



TOURISM STRATEGY of TURKEY - 2023

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MINISTRY OF CULTURE & TOURISM
ANKARA, 2007

“Tourism Strategy of Turkey - 2023 and Activity Plan for Tourism Strategy of Turkey 2007-2013” dated 28/02/2007 and numbered 2007/4, has been approved by the High (supreme) Planning Commission, and has been put in to fence after its publication in 'Official Journal' dated 02/03/2007 and numbered 26450.

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T.R. Ministry of Culture and Tourism
The General Directorate of Investment and Establishments
Ismet Inonu Boulevard No: 5 06100 Emek - Ankara
Tel: +90.312. 212 83 00 Fax: +90.312. 212 83 97

www.kulturturizm.gov.tr

Publication Number: T.R. Ministry of Culture and Tourism Publications -3090
ISBN 978-975-17-3281-1



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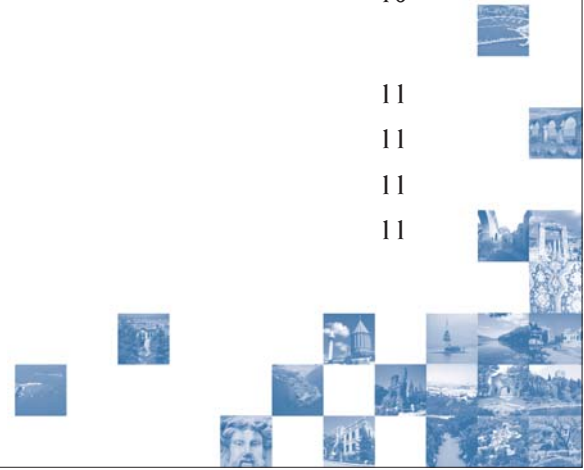
*Towards a happier Turkey at the 100th anniversary
of the foundation of our republic...*





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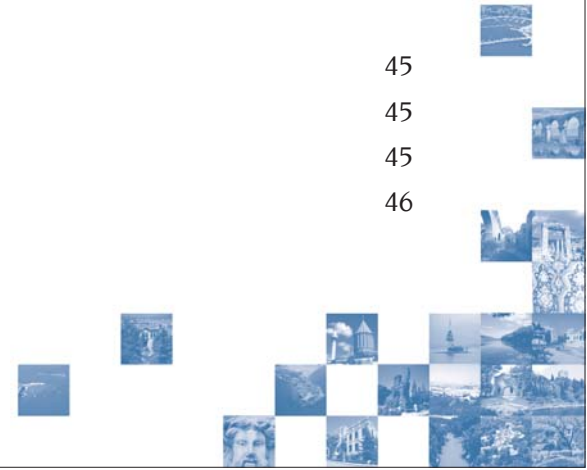


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1. INTRODUCTION (EXECUTIVE SUMMARY)

Tourism Strategy of Turkey - 2023 is an effort that aims at providing extensions to management and implementation of strategic planning efforts and boosting the cooperation between public and private sectors of tourism with reference to the principle of "governance". Tourism Strategy of Turkey - 2023 and Action Plan prepared with a participative planning perspective have the primary objective of guiding the tourism and travel industry at production management and implementation phases, by putting forth a roadmap for the sector. This approach which formed the basis for efforts within the scope of Tourism Strategy of Turkey - 2023 allows for improving itself not on an individual landplot but regional basis within a guiding rather than imperative and dynamic rather than static framework.

The Tourism Strategy of Turkey - 2023 study is in line with the objectives of the 9th Development Scheme (covering the period between 2007 and 2013). The Scheme has this statement that says, "A Tourism Industry Master Plan shall be drafted down to ensure sustainable and healthy development of the tourism sector". The efforts covered herein are pursued to achieve this objective.

Our country has several unique opportunities for different types of tourism compiled under the category of alternative tourism, which include, in addition to coastal tourism, health and thermal

tourism, winter sports, mountain climbing and layout tourism, adventure trips, plateau tourism and ecotourism, conference and expo tourism, cruise ship and yacht tourism, golf tourism and etc. However, it is yet hard to say that this potential is used in a rational manner. Therefore, the Tourism Strategy of Turkey - 2023 and the Action Plan for 2013 collectively target wiser use of natural, cultural, historical and geographical assets that this Country has, with a balanced perspective addressing both conservation and utilization needs spontaneously and in an equitable sense and hence leveraging the share of our country from tourism business, by evolving these possible alternatives.

Handling the aforesaid sources of tourism so as to form tourism corridors, cities and ecotourism areas alongside the development axes rather than planning them on a plot scale is considered a more appropriate approach to promote these assets and determining the criteria applicable to their utilization. By doing so, the attractiveness of regions with tourism potential shall further be enhanced with alternative types of tourism.

With this study, those investors planning to accomplish tourism related projects along the tourism development axes the evolvement of which is anticipated at the onset, should find the opportunity to actualize their investments in these areas, by using of coastal tourism or other alternative tourism types. In the mean time, they will be entitled to a number of government incentives granted in





terms of planning, land allocation and with respect to tourism projects.

Forthwith the realization of the objectives envisaged by the Tourism Strategy of Turkey - 2023, more appealing and stronger alternative destinations and routes shall be established, thanks to integrated rather than individual assessment of various sites and settlements that pose significance for health, thermal and plateau tourism, winter and mountain sports and for their cultural heritage, distributed throughout our country. Establishment of a sound tourism route and regional destination will help achievement of setting relatively weaker settlements within such regions on a self strengthening course, along with their own cultural assets, handicrafts, catering and temporary accommodation facilities.

The tourism and travel industry shall be organized from a single and common viewpoint on a per destination basis, throughout the promotion and marketing phases, by which way, it shall be possible to assess and then balance various regional investment, promotional and marketing opportunities, as a whole.

Developments towards mass tourism activities and particularist approaches to tourism planning in Turkey have led to:

- Mass concentration at the Mediterranean and Aegean Coastal areas,
- Distorted urban development / house-building in

back-shore and adjacent areas,

- Deficient Infrastructure and environmental problems.

In an effort to convert this adverse structure into a positive, favourable one, an integrated policy and strategy and application based approaches are being set within the scope of Tourism Strategy of Turkey - 2023.

The study embodies planning and development efforts built on a 'land development pattern' perspective that encourages private sector investments on a regional scale in areas with high tourism potential at coastal banks, to eventually end up in "Tourism Cities". This way, it shall be possible to plan not only the coastal lines but also the backshore areas and even settlements neighbouring them as a single and comprehensive whole and thus to improve tourism diversity and optimize and transform existing settlements. These policies are of vast significance for tourism and travel industry to maintain a sustainable course of development.

The study for the Tourism Strategy of Turkey - 2023 proposes a variety of long term strategies in the realms of planning, investment, organization, domestic tourism, research and development (R&D), Services, Strengthening Transportation and Infrastructure, Promotion and Marketing, Education, Branding at City Level, Diversification of Tourism Products, Rehabilitation of Existing Tourism Areas and Improvement of Destinations.





In the planning section, the study highlights the fact that tourism industry needs to be backed by a strategy-planning concept, which has the qualities for flexibility, transparency, accountability, participation throughout the management and implementation phases and for sustainable growth. The section dealing with investments generally addresses such concerns as certification of investment and consulting companies in the tourism industry, having prospered in fulfilling a certain set of standards on quality of services or the need for annual incentive systems specific for the region and the type of tourism activity, after suggesting that VAT discounts will accelerate investments in this industrial discipline.

The organization part anticipates the establishment of councils at national, regional, city and destination levels, to provide and activate a good governance practice for the industry. At this context, it stresses the significance of drafting a set of legal and organizational arrangements which would allow for the development and deployment of such service functions as National Tourism certification, Domestic Tourism Search and Guidance and Tourism Education Guidance services, as an integral part and within the organizational structure of the Ministry of Culture and Tourism. As for the Domestic Tourism Strategy, this section focuses primarily on compilation of statistical data and on promotional campaigns for domestic travel, in a general perspective.

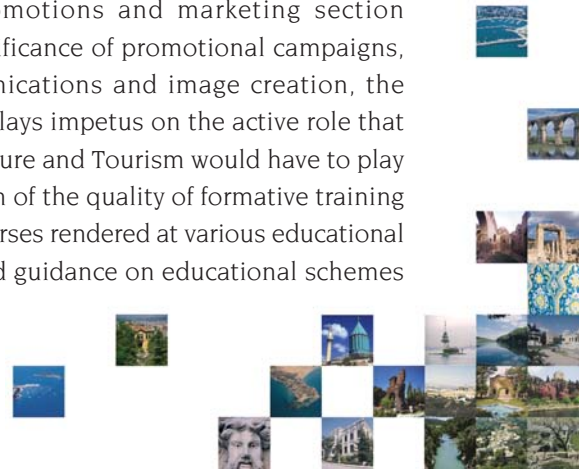
The section dealing with R&D efforts presents a

number of propositions on establishments to assume full responsibility for research and development efforts in the field of tourism at national level during the forthcoming years, with a suggestive notion of their probable duties.

In the Quality of Services section, highlight is brought upon the urgent requirement for raising awareness among decision makers in continuous education, customer satisfaction and Total Quality Management concepts in the tourism industry and significance of standardizing and certifying professional qualifications.

The section dealing with Strengthening Transportation and Infrastructure indicates that a developing infrastructure along with diversified modes and means of transportation should be considered as a sine qua non for the development and diversification of tourism activities and discusses the significance of attempts toward various practices that would bring the private sector to the forefront while minimizing costs on the part of the public in these areas of concern.

While the promotions and marketing section highlights significance of promotional campaigns, brand communications and image creation, the education part lays impetus on the active role that Ministry of Culture and Tourism would have to play for optimization of the quality of formative training classes and courses rendered at various educational institutions and guidance on educational schemes





and syllabi at higher decision-making levels addressing both qualitative and quantitative aspects, along with improvement of the existent skills and qualities of industrial actors, through continuous education.

The part dealing with branding at city level defines efforts to be pursued for cities that have already become a brand in tourism and for cultural tourism, in our country.

The section concentrating on diversification of tourism types sorts out and performs a case-by-case analysis of the types of tourism that takes top priority on the development schemes in the future (i.e. health and thermal tourism, winter sports, golf tourism, coastal tourism, ecotourism and plateau tourism, conference and expo tourism).

There is a persistent thematic and guiding approach in the sections dealing with Tourism Development Areas, Tourism Corridors, Tourism Cities and Ecotourism Zones. This approach mainly aims at routing the public and private sector sources toward the top priority tourism development areas. In the context of these sections, nine tourism development areas, seven thematic corridors, ten tourism cities and five ecotourism zones are being proposed. Again, these sections discuss on how, where and on which criteria the alternative tourism types might be developed both at national and regional levels.

Suggestions are also being made for a wide range of alternative modes of transportation, including

motorways, fast train tracks, airports, cruise ship and yacht marinas and etc, in order to improve the quality of transportation while enhancing the means of transportation to new destinations.

Predictions propose that 63 million travellers shall be attracted, yielding a US\$ 86 m overall international tourism receipt, and about US\$ 1350 average revenue per international tourist by 2023, when the efforts foreseen under the strategic approaches of Tourism Strategy of Turkey - 2023 can be pursued and the infrastructure and accommodation needs are fulfilled prosperously within the regions to be developed.

2. TURKISH TOURISM TOWARD NEW HORIZONS

2.1. VISION

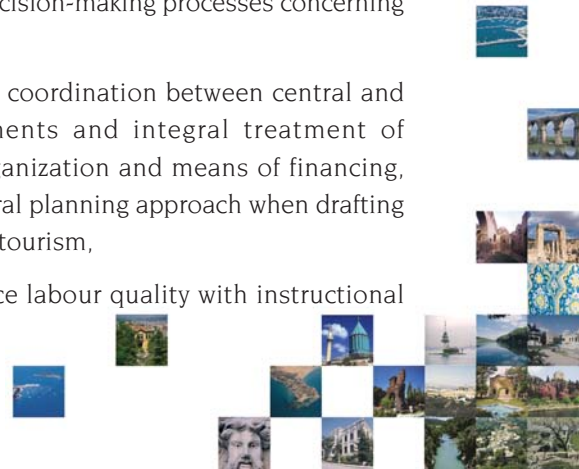
With the adoption of sustainable tourism approach tourism and travel industry will be brought to a leading position for leveraging rates of employment and regional development and it will be ensured that Turkey becomes a world brand in tourism and a major destination in the list of the top five countries receiving the highest number of tourist and highest tourism revenues by 2023.





2.2. ACTIONS TO REALISE THE VISION

- To contribute to the objective of sustainable development by eliminating the interregional differences in levels of development
- To help increase the competitiveness of the tourism sector through creation of re-gional tourism brands rather than relying upon cheaper products
- To reconsider and plan the existing tourism sites within a sustainability perspective and thus create high quality, viable environments,
- To support the social and economic objectives of central government with tourism development,
- To support tourism development with sustainable environmental policies,
- To strengthen international cooperation,
- To harmonize sectoral development policies and targets with those of national development schemes,
- To closely trace global trends and demands and build up plans and conduct practices accordingly,
- To develop tourism with in a multi-functional approach, by focusing on destinations,
- To extend the season throughout the year by diversifying tourism products,
- To promote tourism and raise awareness in public, private companies and NGOs especially on ecotourism, plateau and agricultural tourism,
- To make both domestic and international promotions and marketing efforts effective,
- To ensure integration of various types of tourism specific to region or locality, thus establish tourism cities with focus on alternative tourism (health, thermal, golf, winter sports, nature trips and etc.), capable of offering an ample variety of tourism facilities, along with such utilities as health, education and etc.,
- To create tourism products based on tourist profile,
- To use tourism as an effective tool for fostering social and economic development of backward regions and disadvantaged groups,
- To alleviate the burden on public by encouraging active involvement of private sector enterprises in tourism infrastructure and transportation projects,
- To ensure that appropriate governance mechanisms are used, in which central and local government and civil actors can collaborate and cooperate in decision-making processes concerning tourism,
- To ensure coordination between central and local governments and integral treatment of managerial organization and means of financing, within an integral planning approach when drafting down plans on tourism,
- To enhance labour quality with instructional





courses on Tourism and to enforce the effective operation of a sector specific certification system,

- Helping infrastructure related and environmental problems occurring at locations where tourism activities get denser be solved with joint efforts and contribution of local governments and private sector enterprises,
- To provide full support for extraordinary accommodation facilities brought into tourists' service, by conserving the regional architectural assets.

3. STRATEGIES FOR STRENGTHENING THE TOURISM INDUSTRY

3.1 PLANNING

STRATEGY

"To exhibit a planning approach that supports economic growth, is physically applicable and socially oriented and fairly reflects the principle of sustainable tourism."

In order for a region to be proclaimed as a Culture and Tourism Conservation and Development Region and as a tourism center, a tourism development scenario should be worked out in the first place and then the target groups should be defined accordingly,

regions and axes that are promising from the angle of tourism activities and of investment feasibility should be determined in culturally attractive areas.

Tourism shall be used as a sound planning and implementation tool for efforts dedicated to elimination of regional inequalities, alleviation of poverty and development of employment opportunities, also during the coming years. At this end, assurance shall be provided for coherence across investments to be made by various entities.

To ensure development of tourism activities both at national and regional levels is an objective that is attainable only when top priority regions and areas are determined according to not only the sector specific plans worked out by the Ministry of Culture and Tourism but also the macro policies evolved and institutionalised in national development schemes prepared by the State Planning Organization and the required sets of infrastructure projects appertaining to these areas are included in the investment schedules of relevant entities and organizations.

The novel planning approach for Tourism Centres and Cultural and Tourism Conservation and Development Areas mainly adopts a flexible and strategic planning concept, which is built upon actions rather than strict land use decisions and targets an integrated and dynamic structure. In these areas, the project sites are further divided into subzones, so that planning takes place and the





investors are expected to set up individual projects of their own. Cultural and Tourism Conservation and Development Zoning is not simply a border lining process, but is meant to involve such other procedural flows as planning and segmentation of land within the so set boundaries, true to a predefined set of targets and requirements.

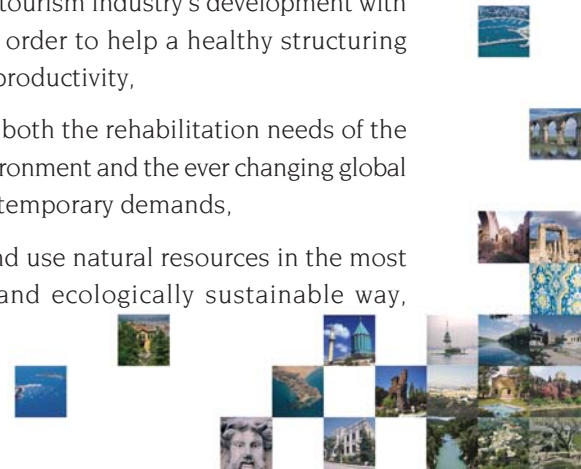
OBJECTIVES FOR THE YEAR 2023

- The current lack of a physical planning practice will be overcome by means of various regulatory arrangements to set out and implement coordination.
- An integrated approach shall be adopted and maintained for planning efforts in areas with high local tourism potential, instead of a problem-focused conception of planning.
- The fragmented and plot based planning practice shall be discontinued and tourism cities with remarkable global competitive power should be established.
- Technical personnel support will be provided for entities and organizations bearing the authority to approve plans at local level and thus the development of tourism shall be directed.
- Provisions shall be made for establishment of participative mechanisms such as Local Agenda No. 21, with the local council's becoming functional in a given neighborhood. Promising areas where organized tourism activities can easily be developed shall be of preference when selecting tourism

development areas in any given locality, while in the mean time a systematic structuring is assured through solution proposals for tenancy, infrastructure and environmental concerns.

Planning of tourism industry, especially tourism oriented physical planning should be supported by all available organizational models, alternative means of funding and a sound legal framework. In this context, an effective policy should:

1. reroute all tourism investments toward reducing the imbalances of welfare and development imbalances throughout the country and treat them with an approach that safeguards, conserves and improves the natural, historical, cultural and social environment,
2. broaden the base of participation in social, cultural and artistic events and propagate the notion of development,
3. reveal and expose, primarily with scientific studies, the cultural and artistic values and heritage and create a community awareness on these assets,
4. relating the tourism industry's development with market facts in order to help a healthy structuring and increased productivity,
5. Respond to both the rehabilitation needs of the investment environment and the ever changing global trends and contemporary demands,
6. Conserve and use natural resources in the most economically and ecologically sustainable way,





7. realize such organization and funding models that do not pose any financial burden on public and widen comprehensively organized and integrated projects at regional and local levels,

8. make use of tourism sources in a sense of conservation and balanced development, avoiding to exceed their carrying capacities,

9. develop an "area management" model that accounts for an understanding of tourism, which focuses on historical, cultural and artistic assets, namely assets- based tourism or destination based tourism development instead of a hotel or other mass accommodation facility based one, by virtue of both current and future regulatory arrangements and that responds fully to the demands and expectations of the local public and that enlivens, protects and produces multiple activities and assets, also making positive contributions to employment,

10. avoid causing any adverse affects on nature, culture and social structure, make sound contributions to economic growth with foreign exchange receipt and employment dimensions, organize the demand, create the grounds needed for further development of tourism industry and produce integrated, self-implementing projects,

11. not place the burden of social and technical infrastructure projects on public, but provide the sufficient grounds on which the funding needs of the same can be supplied jointly by users and beneficiaries, on a shared basis,

12. envisage development of tourism settlements that possess environment and organizational structuring at an acceptable level of quality,

13. present a fully total quality criteria compliant service in the fields of environment, transportation, accommodation, culture, history and arts, prevent irregular urban development and sprawl and restore readily deformed city and urban spots, and

14. finally solve infrastructure and environmental problems arising in regions where tourism movements get denser in close cooperation with local governments and contributions of infrastructure users.

TOWARDS THE OBJECTIVES

Planning with focus on Destination

Studies which concern development of tourism facilities in specialized tourism areas will be conducted. In the planning of tourism development areas, by local governments it shall be essential to consult with Companies engaged with developing and directing investments in the tourism industry, beholding valid and legitimate licenses issued by the Ministry of Culture and Tourism, for specialised opinions, insofar as the most effective use of the already limited tourism sources is intended. At this context, the impetus will have to be laid upon arranging a provision that licensing of such companies are to be handled by the Ministry of Culture and Tourism, by making relevant





amendments in the contexts of the Tourism Encouragement Law and the Law governing the Establishment and Duties of the Ministry of Culture and Tourism. Thus, sureties shall safely be placed for improvement of the quality of services at short and medium terms at the project development phase.

Strategic Planning

A flexible and strategic planning approach shall be developed and adopted, that equally addresses organizational modeling, funding alternatives and legal grounds, avoids placing the burden of social and technical infrastructure works completely on the public but, rather distributing it among users and beneficiaries, provides means for the establishment of well organized high quality tourism campuses and conserves and uses natural resources in the ecologically and economically best productive way, with a perspective of diversity.

Physical plans shall consist of a written report and a main schematics on which the basic development routes are earmarked. These plans shall be used for generation of strategic decisions relating not only to land use but also to all other aspects including physical environment, employment, social services, organization etc.

3.2. INVESTMENT

STRATEGY

To boost tourism investments by designing incentive schemes that would make tourism investment projects economically feasible and viable.

Tourism areas are among the most common areas of investment that receive support and a wide variety of incentives globally.

Therefore, certain measures shall be taken with respect to tourism development and certain incentives shall be granted for the industry.

In order to recapture the investment rates of 1990s, incentives will be granted, that would render tourism investment projects more feasible. Yet the terms and conditions, regional characteristics and enforcement durations are to be set out on analytical studies, annually.

OBJECTIVES FOR THE YEAR 2023

- Certain incentives will be offered to the industry in general, with a view to retrieve sector's contributions to the national economy,
- Efforts shall be commenced for obtaining support within the framework of IPA Program (IPA - Instrument for Pre accession Assistance) of the European Communities, in the tourism sector.





- Adjustments shall be made in the taxation regime so as to allow access to this support by not only tourism accommodation facilities but also travel agencies which confronts the very definition of Small and Medium Scale Enterprises.
- Means shall be provided to ensure investment by foreign direct capital in our country's tourism industry.
- The short term renovation needs of the tourism accommodation shall be covered.
- Policies specific to promotion and marketing shall be developed as specific for promotion and marketing, concomitant with the granting of incentives on investments in the field of tourism.
- Investments at regions off the coastal lines shall be encouraged through engineering of projects that allows for diversification and spreading of tourism activities throughout the entire year and across the country.
- Sectoral grant mechanisms shall be developed at local level, depending on the level of sophistication and top priority tourism types (cultural tours, thermal tourism and winter sports).

TOWARDS THE OBJECTIVES

Incentives

- The amounts, terms, regional characteristics and enforcement durations of incentives shall be determined yearly, through detailed studies.



- The investor shall be provided with more design opportunities, based on the tourism cities approach aiming at strategic planning, in time of land allocations.

- Long term loaning facilities with low interest reimbursement capabilities shall be provided to tourism operators for replenishing and renovating their tourism complexes.

Eliminating the Bureaucratic Barriers

The Investment Support Agency shall be strengthened as a central organization to issue all kinds of investment permissions to provide ease for foreign investors in possession of title to property and making investments within our country, as part of the ultimate objective of attracting foreign direct capital for investments.

Certification of Companies

Companies willing to pursue activities in the tourism industry, on such specialty domains as investment counseling and consulting services to add on quality and progress rates of projects in the field of tourism shall be certified by the Ministry of Culture and Tourism.



3.3. ORGANIZATION

STRATEGY

"To achieve institutionalization through councils to be established at national, regional, provincial and local levels within the context of 'Good Governance', to ensure full and active participation of tourism sector as well as all related public and private entities and NGOs in relevant decision-making processes".

The overall success of tourism and travel industry depends on the ability to set up and implement an effective management organization. For this reason, an effective organization will be established in both area and institutional management, in the sector.

New arrangements are needed in the tourism industry which will provide dynamism to the sector while at the same time minimizing the vulnerability of the tourism sector to international crises. Such formations will be structured with close cooperation of public and private sector enterprises and NGOs. For the purpose, a challenge for institutional structuring shall be taken, with a view to direct the tourism and travel industry. In such institutional structuring, impetus shall be laid upon efforts dedicated to coordinate the macrolevel policies of public and private sector unions, in accordance with private sector's expectations.

OBJECTIVES FOR THE YEAR 2023

The Ministry of Culture and Tourism intends to assume a more effective role in attaining diversity in tourism activities and directing the same to local governments and private industries, as the ultimate decision-making body in area management, by developing and furthering its relations with local administrations.

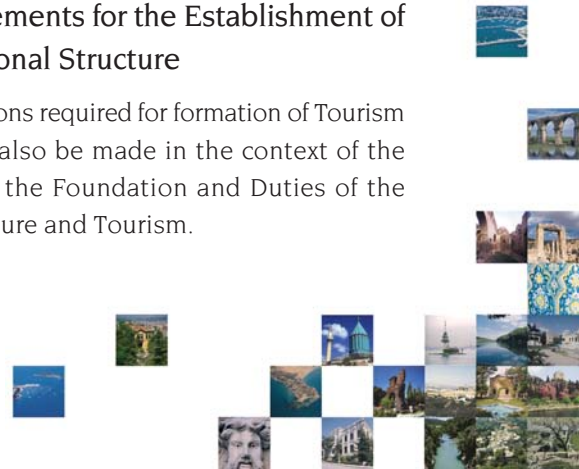
Tourism Encouragement Law and Law governing the Foundation and Duties of the Ministry of Culture and Tourism shall be amended so as to reflect the principle of governance.

The resultant organizational structure will embody various institutions formed with participation of representatives from public and private sector entities and NGOs, which will grab the wheel to steer the industry, always assuming full and sole responsibility against the public and private sector and civil society. Having been formed and set operative on national, regional, provincial and local scales, these structures shall then transform into Councils.

TOWARDS THE OBJECTIVES

Legal Arrangements for the Establishment of New Institutional Structure

The set of revisions required for formation of Tourism Councils shall also be made in the context of the Law governing the Foundation and Duties of the Ministry of Culture and Tourism.





New Role of Ministry of Culture and Tourism in Development of Tourism Industry

- The Ministry of Culture & Tourism shall pursue efforts as the sole and ultimate body responsible for the planning of areas with tourism potential and land segments that it chooses as appropriate areas for to host tourism developments.
- The Ministry of Culture & Tourism shall assume full and ultimate responsibility for setting up and implementing legal arrangements, plans, policies and projects that would direct the tourism industry also in the fields of marketing and promotion, education and R&D.
- The Ministry of Culture & Tourism shall set up and implement a National Tourism Certification Body, to develop certain standards in the field of tourism following a careful categorisation and determine the rules as per which practical implementation shall take place for realisation of enterprises, and
- A domestic Tourism Research and Steering Committee, which shall conduct studies on all kinds of research, analysis and policy-making aspects of domestic travel, and
- A Tourism Education Steering Committee, which shall host efforts dedicated to determining the outlines, content and strategies of policies on both formal and informal education in the discipline of tourism, and

- Finally a National Tourism Databank Unit, to render efforts dedicated to harvesting and retrieving, processing and evaluating statistical data, field research and findings and measurements about tourism and travel industry.

Formation of Councils to ensure Coordination across the Tourism Industry at National and Regional Levels

National Tourism Council :

This organisation shall be led and managed by a board of executives consisting of 15 to 20 members qualified to represent all shareholders in the industry. As at the beginning, the Council is anticipated to receive participation by a delegation of 3 representatives of Ministry of Culture & Tourism, 1 representative of State Planning Organisation, a group of 7 representatives from Tourism industry, 1 representative of labour organisations and 2 representatives of Non-Governmental Organisations. As and when it deems necessary or desirable, the Council may send invitations to persons, entities and organisations that have expert knowledge or engagement in areas not particularly covered by its permanent membership, to join its sessions as temporary members to properly include their expert views and opinions in relevant discussions. Therefore, the criteria for qualification and election of councilors include, among others, the following:





- Possession of in-depth knowledge and experience in tourism and travel industry,
- Accommodation of skills for academic and analytical thinking and ability to competently set tourism's macro policies, and lastly,
- Accumulation of appropriate level of knowledge required to harmonize tourism policies with national policies and programs run by other industrial sectors.

The duties of the National Tourism Council (NTC) will mainly consist of the following:

- Create a brand on national, regional and local scales and coordinate efforts dedicated to marketing of tourism areas and co-development of industrial activity, consistent with the peculiar characteristics of these areas.
- Make all necessary arrangements to ensure that positive impacts of tourism are also benefited by the fellow citizens of the country, in line with the development of domestic tourism and present knowledge and advise to the Ministry, useful for development of policies ad hoc for the purpose,
- Set out the minimum quality standards applicable to accommodation facilities, products and labour in tourism and travel industry,
- Render efforts for further diversification and continuous quality improvement of the tourism product
- Support business enterprises with in-service

education consistent with the strategy to progressively improve human resources and coordinate technical assistance and know-how to be supplied to these entities for the purpose,

- Perform research and compile and prepare data that will be used by Ministry of Culture & Tourism as input in the tourism policy making process.
- Perform analyses backed by plainly visible and measurable criteria for consistency assessments of tourism policies in effect and brief the Ministry of Culture & Tourism on the resultant findings,
- Put up suggestions to guide practical conduct of Ministry in case of a crisis management, for putting odds out of the way,
- Act as an opinion raising, idea forming entity for the councilors that also provides technical assistance.

When it deems necessary, the Council will carry out its work through subcommittees that it shall form up and these committees will be responsible to determine programs at local level and to notify the Council board of executives of their program decisions. These committees may be dissolved on successfully delivering the pilot research activities and project related assignments originally entrusted to them. In an other way of speaking, these committees shall form up as ad hoc workgroups dedicated to a certain work or project.





Developing Tourism Councils capable of representing all parties in a City, to attain tourism development at provincial level

The secretarial tasks that need to be pursued at city or local level shall be undertaken by Provincial Directorate of Culture and Tourism of the cities.

City Tourism Councils:

City Tourism Councils (CTCs) shall be established and set functional, with the primary duties being to present opinions, vocalise demands and make suggestions to the National Tourism Council, on behalf of all shareholders in the city. In addition to their primary duties as aforesaid, the CTCs shall contribute to sounder, more consistent and participative decisions taken by the NTC. The membership of CTCs will comprise of representatives of various entities and organisations finding representation in the NTC. Other persons and / or entities / organisations shall well be accepted to partake in or become part of these councils, whether as new or temporary members, to provide expert opinions and recommendations based on their specialty knowledge and experience on any matter.

The key role that CTCs are supposed to play is associated with provision of services, including advisories to business enterprises. They will receive full support and assistance from both public and

private sectors in terms of funding and consultation and assume the role of a body intermediary which ensures cooperation between business enterprises.

Basically, the Councils will be expected to fulfill the following duties:

- Search and find out and then bring together and present to the National Tourism Council (NTC) the local demands, expectations and needs,
- ensure cooperation and coordination among members,
- Carry out studies and define policies on the maximum use of the tourism potential at city level,
- Work for assuring education of the organisational members and thereby improve the quality of labour,
- Set up and implement effective networks among members,
- Coordinate or mediate through contacting relevant entities / organisations a crossplated coordinated provision of the technical assistance and know how needed by small enterprises upon request of Local Level Councils of Tourism and assure that the local community gets the best out of the same.
- Support efforts dedicated to creation of a "Turkey brand" as an integral part of a whole, working in close cooperation with other regional and local tourism organisations.





3.4. DOMESTIC TOURISM

STRATEGY

"To provide an alternative tourism products based on acceptable quality and affordable prices to various groups in the society."

Development of the domestic market is as important as that of the foreign market for the growth of Turkey's tourism industry. The states that literally attract the greatest number of travellers from around the globe appear to have achieved an impressive level of development in their local industries engaged with domestic travel business.

A sound cooperation and coordination is a must among public and private sector, tourism organizations and NGOs, should an accomplishment is targeted for the market of domestic travels. Accordingly, arrangements shall be made and means provided as and to the extent appropriate to convince local travellers take vacations, with various events and campaigns held jointly with a variety of press and educational institutions, aimed at raising public awareness on history, nature and culture both on a national and local scale. Activities to be pursued at this extent shall not only leverage the share of domestic tourism in overall tourism receipts of the country but also serve significantly for recognition and conservation of historical and cultural assets of this country.

Areas of cooperation shall be sought with private sector entities, tourism organisations and NGOs along with an increase in the content and frequency of promotional efforts concerning domestic market and studies made to encourage an increase in number of itineraries, ads and tours of travel agencies with focus on internal market.

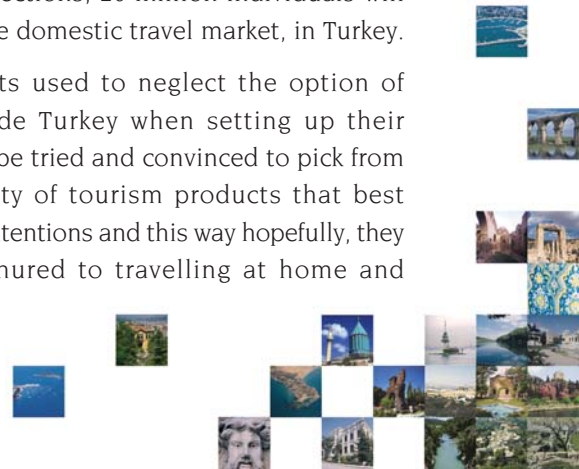
OBJECTIVES FOR THE YEAR 2023

Moves for developing and sustaining tourism alternatives shall be spread across the country. In this framework, the accommodation capacities of destinations included in the development plans shall be improved and quality of transportation will be bettered by means of studies targeted to improve the transportation opportunities among destinations.

Arrangements shall be made for creation of a variety of alternative tourism products, facilities and itineraries with weight laid upon promotion of the country's assets worthy of visiting to help an increase in the domestic tourism's share in overall tourism movements and receipts.

As per the projections, 20 million individuals will benefit from the domestic travel market, in Turkey.

Those residents used to neglect the option of travelling inside Turkey when setting up their itineraries will be tried and convinced to pick from among a variety of tourism products that best describe their intentions and this way hopefully, they will become inured to travelling at home and





after all, this travel routine shall be spread across the country.

Efforts requiring full cooperation of public and private sector entities aimed at developing various social tourism projects shall be pursued especially for disadvantaged community groups (i.e. people with disabilities, impoverished groups, youth, women etc.) with the ultimate objective of boosting their involvement in domestic travel activities. An Inland Tourism Research unit shall be founded within the core organisation of Ministry of Culture & Tourism to conduct all necessary research and make assessments concerning the domestic travel market, with a view to increase the role and effectiveness of public sector in managing and directing domestic tourism.

Diversification and countrywide spreading of domestic travel will present another focus to lay attention, especially with the highlight of cultural tourism, alongside with efforts dedicated to creation of city brands.

TOWARD THE OBJECTIVES

Promotion of Domestic Travel

A variety of plans and programs shall be drafted for the promotion of domestic travel and innovative tools shall be employed in related efforts.

Supporting the Domestic Travel Market

Tourism enterprises will be encouraged to allocate domestic tourist quotas at discounted prices to meet the recreational needs of low and middle income groups.

Travel agencies offering package tours for domestic tourism market shall be supported.

Program alternatives will be evolved that address university youth, high school juniors and middle aged singles, which collectively form up 20 percent of the entire population. As better recognition of the country among young people will increase their attitude toward favouring travel and vacation habits more than usual, joint workgroups and programs shall be put in action with the sector, for persuading them to turn towards youth tourism, in growing lots.

Monitoring the Domestic Travel Market

A Domestic Tourism Unit shall be formed within the Ministry of Culture & Tourism, with the contributions of which, statistical information on inland travel behaviour will be collected and compiled. This statistical information will encompass basic indicators that measure different aspects of domestic tourism demand such as Number and Variation of Inland Travellers, Number of Overnight Stays by Turkish residents by purpose of travel, Types of Accommodation used in time of domestic travels, Economic Value of Expenditures made by Turkish





residents for and duration of Domestic Travels and Change in Domestic Travel Activities by seasonal term or Differentiations in Domestic Travel Activities of People according to various parameters (age, gender, level of education, economic wealth etc.).

Alternative Tourism

Research will be conducted on products of alternative tourism in the domestic travel market, followed by studies with focus on capacity increase at regional and local levels and next step will be promotion and marketing of these assets.

Social Tourism

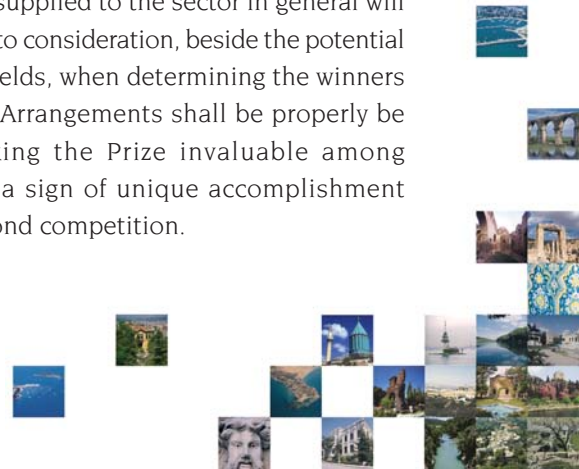
A variety of social tourism projects shall be developed and launched to allow disadvantaged groups to take up vacations more easily.

3.5. RESEARCH AND DEVELOPMENT STRATEGY

To ensure top prioritisation of R&D efforts in tourism industry among public and private sector and tourism organisations.

In tourism the term of "Research" is perceived within the context of competition, cooperation and search for new products, in tourism. Studies on product deployment across the enterprise, enhancing staff qualities, search for cooperation and innovation

shall all be encouraged in tourism industry. At this point, mechanisms ensuring cooperation shall be established with participation of public and private sector, NGOs and universities. A National Tourism Database shall be set up and implemented within the Ministry of Culture & Tourism for the purpose of providing information to business enterprises for research and development and arrangements made for making the resultant database available for use by all members over the internet. Forthwith upon obtaining such information, the enterprises will be able to achieve innovations by either evaluating them inhouse or making use of advise fed from outside. In order for enterprises to make social and economic contributions to national development head to head with the ever changing and developing demand for tourism, a comprehensive assessment of each and every innovation brought to fore by business enterprises shall be made by a cadre of experts based on impartial, unbiased criteria and subsequently, outstanding performances will be commemorated with a set of National Tourism Prizes for each destination of concern. Innovations and social benefits supplied to the sector in general will also be taken into consideration, beside the potential for economic yields, when determining the winners of such prizes. Arrangements shall be properly be made for making the Prize invaluable among enterprises as a sign of unique accomplishment above and beyond competition.





OBJECTIVES FOR THE YEAR 2023

Research process

This will ensure:

- Working out of the big picture for the sector and determination of models and trends on both national and international scale,
- Ascertaining of tourism activity determinants and constraints and drafting of policies,
- Studies for determining the amounts and ways for augmenting social and economical gains obtained from tourism activities and on what can possibly be done for elimination of negative aspects,
- Conduct of studies on systems that respects the environment capable of providing maximum output making use of minimum energy and natural resources and consuming minimal fuel for deployment in enterprise management, and
- Transpiration of new ideas and innovations with regard to products, people, practices and operations.

Development Process

For the part of enterprises operating in tourism business, development refers to the de-ployment of a new cost effective activity in a given enterprise, use of a novel combination of factors or new products revealing themselves in different forms in different products. Innovation processes of enterprises that

pertain to products, procedures, markets of coverage, organisational structures and changes in skills and competencies of workers employed are still far from being understood well by a plenitude of business enterprises.

The tourism industry will be driven towards a sustainable development part in a competitive, innovative and inquisitive manner in an international sense. Accordingly, for the purpose of achieving regional development, targets have been set toward performance of studies dedicated to leveraging demand in local market by enhancing the competitiveness and diversity of regional appeals and providing know-how and specialised advise to small and medium sized enterprises.

While the power and responsibility of setting the medium and long term tourism strategies and policies will remain with the public authorities, councils which will be formed and operate within the context of good governance will help industrial organisations and NGOs assume partial responsibility for contributing to planning, implementation and renewal efforts to be rendered for a sustainable development.

TOWARDS THE OBJECTIVE

Branding: In order to place tourism development on a sustainable course, efforts shall be pursued for:





- Creating an Image of Turkey which shall be a clear communication to be used uniformly in local and international markets,
- Creating a Regional and Local Image of Tourism by demonstrating a collective attitude in marketing activities and pushing regional values to the upfront, with a view to ensure branding and credibility of each destination.

Sustainable R&D: Research and statistical studies held both centrally and at enterprise level shall be monitored and assessed on an ongoing basis in local public and private sector entities, with the objective of being continuous optimisation and improvement.

The statistical data available on tourism industry shall be reorganized in such a manner to support new developments and research studies aligned to global standards.

Statistical data shall be made accessible to researchers and businesses. Cooperation and coordination shall be managed between public and private sectors, for enhancing the cooperative environment.

Businesses shall be provided with necessary data needed to keep themselves moving in line with the national strategy.

R&D Management: The following entities shall serve for R&D in the tourism industry, throughout the implementation phase of Tourism Strategy of Turkey - 2023:

- State Planning Organisation
- Ministry of Culture and Tourism
- National Tourism Council (NTC),
- City Tourism Councils (CTCs),
- National Tourism Certification Service (NTCS)
- Domestic Tourism (DT) Surveys Unit
- Tourism Education Steering Unit
- National Tourism Databank Unit (NTDU), and
- Universities

All the above units and functions the establishment of which are in design will provide assistance on such technical matters as determination and creation of tourism capacities and supplying continuous flow of information to businesses at each region, thanks to which, convenience of investments in various market segments will be assured.

3.6. TRANSPORTATION AND INFRASTRUCTURE STRATEGY

STRATEGY

"To eliminate transportation and infrastructure problems of densely populated and fastest growing tourism centers"





Efforts shall be pursued for completion of the Mediterranean - Aegean Tourism Infrastructure Coastal Management Project already being implemented by Ministry of Culture & Tourism in order to bring solutions to infrastructure problems of the Mediterranean and Aegean coasts where tourism potential is still at very high levels. At this end, assuring user contribution to funding of the project, which is anticipated to be implemented through infrastructure unions to be formed up by local government and users, institutionalisation and legal arrangements for the purpose, will give a new impetus to the completion of the project.

The Ministry of Culture & Tourism shall proceed with efforts toward developing the infrastructure in areas which have tapped or untapped tourism potential in close cooperation with local governments.

Transportation is a bridge that connects tourists to tourism centers which serve as focal points of consumption. This feature makes transportation a main product for tourism industry. Improving transportation and making it run healthier are the two concerns that require integration of various modes of transport, for tourism industry. Subsequently, focus will be laid upon strengthening the transportation links to enable extending of tourism activities throughout the entire year and introduction of new types of tourism other than coastal tourism, while building on the existing level of inland leisure and recreational tourism activities.

OBJECTIVES FOR THE YEAR 2023

The Ministry of Culture & Tourism places special emphasis on completion of Mediterranean - Aegean Tourism Infrastructure Coastal Management Project and it has already made up plans for the realisation of design engineering and construction of a variety of utilities such as potable water, sewerage, waste water treatment and discharge, solid waste collection and disposal facilities with such installed capacities to suffice the needs of both resident and travelling populations, by the year 2023, along the 2.000 kilometers long coastline extending from the provincial borders of Antalya City towards the provincial borders of İçel City.

One of the most vital characteristics of Tourism Strategy of Turkey - 2023 involves arrangements to be made in relation to the existing transportation system. Targets have already been set to follow a path of development with augmented assessment of the tourism potentials posed separately by each of land, sea and maritime transport links, which are deemed as a vital input for the travelling industry alone.

In an effort to better introduce and promote the natural, historical and touristic assets of our country, plans have already been set to restore and improve the conditions of various sea courses and railway tracks, that have the potential of becoming a subject of tourism. Minimising the public share in investment





projects aiming at diversification of transport in our country poses significance for delivering dynamics to this industrial sector. Therefore, various investment projects are waiting at stake for brand new design and construction or improvement of the existing qualities of railroads, marinas and cruise ship harbours, motorways and split highways, all to be funded based on either of the following models, whichever helps minimise public share in investment costs.

- Build- Operate - Transfer (BOT)
- Build - Operate (BO)
- Design - Build - Finance - Operate (DBFO)
- Build - Own - Operate (BOO)
- Build - Lease - Operate - Transfer (BLOT)
- Public - Private Sector Joint Venture,
- Liquidation

TOWARD THE OBJECTIVES

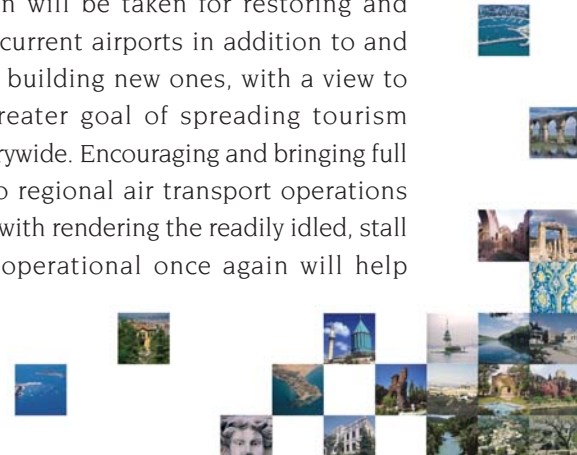
Solving the infrastructure problems in areas with high tourism potential

The Ministry of Culture & Tourism shall make arrangements for launching an active study aimed at compensating the deficits in industry-related infrastructure with a couple of applications such as cooperation with local governments, financial support etc. in areas with high tourism potential, where tourism activities are to be diversified. Within the scope of this study, arrangements shall be made and

grounds be constituted for cooperation with related entities and organisations to alleviate infrastructure related problems in prospective tourism destinations, in existing inland destinations which will be converted into centers of city and cultural tourism and in areas considered suitable for hosting a diversified range of tourism activities, with guidance, if and when required.

Developing airport access, a frontal issue of saving time and security

The long distance between our country and international tourism markets in combination with her broad frontiers and geographical strictures (i.e. cliffy and rough terrain) makes airborne transport the best choice and most convenient solution for tourism development. Therefore air carriers have in fact a significant role to play in diversifying tourism activities in our country and spreading them throughout the year. The recent developments in air transportation will undoubtedly have positive impacts on tourism and travel industry, prolonging the staying times of travellers. In this sense, as the need is obvious, action will be taken for restoring and perfecting the current airports in addition to and supplement of building new ones, with a view to achieve the greater goal of spreading tourism activities countrywide. Encouraging and bringing full functionality to regional air transport operations spontaneously with rendering the readily idled, stall airfields fully operational once again will help





realisation of tourism activities without any trouble, yet with much more health. The development of regional airline operations shall for instance help long range transportation of passengers within a given travel route across Anatolia, without boredom in travellers or any loss of time due to long hauling distances. Besides, the travellers taking a tour shall have the opportunity to visit more places in considerably shorter times, which, in turn, will help better promotion and publicisation of our country. With a view to cover up this requirement, flights from large population centres shall be supported with secondary and tertiary airports.

Improving the interregional railway links in order to enhance the share of railway transport

As a result of the most recent technological developments in railway communication, boarding and travelling on rolling stock has become the safest and most comfortable of all available modal choices. The ever-increasing environmental concern for the environment suggests that there would be an increased trend toward this particular mode of transportation, compared to road transport, during the upcoming years. Building on this perspective, high speed railway tracks with regional links interconnecting the major tourism areas across the country in addition to combining the existing railway links together shall be constructed and/or developed, as appropriate.



Increasing the level of safety and accessibility of highway transport for Tourism purposes

The highway network of our country is well below the EU average, both in length and coverage. Especially creating new transportation links while reinforcing the existing ones will mean much for the tourism industry, as it will give a boost to the safety and quality of motorways. As a complementary measure in support of Tourism Strategy of Turkey - 2023, the new destinations projected en route the main road connections (i.e. Tourism Development Areas, Development Corridors and Main Development Axes, Tourism Cities, Ecotourism Zones, Brand Cities) will be connected to main motorway arteries with segmental split highways (access roads).

Developing Sea Tourism

Arrangements will be made for speedy construction and bringing into service of cruise ships to board passengers wishing to travel by the sea, with construction and operational start up of ports where they can anchor and dock safely, in areas with high tourism potential, in an effort to attract more qualified travellers, in addition to measures for persuading them to stay longer in any given destination.

Furthermore Megayacht marina operation is another fast growing trend of the recent years, in sea tourism. In an effort to conveniently address this demand,





plans have been made for rehabilitating the marinas in Istanbul, Antalya and Izmir Cities so as to successfully accommodate Megayacht operations and thereby increasing the share of Turkey's tourism industry in yacht travels. Also, in addition to the existing and planned marinas both as built and in design, over 200 fisher huts shall be overhauled and transformed into facilities capable of serving any particular need of yacht tourism with a covering range of not greater than 35 nautical miles, fully and carefully exploiting their potentials, as a major step taken forth, which should have significant implications for the industry. Moreover, new marinas shall be designed, built and opened up for operation, with capacities sufficient to support projected visitor arrivals to new destinations.

3.7. MARKETING AND PROMOTION STRATEGY

STRATEGY

"To commence with marketing and promotion activities at each destination, in addition to the national marketing and promotion campaigns with the ultimate objective of branding on a national, regional and local scale"

Promotional efforts shall completely be based upon

scientific analyses and studies, to the extent they are meant to be used for the promotion and market analysis of a particular tourism area.

Work flows to be performed within the scope of promotional activities shall clearly be defined and working methodologies to follow be set so as to allow harvesting, analysing and interpreting valid and reliable data supplied by a comprehensive review of country markets, market characteristics, the trends and expectations of client groups, their demographic structure and the statuses of competing states.

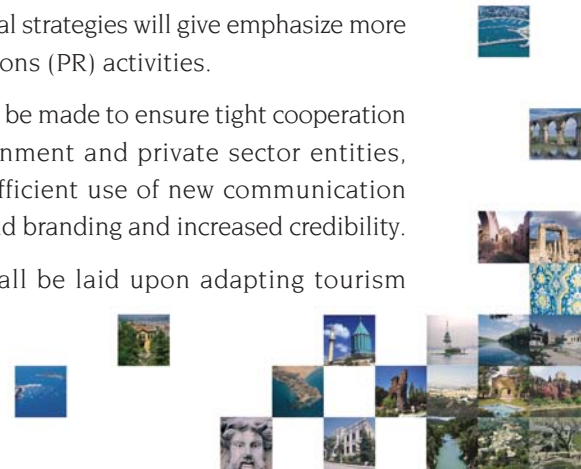
Following a comprehensive analysis and interpretation of the resultant findings of studies conducted, the strengths and weaknesses, opportunities, risks and threats will also be identified (Post SWOT analysis).

A sustainable image shall be envisioned not only for maintaining the competitive power necessitated by the tourism and travel market but also for preserving, if not enhancing, the market share and position. Top concern will be the effective use of PR tools.

New promotional strategies will give emphasize more on public relations (PR) activities.

Provisions shall be made to ensure tight cooperation between government and private sector entities, effective and efficient use of new communication technologies and branding and increased credibility.

Due weight shall be laid upon adapting tourism





operations to contemporary information and communication technologies and multiplying channels of communication with the clientele.

Due regard shall also be paid to ads and promotions rather suited to the needs of tertiary age group of beneficiaries, in line with the changes in world population.

Promotional efforts shall be customised to a certain number of products to be designated for marketing, rather than taking the form of mass promotions.

Branding efforts shall be pursued at destinations in line with the ultimate objective of a country brand and arrangements made accordingly in all introductory stuff for separate inclusion of each and every destination of coverage.

As part of the promoting activities, international events and organisations shall closely be traced and actively participated and held in the country, as much as possible.

Movie production industry shall be used as a tool for promotions.

OBJECTIVES FOR THE YEAR 2023

The promotional activities shall follow a promotional strategy that concentrates on the common wishes and desires of consumers in the market, well acknowledging the differences between various markets and market segments.

Ministry of Culture and Tourism shall remain as a vital component staying in the core of the promotional strategy. Regular testing of the results and measurement of the efficiency of the strategy, followed by the conduct of necessary revisions, if required seem to be a requisite for effective use of it by activities to be pursued until 2023.

There appears the need for searching and finding answers to such questions in mind as how destinations are perceived by the consumer public and how they envision a particular destination in their minds and to what extent do the messages given by campaigns coincide with facts. For this purpose, extreme care and due attention shall be given to close monitoring of global trends, designing campaigns with particular focus on a certain destination and their setting active as separate for each and every market targeted and stressing the values of the modern world while staying loyal to different, original and national values and putting tourism products that are more likely to concern the target groups up to forefront and finally, giving full and unconditional support for such public relations activities as fairs, hospitality services etc., when introducing Turkey to the outer world. Campaigns will take more advantage of electronic media to be able to reach their target groups more rapidly and effectively.





By both design and implementation, any action to be taken by Ministry of Culture & Tourism for marketing and promotion shall:

- stress supremacy of products and total quality, based on destinations,
- ensure branding at national, regional and site levels,
- target product specific marketing of our tourism industry and an increase in the overall quantities of travellers as well as receipts gained after a successful trip,
- assure brand linked communication of the differences and relative predominance of our destinations compared to other destinations in the Mediterranean Region,
- stress modern values with loyalty to our different, original and national values,
- place products concerning the target groups in the front,
- usage of technological developments,
- facilitate from the reputation of people internationally renowned for their deeds of unmatched, unique value,
- draw attention of high income generating traveller groups upon our country, by way of product diversification,

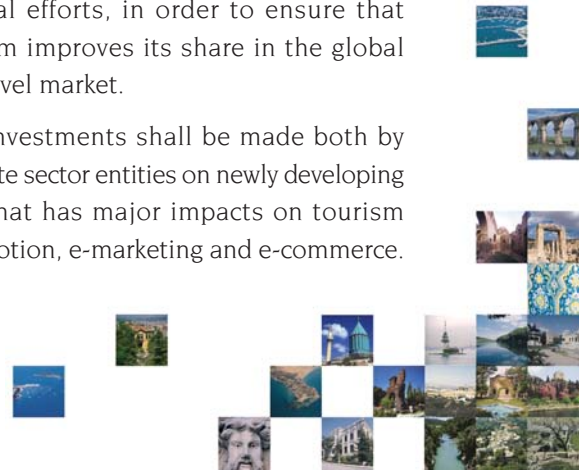
- pay special attention to the East Asia-Pacific Region noting remarkable growth in terms of tourism activities, represented particularly by India and China, and

- help a boost in terms of market share by staging special promotional campaigns with territorial coverage, in states of the Middle East, Iran and Turkish Republics of Central Asia.

Coordination will be assured among entities and organisations partaking in the promotion business and participation of becomingly more community groups earning direct or indirect income from tourism industry, in the funding of such activities, with a view to ensure a more dynamic, professional looking and financial sound promotional activity. Furthermore, commercial companies and other for profit organisations forming up the marketing network will be encouraged to fortify their strengths by mergers / joint actions under the existing free market conditions.

It is on target to reserve 1 percent of the overall revenues obtained from tourism activities each year for promotional efforts, in order to ensure that Turkey's tourism improves its share in the global tourism and travel market.

Additionally, investments shall be made both by public and private sector entities on newly developing technologies that has major impacts on tourism such as e-promotion, e-marketing and e-commerce.





The efficacy and efficiency of promotions and marketing efforts shall be subject to regular reviews.

TOWARDS THE OBJECTIVES

Determining the components of promotional activities

The following components need to be a part of this should be integrated to marketing and promotion activities, in order of precedence:

1. Funding
2. Identification of Markets
3. Market Research
4. Goals
5. Marketing Subject
6. Promotional tools to be used
7. Marketing effectiveness measurements

Before any promotional activities can be launched, the following questions need to be answered:

- a) What shall be promoted? (identification of the tourism product(s))
- b) To whom will the promotion be made? (Target Group)
- c) Where shall the promotion take place? (Market Selection)
- d) When shall the promotion take place?
- e) How shall the promotion be conducted? (Implementation)



Identifying alternative strategies for marketing and promotion activities

Four alternative strategies have been identified in principle, although there is still an ample variety of other "marketing and promotion" strategies that tourism organisations may choose to follow, in practice. These are as follows:

- **Single Target Group Based Promotion Strategy**, which accounts for single predetermined target group,
- **Intensified Promotion Strategy (IPS)**, which is aimed at multiple target groups,
- **Total Promotion Strategy (TPS)**, which covers all segments in a given market, and
- **Undifferentiated Promotion Strategy (UPS)**, which tends to account for the common characteristics of multiple segments, acknowledging the differences among them.

Public and Private Sector cooperation

Public and Private Sector cooperation shall tailor the role of a coordinator to the government and an enforcer to the private sector, which is supposed to open the path for developing different approaches to grants and loans to be made available by the government to the private sector industries in line with promotional activities as state's part of financing. In time of developing the exact approaches to apply, the studies of the councils shall be utilised.



Creating a Good Image

The acts of terrorism, adverse publications and press articles disseminated in the international community on such areas as democracy, human rights etc. and the outbreak and continuation of armed conflicts and political instabilities at the next door of Turkey, due to her challenged geographical position have all contributed to a ruining impact on Turkey's general image among the international travellers. In the next few years, new projects and programs shall be devised to tackle the constraints and eradicate the demise caused by these unfavourable impacts, involving the launch of a variety of promotional campaigns dedicated to seeding a better image of the country in people's minds.

3.8. EDUCATIONAL STRATEGY STRATEGY

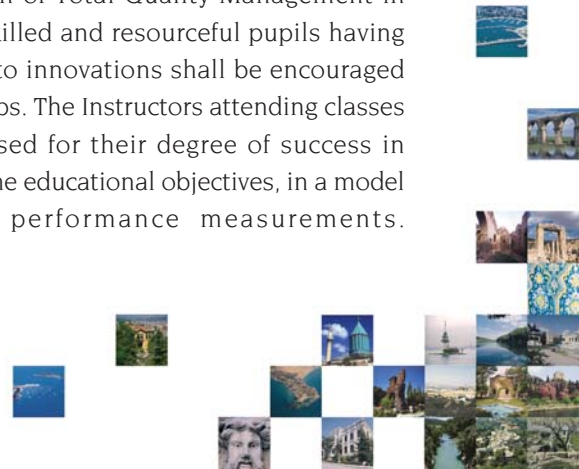
"To set up and introduce an education program in tourism, which would yield measurable outcomes."

Tourism education shall target raising awareness on existence and protection of national tourism assets and resources and leveraging the contribution of tourism to national economy at the highest possible extent. Within the context of education, enrollments shall basically be instructed on moral ethics of serving every traveller without discrimination but discrete

honesty, as well as on the importance of showing hospitality and left for a brainstorm on the long term benefits of such education and knowledge.

Institutions offering vocational education on tourism will receive capacity reinforcements with improvements in quality and content of their curricula. Reputation and profitability of our country's tourism depends on continuation of education with satisfactory quality. In order to stage an effective education, the updates in the field of training and education shall closely be traced and any possible changes both at the present and in future properly be analysed, to form a sustainable base, as per the resultant findings, for perfectly running, failsafe educational schemes.

Tourism education shall principally be designed to teach tourism as a profession, yielding tangible, measurable results. It shall, in the first place, be stressed that raising awareness on quality in both the institutions offering and the public receiving tourism education is in the utmost interest. Impetus shall be laid upon group work in practical implementation of Total Quality Management in Tourism and skilled and resourceful pupils having an open mind to innovations shall be encouraged with scholarships. The Instructors attending classes shall be assessed for their degree of success in attainment of the educational objectives, in a model based upon performance measurements.





Active involvement and support of private sector shall be sought and solicited for educating the labourforce just as needed by the travel market.

OBJECTIVES FOR THE YEAR 2023

Policies on academic education dedicated to raising executives and researchers to lead the tourism policy will be handled together with the vocational education to raise qualified staff for the tourism industry.

Top priority shall be given to raise qualified and competent labourforce for the tourism industry.

Arrangements shall be made to let local governments give directions for improving the quality of services and working environment at tourism premises, as one of the most effective forces assuming vital role in tourism development. Organisations shall be made for staging and conducting informal education schemes to help raising of awareness on various aspects of tourism at community level, especially taking measures that should guarantee their proper media inclusions.

The tourism education syllabi shall also incorporate class instructions on a variety of emerging types of tourism, to help raising of staff capable of meeting the day - to-day requirements of the tourism supply demand chain, in the ever-changing climate of travel market.

Audio-visual communication equipment widely spread among the society shall be used to channel

information to all intended recipients, in the context of informal tourism education. Education of this type shall be designed to improve the individual skills and qualifications of working people in tourism business and target larger community groups. The ultimate goal of this education shall be limited to "certification" and as such, it shall be given in time of the on-the-job training efforts.

TOWARDS THE OBJECTIVE

Co-developing academic and vocational educations to raise qualified staff for the tourism industry

Seminars and symposia organised every year for cicerones shall be left under responsibility of universities and professional organisations and Ministry of Culture and Tourism shall assume the responsibility to function as a supervisory body auditing their conduct according to the effective laws and regulations dealing with tourist guidance.

The skill levels required for standardisation of and performance of analyses and assessments on vocational education as well as productivity analysis true to internationally applied standards, improvement of quality and employment shall be determined with certification. Efforts shall be made toward improving the qualities of agencies and tour guides through in-service education and a set of sanctions to deter poor quality practices. Cicerones





shall be encouraged and unified under a single yet common body, which shall, once established, have jurisdiction all over the country and further be channelled to specialty branching through expert training classes.

Faculties and departments of universities organising and conducting Cicerone licensing or certification educations shall be mandated to include among their relevant syllabi, "Turkey Round Trip Practical Training Tours", as a standard program. These instructions and trips shall be supervised by the Ministry of Culture and Tourism, which shall check compliance thereof with a predetermined set of rules and criteria.

Arrangements shall be made for universities running departments on tourism business administration to offer postgraduate studies with or without a graduation thesis study for university graduates of relevant programs, having good command of at least one foreign language. This modus operandi will not only encourage branching and specialisation among cicerones but also help leveraging of the current levels of knowledge in workers of tourism sector.

Cicerone education shall then be given at Bachelor's degree and all associate degree programs shall be abandoned. The gradual implementation by schools offering Bachelor's degree cicerone education programs, of postgraduate (Master's degree) studies will facilitate specialization of cicerones. In addition, universities running cicerone education programs

are already giving their instructions in English, German and French languages. In that case, the requirement for less known languages remains unmet. Therefore, the Ministry of Culture and Tourism shall establish the necessary cooperation and coordination between Ministry of Education and YOK, for raising of university enrollments in the branches of specialisation and languages of need.

Boosting informal education

Media shall be used for spreading of information that informal education has to give, among wider community lots. The quality of basic education will not only lay a significant focus of improvement on labourforce but also contribute much to prevention of chaotic misguidance and discordance, typically observed in the sector. Moreover, an efficient and thriving tourism education will cause a radical change in the views of both present and future workers of the industry, making them begin to see their involvement in the sector as a chance to build up a career, in a permanent job position. The overall quality of the sector shall, without doubt, be assured with the gradual rise in level of education. Institutions of informal education shall be reinforced with additional quality, but rather focusing on practical implementation. Arrangements shall be made in institutional educators of Tourism and Hotel Managers, by a variety of means for attending class instructors to improve skills and experiences, while in the mean time staying fully informed of last minute updates on a realtime basis.





A model that renders informal education enduring and in a participative perspective under coordination of Ministry of Culture and Tourism, shall be adopted.

A regulatory requirement shall be imposed in tourism and travel industry for the provision of practicing opportunities to certificate holders and participants of tourism classes rendered by at least three star hotel operations, with a view to further improve both the percentage of qualified staff and overall quality of services. Ambiguities will be eluded about the qualities of labourforce, by officially recognising tourism management as a profession. A directive on internship and probation at institutions of higher education already offering class instructions in the field of tourism shall be published and then monitored for proper enforcement, in consultation with all parties involved.

Renewing and updating the content in formal and informal education

The Tourism and Hotel Management departments of universities shall cover, in their educational curricula, such titles that would meet the changing requirements of travel industry as sociology of tourism, world gastronomy and cultures, ancient civilisations and cultures of Anatolia, tourism research methods, creation of new travel destinations, behavioral sciences, research for new tourism products and types and branching (yachting, speleology, scuba diving, mountaineering, rafting

etc.), in addition to such routine titles as tourism in general, foreign language course, front office (reception) and room services, organisational behaviour, business administration, management and organisation, economy, tourism economy, marketing in tourism, tourism law, tourism policies and implementation, tourism guidance, catering services management, travel agency and tour operation, accounting practices in temporary accommodation facilities, financial management in temporary accommodation business etc.

Determination by Ministry of Culture & Tourism of Main Policies on Tourism Education

Ministry of Culture & Tourism shall assume more active duties and role in determining policies and strategies for the planning of formal and informal education on tourism and develop approaches to the quality and content of and policies governing this education.

3.9. STRATEGY OF SERVICE QUALITY STRATEGY

"To activate Total Quality Management in every constituent of the travel industry"

Development of quality of service with associated





standard will bring about a management concept that upholds continuous development, customer and worker satisfaction and participation. Consequently, continual of quality practices shall leverage the service standards of business enterprises as well as productivity, while bringing some awesome benefits to them, in terms of competitive power and marketing.

A flexible system of quality shall optimise the services. This will lead to increased productivity, optimal usage of existing sources, defect-free performance of work and gradual decrease in service costs and time savings. Implementation of quality procedures will not only result in faster, more effective and productive services but also enhance levels of participation by both workers and customers thus develop a collaborative environment.

In order to bring a balance to the individual and corporate goals with service offering, focus will be laid upon enhancing the efficacy and efficiency of labourforce and management by permanent education, coordination and motivation, when building up the quality.

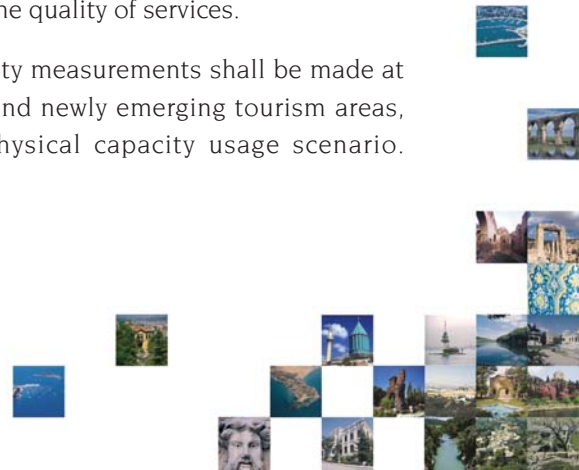
The tourism industry businesses, professional and service unions as well as local governments and all other related entities and organisations will be informed on total quality management and their successful practices will be introduced to the general public.

Awareness shall be raised on quality concerns taking into account the harsher competitive conditions and demand created and standards of quality applied in the services chain shall be improved and spread.

Planning activities shall be furthered in relation to alternative tourism opportunities with the purpose of optimising the seasonal and geographical distribution of tourism activities and creating new potential areas based on the ever changing customer preferences at international markets. Opportunities for alternative tourism shall then be created and means provided for increasing the demand with legislative regulatory arrangements made toward changing the seasonal character of the industry by giving a boost to domestic travel activities, where, tourism types that best serve for attaining a comparative advantage to competitors while preserving and rendering sustainable the natural, historical and social heritage shall be brought to the front.

A system for certification of professional qualifications shall be adopted and implemented, for increasing the quality of services.

Carrying capacity measurements shall be made at both existing and newly emerging tourism areas, based on a physical capacity usage scenario.





OBJECTIVES FOR THE YEAR 2023

Improving the service standard is the top priority concern for making more income from tourism operations, in a core service industry. For the purpose, plans have been made for maximising customer satisfaction by permanently increasing the quality of services and placing the service on a perpetual stance and finally, causing a boost in tourism receipts with the demand to be created subsequent to development and deployment of the concept of sustainable growth in tourism.

The mind whirling speed of technological advancement brings about the expectation for a more effective and fault-free service in the travel industry, in addition to the requirement of offering more qualified service with minimal use of sources. Therefore, the design of a brand new product or development of an existing one when increasing the service standards shall base upon the very expectations of travellers included in different target groups.

With the introduction of a structure based on the principle of flexibility, transparency, participation and accountability in all organisation models and at every level, the grounds for a customer focused and effective service with high quality will be formed.

Targets have been set toward establishment of a system backed by quality management in public and private industrial service providers, the abandoning

of or bringing new functionalities to units no more functional and no establishment of new functions unless this becomes of requirement or mandatory and toward sharing of duties and powers in an equitable sense between central and local governments and assuring recruitment of sufficient number of staff with appropriate qualifications for the best service offering. Adopting a concept of service with focus on customer / citizen in combination with full use of contemporary information and communication technologies will eventually help deployment of a productive and effective service environment.

The public authority in charge of tourism and travel activities and responsible for scrutinising the effectiveness of private sector businesses of the industry, namely the Ministry of Culture and Tourism shall be structured so that it can assume the role of a higher supervisory body that sets out, plans and coordinates standards applicable to local and professional organisations, devised with a sound mechanism of inspection and supervision.

A variety of legal arrangements shall also be made for increasing the rate of involvement and functionalities of local governments. At this end, local governments shall be strengthened in their current structures as a project operator and brought with a role that would enable them act more centrally than local, upon perceiving how important the deeds of the industry would be.





All budgetary allocations, funds, incentives and subventions that the government uses as a tool for supporting the industry will be coordinated and evaluated in such a manner that the industry would get the maximum benefit out of them, in close cooperation with the industry.

The sector's information on and encouragement for rendering education for enhancing the quality of services are also made part of the targets planned.

The working conditions of and worker's health and work safety measures taken for the staff recruited and employed by tourism facilities shall effectively be inspected for compliance with applicable laws, regulations and standards.

The infrastructure and environment related problems occurring in the areas with dense tourism movements and their close vicinity shall be resolved in cooperation with local governments and with participation and contributions of the users of such infrastructure.

TOWARDS THE OBJECTIVES

Developing a sense and awareness of quality

The sense of quality shall apply to every single field and aspect of tourism. Vocational education shall be fostered throughout the travel industry for enhancing the quality. Studies on sustainable growth

and conservation of the environment shall be conducted, with arrangements for an exchange of knowledge and experience among entities and natural persons related with tourism.

Arrangements shall also be made for due involvement of local governments and NGOs in efforts to be spent for understanding and evaluation of the requirement for and significance for the tourism sector of conservation of cultural heritage.

Making Quality "Measurable"

Decisions shall be made on common methodologies and measuring instruments to be used for measuring and tracing the quality of service at central locations where tourism gets denser and thereby their use shall be wider spread.

The deviations in current practices in certification of temporary accommodation facilities shall be eliminated, to form up and retain a unified and robust system.

Harmonisation with international standards shall be accomplished and mechanisms for maintaining and reassuring constant enforcement of such standards will be developed through NGOs, also respecting fully the rules of competition.

Planned Growth

Both infrastructure and superstructure investment projects shall be realised in accordance with physical





plans. For the purpose, the set of physical planning works shall be completed and set enforceable in areas of designation, before the latter can be made available for investment projects.

Private sector enterprises shall be encouraged for setting up and implementing such temporary accommodation facilities as guesthouses and other boardinghouses with special features as well as countryside traveller inns, that can be accounted as accommodation alternatives.

Regulatory Arrangements

A Tourism Satellite accounting system shall be developed and deployed for calculation of tourism receipts.

Close cooperation will be assured among the Ministries of Culture and Tourism and Environment and Forestry and related NGOs for the conservation of natural and historical heritage, which will deliver a substantial speed and efficiency to efforts for practical implementation of interventions and judicial proceedings and levying of sanctions for preventing actions and inactions of any assortment that could pose a material threat to the environment.

Revisions shall be made in the practical implementations of the Environment Law, Tourism Incentives Law and Law for the Conservation of Cultural and Natural Assets together with their associated regulations, for the purpose.

The decision-making mechanisms shall be redesigned within the context of good governance in order to ensure optimisation and effectiveness of quality of service in the travel industry.

Enhancing Quality through Education

Vocational education shall be brought to a standard with the introduction of professional qualifications certification system and a variety of educational schemes shall be worked out to realise the qualities predefined for improving the quality of services.

3.10. STRATEGY OF CITY BRANDING STRATEGY

Manage branding of cities rich of cultural and natural heritage and thereby convert them into a point of attraction for travellers.

City tours represent a type of tourism realised in large population centers having the size of a metropolitan city. Most notable examples to such population centers appealing an exalted number of travellers include Paris, London, Montreal and Prag. The tourism potential of and image created by a city are of vast importance. Therefore, it is essential that all attractions of the city should be used at maximum level. Proposals have been submitted for initialisation of a city travel project as a leading example, in a





number of metropolitan cities of our country led particularly by Istanbul, one of the biggest metropolitan cities with highest tourism potential of the world, followed by Ankara, Izmir and Antalya. The designation of Istanbul as the Cultural Capital of Europe for 2010 brings about the need for strengthening cultural, artistic, urban and environmental qualities of this city.

OBJECTIVES FOR THE YEAR 2023

- Plans and projects for development of city tourism shall be brought into life in Ankara, Istanbul, Izmir and Antalya cities.
- Culture tourism shall be revived and cultural branding efforts initiated for increasing the credibility of Adiyaman, Amasya, Bursa, Edirne, Gaziantep, Hatay, Konya, Kutahya, Manisa, Nevsehir, Kars, Mardin, Sivas, Sanliurfa and Trabzon cities.
- Each year, a city will be disclosed and publicised as "City of Cultural Tourism", by Ministry of Culture and Tourism, in an effort to maximise cultural visits domestically and internationally.
- Buildings, structures and ruins of historical, cultural and architectural value will be restored.
- Local events will be developed in line with internationally accepted standards.
- Facilities and places will be built to stage cultural and artistic shows.

- Provisions will be made for raising awareness among the local public on the value and conservation of both physical and abstract cultural heritage.
- Marketing and promotion efforts will be onset at both national and international levels to promote and highlight the rich cultural heritage of our cities.

TOWARD THE OBJECTIVES

Architectural arrangements

- City museums shall be established, neat to the international standards,
- Buildings and structures and ruins of historical, cultural and architectural value will be restored,
- Projects shall be drawn up for restoration of historical city texture and old city centers,
- Lightening and landscape arrangements shall be made in the surrounding areas of such historical structures as monuments, castles, aqueducts, fortification walls, taverns, caravansaries and etc.
- Catering facilities for travellers shall be constructed in the areas of historical attraction, and
- Several new authentic shopping centres shall be built such as large covered markets where such famous handicraft products as leather, carpets, jewelry and ornamental garniture will be presented, along with arrangements for restoration and improvement of existing ones.





Transportation System Arrangements

- Airport Hotels shall be constructed,
- Public transport systems shall be established and put in place as running for transportation of passengers between airport and town centres,
- Piers, quays and harbours in coastal cities shall be rearranged and restored, as appropriate, and
- Sea tourism opportunities shall be enhanced.

Cultural Route Arrangements

- Efforts will be commenced for replenishing facilities and events for congress tourism,
- Exposition and conference halls shall be built,
- Art villages will be established, and
- Events will be organised on national and international scales.

Physical and Social Arrangements

- Tourism information booths shall be erected at suitable locations in town centres,
- Infrastructure and superstructure deficiencies shall be remedied, in the first place, in cooperation with local governments and relevant organisations,
- Sign posting and information plates shall be installed,
- Special city maps showing touring routes and attraction points to be used for city tours shall be

printed with publication of introductory brochures and city guides and marketing and promotion activities shall be rendered both nationwide and on international platforms.

3.11. STRATEGY OF TOURISM DIVERSIFICATION

STRATEGY

"To develop means for alternative tourism types led particularly by health, thermal, winter, golf, sea tourism, ecotourism and plateau tourism, conference and expo tourism activities"

The goal to spread tourism season over the entire year is dependent upon diversification of tourism products. At this end, priority shall be placed for supporting and arranging of development of tourism types defined with top priority.

OBJECTIVES FOR THE YEAR 2023

Health and thermal tourism

- Each of the ancient Troy, Aphrodisian and Phrygian Settlements shall be evolved into a regional destination with thermal facilities and cultural themes, which shall by capacity be integrated to other alternative tourism types to incorporate cultural and natural heritage of the surround areas.
- Studies will be furthered in carefully planned





stages for the best evaluation of all resident resources, taking into account the regions with geothermal springs.

- Construction work carried out within the scopes of original and revised construction plans concerning the thermal tourism centres hitherto announced by the Ministry of Culture and Tourism shall be completed.
- Efforts shall be pursued to make our country as the top ranking destination of the European continent for thermal tourism interests.
- Studies shall be conducted for establishment of local governments' union and distribution companies at pilot areas identified for the purpose of effectively distributing geothermal spring waters.
- Forthwith upon completion of studies aimed at designation and physical planning of areas that may potentially be declared as Cultural and Tourism Conservation and Development Areas and/or Tourism centres with focus on the quantity and variety of geothermal springs, the areas so designated will shortly be allocated for the exclusive use of investors for tourism purposes.

Winter Tourism

- A comprehensive analytical study shall be conducted for location and evaluation of areas suitable for hosting winter tourism activities throughout the country.
- Of the locations separated, best candidates for the conduct of alternative tourism activities such as winter, thermal, cultural and congress tourism,

mountain and nature tourism shall be unified in treatment and developed thereafter.

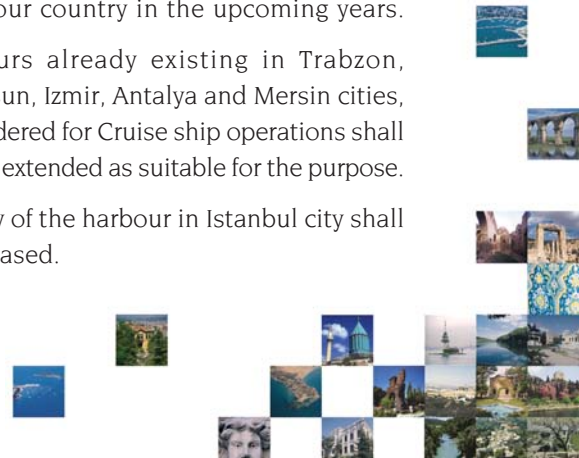
- The areas in question shall preferably be developed through planning efforts to be conducted in cooperation with related local governments and Governorships, land allocation incentives and infrastructure works to be provided by the Ministry of Culture and Tourism.
- For the development of winter tourism activities, youth will be encouraged to learn and perform this sport.

Golf Tourism

- The prevalent climatic conditions, topographical characteristics, rich history and cultural structure of our country shall be assessed for location and evolvement of spots for hosting golfing events and associated flows of golfers.
- New golf fields shall be generated throughout the country.

Sea Tourism

- An eligible and sustainable sea tourism shall be developed for our country in the upcoming years.
- The harbours already existing in Trabzon, Kusadasi, Samsun, Izmir, Antalya and Mersin cities, which are considered for Cruise ship operations shall be renewed and extended as suitable for the purpose.
- The capacity of the harbour in Istanbul city shall rapidly be increased.





- Means shall be provided for the revision of yacht marinas of Istanbul, Antalya and Izmir cities so as to accommodate Megayacht operations .
- Especially the fishers' huts of the Black Sea Region shall be restored, extended and converted so as to receive and dock yachts.

Ecotourism

- In order to form the grounds on which such nature tourism types as ecotourism and plateau tourism would develop, tourism infrastructure related to activities of these types shall be evolved with qualities increased.
- The main travel routes, destinations, intermediate stations and substation spots will be plotted on maps, followed by planning efforts, based on certain scenarios to be adopted for regions to host nature tourism organisations, activities and events.
- In areas where plateau tourism appears to get denser, priority tourism development / action areas whether as spot centers or axes.
- Action plans shall be set up and put in implementation for realisation of agricultural, adventure, cave and sport tourism with cooperation of public and private sector entities and NGOs.

Congress and Expo Tourism

- Such cities with suitable infrastructure to host congress tourism as Istanbul, Ankara, Antalya, Izmir, Konya, Bursa and Mersin shall be given top priority

for consideration and Ministry of Culture and Tourism shall carry out directing studies.

- Planning and allocation work shall be carried out for congress travels and investors shall be encouraged with incentive policies that provides a guidance on how to stage and conduct conferencing and expositional events.
- The role that management companies would assume at destinations of congress tourism shall be rearranged.
- High quality tourism facilities and international airports will be designed and constructed at areas shown on the plans to serve as centers for conference travels.
- A congress centers shall be constructed in each city, to receive efforts for promotion, planning and implementation projects for attracting international conventions to Turkey.
- Expo cities and centres shall be identified and expository organisations developed for creating expo tourism activities.
- Planning efforts shall be made for Istanbul, Antalya, Izmir and Ankara cities as the expo cities of primary concern and thereafter, in Adana, Gaziantep and Trabzon cities as expo cities of secondary concern.
- Comfort and technical infrastructure standards shall be defined by the Ministry of Culture and Tourism in addition to the Exposition Center Regulations of Turkish Bars and Exchanges





Association at expo centres located within expo cities of the 1st and 2nd grade.

- Directions will be provided for realisation of environmental layout plans, city main transportation plan and an outlay of accommodation and restaurant services so as to maximise benefits expected from expositions at Expo Centres located in expo cities of 1st and 2nd grades.
- Proposals for creating "Expo Centres" coming from outside these cities shall be considered and appraised in line with the opinions of National Tourism Council, TOBB and State Planning Organisation.
- The expo centres located in expo cities of the 1st and 2nd grade shall be taken to introductory brochures and promotional materials of the Ministry of Culture and Tourism, followed by certification as such by the Ministry.

TOWARDS THE OBJECTIVES

Health and thermal tourism

- A thermal tourism master plan covering four regions shall be drafted, in the first place. These four regions will include the following:

South Marmara: Balıkesir, Çanakkale and Yalova cities,

South Aegean Region: Aydın, Denizli, Manisa and Izmir cities.

Phrygian Region: Afyonkarahisar, Ankara, Usak, Eskisehir and Kutahya cities.

Central Anatolia: Aksaray, Kirsehir, Nigde, Nevsehir and Yozgat cities.

Balnéothérapie Centres to host thermal tourism operations shall be identified in the above specified regions, followed by efforts concentrated on implementing strategies aimed at developing the infra and superstructures for thermal tourism.

- In order to encourage private sector, public land and thermal spring allocation shall be made.
- Feasibility studies shall be ordered from specialised entities and persons for thermal thermal projects to be initialized by local governments.
- Thermal facilities shall be formed as stand alone compounds in design and incorporate hotel and curing centres annexed to them, all surrounded by green, with built in layout add ons like jogging and excursion tracks and entertainment facilities (i.e. water games such as aquatic parks and etc.), based on a perspective to enhance the quality of environment.
- With the exception of tourism centers falling outside the reference frames of the Ministry of Culture and Tourism, all hotspring areas shall be drawn into architectural designs by professionals and technical opinion of the Ministry shall be solicited, before the designs are approved. In time of architectural plan applications, geology and hydrogeology surveys shall





be carried out by relevant entities and organisations with specialised knowledge on the matter, but, the spring conservation sites will have to be identified, in the first place.

- The second house demands inside and adjacent to the hot spring locations shall be evaluated, once comprehensive studies are performed to affirm their viability.
- Use of thermal spring water at public locations (such as medical bathing centres etc.) will be encouraged, and no use of such waters at individually or mutually owned homes and housing cooperatives will be permitted. This prohibition shall include public areas not specifically authorised for use as lands to host related premises.
- Arrangements shall be made requiring operators to solicit and obtain approval of the Ministry of Culture and Tourism before attempting to make drills on or distribute water from those areas officially proclaimed as Tourism Centres by the Ministry.
- Every measure shall be taken and effort endeavoured to ensure that construction of thermal resort facilities is performed using state of the art technologies and in a dexterous and best workmanlike manner to successfully preserve and reflect the historical architecture and local texture (i.e. architectural designs of Ottoman, Seljuk and Roman times), with the ultimate goal of giving them an international traveller appealing appearance.

- Information on regions known to have hot spring facilities and thermal spring waters will be emphasized in promotion brochures.
- Financial grants obtained for infrastructure works (i.e. land drills, road pavements, potable and domestic water supplies, sewage lines etc.) and environmental layout arrangements will, in the first place, be used for pilot areas.
- thermal tourism shall be taken among the top priority incentive areas, in practice.
- Contacts will be established and maintained with healthcare and social aid organisations located on abroad.
- National and international symposia, seminars and promotional programs shall be held to inform the private sector and general society.

Winter Tourism

- A winter tourism master plan shall be drawn.
- Access to tourism premises will be made easier with road or lift connections and plans sufficiently addressing spaces such as boarding, landing, waiting and parking points required for the proper functioning thereof will be set out, neat to prospective dimensional and operational needs.
- The distances between accommodation facilities and ski runs will be scrutinized to make arrangements for providing direct among them.





- Temporary accommodation facilities of such size and quality sufficient to serve the ski run when operating at full capacity shall be studied and planned.
- All such municipal needs as utility water, electrical power supply, sewage systems, garbage pickup trucks, crews etc. shall be studied and planned to cover the entire skiing centre.
- Road interconnections between all skiing and town centres and other tourism focal points will be repaired and improved.
- Ski runs shall be arranged taking due account of internationally accepted standards.
- Arrangements shall be made as necessary for the organisation of winter sports competitions and events at national and international scale under coordination of related City Governments and local administrations, GD for Youth Affairs and Sports and the Ministry of Culture and Tourism, at the skiing centres and such events and organisations will effectively advertised and promoted.

Golf Tourism

- Projects on golf links shall be developed by the Turkish Golf Federation and Ministry of Culture and Tourism, within the scope of which, areas suitable for golfing shall be identified, taking the future tourism objectives of the country, into consideration.
- Areas with sufficient spaces to accommodate

minimum four golf courses next to each other shall be identified and nominated as golf links.

Sea Tourism

- The single entry pass issuing procedures for yachts bearing foreign flags readily handled by the Seaports and Harbours Service and the Departments of Customs Protection, Passport Police, Border Patrol and Coastal Healthcare shall be arranged under a single and common authority.
- Income generated and receipts collected from operation of the Yacht tourism industry pursuant to operation of the Yacht Tourism Regulations shall be used exclusively for the purpose of developing the infrastructure needs of the sector and funding fairs and expository events to be organised by the sector.
- A set of rearrangements shall be made in the Yacht Tourism Regulations to adapt to and meet the requirements of the day and cover all constituents of the industry (i.e. cruise ship operations, water sports, daily yacht journeys and scuba diving etc.), starting with a name change to "Sea Tourism Regulations", as proposed.
- Development of yacht clubs will be encouraged while means are provided for the establishment and implementation of a system for multi-user yachts owned mutually among a group of people on time sharing basis.
- Arrangements shall be made in legislation for exemplifying yachts the sailing on the sea of which





is largely dependent on wind power and which is used exclusively for sporting (racing) purposes from tax obligations and applying taxes on engine driven yachts at rates to be calculated over their net values shown on insurance policies.

- Technical standards and criteria shall be developed and adopted for stationary facilities as well as floating platform systems for bilge water and solid waste disposal.
- Arrangements shall be made requiring banks operating within the territorial borders of our country, which exports yachts to buyers in the US and throughout Europe, to lodge securities for the customary prepay deposits collected by shipwrights on shipbuilding orders.
- A variety of arrangements shall be made to ensure that short-term instructional courses are opened for both active and candidate workers of yacht tourism sector and other individuals of need, also opening paths for employment in appropriate sea tourism enterprises at our coastal regions in addition to insertion of new classes in official curricula of tourism vocational high schools and academies covering various aspects of sea tourism, facilitating probation of enrollments of the aforesaid in yacht operation companies, to end up with shipman certification as appropriate for their individual fields of formative training and probation.
- Regulatory and administrative measures shall be taken so that the existing fishers' huts can

effectively serve yachts.

- Promotional activities shall be evolved to increase the share of yacht and cruise ship operations in tourism activities of the Mediterranean area, while adjustments made to make investments in the particular area of sea tourism more attractive.

Ecotourism and plateau tourism

- Locals will be taken to instructional courses on touristic product and souvenir making, services, quality and business administration.
- People will be encouraged to build and open up house museums in which various ethnographic and ecological characteristics peculiar to the region are displayed.
- Reception points shall be established at main entrances of the area, where visitors will find detailed site maps showing various routes, regional peculiarities, parking plots and touring routes.
- Arrangements will be made for completion of fountains, toilets, shelters, distance and directional signs and configuration of trekking routes to the Global Positioning System and tracking satellites and against construction of new vehicle passages, in areas reserved for nature tourism.
- In areas reserved for mass tourism, cartography work shall be completed to form basis for physical planning efforts then development plans will be generated in the scales of 1:25,000, 1:5000 and 1:1000,





once after the forestry and pasture areas are identified.

- In areas chosen for nature tourism, environmental layout arrangements shall be made for such attractions that may be found along the route as caves, falls, interesting trees and rocky formations, sporting areas, camping field and etc. with completion of necessary municipal service links, led by transportation.
- Research centres and scientific museums shall be established to allow for conduct of research studies on characteristic features of the region and scientific demonstration and disclosure thereof.
- Local public shall be taught on guesthouse operation and management.

Congress and Expo Tourism

- Meetings will be organised under leadership of the Ministry of Culture and Tourism, aimed at establishing the organisations needed for the development of congress tourism at first, in seven priority cities determined for congress tourism development (i.e. Istanbul, Ankara, Antalya, Izmir, Bursa, Konya and Mersin).
- Based on attempts of National Tourism Councils, first of all, active roles will be assumed for establishing and maintaining congress tourism companies and other similar structures covering management and marketing concerns in each city.

- Expo cities shall be provided with sufficient bed space and accommodation facilities and events and organisations capable of attracting other industrial sectors and guests and international airports and adjacent expo centres shall be constructed in sufficient sizes and with sufficient qualities to accommodate incoming passenger flows of flight operations.

- Reviews shall be made as for determining the barriers and impediments beyond branding of Turkish exposition organisations with TOBB and sector representatives and top priority measures shall then be taken for the elimination thereof.

- TOBB certified exposition events that are also taken to International Purchasing delegations program by the Foreign Trade Undersecretary will receive due inclusion in all promotional and introductory materials of the Ministry of Culture and Tourism.

- Measures will be enhanced to allow for the safe enlargement of exposition areas, that attract very large international visitor groups.

- Fairs and exposition events shall be considered and treated as a strategic sector for the sustainability of country exports of tourism products and services generating income denominated in foreign currencies.

- In cities where fair and expositional events are staged, local governments, institutions of higher educations, professional's chambers and public





administrations will host instructional efforts for raising awareness on and community ownership of city expositions.

- Studies shall be conducted for opening associate degree programs for raising fair organisers and working staff.

3.12. REGIONS TO HOST REHABILITATION EFFORTS FOR TOURISM AREAS

STRATEGY

"To make arrangements for handling in the first place and strengthening the infrastructure of areas where mass tourism activities grow intense and for extending tourism season throughout the entire year in these regions."

The mass tourism that mainly consists of sun-sea-sand activities has already reached a saturation level in the coastal regions of Antalya, Mugla and Aydin cities. Therefore, there is the need for setting up and implementing a number of secondary arrangements for maximising the receipts gained from travellers, once they leave their hotels for daytime trips, ensuring the operation of existing facilities for 12 months uninterrupted and events adding on the credibility thus serving for the branding of these sites.

OBJECTIVES FOR THE TERM OF 2023

- Arrangements shall be made for integration of such health and fitness units as thalasso therapies etc. to existing operations.
- Sporting and recreational areas and especially the training grounds of sports clubs will be planned.
- Golfing areas shall be planned with formation of eligible grounds for investment.
- Entertainment centres and theme parks will be created.
- Authentic excursion and replenishment locations shall be arranged in forest area.
- High quality shopping malls shall be built in multi-storey structures perfectly matching all functional and architectural expectations.
- Revisions shall be made on plans as required to meet up with concurrent needs as to building heights, plot sizes etc. in municipal areas.
- Environmental layout arrangements, street illumination systems, kerbs and pedestrian walk pavements shall be upgraded in populated landward areas.
- Farm tourism, organic farming, hobby gardens, boutique villa gardens etc. shall be provided in landward areas for the dual purpose of avoiding speculations and diversifying such areas to help them contribute to tourism.





- Arrangements shall be made within settlements for places suitable for production of original handicrafts, market spaces and such transport means and lines as trolleys, phaeton and lift running tracks. for entertaining the guests while giving them a unique sight seeing experience.
- Attention shall also be drawn on arrangement of cycling paths and pedestrian pavements with a view to diversify and further improve the quality of transportation between the tourism premise and city centers.

TOWARDS THE OBJECTIVES

Infrastructure Unions: These will be encouraged for establishment to assume an active role in solution of problems encountered by daily tourism, in addition to further strengthening the infrastructure of areas where tourism activities take place.

Tourism Product Diversification: This will be done in all covered regions.

3.13 TOURISM DEVELOPMENT ZONES STRATEGY

"To use tourism as a key tool for local and regional development in tourism development areas encompassing more than one cities to be transformed into destinations"

Within the strategy of developing destinations supported by physical decisions in accordance with the vision and philosophy statements, emphasis will be laid upon regional and thematic characteristics of destinations.

Arrangements shall be made for our national tourism to develop in the form of thematic regional destinations, along predetermined development axes.

OBJECTIVES FOR THE TERM OF 2023

A key factor to develop tourism on a countrywide scale is without doubt, diversification of transportation infrastructure, accompanied by concomitant quality improvements. Within this context, the need is obvious for strengthening the access links of the destinations proposed for development, with airports, split highway structures, railway and seaway connections. Therefore it is the core objective of the action plan to not only develop the destinations to be opened up in the upcoming years for mass and coastal tourism but also support them with such tourism diversities as thermal, winter, plateau, cultural, congress, ecotourism and faith and gastronomy tourism activities and events.

The tourism activities envisaged for development in national travel industry is expected to develop destinations confronting to international standards, spread through inland parts of the selected regions and throughout the entire year rather than being dependent on any particular season.





TOWARDS THE OBJECTIVES

I. Thematic Zones: 9 thematic zones are being proposed in our country to serve the objectives of this strategy, the cities of coverage and themes of which, are as follows:

I. Phryg Cultural and Thermal Tourism Development Zone

This zone covers the cities of Eskisehir, Afyon, Kutahya and Usak, targets cultural and thermal tourism based development.

This zone is among the top priority development areas identified within the scope of thermal Tourism Cities Project, an initiative given start, with consideration of geothermal potentials of the country for developing thermal tourism activities.

The area encompasses around 20 natural geothermal springs, at the moment. Target is set toward establishing thermal cities and high quality balneoterapie centres, on and around these springs.

The Phryg Tourism area is also rich of natural and cultural heritage, representing a unique potential for relevant tourism types. This potential will be revealed for the exclusive and controlled use of tourism with a variety of excavations, restorations, scape arrangements and other similar efforts.

Objectives have been set for the planning of 4 golf links each with 18 holes, with a view to diversify touristic events, in addition to cultural and thermal

tourism activities. Furthermore, such resident yet minor canyons, ponds, dams etc. of the region shall be redesigned to welcome lovers of Nature and adventurers.

Arrangements will also be made for integration of the area with other types of travel and large scale "thermal Tourism Cities" shall be brought into life with concurrent efforts dedicated to diversification of transportation links with improved quality in the Phrygian Tourism Development Zone.

The areas in the region, which can be proclaimed as Cultural Heritage Conservation and Tourism Development Sites shall be identified and forthwith completion of physical planning efforts, be allocated for the sole use of intended tourism investors, within the scope of the strategic plan.

Finally, there is a proposal for construction of an airport at Altintas district of Kutahya City, to help the greater goal of transforming the area into the most visited and renowned tourism destinations of the country and world, in the medium and long run. The region shall further be enhanced in terms of accommodation facilities and capacity with dedicated efforts on planning and implementation of thermal, cultural and ecotourism activities.

II. TROY Cultural and Thermal Tourism Development Zone

"Troy North Aegean Culture and thermal Tourism Development Zone", covers the cities of Çanakkale





and Balıkesir and is intended for development of Health and thermal tourism as well as rural tourism. With the rare thermal spring water potential it has at coastal banks, this region is perhaps the best candidate for becoming a unique site attracting increasing numbers of international travellers. Given the unique climatic pattern of the Goose Mountains, which is referred as the venue of the first beauty competition of human history in myths and diversified range of endogenous floral and faunal species it hosts, the region has targets for development of a high quality tourism though on a restricted terrain, combined with its thermal and coastal tourism potentials.

Efforts will be pursued toward identification and then integration with other tourism types of geothermal springs located along the southern slopes of Goose Mountains, with arrangements made concurrently for attracting new investments into the territory and increasing the capacities of the region in terms of both accommodation facilities and of available bed capacity. Furthermore, the Saros Bay, Erdek and Isle Avsa will be proclaimed as the two new tourism cities, as a contexture of this zone.

Planning and implementation efforts shall be intensified in the upcoming terms, for adjusting the capacities of existing accommodation facilities of the region to the peculiar needs of thermal, culture and ecotourism activities.

Supplementary studies aimed at diversification and quality improvement of transportation links will be performed in the Troy Cultural and thermal Tourism Development Zone.

On completion of tourism related planning of the region, investments will immediately be given a start, to host efforts aiming at transforming the region into a major destination for nature - cultural and thermal tourism in the medium and long term.

III. APHRODISIA Culture and Thermal Tourism Development Zone

Covering the cities of Aydin and Denizli and over twenty geothermal springs, the "Aphrodisia Culture and Thermal Tourism Development Zone" is mainly intended for growth towards health and thermal tourism.

This region is one of the top priority development areas within the scope of Thermal Tourism Cities Project, an initiative given start with consideration of the geothermal spring water potential of our country and a view to evolve thermal tourism.

Studies shall be initiated and conducted for diversification and improvement in quality of the transportation links to Aphrodisia Culture and Thermal Tourism Development Zone.

The areas falling within the region, which can be proclaimed as Cultural Heritage Conservation and Tourism Development Sites shall be identified and forthwith completion of physical planning efforts,





be allocated for the sole use of intended tourism investors, within the scope of the strategic plan.

Planning and implementation efforts shall be intensified in the upcoming terms, for adjusting the capacities of existing temporary accommodation facilities of the region to the peculiar needs of thermal, culture and ecotourism activities. Target has been set toward transforming Aphrodisia into a major destination and highly credible brand in the medium and long term.

IV. SOGUT Culture Tourism Development Zone

Encompassing Bursa and Bilecik cities and Iznik district this zone shall be developed for culture tourism. In the context, impetus shall be given to revive the old historical paths and restoration of existing civilisation ruins as well as development of an open air museum of suitable spots and position of the territory as a thermal and culture tourism development zone in international platforms.

Studies shall be initiated and conducted for diversification and improvement in quality of the transportation links to Sogut Culture Tourism Development Zone.

Efforts will be pursued for integrating the region with other tourism types to obtain a large scale culture tourism volume in the end and for placing the region among the most significant destinations of world tourism, with restorations to be made and open field

museums built. The region shall also be given a boost in terms of both accommodation facilities and bed capacities.

V. CAPPADOCIA Culture Tourism Development Zone

The Cappadocia region is a world renowned destination with unique historical, cultural and natural riches and original urbanscape embedded in a historical and natural layout, which encompasses the cities of Kayseri, Kirsehir and Nevsehir.

Stepping forefront with culture tourism, Cappadocia Region has though a vast potential for other types of tourism which has to be appraised and evaluated better, with conception and implementation of diversified alternatives as well as improved scenic layout and attractions such as golf areas to an acceptable level of quality, wherefore a number of targets have been defined toward evolvement of alternative types of tourism thus making the entire region a new tourism destination.

With the projects to be implemented within the Cappadocia Culture Tourism Development Zone, 5 golf links each with 18 holes and required set of facilities are anticipated for construction. Furthermore, the interesting geography of the region that presents extremely convenient layout and tracks for trekking purposes in combination with rich handicrafts (pottery, carpet and rug production), local gastronomy kitchen and regional wines will





form the basis of tourism activities. These will be complemented by marketing of the region within a perspective of sustainable tourism, with the use of potentials for 1 to 2 hour balloon tours, original urbanscape evolved in historical and natural layout, handicrafts and gastronomy tourism.

The golf and other alternative types of tourism will be planned so as to confront fully with the natural and characteristic features of the region so, boutique style hotels shall be built with existing ones restored and improved in quality and bed capacity will be increased to meet for the demand of tourists.

VI. TERRA MERE Ecotourism Development Zone

This zone named Terra Mere, which stands for Lakes District, is located in the intersection of Aegean, Mediterranean and Central Anatolia regions and encompasses the cities of Konya, Isparta, Afyon and Burdur.

As its name suggests, the area is covered by numerous lakes noticeable among which are Beysehir, Egirdir, Kovada, Acigol, Burdur, Salda, Eber and Aksehir Lakes. Efforts shall be sustained for creating a variety of sites for nature trips and a base for such activities as trekking, caravan and tent camping, paragliding, mountaineering, caving, hunting, horse riding, cycling, surfing, photo safaris etc.

Moreover, a sustainable tourism approach shall be adopted for the entire region which accommodates a significant amount and varieties of wildlife, in which all precautions shall be taken to avoid deteriorating habitats and ecosystems, while visitors shall be informed on concerns of nature and its conservation and further given the change to make individual contributions to conservation efforts.

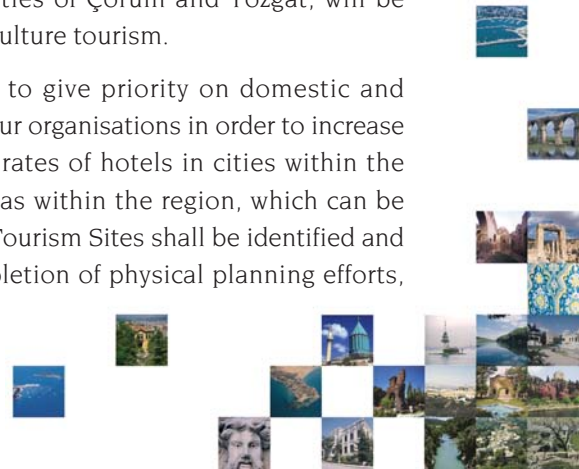
The areas falling within the region, which can be proclaimed as Tourism sites shall be identified with reference to lakes and forthwith completion of physical planning efforts, be allocated for the sole use of intended tourism investors, within the scope of the strategic plan.

With the land allocation and new investments to be made within the Terra Mere, the number of high quality facilities will be improved and bed capacity will be increased.

VII. HITTITE Culture Tourism Development Zone

The Hittite Culture and Tourism Development zone, covering the cities of Çorum and Yozgat, will be developed for culture tourism.

It is necessary to give priority on domestic and international tour organisations in order to increase the occupancy rates of hotels in cities within the region. The areas within the region, which can be proclaimed as Tourism Sites shall be identified and forthwith completion of physical planning efforts,





be allocated for the sole use of intended tourism investors, within the scope of the strategic plan. With the aforesaid investment projects' completion, the region is expected to be given a capacity boost in terms of both accommodation facilities and bed capacity.

VIII. URARTU Culture Tourism Development Zone

Once homestead of the ancient kingdom of Urartu in eastern Anatolia, this zone is rich of cultural and historical elements and encompasses the cities of Van and Bitlis. Also it has a potential for coastal and winter tourism and shall be developed for the greater purpose of converting the region into a cultural destination at both national and international scale.

The region shall be integrated with other tourism types and a large scale "Urartu Destination" will be realised, which shall be complemented with associated land allocation and new investments in the region, which in turn, help an increase in both the number of accommodation facilities and their bed capacity. Within the scope of projects to be realised with these investments, 2 golf playgrounds shall be formed with 18 holes in addition to Ahlat and Van Water Sports Complex, Cruise Ship Approach and Docking Quays and a yacht marina. Furthermore, the current links of the region with GAP and winter corridors are anticipated to be strengthened.



Following completion of plans, the region is expected to have improved quality in all of its accommodation facilities.

IX. GAP Culture Tourism Development Zone

The area covering Adiyaman, Batman, Diyarbakir, Gaziantep, Kilis, Mardin, Siirt, Sanliurfa and Sirmak cities will be developed primarily for culture tourism, with secondary developments focused on golf, health, youth tourism, ecotourism and travels for such activities as paragliding, trekking, water sports, canoeing, bird watching and congress tourism.

The region will also host large scale culture - faith tourism development efforts after being integrated to other types of tourism. At this context, land and cultural structure appropriations in combination with realisation of new projects will help an increase in the number of accommodation facilities as well as in their bed spaces.

Finally, the increase in existing accommodation capacity within the perspective of culture - faith tourism goals will provide additional capacity for accommodating tourist groups flown to the region's coastal banks.

2. Tourism Diversity and Integration at Tourism Development Zones

Tourism development planning according to certain themes is in the core of objectives set for the zones.





In designs for planning, areas, as wide as possible, shall be made available and set on a course for tourism development, as in the case of tourism cities.

Arrangements shall be made for associating the development of alternative tourism types with other cultural and natural assets in close neighbourhood.

3. Administrative Structuring in Tourism Development Zones

Both statutory and administrative arrangements shall be made, as necessary for ensuring self-growth of Tourism Development Zones so as to form a destination out of themselves and integrity of investments to be made and projects to be implemented and the establishment of Infrastructure Unions with participation of representatives from public organisations, local governments and private sector bodies and enterprises.

3.14. TOURISM DEVELOPMENT CORRIDORS

STRATEGY

"To develop a certain route for tourism on definite themes, by rehabilitating historical and natural texture."

The act of tourism is a social movement, from beginning till the end. This social movement is ensured by transportation. There are certain routes

in our country which need to be posited from a tourism viewpoint, due to their richness in terms of natural, historical and cultural values. The tourism potential of these routes will be brought for use, in a planned manner.

OBJECTIVES FOR THE TERM OF 2023

Along the corridors which will be developed as destination points, transportation will be diversified and its quality will be improved.

In order to direct the tourism development in the corridors towards boutique hotels and boardinghouses, which will provide service with low intensity, high quality and for the whole duration of a year, the necessary planning work will be done.

Corridors will be planned, managed, promoted and marketed with a collective sense of the whole, as destination points.

TOWARDS THE OBJECTIVES

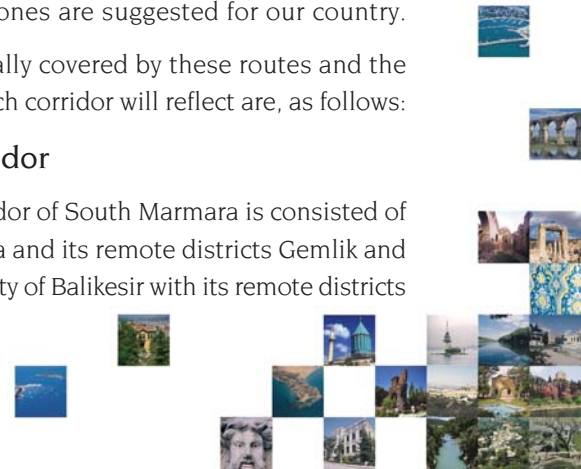
1. Tourism Development Corridors

Within the adopted strategy, 7 thematic tourism development zones are suggested for our country.

The cities actually covered by these routes and the themes that each corridor will reflect are, as follows:

I. Olive Corridor

The Olive Corridor of South Marmara is consisted of the city of Bursa and its remote districts Gemlik and Mudanya, the city of Balıkesir with its remote districts





Gonen, Bandirma and Erdek and the city of Çanakkale, with its coastal line extending to its remote district Ezine, also encompassing the Kapıdağ Peninsula of Erdek, with its close neighbourhood in the southern part of Dardanelles and Avsa, Pasalimani and Ekinli Isles and the Marmara Isle of the Marmara District, lying to the north.

The region will be developed as a destination for health and gastronomy tourism. The region, by its very nature, has a variety of plant species used in alternative medicine and comes up to the forefront with its high potential for production of olives, olive oil and wines. It shall be this potential, which shall serve as the main theme of the corridor's development.

The region will also form the subject of a number of plans and applications for thermal, culture and ecotourism operations, along with a capacity increase in its existing temporary accommodation facilities vis-a-vis the intended developments.

II. Winter Corridor

The natural, cultural and historical attractions along corridor which has been established within the framework of the "Winter Tourism Master Plan" under construction in order to develop the winter tourism, and by taking into consideration the existing and potential winter tourism centers within the region comprising the cities of Erzincan, Erzurum, Ağrı, Kars and Ardahan, will be associated with other assets in close vicinity and the tourism diversity which can

serve for winter tourism will be ensured.

In the Erzurum Konaklı and Gez Regions as well as the surrounding vicinity of the Hot-spring Balneoterapie Centers in the cities of Erzincan, Erzurum, Ağrı, Kars and Ardahan, new accommodation facilities will be created. By utilising the historical city structure located in town centres of Kars and Sarikamis as accommodation units, these facilities shall be restored and improved in both capacity and bed space, suitably for accommodating winter, culture, thermal and city tourism flows.

III. Faith Tourism Corridor

The one called "Faith Tourism Corridor" comprises, the city settlements of Hatay, Gaziantep, Sanliurfa and Mardin, with the city of Tarsus laid in the point of origin.

En route this corridor, plans have been made for construction of a split superhighway linking Tarsus to Mardin, with the accomplishment of which, a boost is expected in the number of visitors, in the short and medium term, concomitant with the enhanced accessibility of the region and associated positive change of preference in travellers. Moreover, another step considered essential for developing Faith Tourism will be taken by interconnecting the cities of Diyarbakir and Siirt, in two alignment extensions laid opposite to one another, with the main railway track that currently ends up in the city of Sanliurfa.





The historical buildings will be restored to serve as guesthouses and arrangements shall be made for supporting small, self or family-owned hotels.

The region shall host a variety of planning and implementation efforts aimed at improving the existing accommodation facilities in terms of capacity.

IV. Silk Road Tourism Corridor

This corridor has been demarcated to cover the Ayas - Sapanca Segmental Corridor, which is a fraction of the historical Silk Road alignment entering Anatolia that trespasses the Metropolitan City of Istanbul to reach the European Continent and the Cities of Adapazari, Bolu and Ankara found on its alignment, also encompassing the remote districts of Sapanca, Geyve, Tarakli, Goy nuk, Mudurnu, Beypazari, Gudul and Ayas, of the aforesaid cities.

Settlements along the corridor will be developed for nature and ecotourism and will also have permanent links with winter tourism facilities of the region.

The region has an ample variety of artworks and examples of civilian architecture of the Seljuk Kingdom and the Ottoman Empire, thus is pretty much rich of historical texture and heritage. In furtherance of its historical past, the Region has a buoyant potential on its route alignment between Ankara and Istanbul, the two major cities of the country, for culture and commodity exchange. As it is also carved in a rich landscape of natural beauties and interesting scenes, arrangements will also be

made for giving the region a culture and ecotourism focused growth, which will include guest-house operations.

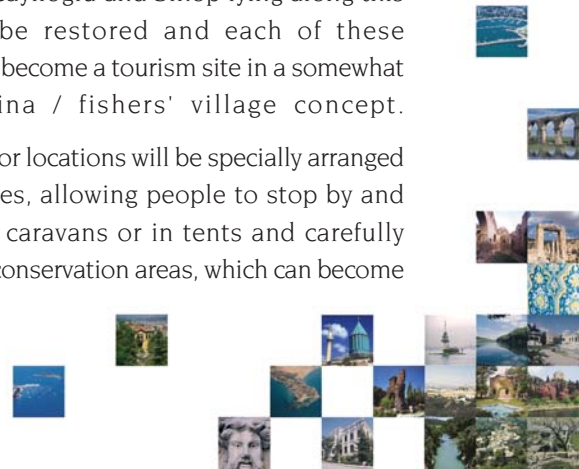
There is also a set of plans made for improving the region both in terms of the number of accommodation facilities and bed capacity to well adapt to the specific needs of tourism, with a variety of civil works, aimed at restoring the stand-alone monumental buildings of civilian architecture of the remote past into rare structures of accommodation, with the adoption of either Build-Operate-Transfer or long term lease methods.

V. Black Sea Coastal Corridor

This is anticipated as an inland tourism development corridor to be developed for serving such metropolitan cities as Ankara and Istanbul, extending between Sile and Sinop Cities with an approximately length of 500 km.

The region will be developed with a perspective of culture, coastal and nature tourism. For the purpose, the fisher huts found in settlements of Sile, Akcakoca, Amasra, Cide, Caylioglu and Sinop lying along this corridor will be restored and each of these settlements will become a tourism site in a somewhat suitable marina / fishers' village concept.

Along the corridor locations will be specially arranged for camping sites, allowing people to stop by and camp either in caravans or in tents and carefully planned inside conservation areas, which can become





a focal point for the development of eco-tourism, in addition to a number of recreational, replenishment centers wisely placed in the core of woods. Also a variety of plans and related realisation efforts will be provided for building up and commissioning boutique hotels, boardinghouses and original countryside traveller inns. This territory will host a number of planning and implementation efforts aimed at developing it into a centre of culture and ecotourism, with increased number of accommodation facilities and improved bed capacity.

VI. Plateau Corridor

Principally demarcated for plateau and nature tourism on the coastal sash of the Northern Black Sea from Samsun to Hopa Cities, this corridor embodies a gorgeous number of tremendous, breath-catching landscapes and scenes.

Embedded in numerous tones of green, this region is the heart of tourism activities and potency of the entire Black Sea Region. Therefore, practical implementations will take the form of a fresh new tourism development scenario founded on plateau, coastal, culture and health tourism in the core, for the entire Black Sea Region. Also, the region will be posited as a unique world site and destination attracting lovers and explorers of nature both from within and outside the country, forthwith upon the integration of plateaus and highlands found in the region with other types of tourism.



The plateau corridor shall further be enhanced with a diversified range of entertainment and leisure activities to include camping, golfing, skiing, caving, paragliding, rafting, riding, ballooning, fishing, bungee jumping and photo-safari organisations, with appropriate planning and implementation.

A number of planning and implementation efforts shall be rendered for improving the temporary accommodation facilities already present in the region, both qualitatively and quantitatively, with focus on culture and ecotourism organisations.

VII. Thrace Cultural Corridor

The Thrace Corridor is an area covering Edirne, Kırklareli and Tekirdag cities. Located on the European wing of the Marmara Region, it is demarcated as a bowl bordering the Black Sea on the north and terminating at Aegean Sea, in the south. The corridor already has a variety of boutique hotels and specially licensed temporary accommodation facilities in place and running, with a variety of camping and bungalow operations, distributed randomly on its plain.

The intended tourism diversity will be considered when drawing up plans for addition on existing bed capacity. The historical houses of Adrianople, a polis of the ancient Greek now resembled in the urbane of Edirne will be restored, in such a manner that the old city's appearance can be regained and to serve as accommodation facilities for travellers



and outsiders in such forms as boutique hotels or boardinghouses. These accommodation facilities will also receive improvements both in quantity and quality, as appropriate for culture and ecotourism operations.

2. Tourism Diversity and Integration along Tourism Development Corridors

Plans will be drawn up for developing tourism and travels en route the Corridor with certain themes.

The plans will target the opening of areas, as wide as possible, up for tourism interests, in continuation and as an extension of the concept of tourism cities.

Alternative tourism types to be selected and implemented for the corridors shall be associated with other cultural and natural assets of their close vicinity.

3. Administrative Structuring in Tourism Development Corridors

All work necessary at both legislative and administrative levels will be performed for the establishment of Infrastructure Unions, to be formed up of public entities and organisations, local governments and private sector representatives, to hold and maintain miscellaneous investments and projects to be implemented for the realisation thereof, in a discrete integrity, so as to allow for the self-development of the established Tourism Development Corridors into stand-alone destinations.

3.15. TOURISM CITIES

STRATEGY

“To plan tourism settlements capable of competing the world examples by becoming a global brand.”

OBJECTIVES FOR THE YEAR 2023

Ten new tourism cities shall be brought into life, in addition to the five being planned by the Ministry of Culture and Tourism.

TOWARDS THE OBJECTIVES

1. Tourism Cities

Within the scope of the Action Plan, the research and development efforts for the 10 new tourism cities will be conducted and completed. The names proposed for these ten new cities, are as follows:

1. Igneada - Kiyikoy EcoTourism City
2. Kilyos Tourism City
3. Saros Bay Tourism City
4. Kapıdağ Peninsula, Avşa and Marmara Isles Tourism City
5. Datça Ecotourism City
6. Kas - Finike Tourism City
7. Anamur Coastal Line Tourism City
8. Samandag Tourism City
9. Macka Tourism City
10. Kahta Tourism City





2. Tourism Diversity and Integration in Tourism Cities

Plans will be drawn up for developing tourism and travel in these Cities based on certain themes.

The plans will target the opening of areas, as wide as possible, up for tourism interests. Alternative tourism types to be selected and implemented for the corridors shall be associated with other cultural and natural assets of their close vicinity.

3. Administrative Structuring in Tourism Cities

All arrangements necessary at both legislative and administrative levels will be performed for the establishment of Cappadocia Infrastructure Unions, to be formed up of public entities and organisations, local governments and private sector representatives, to hold and maintain miscellaneous investments and projects to be implemented for the realisation thereof, in discrete integrity, so as to allow for the self-development of the established Tourism Cities into stand-alone destinations.

3.16. ECOTOURISM ZONES

STRATEGY

"To develop nature tourism with reference to development plans"

OBJECTIVES FOR THE TERM OF 2023

The territory covering the cities of Bolu, Zonguldak, Bartın, Kastamonu and Sinop, which are located in the Black Sea Region, the inland parts of East Antalya and the locations where this city conjuncts with the city of Mersin at skirts of the Taurus Mountain, the GAP Ecotourism Corridor which interlinks the main GAP corridor with Winter Corridor have been identified as the top priority ecotourism development zones in Tourism Strategy of Turkey - 2023 for their biodiversity and high ecotourism potentials.

Plans are toward spreading out ecotourism activities throughout the aforementioned regions, always upholding the principle of sustainability and showing full respect to and conserving biodiversity, in usage planning of our natural resources. The natural resources found in the aforesaid regions are diversified. Accordingly, plans have been devised for evaluation of local products to form the very first steps of evolving into a brand principally through workshops in which various handicrafts and local examples can be processed and associated structuring in local architecture presenting conformity with the environment also observing the balance between conservation and utility.





Arrangements shall be made for integration with National Parks, Nature Conservation Sites, Hunting and Wildlife Reservation Areas and Sites already located within the regional boundaries, once an ecotourism focused development is attained in the territory. The transport infrastructure and access to the region shall also be diversified with land, air and railway links, with the gradual supply and opening for public use of alternative modes of access to any particular location therein.

The grounds will be established for coordinated efforts of public entities and organisations and local governments in the ecotourism zones. Provisions shall be made for assuring recycling of ecotourism outputs back to the local community and an understanding that requires active involvement of the local public shall be adopted and followed throughout the relevant planning and implementation activities. Besides, attempts shall be made as appropriate for establishment of Infrastructure Unions at local level with participation of government organisations, local governments, private sector entities and local NGOs at localities to receive ecotourism activities.

TOWARDS THE OBJECTIVES

At regions to receive ecotourism organisations, non-agricultural areas of employment shall be created in the rural, with the greater objectives of reducing, if not eliminating the interregional imbalances, optimising women's status in communal structure,

ceasing rural population migrations to urban areas and contributing to the preservation and promotion of national values. Additionally, efforts shall be pursued, in these ecotourism regions, to:-

- Achieve and maintain economical balance through product diversification in regional economy,
- Create major job opportunities for both skilled and unskilled labourforce of the region,
- Ensure development of small and medium sized enterprises located in the region,
- Ensure development of indicative infrastructure investment projects, which would provide an example and encourage local industrial and commercial business entities to take a similar path.
- Ensure the modernisation process at local level by educating youth and the local community, in general,
- Provide recreational and touristic opportunities for use by the local public and guests in a region which has not any other option to evolve socially and economically,
- create an increase in per capita income of individuals among the local community, yielding more taxation revenues for the government, and
- develop an understanding and raise awareness on improving the image of the locality and environmental protection and development concerns, among the local community.





4. IMPLEMENTATION TOURISM STRATEGY OF TURKEY

4.1. Corporate Structuring and Governance

In order that the Tourism Strategy of Turkey - 2023 can be realized with all its dimensions in an integrity and can reach its objectives, it is important that public institutions and organizations, the business world and non governmental organizations as well as the whole public adopt the strategy and act harmoniously according to the common objectives.

In order that this harmony can be realized at the highest level, it is being aimed to realize an efficient, transparent and accountable process at the level of political and administrative management, decision taking, programming, resource allocation, application, coordination and supervision. By defining the authority and responsibilities of shareholders within governance principle, an environment in which with active cooperation and coordination is worked will be established.

Within this framework, for the implementation of the strategy, the institutional structuring model, the roles and responsibilities of inter and intra-organisational actors will be prepared as follows:

National Tourism Council; For the determination of policies and the process of decision taking on the highest level during the implementation of the

Tourism Strategy of Turkey - 2023, it will be the body for the supplying of data, the implementation, evaluation and orientation of policies for the Ministry of Culture and Tourism.

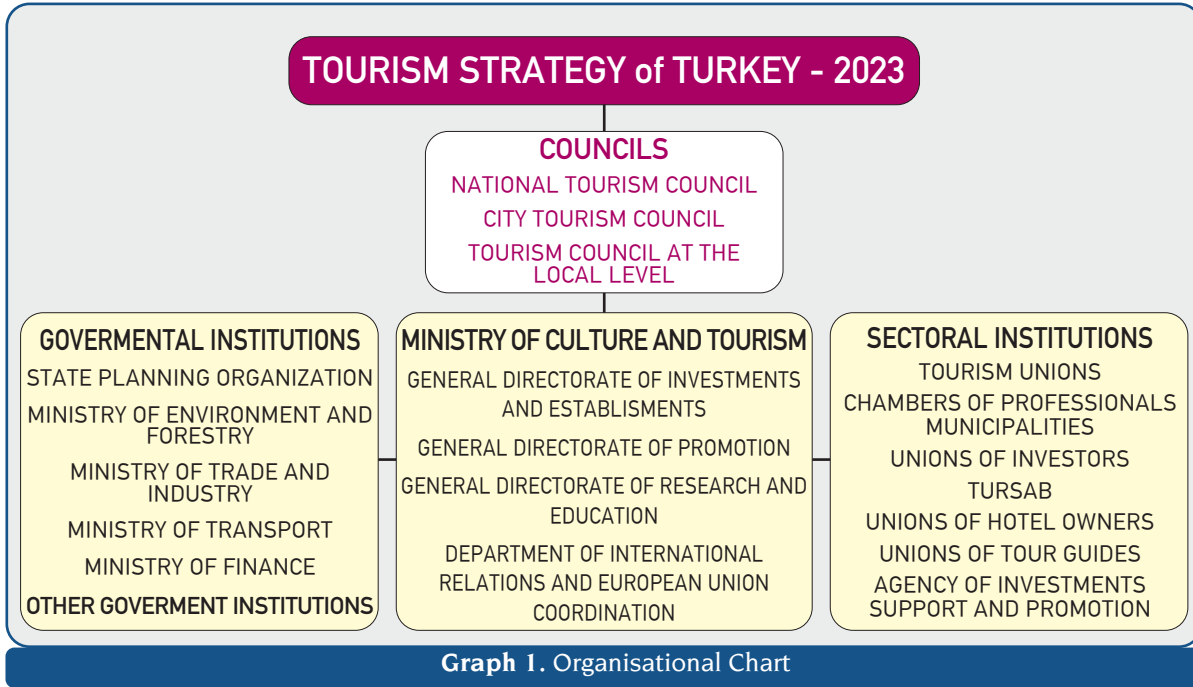
State Planning Organisation (State Planning Organisation) : shall assume full responsibility and in order to reach the objectives of the Ninth National Development Scheme as well as the ones of the Tourism Strategy of Turkey - 2023, the State Planning Organisation, being a member of the National Tourism Council, will assume an active role.

Ministry of Culture and Tourism; The Ministry of Culture and Tourism which will assume a regulatory role and also overtake respective duties in the planning, implementation, documentation and orientation of the tourism education. The Ministry of Culture and Tourism will play a role as a regulatory, supervisory and directing body. The functions to be established and enforced within the Ministry of Culture and Tourism are:

National Tourism Certification Service: This function will support the development of and specialisation in international and national standards.

Domestic Tourism Research and Steering Department; This function will do every kind of research, evaluation and policy determination works concerning domestic tourism.





Tourism Education Guidance Service; By following the changes in the tourism sector, the unit will do the necessary work for setting out the main aspects, the content and the strategy for wide - spread tourism education policies and will submit its view to the Ministry of National Education, The Higher Education Council as well as the sector establishments how the training can be updated in connection with the needs of the tourism sector and contemporary developments.

National Tourism Data Repository Service; This function will do the necessary work in order to collect, process and evaluate the statistics, field research and measurements related to tourism.

City Tourism Councils; With the participation of its members in order to represent all shareholders in the region, the Council will submit its views, demands and recommendations to the National Tourism Council concerning tourism development and will thereby contribute to its right decision - taking.





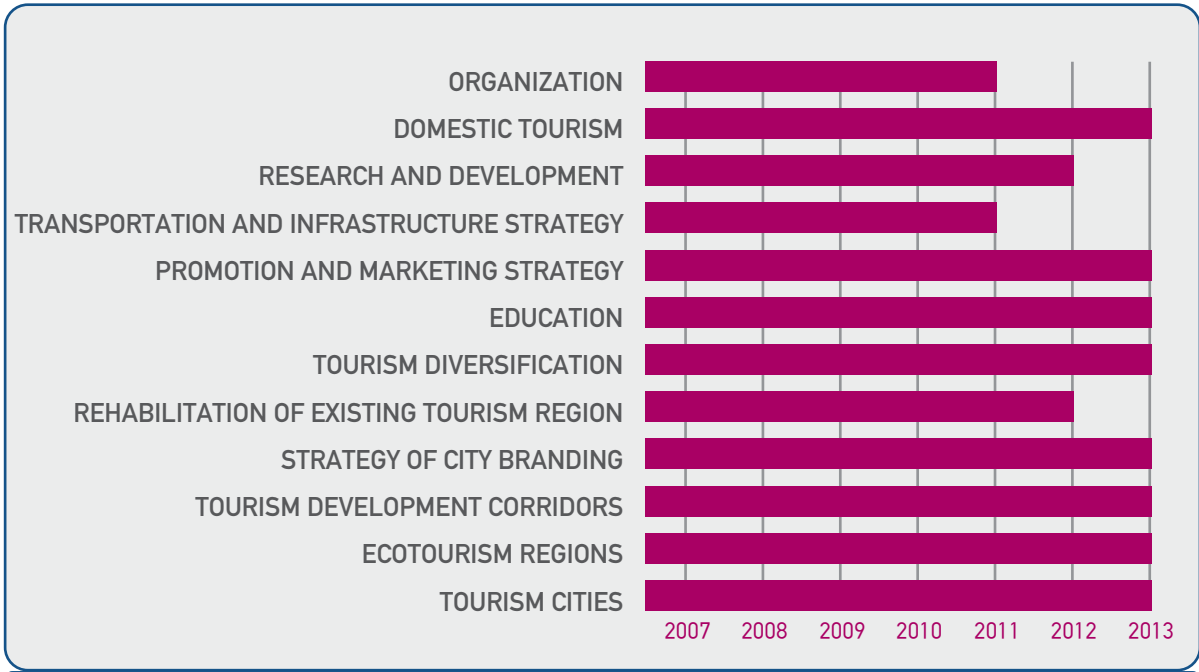
The organizational structure of the institutions and establishments which will be actively involved in the implementation of the tourism strategy document is given, below.

4.2. Action Planning

The Tourism Strategy of Turkey - 2023 has been prepared targeting the term of 2023 for completion, yet it concretises its anticipations about targets as of term 2013.

An intensive preparatory phase has to be fulfilled before the targets can be attained and best economic and social benefits retrieved in the shortest possible time.

The individual actions have been broken down on schedule, according their implementation priority and expected returns on the timeline. The prioritisation of actions took due account of tourism product diversification and countrywide tourism activity concerns.



Graph 2. Tourism Strategy of Turkey - 2023 Implementation Phase





4.3. Monitoring and Evaluation

The criteria of measurement developed for monitoring the performance of Tourism Strategy of Turkey - 2023 and how successfully the targets are attained will be among the basic tools used by enforcers and decision-makers to get involved and proceed with the transformation process. At this extent, a National Tourism Database Repository and a National Tourism Certification Service shall be formed and put in function.

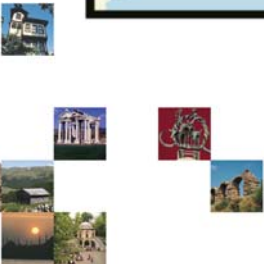
Throughout the process monitoring phase, which has critical importance for the overall success of the strategy, the outcomes of updates measured according to predefined indicators will be subject to regular comparative analyses with preset targets and objectives.

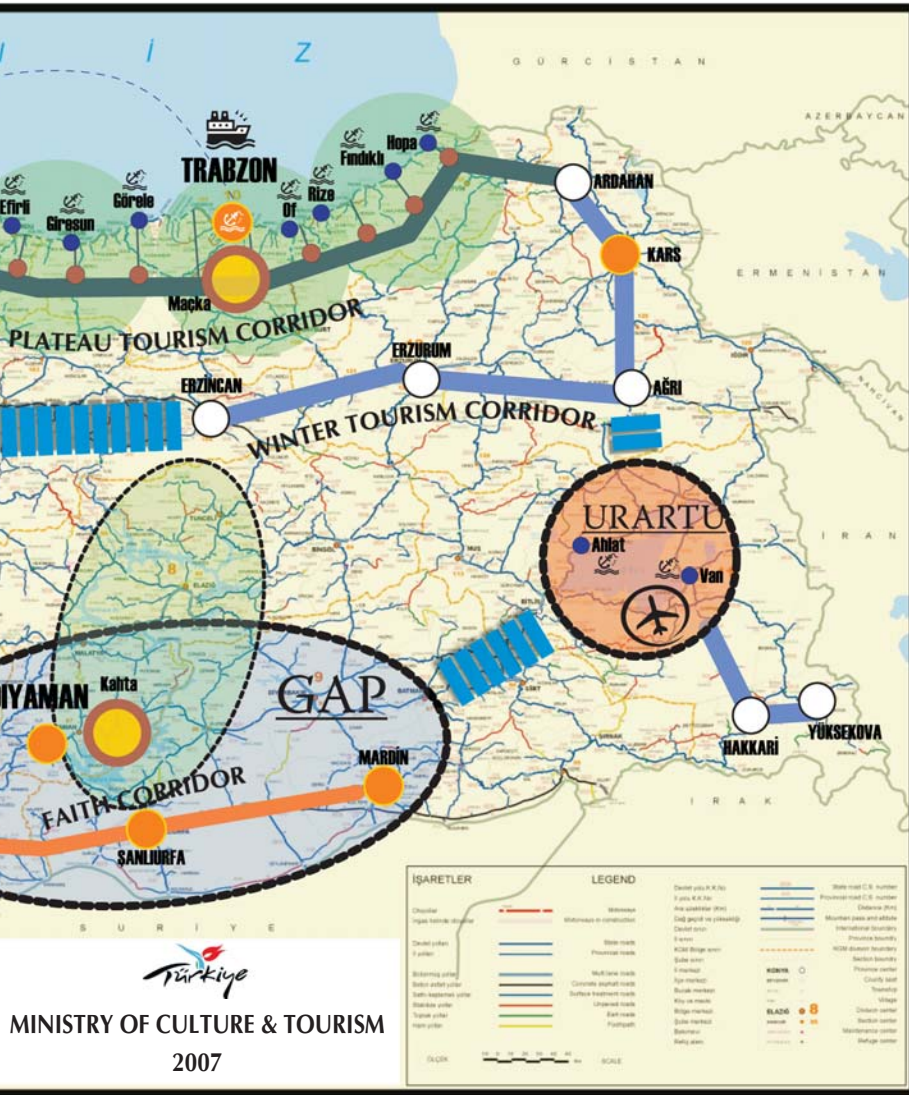
The National Tourism Database Repository Service will organise the data transmitted by various public and private sector entities and then submit its conclusions with opinions to Ministry of Culture and Tourism and National Tourism Council. Later, the service and council will get together to set measures required to be taken in line with the conclusions and opinions submitted, making necessary amendments in the strategy accordingly.





TOURISM STRATEGY of TURKEY - 2023 CONCEPTUAL ACTION PLAN





MINISTRY OF CULTURE & TOURISM
2007

LOCI OF TOURISM DEVELOPMENT

Existing Tourism Cities	Winter tourism development locus	Settlements based on Urban tourism	Thematic development zones (differs according to colors)
Suggested Tourism Towns	Settlements to develop with marinas	Settlements focused on Cultural and religious tourism	Development zones focused on Ecological Tourism
Development zone for highlands plateau			

CONNECTION TYPES DEVELOPMENT LINE

Silk Road	Eastern Mediterranean and South Eastern religious and Gourmet Tourism Line	Function and transportation Axes	Plateau tourism development line
Winter tourism Corridor	Sea transportation Connection	Southern Marmara Olive and Trace Culture Line	Western Black Sea Line

OTHER SIGNS

	Marina
Harbor	
Rehabilitation areas	



**Printed in 2023 copies.
First edition.**



MINISTRY OF CULTURE & TOURISM
THE GENERAL DIRECTORATE OF INVESTMENT & ESTABLISHMENTS

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