessons learned and experiences.



A number of OIC countries that have a wealth of national policies and experiences on sustainable tourism development, as reflected in this chapter, should be encouraged to promote the exchange of knowledge and expertise between newly emerging sustainable tourism markets. In this context, holding fairs, conferences, workshops, and seminars on sustainable tourism could bring a set of advantages and help to promote intra-OIC cooperation. Additionally, gatherings targeting important sustainable tourism market participants should be planned that they can establish a business network and hold B2B meetings where they could discuss potential future initiatives and business opportunities. Activities such as sectoral exhibitions, fairs, and festivals are also critical to raising awareness among potential consumers and investors as well as influential for branding and marketing. In the domain of fairs and exhibitions, among OIC institutions, the Islamic Centre for Development of Trade (ICDT) is active and has a long experience in the organization of such OIC-wide and regional events. In this regard, the ICDT could take some initiatives at the OIC level to organize such colourful events in close cooperation and coordination with OIC countries, relevant OIC institutions, and the OIC General Secretariat. Importantly, companies and relevant stakeholders from OIC countries should be encouraged to actively participate in these events to be held by the ICDT in the domain of sustainable tourism development.

In addition, the development of the sustainable tourism sector could be aided by the formation of alliances among relevant sectoral stakeholders in the OIC region. For example, hotel establishments with “sustainable tourism certificate” from OIC countries could form an alliance and develop joint promotional activities and campaigns to attract more tourists. The OIC and its relevant institutions like The Islamic Chamber of Commerce, Industry and Agriculture (ICCIA) and ICDT could facilitate or provide guidance in the formation process of such alliances in the area of airlines, tour operators and accommodation establishments within the OIC. Alternatively, such relevant OIC institutions could create online portals to encourage networking among such relevant sustainable tourism stakeholders from OIC countries.

Successful OIC countries in the area of sustainable tourism development often invested in human capital development. Yet, still many OIC countries do not have a sufficient number of well-trained human capital with specific knowledge of sustainable tourism. All relevant OIC institutions like ICDT, Standards and Metrology Institute for Islamic Countries (SMIIC) and Statistical, Economic and Social Research and Training Centre for Islamic Countries (SESRTC) in cooperation with the General Secretariat and OIC countries should consider organizing regular capacity-building and training programs in the domain of sustainable tourism with a view to upskilling human capital and improving national human resources capacities of member

countries. This set of programmes should include a variety of aspects of sustainable tourism such as standards, certification, accommodation services, waste management and preservation of natural parks. Moreover, these activities could stimulate the exchange of experiences among OIC countries in the domain of sustainable tourism. The ICDT's brand-new TOUR-DEV (Tourism Development) programme could include such programmes in its annual execution plans with a view to providing OIC countries with chances to benefit from planned activities on a regular basis. ICDT to continue to issue on sustainable and health tourism, SESRIC its Outlook on OIC Tourism in order to raise awareness on the importance of tourism in economic development in OIC Member States and SMIIIC Technical assistance on Halal Certification and Accreditation on Halal Tourism or Muslim-Friendly Tourism.



## Chapter 4: **Sustainable Tourism and Prospects for International Trade and Investment**

## Chapter 4. Sustainable Tourism and Prospects for International Trade and Investment

Respecting the universe and preserving nature has become an important component of the global tourism economy, which is often called sustainable tourism. Sustainable tourism is also important for achieving the sustainable development goals (SDGs) for developing countries and investments made in this niche market have the potential to boost international tourism activities and therefore could trigger international trade in services as well. Moreover, the development of sustainable tourism could boost investments in the tourism sector either by attracting new investors or motivating existing investors to make additional investments to align their activities with the concept of sustainability.

Against this background, this chapter first looks at the nexus between sustainable tourism and international trade & investment. Then it provides a discussion on the main challenges that hinder international trade and investment in the domain of sustainable tourism. Lastly, the chapter summarizes key prospects for the development of international trade and investment in this important area before presenting the conclusion.

### 4.1 Sustainable Tourism and International Trade

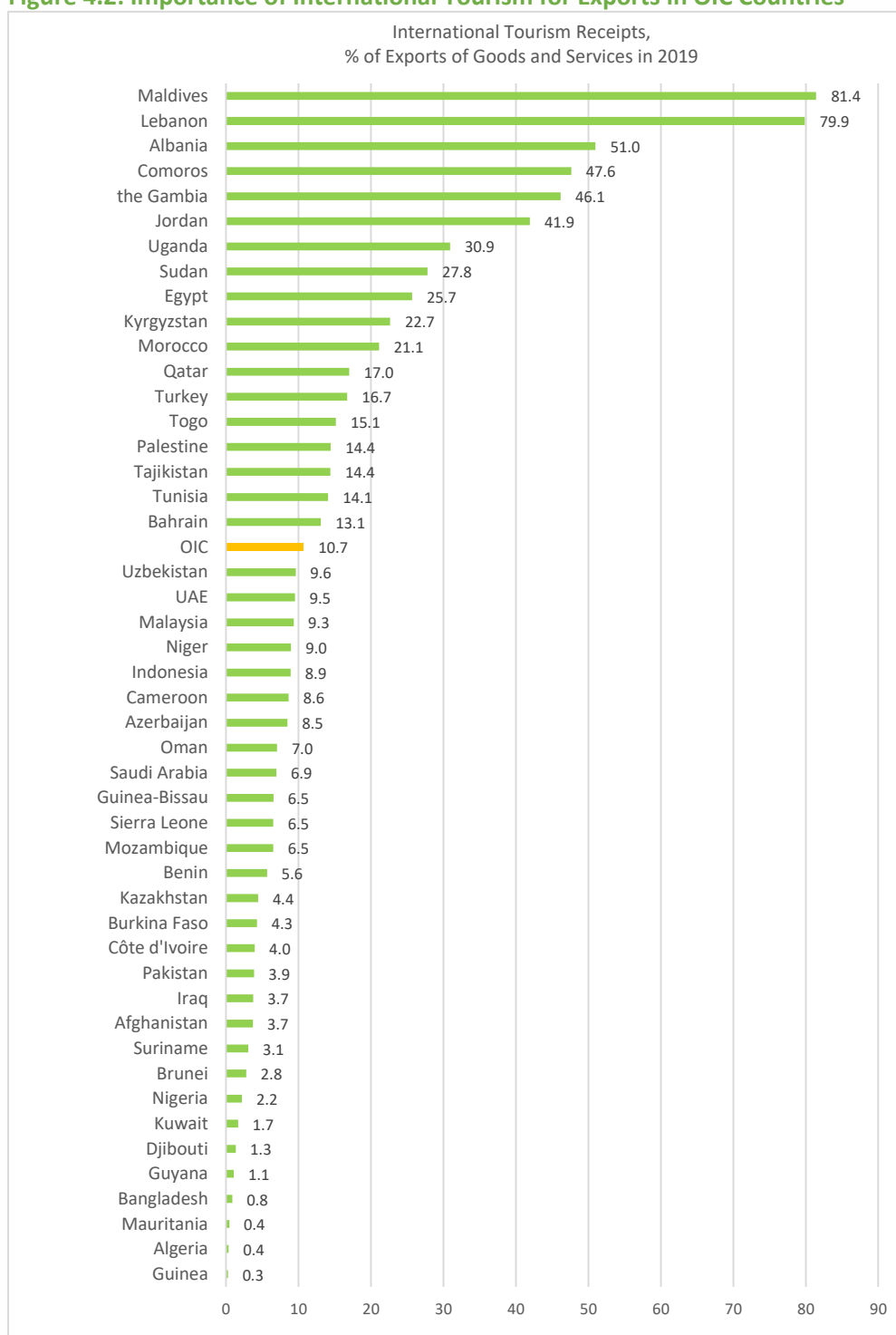
Sustainable tourism activities as in other international tourism activities constitute an important source of foreign exchange and have the potential to transform the investment landscape towards a more sustainable one. In this way, sustainable tourism activities not only have the potential to boost export figures but also could trigger investments that are “responsible” in its nature.

Just before the outbreak of the COVID-19 pandemic, OIC countries benefited a lot from the contribution of international tourism receipts to exports of goods and services. In the OIC region, international tourism receipts, on average, is estimated to represent a share of 10.7% of total exports of goods and services in 2019 based on the WTTC 2022 estimations (Figure 4.1). Nevertheless, the pandemic has resulted in sharp declines in 2020 and it was measured at 4.3% in 2020. In 2021, a slight improvement was recorded and it was measured at the level of 4.4%.

**Figure 4.1: Importance of International Tourism for Exports in OIC Countries**

Source: Author's calculation from UNWTO and WTTC

In some OIC countries like the Maldives (81.4%) and Lebanon (79.9%) this share reached the threshold of 80% (Figure 4.2). In such OIC countries, international tourism plays a crucial role in their economies by bringing a significant amount of foreign exchange earnings. In 18 OIC countries, this share was found to be higher than the OIC average of 10.3% in 2019. In the OIC Africa region, the Gambia (46.1%), Uganda (30.9%), and Togo (15.1%) had the highest shares. In Asia, Maldives (81.4%), Albania (51%), and Kyrgyzstan (22.4%) reported the highest shares. In the Arab region, the tourism sector made the highest contribution to exports in Lebanon (79.9%), Comoros (47.6%), and Jordan (41.9%) in 2019.

**Figure 4.2: Importance of International Tourism for Exports in OIC Countries**

Source: Author's calculation from UNWTO and WTTC

When it comes to “sustainable tourism”, some estimations could provide a better idea about the contribution of this niche market to total exports of goods and services in OIC countries. In 2019, the total volume of exports generated through sustainable tourism activities ranged between USD 32 billion (conservative estimation) and USD 59 billion (moderate estimation) in the OIC group. To this end, the sustainable tourism market should have a higher place on the agenda of policymakers as an important enabler of exports (Figure 4.3).

**Figure 4.3: Estimated Volume of Exports by Sustainable Tourism Activities (USD Billion) in OIC Countries, 2019**



Source: Author's calculation from UNWTO and WTTC by assuming that the market share of sustainable tourism is 12% (conservative estimation) and 22% (moderate estimation).

## 4.2 Sustainable Tourism and Investment

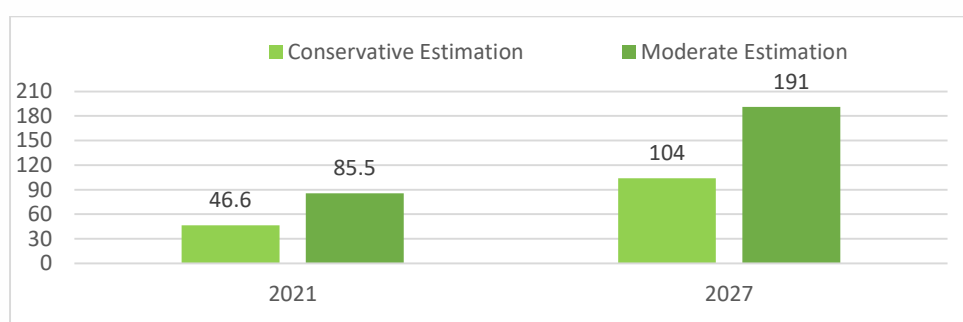
The sustainable tourism market has been growing rapidly due to the increased emphasis on the concept of sustainability and environmental protection. The discussions evolved around global warming and international commitments like Paris Agreement and SDG 2030 Agenda have just increased the popularity of this tourism niche market before the outbreak of the pandemic.

Many studies show that sustainable tourism is expected to grow further worldwide over years such as due to increasing awareness of protecting nature, SDG-aligned policies (SDG 8,12, 14, and 15), and global warming. In particular, during the COVID-19 pandemic, more countries and policymakers realized the importance of conducting international tourism activities by respecting nature. The concepts like environmental protection, personal hygiene and safety, and responsible tourism have become more popular than ever. Therefore, many studies indicate that the sustainable tourism market will grow much faster in the post-pandemic period as compared to the pre-pandemic period. For example, Vig and Deshmukh (2021) estimate that the ecotourism market size is expected to reach USD 334 billion by 2027, registering a Compound Annual Growth Rate (CAGR) of 14.3% from 2021 to 2027. This reflects the dynamism of the sustainable tourism market. By using the (CAGR) of 14.3%, Figure 4.4 estimates the market potential of sustainable tourism



in the OIC group. Its estimated market size will range between USD 104 billion (conservative estimation) and 191 billion (moderate estimation) in 2027. In other words, the market will see an increase of a minimum of USD 57.4 billion and a maximum of USD 105.5 billion. Most of these additional market size will come from new investments to be made in the sustainable tourism market. However, in order to reach this investment potential, many OIC countries need to make additional national savings or use the savings of other countries/companies in the form of Foreign Direct Investment (FDI).

**Figure 4.4: Estimated Market Potential of Sustainable Tourism (USD Billion) in OIC Countries by 2027**

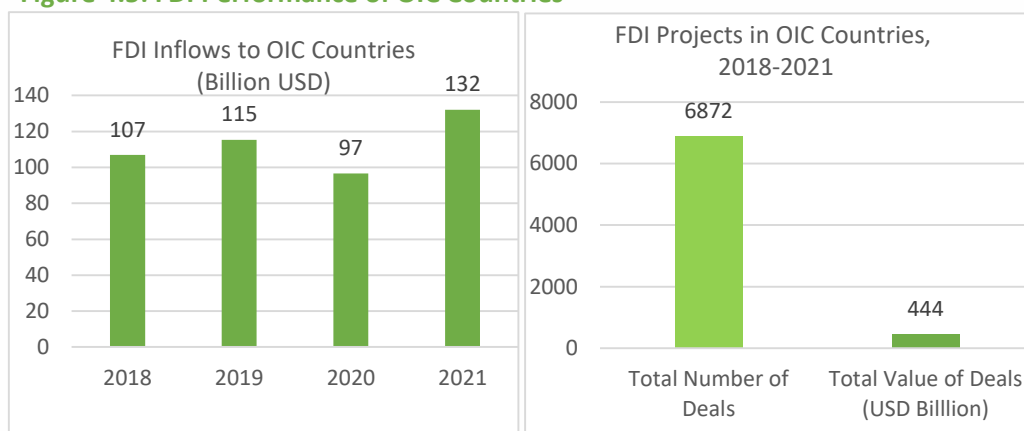


Source: Author's estimations based on WTTC figures on the contribution of international tourism to GDP in the OIC region. Note: 12% (conservative) and 22% (moderate) of International tourism-related GDP in the OIC region stemmed from sustainable tourism activities is the assumption used in the estimations. CAGR 14.3% is assumed between 2021-2027 as indicated by Vig and Deshmukh (2021).

A quick overview of the recent FDI performance of OIC countries could provide an idea on the potential of the OIC region. OIC countries, as a group, achieved to attract FDI inflows that amounted to USD 115 billion in 2019 before the outbreak of the pandemic (Figure 4.5). In 2020, a decrease of USD 18 billion was recorded due to the uncertainties brought by the pandemic. Yet, in 2021 OIC countries started to recover in terms of FDI attractiveness and the total volume of FDI inflows hit USD 132 billion. The figures on the number of FDI projects and the total value of deals also indicate that there is positive momentum in the FDI landscape of OIC countries. The total number of FDI deals made in the OIC region was around 6872 over the period 2018-2021 (Figure 5.5). The total value of these deals is estimated at around USD 444 billion. Many studies like SESRIC (2022) foresee that OIC countries could attract

more FDI inflows in the post-pandemic period given their abundant natural resources, young population, and increasing geopolitical importance.

**Figure 4.5: FDI Performance of OIC Countries**



Source: UNCTAD WIR (2021 and 2022), Annex Tables

As a rapidly growing niche tourism market, projects in the domain of sustainable tourism could attract a significant number of foreign investors that could boost FDI figures in OIC countries. A considerable number of OIC countries (more than 30 of them) have already listed “tourism” as a priority investment area and the national Investment Promotion Agencies (IPAs) have started to promote this sector in their promotional activities. Moreover, most of these OIC countries put a lot of emphasis on the term “sustainability” and pay greater attention to the principles of sustainability. In other words, these countries not only aim to attract more FDI projects in the domain of tourism but also projects and investors that could contribute to the national efforts on ensuring sustainability. In this respect, there is a high potential for OIC countries to attract more investors to this niche market if they could properly promote their FDI landscape and showcase opportunities available for investors in their respective countries.

In this picture, a set of indicators and indices could be used by OIC countries that are often used by investors to examine a host country’s readiness and strengths for “sustainable tourism development”. A well-known international index in this domain is called Travel & Tourism Development (TTD) Index developed by the World Economic Forum which ranks 117 countries around the world. The TTD index benchmarks and measures “the set of factors and policies that enable the sustainable and resilient development of the Travel and Tourism (T&T) sector, which in turn contributes to the development of a country” (World Economic Forum,

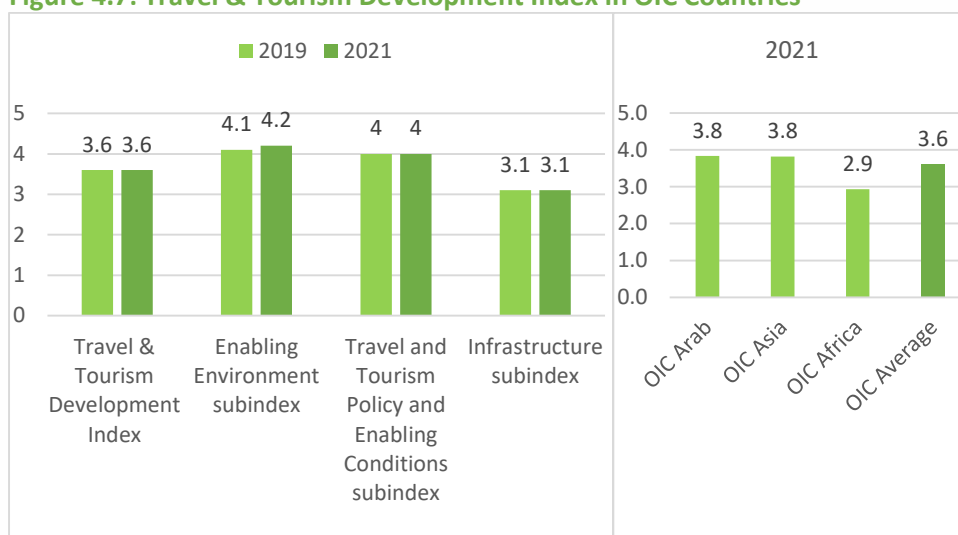
2022). The index is comprised of five sub-indices (Enabling Environment; Travel and Tourism Policy and Enabling Conditions; Infrastructure; Travel and Tourism Demand Drivers; Travel and Tourism Sustainability), 17 pillars, and 112 individual indicators, distributed among the different pillars as exhibited in Figure 4.6.

**Figure 4.6: Components of the Travel & Tourism Development (TTD) Index**



Source: World Economic Forum (2022)

Figure 4.7 (left) displays the performance of the OIC group in the Travel & Tourism Development Index and its three subindices. The average of the OIC group stayed at the level of 3.6 both in 2019 and 2021. Only in the enabling environment sub-index score, there was a minor improvement that increased from 4.1 in 2019 to 4.2 in 2021. At the OIC sub-regional level, the OIC Arab and OIC Asia regions, on average, obtained higher scores (3.8) that exceeded the overall average of the OIC group (3.6) in 2021 (Figure 4.7, right). Yet, the OIC Africa region had the lowest average score (2.9) which was lower than the OIC average of (3.6). This reveals that the OIC countries located in the Africa region need to take more actions and implement policies to provide a more enabling environment for achieving sustainable tourism development.

**Figure 4.7: Travel & Tourism Development Index in OIC Countries**

Source: Author's calculation from the WEF. Note: a higher score is better

Looking at the individual performance of OIC countries in the TTD index could provide more details about the success stories and good practices in terms of the development and implementation of sustainable travel and tourism policies. To this end, Table 4.1 presents the individual ranking of OIC countries in 2021 in the TTD index. Among OIC countries, the United Arab Emirates from the OIC Arab region topped the list with a global ranking of 25. It was followed by Indonesia from the OIC Asia region (with a ranking of 32) and Saudi Arabia (with a rank of 33) from the OIC Arab region. Six OIC countries namely the UAE, Indonesia, Saudi Arabia, Malaysia, Qatar, and Türkiye were ranked in the global top-50 of the TTD index in 2021, reflecting their effective sustainable tourism policies as well as enabling environment for the emergence of sustainable travel and tourism activities. From the OIC Africa region, Egypt topped the list with a global ranking of 51.

**Table 4.1: Travel & Tourism Development Index, 2021**

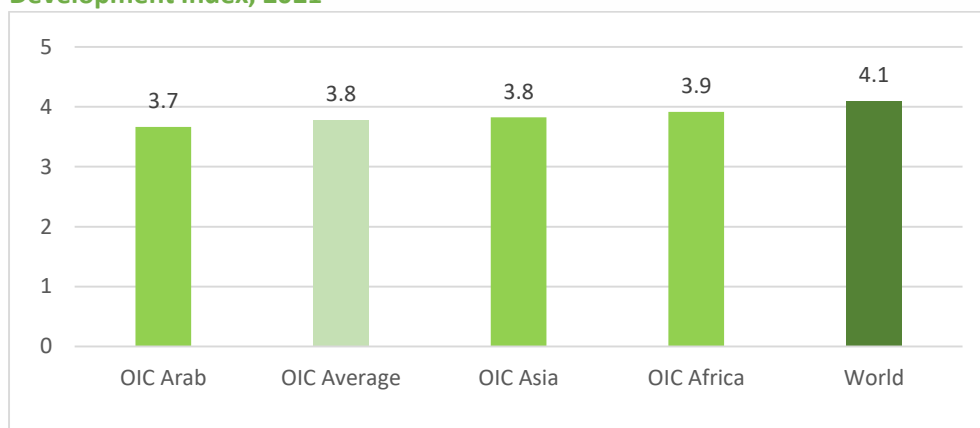
Country	Global Rank	Country	Global Rank
UAE	25	Kuwait	86
Indonesia	32	Kyrgyzstan	90
Saudi Arabia	33	Tajikistan	92
Malaysia	38	Lebanon	94
Qatar	43	Bangladesh	100
Türkiye	45	Benin	103
Egypt	51	Senegal	105
Bahrain	57	Côte d'Ivoire	107
Azerbaijan	63	Nigeria	110
Jordan	64	Cameroon	112
Kazakhstan	66	Sierra Leone	114
Morocco	71	Mali	115
Albania	72	Yemen	116
Tunisia	80	Chad	117
Pakistan	83		

Source: World Economic Forum. The Travel & Tourism Development Index 2021 dataset (version 24 May 2022).

Having a closer look at the Environmental Sustainability Pillar of the TTD index could provide additional insights into the relative performance of the OIC countries and regions as compared to the world average. In particular, the pillar gauges countries' policies to ensure "environmental sustainability" with a particular reference to the travel and tourism sector. The average performance of the OIC group (measured at 3.8) was found to be lower than the global average of 4.1 (Figure 4.8). This indicates that OIC countries, as a group, need to exert more effort and take effective measures to ensure "environmental sustainability". These efforts not only would help OIC countries to protect the environment and better sustainability efforts but also would improve their competitiveness in the global travel and tourism sector.

Increased competitiveness is often associated with increased inflows of FDI that could also help the existing investment gaps in the OIC region in the tourism sector while creating thousands of new jobs and value-added. It is worth noting that when it comes to the environmental sustainability pillar of the Travel & Tourism Index, OIC sub-regions obtained similar averages in the range of 3.7 (OIC Arab) and 3.9 (OIC Africa).

**Figure 4.8: Environmental Sustainability Pillar of the Travel & Tourism Development Index, 2021**



Source: World Economic Forum. The Travel & Tourism Development Index 2021 dataset (version 24 May 2022)

While evaluating countries' performance at the global scale in terms of sustainable travel policies, another prominent index is being used. It is called "Sustainable Travel Index (STI)" that was developed by Euromonitor International (2021). The sustainable travel index enables travel businesses, destination management organisations, and tourism boards to understand sustainability challenges and opportunities by providing quantifiable metrics across seven pillars.

These pillars look at 99 countries through the lens of environmental, social, and economic sustainability, country risk as well as sustainable tourism demand, transport, and lodging. Overall, 57 data indicators —each weighted according to the level of direct or indirect relevance — are used to derive the final index ranking to determine the comparative performance of countries. The index can be used to benchmark performance against country peers, develop a sustainable tourism strategy, engage with the United Nations Sustainable Development Goals, and help deliver positive impacts for all stakeholders involved (Euromonitor International, 2021).

At a global scale, Sweden, Finland, and Austria topped the list in 2020. Among OIC countries, Jordan (with a ranking of 43) from the Arab region and Cameroon (with a ranking of 52) from the Africa region, and Oman (with a ranking of 57) from the Arab region were the top performer ones in STI in 2020. These countries were followed by the UAE (with a ranking of 58) and Algeria (with a ranking of 60) (Table 4.2).

**Table 4.2. Sustainable Travel Index Rankings 2020**

Country	Global Rank	Region	Country	Global Rank	Region
Jordan	43	Arab	Lebanon	79	Arab
Cameroon	52	Africa	Maldives	80	Asia
Oman	57	Arab	Kuwait	82	Arab
UAE	58	Arab	Malaysia	85	Asia
Algeria	60	Arab	Qatar	86	Arab
Kazakhstan	62	Asia	Nigeria	90	Africa
Tunisia	63	Arab	Egypt	91	Arab
Türkiye	66	Asia	Indonesia	92	Asia
Mozambique	68	Africa	Morocco	95	Arab
Azerbaijan	69	Asia	Pakistan	99	Asia
Bahrain	70	Arab			
Saudi Arabia	72	Arab			
Uzbekistan	73	Asia			

Source: Euromonitor International

A few additional insights on the performance of OIC countries from the pillars of the STI could be illuminating and could reveal the rich experience and strong performance of member countries in various dimensions related to “sustainable tourism.

- A thriving natural environment is one of the main prerequisites for a successful and sustainable tourism offer. In this respect, STI includes a pillar on the “environmental sustainability” that contains five categories: climate, natural assets, pollution, energy and water. This pillar addresses the overall health of a country in terms of the environment, biodiversity and natural resources under threat due to climate emergency. In this pillar, Mozambique, as an OIC country from the Africa region, holds the top ranking for environmental sustainability among 99 countries included in the index. The country has many national parks and protected areas like community-run conservancies which protect biodiversity through nature-based tourism, offering an alternative source of revenue to poaching (see box 4.1). Cameroon, as an OIC country from the Africa region, ranked 5<sup>th</sup> and was placed among the top-performer countries around the world in this pillar of the STI.



#### Box 4.1: Mozambique — Maputo Reserve and Ponta do Ouro Marine Reserve

Founded in 2009, the Ahi Zamene Chemucane (AZC) is a community association for the sustainable management of natural resources. The government of Mozambique gave local communities exclusive rights to manage two large and important conservation areas: Maputo and Ponta do Ouro Marine Reserves, both known for diverse wildlife. In partnership with the Mozambique Ministry of Tourism and the National Tourism Institute, with financial support from international development institutions, the AZC worked with local communities to develop the area for sustainable tourism, including the construction of an eco-lodge that trains and employs locals in hospitality and conservation. The profits are funnelled back into the community which acted as a lifeline to local families in 2020 when restrictions due to the pandemic created food shortages.

*Source: Author's extraction from Euromonitor International (2021)*

- One area often overlooked area is whether a country is overly dependent on tourism which makes it vulnerable to external threats such as natural disasters, terrorism or pandemics which can put jobs and communities at risk. The economic sustainability pillar of STI, therefore, considers a country's relative economic performance based on its tourism dependency, debt levels, hospitality employment, and business readiness to gauge strengths and weaknesses (Euromonitor International, 2021). In this pillar, among OIC countries, Malaysia from the Asia region took the lead and ranked third among 99 countries due to the country's efforts and policies to improve economic sustainability, particularly in the area of the hospitality sector.
- The travel and tourism industry is particularly susceptible to external risks like geopolitics, natural disasters, man-made catastrophes and diseases. The risk pillar of the STI has three main areas: safety, healthcare and endangered cultural sites and species. And in this pillar, again, an OIC country from the Arab region, Saudi Arabia took the lead among 99 countries included in the ranking thanks to the country's recent bold steps in preserving the nature and heritage conservation and its efforts to promote sustainable tourism in such areas (see box 4.2).

#### Box 4.2: Saudi Arabia – At-Turaif District and Red Sea Projects

For years, travelling to Saudi Arabia for tourism purposes was limited except for business or religious visit purposes. In 2019, however, the Kingdom has decided to be an important hub for tourism such as by offering electronic visas for visitors and transforming the natural and cultural sites for sustainable tourism activities through making investments. The Kingdom has developed heritage sites to ensure tourism remains viable and sustainable for the long-term. For example, Saudi Arabia's ancient capital, the At-Turaif District, is an important historic, political and cultural site. The whole area is being furthered developed for tourism and will help employ locals. Additionally, the Red Sea Project aims to develop and preserve the country's western coastal areas. Tourism development will be a crucial growth area and will reduce its reliance on more traditional industries, such as oil. By 2030, Saudi Arabia expects that tourism will contribute 10% of the country's GDP.

*Source: Author's extraction from Euromonitor International (2021)*

### 4.3 Challenges for Boosting International Trade and Investment

The sustainable tourism sector is among the fastest growing niche markets in the worldwide tourism sector. In particular, a number of international agreements and commitments like the adoption of the SDG Agenda 2030, the Paris Agreement, and the Glasgow Climate Pact (COP 26) have facilitated and speeded up the transformation of the tourism sector towards a greener and more sustainable one. Many OIC countries have taken part in these agreements and negotiations. They have also set national targets besides international ones that require major investments to make the tourism sector more environmentally friendly and align it with the sustainability agenda. Yet, many OIC countries face a set of challenges that limit their efforts and capabilities to develop sustainable tourism. These challenges limit their ability to boost international trade and attract investments, which can be grouped as follows:

#### a) Standardization and certification on “sustainability”

Although there are some indicators for measuring environmental degradation like carbon emission caused by tourism activities, there are differences in defining “sustainable tourism”. In particular, when it comes to certification of “sustainability”, there are broad differences at the national level that have led to issues related to the monitoring of standardization and certification as well as policy development.

### b) Inadequate infrastructure

The quality of infrastructure differs among OIC countries. Many OIC countries have inadequate or old infrastructure that reduces their competitiveness in sustainable tourism activities. A number of OIC countries also have relatively developed infrastructure in city centres or urban areas. Yet, in rural settings where sustainable tourism has the highest potential, many OIC countries are not able to offer the same competitive infrastructure and basic services. This not only affects the satisfaction of tourists but also create an unfavourable investment environment for potential investors.

### c) Investment and financing gaps

One of the key reasons why many OIC countries are not able to provide a competitive infrastructure in the domain of tourism is the existing investment and financing gaps. In particular, the public sector has limited resources and tends to use them for ensuring more essential basic services like the provision of drinking water rather than the development of sustainable tourism areas like natural parks or protected areas, particularly those OIC countries located in Sub-Saharan Africa. Some OIC countries focused on mass tourism and prioritized investments for the development of sun-sand tourism rather than sustainable tourism. The private sector and investors have also issues in access to finance particularly for their projects on sustainable tourism in many OIC countries.

### d) Limited awareness of “sustainability” among tourism stakeholders

Although sustainable tourism has become a trend in many OIC countries, however, there is still limited awareness of the concept of sustainability and its principles among tourism stakeholders including tourism-sector professionals, policymakers, and investors. This limits or slow down the development of investment projects. In some cases, getting approvals for high-potential projects take more time than expected particularly from the public sector due to incomplete information or lack of knowledge on the basics of sustainable tourism. Such examples discourage potential investors and reduce potential export revenue through sustainable tourism.

### e) Increased global uncertainties

Since 2020, global uncertainties have increased. The tourism sector has tried to survive given travel bans, mandatory COVID-19 tests, and quarantine requirements reduced people’s appetite for travel. Airlines, hoteliers, and tour operators,

amongst others, witnessed a sudden drop in their revenues as tourism activities dwindled. The vaccinations against COVID-19 have increased hopes for normalization. Yet, the increased pressure on prices of products and services (i.e. inflation) not only made tourism products and services more expensive but also changed people's priorities. The outbreak of the recent Ukraine-Russia crisis has added additional uncertainties both for travellers and investors. In this picture, tourism stakeholders try their best to continue their operations and make additional investments both in OIC countries and elsewhere.

#### 4.4 Prospects for International Trade and Investment

Sustainable tourism could play an important role in diversifying tourism products/services. To this end, protecting and conserving natural and cultural assets are critical for income, employment, and future generations. Many destinations depend on abundant wildlife, flora, and fauna as a key part of their tourism offer. For example, over one-third of direct tourism revenues in Africa were generated from wildlife tourism pre-pandemic, according to the WTTC. Travel businesses are on board with preserving biodiversity and 10% even accelerated investment in this area during the pandemic according to a Euromonitor Voice of Industry survey (Euromonitor International, 2021).

The following four factors constitute prospects for the development of sustainable tourism in OIC countries. These factors could help OIC countries to address existing investment gaps in sustainable tourism and give an impetus for increased export revenue through boosted tourism activities.

##### 4.4.1 Public-Private Partnerships (PPPs)

Public-Private Partnerships (PPPs) entail cooperation between the public and private sectors to achieve a long-term objective, typically for a project involving social and economic infrastructure that will aid in the growth of a community or region. Such partnership agreements are used to finance the construction and management of numerous tourism-related infrastructure projects, including roads, rail networks, and airports. PPP could be suggested as a workable model to finance sustainable tourism projects since the development of the tourism sector frequently necessitates significant initial investments. Under this model, tourism projects are financed and operated through a partnership of government agencies and private sector agents. PPPs can also be a powerful tool for tourism product development and enhancement, as well as for research, marketing, and promotion (Smith, 2011).

Private funding can support expanded infrastructure investment for the government without immediately increasing borrowing and debt levels, and it can also be a source of revenue. In addition, improved management in the private sector and its ability for innovation can result in more efficiency and deliver better quality services at cheaper costs. PPPs offer commercial opportunities to the private sector in fields from which it was frequently previously excluded, as well as the extension of products and services beyond their current scope. Identification of potential partnership areas is also a crucial step in establishing PPP. UNWTO (2015) revealed that the most critical areas for PPP in the tourism sector are as follows: improving destination image, preserving cultural and heritage resources, education and training, safety and security, and environmental protection.

There are successful examples in the OIC region that the PPP modality worked well in the domain of tourism. For example, the PPP model helped Türkiye and Tunisia to have brand-new international airports in some major touristic destinations (e.g. Istanbul and Antalya) and Enfidha–Hammamet International Airport. Lebanon used the PPP modality for the tourism development of Jeita grotto, Saida, and Tyr touristic attractions sides. Indonesia also benefited from the PPP modality in the Nusa Dua Tourism Area with the involvement of public and private authorities as well as the support of local civil society organisations (OECD, 2014).

Overall, while attempting to attract more FDI to finance sustainable tourism projects, OIC countries are recommended to benefit from the potential of the PPP modality to boost investments in sustainable tourism and forge with new partnerships. It is also important to highlight that transfer of know-how and experience among other positive spillovers effects of PPP projects could be important for fostering sustainable tourism in OIC countries. For example, a private company based in Türkiye or Malaysia could bring a brand-new environment-friendly airport building structure to a destination in the OIC Africa region by transferring the required technology and know-how under the PPP modality agreement. In this way, transformation towards “sustainable tourism” could be accelerated.

#### 4.4.2 Intra-OIC Cooperation

Boosting intra-OIC tourism cooperation could bring a number of benefits for the development of sustainable tourism in OIC countries. The positive pattern seen in intra-OIC tourist arrivals and tourism receipts highlights that there is an increasing awareness of tourism destinations of OIC countries. In particular, Islamic tourism

activities, which put a lot of emphasis on the protection of nature and preserving resources, could also provide another golden opportunity for intra-OIC sustainable tourism cooperation. Sharing experiences of OIC countries in terms of developing sustainable tourism policies and practices could pave the way for other OIC destinations to design and implement similar policies by taking their local conditions into consideration.

#### 4.4.3 Positive Pattern Seen in FDI Flows

OIC countries experienced an increase in FDI inflows before the outbreak of the pandemic as discussed in section 4.2. Besides, there was a specific positive pattern globally in tourism FDI over the period 2015-2019. It went up from USD 20.6 billion in 2015 to USD 61.7 billion in 2019 (FDI Intelligence, 2020). Cumulatively, the total value of 2309 tourism FDI projects made up around USD 196 billion in the world over the period 2015-2019. The estimates show that 470 thousand new jobs were created by these projects. Yet, FDI Intelligence (2022) revealed that the COVID-19 pandemic hit new tourism FDI projects in 2021. FDI project numbers in the tourism sector fell by 8% in 2021, from 271 investments in 2020 to 250 in 2021. Job creation and capital investment in tourism FDI over the period also declined by 34% and 42%, respectively.

**Table 4.3: OIC Countries by Number of Tourism FDI Projects, 2017-2021**

Country	Number of Tourism FDI Projects	Region
UAE	87	Arab
Türkiye	45	Asia
Indonesia	27	Asia
Saudi Arabia	21	Arab
Egypt	21	Arab
Morocco	20	Arab
Malaysia	19	Asia
Bahrain	11	Arab
Oman	10	Arab
Tunisia	8	Arab

Source: FDI Intelligence (2022)

Some OIC countries benefited to a higher extent from these tourism-related FDI projects over the period 2017-2021. The UAE hosted 87 new tourism FDI projects in this period. With this performance, the UAE topped the list in the OIC region as well as being placed among the top-10 performer countries in the world. Türkiye from

the Asia region also was among the top destinations in terms of the number of tourism FDI projects that hosted 45 projects and it was followed by Indonesia (27 projects) and Saudi Arabia (21 projects) (Table 4.3).

In this picture, it is also critical for OIC countries to know more about the global major investor companies in tourism-related FDI projects. Over the period 2015-2019, Marriott International was involved in 96 tourism FDI projects and ranked first. It was followed by the companies titled Selina (62 projects) and Accor (50 projects). (Table 4.4, left). When it comes to subsectors for tourism FDI, not surprisingly, the accommodation sector took the lead with a total of 89 projects in 2021 (Table 4.4, right). In the same year, software publishers (40 projects) and travel arrangement & reservation services (26 projects) realized a high number of FDI projects within the tourism sector.

**Table 4.4: Tourism FDI by Number of Projects**

Top 10 Parent Companies for Tourism FDI (2015-2019)		Top 10 Subsectors for Tourism FDI in 2021	
Marriott International	96	Accommodation	89
Selina	62	Software publishers, except video games	40
Accor	50	Other	33
Hyatt International	44	Travel arrangement & reservation services	26
InterContinental Hotels Group (IHG)	44	Advertising, PR & related	18
Melia Hotels International (Sol Melia Hotels & Resorts)	33	Internet publishing & broadcasting & web search	16
Barcelo	28	Rental & leasing services	11
Wyndham Destinations	27	Performing arts, spectator sports, & related	10
Minor International	26		
Booking Holdings (The Priceline Group)	25		

Source: FDI Intelligence (2020 and 2022)

These figures could provide some clues to OIC countries such as to develop targeted sustainable tourism investment policies and start negotiations with potential major investors with a view to highlighting their tourism potential, readiness for sustainable tourism development, and showcase prospects for international investments.



Attracting major investors to OIC destinations is a daunting task as there is growing competition among countries across the globe. Therefore, tourism authorities of OIC countries need to work hand in hand with national Investment Promotion Agencies (IPAs) and other national responsible bodies like Ministries of Economy or Investment to develop a successful marketing and promotion story for their respective destinations, identify potential incentives for investors, and improve the regulatory framework for the protection of investors. Only in this way, foreign investors could land in OIC destinations to implement brand-new sustainable tourism-related projects. As some figures presented above highlight, a few OIC countries like the UAE, Türkiye, Indonesia, and Saudi Arabia have already started to implement such successful tourism-investment policies that other OIC countries could also consider.

#### 4.4.4 COVID-19 Pandemic & Sustainability Agenda and SDGs

The COVID-19 pandemic has made it clear that it is not possible to go back to 'business as usual' that focuses solely on traditional investments with a view to promoting economic growth and productivity. Rather, non-traditional investments that enhance innovation and encourage environmental sustainability should be prioritised in the post-pandemic era. Sustainable tourism must no longer be a niche part of our sector rather it should be mainstreamed in all tourism activities and policies (FDI Intelligence, 2021).

Even before the outbreak of the Covid-19 pandemic, there had been a growing trend on the importance of sustainability. The outbreak of the pandemic has further deepened the debate around the sustainability of economies and lifestyles. Since 2020, a growing number of multinational companies have been reviewing the energy matrix of their operations (FDI Intelligence, 2020 and 2021). The amount of money going into renewable energies has never been higher. In tourism, investors have started to pay increasing attention to the social and environmental footprint of the projects they assess. Many investors are willing to prioritize developments that lift communities and preserve ecosystems. To this end, making tourism operations more sustainable will be among the main objectives of new projects of multinational companies while countries set to achieve SDGs by 2030.

#### 4.5 Conclusion

In the OIC region, international tourism receipts, on average, is estimated to represent a share of 10.7% of total exports of goods and services in 2019 based on

the WTTC 2022 estimations. In some OIC countries like the Maldives (81.4%) and Lebanon (79.9%) this share reached the threshold of 80%. Overall, international tourism plays an important role in many OIC economies such as by creating jobs, supporting economic growth and stimulating investments.

Among emerging niche tourism markets, sustainable tourism activities cover various types of tourism activities by paying attention to sustainability. In this regard, the growing awareness of sustainability is one of the most important emerging consumer travel trends. The rise of sustainability and the increase in the number of responsible travellers will be more prominent in near future. These travellers are more likely to choose eco or sustainable tourism holidays and support businesses and brands that are committed to social values and respect the environment. In this context, during the post-pandemic period, OIC countries should organize more activities and campaigns to raise awareness and activities on new developments, regulations, and opportunities in the sustainable tourism sector at the national level. All stakeholders should be included in the picture from big companies, SMEs, and tourism associations to policymakers in the country.

Sustainable tourism has started to be a key niche market that could drive the growth and development of the tourism sector in a number of OIC countries. Its full potential is yet to be unleashed. In this direction, a number of agenda items in all relevant Ministerial Sessions of the OIC including the Islamic Conference of Tourism Ministers and the COMCEC should be included. In this way, policies and programmes at the OIC level could be developed, implemented, and monitored. Moreover, specific resolutions could be adopted which would facilitate the implementation of dedicated events and programmes for the development of sustainable tourism at the OIC level as well as secure funding for such events.

Some OIC countries have already started to promote the development of sub-segments within sustainable tourism. For example, the tourism boards of Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan have come together to stimulate domestic 'active/adventure tourism with the help of the Adventure Travel Trade Association (ATTA) and USAID. Within the scope of the COAST project in the Gambia, it is aimed to develop new and sustainable community-based tourism activities. To this end, OIC countries are recommended to identify sustainable tourism and its sub-segments like “eco” or “adventure” tourism as priority areas. These identified areas should be included in their national tourism action plans. It is also important to put in place a set of incentives for

businesses and stakeholders for the development of sustainable tourism and its sub-segments

To harness the power of investment towards sustainable development of tourism, it is critical that governments have both policies in place and new investment vehicles that will allow them to recover, retain and attract foreign direct investments. This way, countries can revive tourism and enhance the sector's positive impact on people and the planet as well as accelerate the achievement of the SDGs. Some OIC countries extensively benefited from tourism-related FDI projects over the period 2017-2021. For instance, the UAE hosted 87 new tourism FDI projects while Türkiye achieved hosting 45 new tourism FDI projects in the same period.

While developing policies on investment, OIC countries should also take actions to support environmental sustainability and the well-being of local communities as the UN's Climate Change 2021 report warns that sea levels will continue to rise unless governments and businesses take action. There will be an increase in droughts and more severe heat waves that will affect health, agriculture, and infrastructure. All of these new developments will affect tourism. In the near future, the tourism sector will be instrumental in achieving the UN's Sustainable Development Goals defined in the 2030 Agenda for Sustainable Development (DinarStandard, 2022). In this regard, OIC countries should treat the tourism sector as an enabler of SDGs and could take actions to make the entire sector more responsible for respecting the principles of “sustainability”.

Lastly, public-private-community partnerships (PPCP) and collaboration at all government levels, including at the multi-national level, will be essential to address staff shortages and bring success in sustainable tourism such as by triggering new investments. Improved collaboration and coordination at the multi-national level can lead to the easing of restrictions and favourable visa policies which can facilitate worker flows across international borders. It can also contribute to the mutual recognition of workers' skills and qualifications across borders. Mutual recognition by authorities of training and employee background records could expedite onboarding and reduce unnecessary processes for those roles. Overall, greater standardisation and coordination at the OIC level with a focus on sustainable tourism will help the growth of the sector, and provide employment flexibility and broader career opportunities whilst allowing the sector to quickly adapt to changes in demand.

## Annex I: Key Documents and Meetings on Sustainable Tourism

In chronological order, the following key documents and meetings shaped the development of sustainable tourism (Sustainable Development Goals Information Platform, 2022):

- 1980- Manila Declaration – The Manila Declaration of the World Tourism Organization aims to provide guidelines for the harmonious, balanced and equitable development of national and international tourism, to formulate and implement tourism policies, plans and programs within the framework of these principles, depending on the priorities of the states.
- 1985- Declaration of Tourism Rights and Tourist Law - At the sixth meeting of the World Tourism Organization in Sofia, the Declaration of the Rights of Tourism and the Tourist Law were adopted, which set out the rights and duties of tourists and the host population, and would be implemented by states and the tourism industry.
- 2002- World Ecotourism Summit - The summit held in Quebec, Canada in May 2002 represented the most important event within the framework of the International Year of the Ecosystem. The main themes of the summit were: ecotourism policy and planning, ecotourism regulation, product development, ecotourism marketing and promotion, and monitoring the costs and benefits of ecotourism.
- 2003- First International Conference on Climate Change and Tourism- The conference was held in Tunisia to bring together tourism authorities, organizations, businesses and scientists to discuss the impacts of climate change on the tourism industry.
- 2008- Global Sustainable Tourism Criteria – The Global Sustainable Tourism Criteria represent the minimum requirements that any tourism business or destination must meet in order to ensure the conservation and respect for natural and cultural resources, as well as to implement the potential of tourism as a means of poverty alleviation. 41 criteria are provided and divided into four different categories: 1) sustainability management, 2) social and economic, 3) cultural, 4) environmental.
- 2009- Roadmap for improvement – The “Roadmap to Recovery” was prepared, which would be finalized based on seven action points at the World Tourism Organization General Assembly. The roadmap consisted of three interconnected actions and 15 recommendations which aimed at supporting the tourism sector and the global economy. These; flexibility, incentives and green economy.
- 2012- The Future We Want Statement- It is the sustainable development and green economy statement adopted at the United Nations Conference on Sustainable Development held in Rio on 19 June 2012. The Declaration includes broad sustainability goals within the themes of poverty eradication, food

security and sustainable agriculture, energy, sustainable transport, sustainable cities, health and population, and promoting full and productive employment. The declaration called for the negotiation and adoption of the internationally accepted Sustainable Development Goals by the end of 2014. In addition, the declaration called for a United Nations resolution that strengthens and consolidates UNEP, both financially and institutionally, so that it can better disseminate environmental information and build capacity for countries.

- 2015- UN 2030 Agenda – As a result of the summit attended by more than 150 world leaders, 169 targets were determined under 17 sustainable development main objectives within the framework of the “Transforming Our World: 2030 Agenda for Sustainable Development by 2030” plan. Among these targets, there is also the title of sustainable tourism. In these goals, the importance of sustainable tourism as a driving force for employment, promotion of local culture and products and economic benefit was emphasized.
- 2017- Year of Sustainable Tourism – 2017 was declared the year of sustainable tourism within the scope of Sustainable Development Goals. The 70th General Assembly of the United Nations has designated 2017 as the International Year of Sustainable Tourism for Development. Throughout the year, the UNWTO and the wider United Nations system worked to raise awareness among public and private policy makers and the general public about the contribution of sustainable tourism to development. At the same time, UNWTO took the lead in mobilizing all stakeholders to work together to make tourism important in the movement for positive change. The year was celebrated under the 2030 Agenda for Sustainable Development and the Sustainable Development Goals (SDGs). Emphasis was placed on the importance of government policies, business practices and consumer behaviour to create a more sustainable tourism sector that could contribute to the Sustainable Development Goals. The role of sustainable tourism was mentioned in five key areas. These; inclusive and sustainable economic growth; social inclusion, employment and poverty reduction; resource efficiency, environmental protection and climate change; cultural values, diversity and heritage; mutual understanding, peace and security.

## Annex II: Geographical Classification of OIC Member States

OIC- Africa Group		OIC -Arab Group		OIC- Asia Group	
Benin	Mali	Algeria	Morocco	Afghanistan	Malaysia
Burkina Faso	Mozambique	Bahrain	Oman	Albania	Maldives
Cameroon	Niger	Comoros	Palestine	Azerbaijan	Pakistan
Chad	Nigeria	Djibouti	Qatar	Bangladesh	Tajikistan
Côte d'Ivoire	Senegal	Egypt	Saudi Arabia	Brunei	Türkiye
Gabon	Sierra Leone	Iraq	Somalia	Indonesia	Turkmenistan
The Gambia	Togo	Jordan	Sudan	Iran	Uzbekistan
Guinea	Uganda	Kuwait	Syria*	Kazakhstan	Guyana
Guinea-Bissau		Lebanon	Tunisia		Suriname
		Libya	UAE		
		Mauritania	Yemen		

Source: OIC (website). \*Syria (suspended membership)

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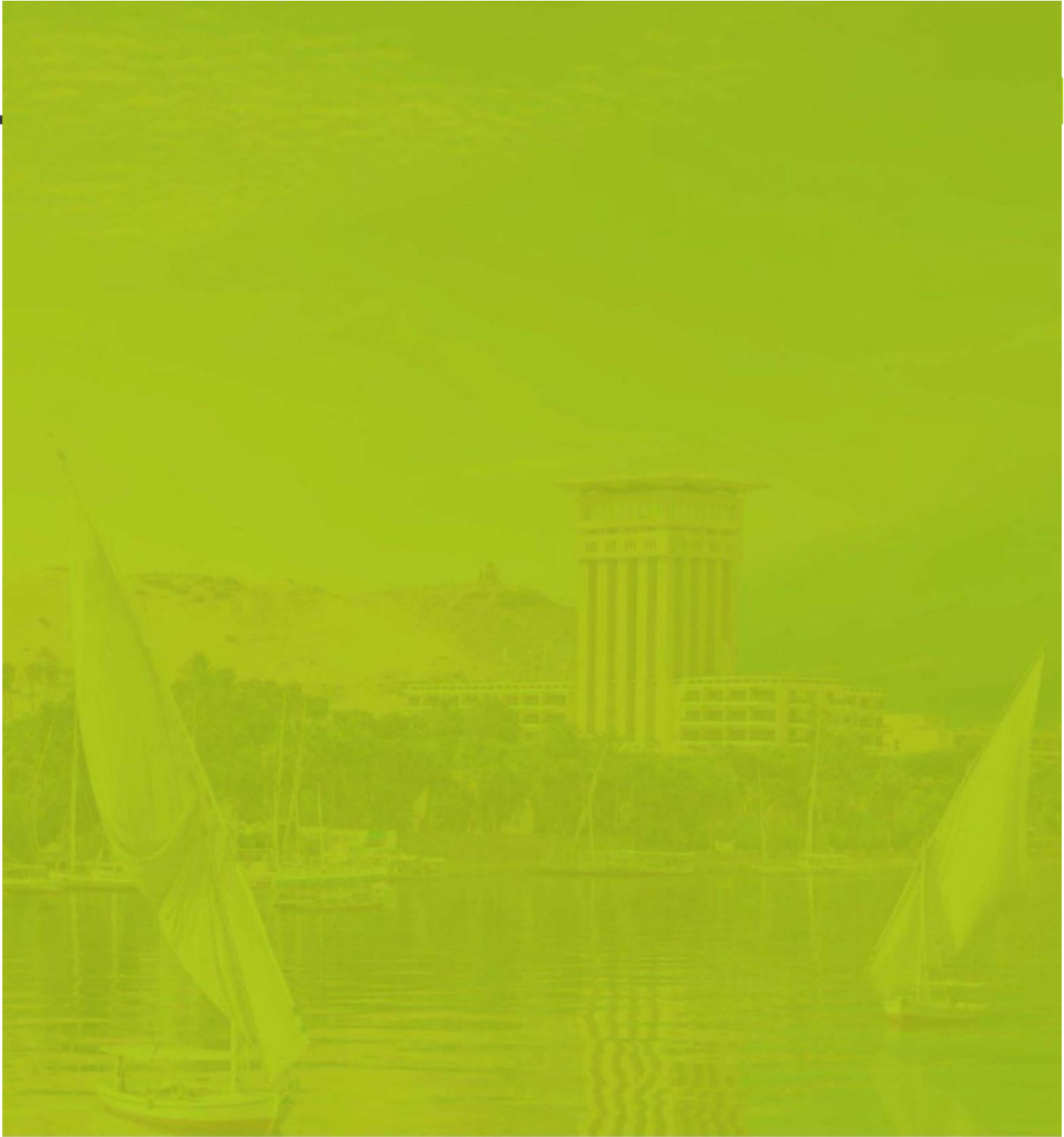
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