SME SUPPORT PROGRAMME

Project No. (SSP) MED/2005/17542

Programme funded by the European Union and implemented through the SEBC

Sector Study and Value Chain Analysis of the Tourism Sector in Syria

ToR No.: WP3/086

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November 2009

PROJECT NO. MEDA/2005/17542

EUROPEAID/122282/C/SV/SY

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The European Commission funds the SSP based on the financing agreement signed between the European Community and the Syrian Arab Republic, ref.:MED/2005/17542.

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Abbreviations

FIT – Fully Independent Traveller

HACCP - Hazard Analysis and Critical Control Points

HR – Human Resources

JTB – Jordanian Tourist Board

MAM- Municipal Administration and Modernization Project

MoT- Ministry of Tourism

NGO – Non Governmental Organization

OECD – Organization for Economic Co- Operation and Development

SME – Small and Medium Enterprises

USP – Unique Selling Proposition

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1. Executive Summary

The highly dynamic phase of tourism development in Syria may lead to quick and important changes with regard to the international image of the country and income from the tourism industry. A crucial crossroad might be reached already where swift coordinated action by the private and public sector will show whether Syria will increase competitiveness to grasp the opportunity obtaining a profitable share of international high yield quality foreign tourism, especially through sustainable developments involving SMEs, or a missed opportunity will leave this product immature and mediocre.

There is a general growth in the Syrian Tourism Industry at present, but especially the Foreign Tourism segment -focus of this report- is dominated 80% by European Travellers. The increase of 16 % in 2008 is impressive. Depending on specific nationalities increases of even 30% and more (Spain/Italy) can be found.

Although there have been important legislative and planning actions (e.g. 10th 5 year plan & other studies), institutionalization efforts with the private sector (e.g. tourism federation) as well as tourism projects with international cooperation (e.g. MAM) gaps with regard to imple-mentation of plans in the regions (e.g. at historic sites) and continuous monitoring can be found. The private – public partnerships shows much potential for optimisation. The develop-ment of the human resources and accommodation product needs strong development to match competitiveness if benchmarked with Jordan, an important neighbour for cross bor-dering foreign tourism. Investment opportunities in general are not fully exploited, especially into new and niche products e.g. in Eco Tourism and Spa & Medical (Wellness) Tourism.

While analyzing the Strength and Weaknesses of the Syrian Tourism Product, favourable authenticity of the product is found, and – as to the results of qualitative international customer´s surveying – is in general appreciated by the higher yield spender´s group of the cultural & heritage sector. Unique historic sites and accommodation (e.g. Boutique hotels) combined with internal stability, security and positive gender issues are a backbone of this part of tourism. Critical is a lack of “International Know How” combined with a missing “Code of Ethics” for enterprises with regard to tourism management. Severe gaps in sector develop-ment, the “Hotel Star Rating System” and “Food Safety” challenges are evident. Enforcement of international quality standards e.g. through quality labels especially at the beach and historic sites is yet to be matched. The threat of a turn into a negative international tourism image also through over-marketing of the destination is present.

Large opportunities for the development of the SME sector can be found by analyzing the tourism value chain. Only an estimated 25% of the international tour operation expenses of a group tourist will go to Syria and only about 6% of the total expenses of a tour will be spent for ancillary services which are beneficiary for direct approach to the population, predominantly through SMEs. More action is needed to stimulate the arrival of international FITs (Fully Independent Travellers) excellent spenders and thus contributors for the direct benefit of the gross national product.

Future sustainable tourism development requires mix of support e.g. grants and trans-regional know how dissemination combined with determined upgrading of the human resources sector. SME stimulation would help to provide adequate products to match quality tourist´s expectations also giving them opportunities to spend more on Syrian soil for services (e.g. food, hygiene) and national (quality) products (e.g. art & handicraft sector). Even modest spending increases of only 35 Euros per European Tourist yearly would mean 11, 5 Million Euros revenue for SMEs.

Recommendations with regard to increase the competitiveness of the Syrian Tourism Product are given in a “Recommendation and Implementation Matrix“ for immediate action to be taken. However, more research with regard to other inbound tourism markets and the specific potential of “Tourist – SME Clustering Potential” are strongly recommended. Thus a synergy could be obtained with the foreseen international EU support project aiming at (re-) training measures for the Syrian Tourism Industry.

2. Introduction

The assignment of a team of one international expert (25 days) and one local expert Mr Osama Al Nouri (20 days) took place with assessments and interviews throughout Syria between September and November 2009. Due to the excellent style of cooperation shown by the local expert with the public and private sector in Syria as well as to the generous help from the Jordanian tourist authorities (JTB) for the regional benchmarking, results could be obtained in a very short time frame to give a stimulating input for the further development of the future competitiveness and needs for sustainability of the tourism sector in Syria. Results have been obtained as according to the objectives of this study and should be read with regard to the need of being taken in the near future for implementation by the relevant stakeholders, donors and authorities. Furthermore in-depth studies with regard to urgently pending developments in the Syrian tourism industry are pending to make full usage of the inputs of this mission.

3. Objectives & Context of the Study

The present report demonstrates findings with regard to the potential of the tourism sector in Syria focussing on its competitiveness by benchmarking on a regional level with neighbouring Jordan.

The Tourism industry in Syria has been reviewed and a recommendation action plan matrix is provided, see chapter 7.

The objectives of the assignment have been achieved through the following activities:

- Review of relevant reports & legislations and other available data from the Syrian Government, private sector institutions and donor projects
- Research on the tourism sector in Syria including the preparation of a SWOT analysis see chapter 5
- Analysis of the tourism value chain using a specific modified evaluation device for the foreign tourist
- Interviews with relevant beneficiaries and stakeholders from the industry, e.g. Ministry of Tourism, Heads of the tourism chambers and federation, airline managers, college educational personnel, investors, entrepreneurs and employees from the tourism industry

- Evaluation of the customer needs, satisfaction and spending habits by surveying international sample traveller´s groups and FITs with a questionnaire and through a tourism online forum (Thorntree)

Based on the above a sector review is given and .recommendations and feedback from other stakeholders and beneficiaries have been assessed and taken into account for the future recommendations.

A Power Point Presentation (PPP) with findings and recommendations has been presented to interested key stakeholders at SEBC on the 29th of October 2009 and is available for further use.

4. Tourism trends and international competitiveness in Syria

Data with relevance to the assignment are shown below and put into comparison with the regional competitor of the region which is Jordan.

Travel & Tourism Indicators Syria[1].

2009-2018 % Forecast

		%	
T&T industry, 2008 estimates			
GDP (US$ millions)	2,044	6.1	5.7
Employment (1,000 jobs)	512	6.9	6.4
T&T economy, 2008 estimates			
GDP (US$ millions)	4,885	14.5	4.7
Employment (1,000 jobs)	1,130	15.2	5.6

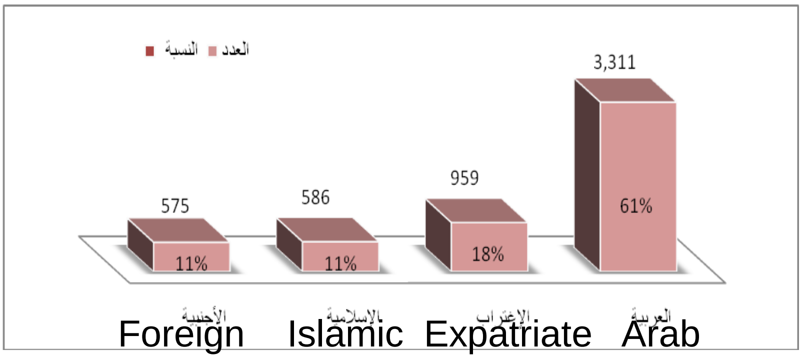
Travel & Tourism indicators Jordan

T&T industry, 2008 estimates			
GDP (US$ millions)	1,360	7.9	4.8
Employment (1,000 jobs)	134	7.6	3.3
T&T economy, 2008 estimates			
GDP (US$ millions)	3,280	19.2	4.9
Employment (1,000 jobs)	312	17.6	3.4

Analyzing those figures it is easy to see the per capita advanced income Jordan obtains from its tourism product and the potential Syria may still have to go.

[1] Source: World Travel & Tourism Council, TSA Research 2008

Review of the Tourism Market to Syria



Distribution of incoming tourists in 2008 according to the number of tourists and the percentage of each market

Source: Ministry of Tourism

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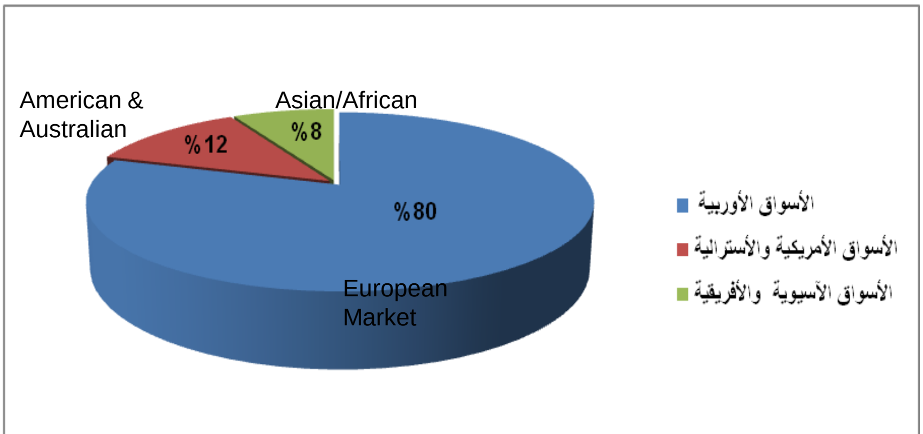
Although the Foreign Tourism Market only gets a relatively small share of the whole tourism “cake”, its potential, especially because of the ability to transcend the other markets seasons, has to be considered as very high[2].

Overview: The Foreign Tourism Market



Source: Ministry of Tourism

SME Support Programme - Tourism Sector

As the foreign Tourism Market is largely consistent of OECD countries it should be taken into account that the tourism product, quality and

[2] As this study focuses on the Foreign Tourism segment it should be stated that there is an urgent need for further specific research and analysis of the Islamic, Expatriate and Arab markets.

training as well as the marketing orientation should be orientated at such standards.

Overview of the European Market to Syria

Years Markets	2003	2004	2005	2006	2007	2008	Absolute Growth	Average annual growth rate
Russia	28,696	35,188	38,212	37,638	42,455	51,687	80%	16%
German	25,036	34,878	38,408	34,973	33,772	51,251	105%	21%
France	26,910	33,599	31,191	25,257	26,817	37,662	40%	8%
Italy	8,859	11,729	13,898	10,431	13,812	24,871	181%	36%
U.K	16,908	19,902	20,508	18,495	20,069	27,916	65%	13%
Spain	6,890	11,329	15,744	9,732	15,332	18,625	170%	34%
Sweden	12,950	19,069	16,548	15,570	14,280	21,807	68%	14%
Other Europeans	54,651	77,964	83,367	68,879	70,583	96,126	76%	15%
Total	180,900	243,658	257,875	220,975	237,121	329,945	82%	16%

SME Support Programme - Tourism Sector

Source: Ministry of Tourism

Impressive here are the specific data and increases for Syria from different countries providing high yield tourism – e.g. Germany, Spain, Italy - this template is of essential use when making further prognostics with regard to the extension of the value chain – especially with regard to the ancillary services, see chapter 6.

Travel & Tourism Competitiveness Index Syria[3]

Looking at the international performance of Syria with regard to its ranking in the competitiveness index it is obvious that a huge space for positive improvements is available. The published results are also backed up by the survey results interviewing foreign tourists of different nationalities for this study.

Rank out of 133 countries - Topic	**Syria World Rank No.**	**Jordan World Rank No.**	**Syria Score (maximum 7)**	**Jordan Score (maximum 7)**
2009 Index	**85**	*54*	**3.7**	*4,2*
2008 Index	**94**	*53*	**3.6**	*4,2*
T&T regulatory framework	**68**	*36*	**4.5**	*5.2*
Policy rules and regulations	**93**	*61*	**4.0**	*4.5*
Environmental sustainability	**111**	*35*	**4.0**	*4.9*
Safety and security	**23**	*17*	**6.0**	*6.1*
Health and hygiene	**89**	*58*	**4.0**	*4.9*
Prioritization of Travel & Tourism	**58**	*24*	**4.5**	*5.3*
T&T business environment and infrastructure	**82**	*67*	**3.2**	*n.a.*
Air transport infrastructure	**98**	*63*	**2.5**	*3,2*
Ground transport infrastructure	**63**	*69*	**3.6**	*3,5*
Tourism infrastructure	**97**	*65*	**1,9**	*3,4*
ICT infrastructure	**94**	*70*	**2.2**	*2,8*
Price competitiveness in the T&T industry	**5**	*42*	**5,8**	*5,0*
T&T human, cultural, and natural resources	**100**	*54*	**3.5**	*4,1*
Human resources	**93**	*59*	**4.8**	*5,1*
Education and training	**89**	*44*	**4.3**	*5,0*
Availability of qualified labour	**90**	*92*	**5.3**	*5,2*
Affinity for Travel & Tourism	**32**	*6*	**5.2**	*6,4*
Natural resources	**128**	*87*	**2.1**	*2,8*
Cultural resources	**78**	*87*	**2.0**	*1,8*

[3] Source: World Travel & Tourism Council, TSA Research 2008

Some more figures from the Competitiveness Report worth mentioning are from the different pillars of the study:[4]

Prioritization of Travel & Tourism **Rank No.**

- Government prioritization of the T&T industry.............56.....■
- Available seat kilometres, domestic............................64.....■
- Available seat kilometres, international. ....76.....■
- Departures per 1,000 populations...............................95.....■
- Airport density. ....113 ...■
- Number of operating airlines..................................... 51.....■
- International air transport network ....100....■

Ground transport infrastructure **Rank No.**

- Quality of roads ....65.....■
- Quality of railroad infrastructure...................................49.....■
- Quality of port infrastructure ....97.....■
- Quality of ground transport network.............................28.....■
- Road density...50.....■

The following table represents the output reached by the consultants while thoroughly benchmarking the foreign markets to Jordan and Syria. These factors have been assessed and reflect the main assets as well as the deficiencies with regard to the benchmarked neighbour.

Benchmarking & Competitiveness Orientation on Differences

Product	Syria	Jordan
Accommodation	+ Boutique Hotels - Booking & Reservation - Star Grading System (non OECD) + Service Mentality	+ Hotel Standards (OECD) - Lack of „charme" character - Service mentality
Access to the country	- Airline frequency & quality + Visa & Immigration Group - Visa FIT	+ Airline frequency & quality
Food & Beverage	- Food Safety	+ Food Safety
Medical (Wellness) Tourism	N Hardly existent	+ Strong Developments
Human Resources	- International Quality Tourism Education + Service Mentality	N International Tourism - Education - Service Mentality
Infrastructure Sites & Attractions	- Hygienic Factors - Toilets - Safety & Signs - TICS & Visitor Centres	N Hygienic factors + TICS & Visitor Centres

N = Neutral; + Positive; - Negative

[4] Source: The Travel & Tourism Competitiveness Report 2009 © 2009 World Economic Forum

5. SWOT of the Syrian tourism product

The report follows here the presentation for the stakeholders explaining the bullets with regard to the “Strengths” and the “Threats” more explicitly whereas Weaknesses and Opportunities are dealt further with an extra template together with recommendations, see chapter 7, which makes it more reader-and implementation friendly for the different sectors and segments.

5.1. SWOT Analysis Tourism Sector Strength

- **Authenticity of the product & hospitality**
- **Religious & cultural heritage sites**
- **Internal stability, security & safety – gender issues**

Syria is in a still excellent position with regard to it tourism – raw – product as it is getting at present an increasing number from the culture and heritage travellers. The survey showed a basic satisfaction and even enthusiasm with regard to “unspoiled” cultural products but it has to be remembered here, that this group of “tolerant” travellers who make a higher valuation with regard to the experience than the comfort will soon fade away and especially with the increased marketing of Syria more demanding and critical travellers will arrive. Then Syria will have to defend its position in the culture and heritage travel market by showing strong commitment to the development of holistic quality in tourism.
On the positive side it is to mention that especially single travelling women feel comfortable which is a huge advantage with regard to other countries in the region where continuous hassling has brought a negative imaging already.

Travellers feel safe – see also the good rank in the competitiveness report – and there is also a positive feeling at occasional check points by the authorities in the country.
Nevertheless it should be stated that civilian clothed people – especially in Damascus – carrying automatic weapons may leave uneasy feelings to tourists, so it might be considered to have gun carrying people wearing uniforms.

- **Geographic proximity to Europe**

Although here put as a strength, Syria does not make the best out of it due to the severe problems the national carrier Syrian Arab Airlines is in. So it will have to be watched to what extent the situation of accessibility will improve with regard to the e.g. frequency and upgrading of international and possibly low cost air carriers.

- **Diverse natural scenery**
  Although this can be stated in general as positive and would allow developing the segment of eco – tourism as a niche segment, it has to be taken into account that negative ranking of Syria with regard to environmental issues shows that there is a long way to go still.

- **Handicrafts & arts**
  There is a diverse handicraft production with regard to textiles, soap, wooden and glass items, etc. which are not really brought into the value chain. Here a Tourism SME orientated study should be undertaken to see how the combination of different support involving production – product development – HR training and marketing strategies could be taken at its best. The revision and full implementation of the country's´ strategy for the development of handicrafts prepared by the Ministry of Tourism should be taken for implementation at its earliest convenience[5].

- **Positive service mentality, price regulations**
  In general it is a positive sign, that due to governmental rules a pricelist in English and Arabic should be available in any food & beverage outlet – however in practice there is still the need at a lot of restaurants to print the menus as well as the receipts also in English language and numbering.

- **Quality of the transportation (Group/FIT)**
  The fleet of Buses for foreign tourists in service appears in a very good shape and due to the strictly enforced traffic laws it seems speeding is no problem. However from the legislative frame standpoint it seems that the tourism transportation businesses are defragmented with no clear one reference in this subsector. This group also would merit a closer look how to optimize.

- **Unique accommodation possibilities (e.g. Boutique Hotels)**
  A real USP (Unique Selling Proposition) for the foreign tourists is the uniqueness of accommodation possible especially if heritage hotels at excellent locations. However, at the regular hotel level, it has to be stated the gross main product consists still out of hotels which are not matching OECD orientated star classification systems. There is a need especially in the 3 and 4 star sectors for updating and reinvestment. It would be recommendable to orientate on the leading successful examples in the market, e.g. Hotel Talisman, Hotel Martini, Hotel Four Seasons and not

[5] According to the information obtained from the MoT a strategy for the handicraft sector has been started. The relevant document is the "Ministry of Tourism Strategy to encourage and develop handicrafts in Syria – 2007/2008". However no concrete outcome or results can be assessed at present.

follow other hotels, especially in the 4 Star segments which are not up to date with their service approach and already may have the tendency to overprize their products.

- **Richness of the Syrian cuisine**
- Syrian cuisine for sure is strength but presently it comes with a "but". Besides some excellent restaurants which even serve with a show kitchen effect (Naranj in Damascus) the larger group consists of restaurants where the tastiness may not be matching the adequate food safety required and also asked for in the survey comments by the tourists.

- **Small and medium enterprises market for tourism technical products**
  Results of a visit to the .ATB –tourist fair in Damascus: there is a small but obviously growing market for modern Syrian tourism industry supplier products. Although part of it is distribution of products only, there also can be found numerous items, "made in Syria", e.g. for the hotel industry, e.g. napkins, towels, furniture which can be expected to be growing further and would be interesting to be included in a sector tourism cluster study

5.2. SWOT Analysis Tourism Sector Weaknesses

The list of weaknesses unfortunately is relatively long and demonstrates that Syria still is in a transition phase to reach the map of international quality tourism. This is also reflected with regard to the low ranking in general – especially when benchmarked with Jordan - which already has developed, also due to the strong inputs of international aid from the SIYAHA and Aqaba tourism support projects.

- **Lack of exposure of the industry to „International Know How" & „Best Practices"**
- **Quality of the tourism product – hotel star system**
- **Ethical issues (in the industry & at large)**
  Using the method of participating observation in hotels and restaurants (especially in three and four stars) it becomes evident that the employees need retraining to international standards. Examples of non adequate behaviour with the tourist due to the lack of instruction and missing language knowledge are numerous whether it is the organization of the room cleaning, service aspects in timely and organized preparation of bills or adequate reception.

- **Country infrastructure (airports, roads, railway etc.)**
  Although the road net in Syria appears sufficient to reach touristic sites, the signing system for the FIT tourist is insufficient. Sites cannot easily be reached even if the signing is in place, e.g. Aleppo signage – it is inconsistent and lacks a final logic.

- **Tourism infrastructure (hotels, restaurants, guides etc.)**
- **Delay of investment projects – quality of construction safety**
- **Administrative and legal constraints for operators and investors (complicated procedures, taxation etc.)**
- **Carrying capacity & seasonality - booking situation of accommodation**
  Obviously there is more demand of – qualitative – rooms in hotels that the industry - especially in seasons where the Arab tourism also takes its share – cannot fulfil. Overbooking and re-shuffling of tourist seems to become more the rule than the exception and is a critical weakness which may harm the image of the tourist destination Syria on the short term. Already signs in the cross country marketing with Jordan show that the preference of Jordanian tour operators is shifting towards other countries than Syria as to the impossibility to receive prices and confirmed bookings from Syrian hotels in time.

  Investors building up new rooms claim to face a lot of delaying bureaucratic obstacles and the – practical – investment climate does not appear very tempting as anecdotic evidence from constructors has shown.
  Severe construction deficiencies can be found even in newly erected hotels when it comes to safety and security issues with regard to fire exits or exit ways in case of earthquakes and other natural hazards.

  Restaurants are plentiful, the cuisine is rich but – especially for the not guided tourist = the FIT – it is hard to be sure whether to find a (food) safe place. Anecdotal reporting by expatriates living in Syria as well as from comments of the survey it is evident that food safety is not working at its best. Sample inspections during the assignment show that HACCP elements are not strictly been followed and antiquated elements (e.g. the wooden cutting block) are even still used in the tourism food education system at a leading college.

- **Institutional frame (Ministry of Tourism + Federation + Tourism Chambers + Private Sector)**
- **Implementation of new laws & decisions**
- **Finish & monitor of existent international projects, e.g. MAM – project**

Although laws and institutions are in place and there is cooperation between the private and public sector, it does not seem to match to its full extent the urgently needed implementation issues. Numerous new or old projects with international donors have been mounted but it seems doubtful whether they are monitored and followed up as necessary. Developed systems and signs do not appear to be consequently monitored and maintained by the local counterparts.

- **Undervalued role of specialized NGO's**
- **Lack of environmental friendly practices**
  As the role of NGOs is relatively new in the country it will be a matter of time and benevolent fostering by the state authorities to let them play there deserved role with regard to tourism issues, especially including the environmental and ecological sector.
  Environmental friendly practices are obviously not in place on a large scale be it in the hotel industry (cleaning liquids, waste management) or on the beaches with their severe pollution problems.

- **Human resources & training – college education**
- It is evident that the present educational system is in need of re-reviewing and should gear towards more internationalisation. Standards at present are not clearly matching the expectations of the foreign tourists. HR Training and retraining appears especially weak also due to the lack of language training.

- **Underdeveloped status of archaeological sites – master plans, site management, cleanliness, hygiene, safety**
  Archaeological sites, although providing an excellent tourist experience factor, are not in an adequate shape if OECD orientated standards would apply. The obviously existing (master) plans for the sites are not enforced when it comes to the in parts desperate shape of hygiene and sanitary facilities and a clear site management.

- **Tourism product (diversity & low tourist expenditure etc.)**
- As further demonstrated with the tourism value chain analysis, the tourism product is not fully and consequently developed, also the participation of SMEs in the different sectors and the tourist expenditure is relatively low due to the shortage of relevant product to spend money on.

- **Accessibility (flights & ferries)**
  Especially the turbulences with regard to the problems Syrian Arab Airlines is facing are harming not only the image of the country but also prevent tourists from arriving to Syria in time. Beneficiary of such

developments are neighbouring countries including Jordan which will have the privilege then to be the point of entry and departure.

5.3. SWOT Analysis Tourism Sector Opportunities

Following the logic of the SWOT – the opportunities are plentiful and are here presented as bullets. Specific comments are made with regard to the ***SME chances*** of development – for detailed implementation and recommendations see chapter 7

- **Create an implementation mechanism for existing studies & plans**
  SMEs may benefit here especially in the sectors arts & crafts, small food outlets – especially at archaeological sites, accommodation guest houses – this topic is depending on sector and regional cluster studies which should be undertaken at earliest convenience.

- **Strengthen true Public Private Partnership**

- **Strengthen cultural heritage conservation efforts following best case international examples**

- **Develop environmental protection schemes in the industry (Blue Flag, Green Key)**
  SMEs may benefit here with regard to "Blue Flag Beaches" especially when it come to an active operating of hygiene outlets, e.g. toilets, changing rooms, etc. and food & beverage provisions integrated into the clearly structured framework of an environmental friendly Blue flag small marina or beach.

- **Develop integrative approaches for the benefitting of communities located at tourist sites**
  SMEs would be able to play a leading role in the niches when it comes to catering, food provision, arts & crafts as well as local specialized tour guiding, hiking, bicycling, eco tourism activities etc.

- **Encourage new investments into quality & stylish accommodations**
  SMEs could take their opportunity with regard to small scale accommodation enterprises 1 – 2 star and guest houses or hostels – supported by clear structured business ideas and business planning.

- **Encourage new investment into rest stops, thematic food & beverage outlets, „Hammams – wellness concepts"**
  SMEs would have an excellent opportunity to extend the tourism value chain by developing their businesses taking into account the "hot springs

– thermal bathes", take the opportunities with regard to overland rest stations (Café Bagdad example.

- **Invest in upgrading the human resources as a holistic topic for all segments**

- **Research and development plus adequate analyzing of tourism studies & statistics**

- **Change in the ethics**

- **Strengthen the FIT segment**
  SMEs may play a pivotal role when it comes to the future strengthening of the FIT segment of foreign travellers – here – depending on urgently to be commissioned regional tourism cluster studies taking into account the national tourism value chain model –SMEs may take a leading role with regard to the 1-3 star accommodation, guest houses, pensions, food & beverage outlets as well as to promising niche products as Arabic language schools, spa & wellness related activities, etc.

SWOT Analysis Tourism Sector Threats

Threats as listed below in Syria unfortunately are already on the way to become reality and therefore could also be seen as weaknesses which need urgent dedication to from the public and the private sector.

- **Political unrest and instability in the region**
  From a tourism point of view this threat is always there and cannot be prevented by measures from the tourism industry.

- **Imbalanced „Value for Money" formula**
  This could result due to a lack of ethics or what also could be considered as entrepreneurial greediness – an interesting indicator is always a glass of fresh orange juice which has a huge span of prices already, starting from 50 SYP at street outlets to an international adequate 248. - SYP at the Hotel Four Seasons to an overprized 367 SYP at the Hotel Chams Palace (not even being fresh!). Another example is the "espresso" served near touristic spots which also may reach already more than 300 SYP (3 times the price than in similar touristic locations e.g. in Portugal) which means there are the first signs of tourism nabbed overprizing in sight!

- **Change of ethics towards tourists by the population**
- One of the worst examples in the region would be Luxor/Egypt which became a big hassle place for the tourist; locals seeing them only as an

economic prey to fall upon with cheap and lack of quality items. If too many tourists outnumber the locals and drive the prices too steep up, very adverse effects through tourism may arrive.

- **Loss of biological diversity & pollution**
  Here certain areas, e.g. beaches near Lattakia which should be protected breeding grounds e.g. for sea turtles are close to the point of no - return when it comes to illegal sand removal (for the construction industry) or the tremendous littering

- **Loss of intangible heritage – e.g. dances, Bedouin folklore**
- Although folklore and entertainment play an important role in the tourism industry the threat appears very real that intangible heritage could be misused, e.g. through mere group and dinner folklore to make superficial and exaggerated entertainment and animation which is not what the cultural interested traveller is looking for. Negative examples of the region could be remembered from Egypt and Jordan.

- **Handicrafts – decay of know how – cheap imports**
- The handicraft industry is existent and partly able to develop highly interesting products capable to extend the tourism value chain – but it seems, especially for the group tourist those products are not really accessible, (complaints in the survey) due to specific focus and business practices of the guides and the sale of cheap (foreign Egyptian, Chinese, Indian) low quality items.

- **Absence of international high quality tour operators**
- If the investor´s climate will not become more favourable (law of tourism companies No. 2 of 2009) and the “code of ethics” will not improve those operators might not come although being an essential important indicator for the settlements of quality tourism in a country.

- **Withdrawal of investments and discouragement of future investors**
  As already mentioned under “weaknesses” here the threat is high that interested foreign and local investors alike will lose their interest and move with investment intentions e.g. to neighbouring countries e.g. Jordan where bureaucratic obstacles can be more easily overcome.

- **Over marketing efforts of the destination (seasonality)**
- **Overpromising through web media and marketing materials**
- Utmost care should be taken with regard to the tourism marketing efforts to find a balance between seasonality of the different tourism segments, Arab and Foreign Tourism as there is a shortage of essential services not only in peak seasons already and especially the overbooking

situations in the flight and accommodation industry may lead to a degrading image of the destination. This may be worsened even more if the overpromising on web pages and with regard to brochures carries on. Event marketing should consider the seasonality and make use of an well in advanced published - cultural event calendar which is rightly distributing such specific festivities throughout the year.

6. Tourism Value Chain Analysis[6]

Tourist experience consists of a series of individual experiences provided by multiple different entities from air carriers and hotels to restaurants and tour operators. Failure to provide a good experience at any point may undermine the entire experience and accordingly destroy the competitiveness of the destination. A country's competitiveness in the provision of tourism services is, therefore, complex and requires the harmonization of a diverse set of inter-dependent industries and the public sector. With regard to the tourism value chain also the interdependence of the tourism service should be observed.

Understanding the nature of constraints confronting the tourism industry itself, therefore, requires assessment of the role of each value chain component in the overall tourism experience, the linkages to other agents, and the performance of the service providers, industries and institutions.

The value chain framework – here given for Syria - is based on 2 concrete itineraries, one for Syria, one for Jordan, that are time, place, and price-specific. The tourism value chain – the itinerary - is mapped by way of economic organization, industrial and location specificity within the parameter of total trip expenditure. It is studied further to identify how value is appropriated among the various service providers and suppliers in the industry. To assess the performance of operators within each segment a number of metrics and indicators are compiled and consolidated with insights on the factors affecting Syria´s competitiveness. The approach emphasizes the supply-side aspects of the tourism experience and also enables the identification of industry-specific constraints, constraints driven by the economic organization and the location specific factors that curb the growth of the tourism sector. The framework helps set priorities for targeted intervention not only at a very industry and location specific level but also more broadly in terms of country-wide policies.

This value chain sample further has been benchmarked with the important cross tourism neighbour Jordan to show factors of matching and missing compatibility.

[6] Ideologically the fundamental approaches by Taylor 1996 & Braithwaite 1992 and other tourism value chain studies are followed, but here a specifically adapted version for the Syrian tourism value chain has been given by the consultants.

The analysed sample tours have been taken from one of the best German cultural and heritage operators for the proposition of 2009.

The Value Chain

The Foreign Tourist - the Tourist Expenditure on Travel Experience

Foreign Group Tourist in Syria

Example: Costs German Tour Operator Package, 15 pax = 2.190 EUR per Person (100%)

€ 4	€ 370 + € 546 = € 916	€ 60	€ 610	€ 30	€ 170	€ 400	€ 131 estimate
0.18%	41.82%	2.74%	27.85%	1.37%	7.76%	18.27%	5,98 % estimate
Fees/Taxes	Commissions, Profit	Commissions					Out of pocket expenses
Frontier Services	Foreign Intermediaries	Domestic Intermediaries	International Air Transport Including taxes Premium Carrier	Sites	Ground Logistics	Accom-modation Half Board	Ancillary Service Providers • Food, & Beverage € 70 • Souvenirs € 31 • Tips € 30

Published Price of travel Package low season :

2 nights Damscus , 1 night Crac de Chevalier, 2 nights Aleppo, 2 nights Palmyra

Extension of the Value Chain

SME Support Programme - Tourism Sector

What is striking with regard to the extension possibility of the Syrian Value Chain is the relatively low expenditure behaviour of the group tourist which can be interpreted as simply the non – availability of tourism product more to spend upon. Even higher demand would here to be seen with regard to the FITs. Here clear evidence is shown that a consequent fostering of SMEs to extend the tourism value chain bears clear chances of increased income.

Future sustainable tourism development requires mix of support e.g. grants and trans-regional know how dissemination combined with determined upgrading of the human resources sector. SME stimulation would help to provide adequate products to match quality tourist´s expectations also giving them opportunities to spend more on Syrian soil for services (e.g. food, hygiene) and national (quality) products (e.g. art & handicraft sector). Even modest spending increases of only 35 Euros per European Tourist yearly would mean 11, 5 Million Euros revenue for SMEs based only on 2008 figures see data in tabloid page No. 8.

Recommendations with regard to increase the competitiveness of the Syrian Tourism Product are given in a “Recommendation and Implementation Matrix“ for immediate action to be taken. However, more research with regard to inbound tourism markets and the specific potential of “Tourist – SME Clustering Potential” are strongly recommended. Here the above demonstrated analyzing instrument could be used to assess also the different geographical regions of Syria.

The Value Chain

The Foreign Tourist - the Tourist Expenditure on Travel Experience

Foreign Group Tourist in Jordan

Example: Costs German Tour Operator Package, 15 pax = 2.040 EUR per Person (100%)

€ 15 0,7 %	€ 369 + € 407 = € 776 38 %	€ 65.- 3,1 %	€ 565.- 27,69%	€ 53.- 2,5 %	€ 153.- 7,5 %	€ 413.- 20,51 %	€ 183 estimate 9 % estimate
Fees/Taxes	Commissions, Profit	Commissions					Out of pocket expenses
Frontier Services	Foreign Intermediaries	Domestic Intermediaries	International Air Transport Including taxes Premium Carrier	Sites	Ground Logistics	Accom-modation Half Board	Ancillary Service Providers • Food, & Beverage € 125 • Souvenirs € 28 • Tips € 30

Published Price of travel Package low season :

3 nights Amman , 1 night Dead Sea, 3 nights Petra

Extension of the Value Chain

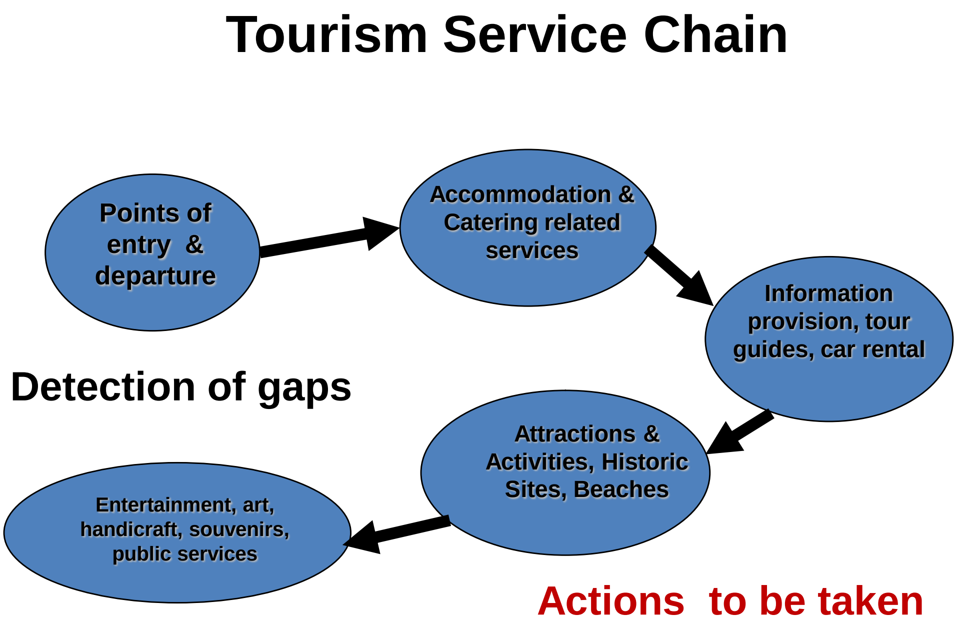
SME Support Programme - Tourism Sector

The strength in the Jordanian tourism value chain – if benchmarking it with Syria – can be seen especially in the value and the quality of the accommodation package which is better and may lead tourists to questioning the strength of this product on a larger scale when arriving to Syria on a cross bordering travel.

7. Policy Recommendations & Implementation matrix

7.1 The Tourism Service Chain

Following the logic of the tourism value chain it is essential to take the tourism service chain also into account, especially if Syria considers its way to become a quality destination for the cultural and heritage traveller's segment of the foreign tourists. As service is strongly linked to training, the importance shall be stressed here once more how important a thorough tourism training strategy for the country will be taking into account all training needs of the service chain by making prognosis also with regard to the volume and time scale of the next years to come in relation to the further tourism development by numbers.



7.2. Corner Stone Recommendations

- **Human Resources Improvements**

  Training & retraining – train of trainer importance

  Comprehensive Master Plan – Tourism Training Strategy needed – see the current EU Project Formulation Mission on Training[7]

- **Investment & Finance**
- **New tourism establishments to be built**
- **Investing into upgrading of present establishments**
- **Fostering SMEs to do new food outlets & overland facilities, - especially sanitary**
- **Abolish bureaucratic obstacles**
- **Stimulate niche product developments e.g. Medical (Wellness) Tourism**
- **Tourism Quality Enhancements**
- **Revising the “Star Category System” to OECD oriented standards**
- **“Food Safety Standards” to be implemented and monitored**
- **Complaints Management System to be developed**
- **Marketing & Promotion**
- **Revision to bring into matching shape with the actual supply possibilities**
- **Entrepreneurial Code of Ethics**
- **Miscellaneous**
- **Develop small scale financing and technical support for SMEs in handicrafts and other ancillary services including as well support to cultural events, thematic restaurants, sanitary outlets**

[7] A mission dealing with such issue in the future should take into account also the measures foreseen by the MoT with regard to their announced “Quality Year for Tourism 2010” also known by the present name “IKRAM”. From the information obtained there will be a tender document obtainable to be bought at the legal department of the MoT.

- **FIT – Attract the upper market segments through countrywide infrastructure upgrades – e.g. signs, visa & immigration issues**

- **Undertake social carrying capacity studies with regard to any new tourist developments**

- **Organize a countrywide „Tourism Round Table“ - Presentation to introduce the contents of this report to the Syrian tourism industry and stakeholders**

- **Order further specific research and analysis of the Islamic, Expatriate and Arab tourism markets**

- **Ministry of Tourism/Directorate of Antiquities & Museums - to apply for an international support long term expert, e.g. by the German CIM/GTZ program for the long term implementation at sites**

- ***The follow up in the near future by the SEBC project, e.g. tender out a sector – regional tourism SME product cluster study***

  To make a logical follow up of this study it is strongly recommended to undertake a sector – geographic SME tourism cluster study to demonstrate the regional variety and possibility concretely based on a local value chain analysis using the demonstrated instrument in a varied format. This study could better show in detail where niches for SME fostering do exist and which potential is available and how the bet interlinking into public – private sector cooperation could be achieved. The study should be performed by a team of an international and local tourism expert and is recommended to orientate on the Tourism World Heritage Site regions:

  Palmyra, Damascus, Bosra, Crac de Chevalier & Saladin, Aleppo and also take additionally the Euphrates region into account. The size of this work, suggested 2 x 35 days for 2 experts may show the micro regional potential and needs of SMEs with regard to the foreign tourism value chain, thus helping future support programs to effectively plan and implement their measures.

7.3. Recommendation & Implementation Matrix

Sector Institution Venue Site Enterprise	Matter Challenge Gap	Recommendation Solution Possibilities	Short Term	Mid Term	Long Term	Public Sector	Private Sector
Accommodation ***PRIORITY***	***- Star ranking of hotels clearly not matching –*** ***- Overpromising on websites and with texts*** ***Lack of management know how (reservation systems)***	***Review the certification system based on OECD orientation taking HR issues into account*** ***Implement a own quality label with international help also for 3 star and below hotels & guesthouses*** ***Implement environmental friendly international labels, e.g. Green Key***	X	X	X	X	X
Airport (s)	***Damascus:***						
	Sanitary services immigration hall	***Upgrading immediately***	X			X	
	Immigration Procedures	***More officers, customer friendliness training; More assistance upon arrival***	X			X	
	Goods for purchase	***Extend value chain trough better offers, selection of goods, f & b locations***		X	X		X

	Luggage trolley system non tourism friendly (exchange depending)	***Provide free luggage trolleys***	**X**		**X**		
	Airports without scheduled flight access : Palmyra, Der Eizzor	***Open other airports for scheduled flights***		**X**		**X**	
Entrepreneurs/ SME-Entrepreneurs	**Lack of international know how**	**Familiarization and Training needed**	**X**	**X**		**X**	**X**
Food & Beverage ***PRIORITY***	***Food Safety*** ***In general***	***Run a food safety campaign as soon as possible plus establish an international renowned food safety monitoring scheme***	***X***			***X***	***X***
		Train and retrain the personnel from the industry		***X***		***X***	***X***
	Import of products	***Ease restrictions for the tourism industry***	***X***			***X***	
Human Resources ***PRIORITY***	***Educational Standards – Hard & Software***	***Stimulate International Joint Ventures***	***X***	***X***	***X***	***X***	***X***
	Lack of international „know how“	***Training & Retraining (EU support programs)***					

	Lack of qualified personnel for the industry *Lack of qualified Tour Guides, dual guiding certification scheme* *Number & Quality of the personnel (education and languages)*	***PRIORITY*** ***Public awareness campaign to recruit more employees from the (rural) population Further privatization of the VTC – Industry*** ***Tourism Training Strategy needed (e.g. within the EU support program) PRIORITY*** ***Give access/grants to ad for a specific service language training program in different languages***					
Immigration ***PRIORITY***	***Visa issues for FITs*** ***Groups: Non distributed immigration cards, delays, no clear queuing system, friendliness of the immigration officers varies, no assistance upon arrival,***	***Ease restrictions & Costs*** ***Clear Signing,*** ***Staff more counters,*** ***Make information booth***	***X***			***X***	
Investments & Finances ***PRIORITY***	***Delay with regard of building & other permissions***	***Establish a "one stop one shop policy" see the example ASEZA – Aqaba/Jordan***	***X***			***X***	

	Bureaucratic obstacles	***Establish an incentive program to encourage investments into Niche Products e.g. SMEs for eco-tourism, medical spa & wellness tourism***					
Medical (Wellness) Tourism	***Knowledge, quality,*** ***Certification standards*** ***Lack of Strategy***	***Order a sector strategy for Syria and the sector focussing on spa & wellness tourism PRIORITY***	***X***			***X***	
		Order a sector study for the potential in the sector of (surgical) medical tourism		***X***		***X***	
		JCI certification to be obtained by existing hospitals		***X***		***X***	***X***
Restaurants F&B ***PRIORITY***	***Food Safety in General***	***Education – retraining*** ***PRIORITY*** ***Quality Label Program*** ***PRIORITY*** ***HACCP Standards observation*** ***PRIORITY***	***X***			***X***	***X***
Sites (Historic and	**Cleanness**	**Implement laws & agreements**	**X**			**X**	**X**

Archaeological) **PRIORITY**	**Safety** **Support** **Services**	**Stimulate on site food & beverage developments for SMEs** **Security of the walks** **Urban planning should be taken into consideration around touristic sites** **Toilets – Provision with SME support** **Coordination and implementation of any site development plans with regard of the list of 20 sites making use of SME initiatives** **Training and Re- Training of the personnel**					
Roads **Road & Rest-stops Intercity**	**Signs erratic, road damages not signed out, not consistent and missing, difficulties for FIT travellers**	**Modernisation of the signs system,** **Training for the traffic police**		**X**		**X**	
Star Rating System – Hotels **PRIORITY**	**Not matching most of the OECD customer´s expectations** **Gaps with regard to quality with similar**	**Order an overhaul and restructuring of the whole system**	**X**			**X**	

	hotels in Jordan (HR + Physical shape						
Syrian Arab Airlines **PRIORITY**	**State of the Aircrafts, cleanliness, technical delays, too less frequency, spontaneous rerouting, unclear compensation scheme, code share problems, delays, communication problems with the customer**	**Overhaul of the fleet, reorganisation of the company,** **revise code share agreements,** **step up frequency,** **establish a real business class**	**X**			**X**	
Tourism Studies PRIORITY	**Lack of Specific Tourism SME Sector Studies** **Tourism Cluster Product Potential Study** **PRIORITY** **Tourism Services Industry** **Tourism Training Strategy** **PRIORITY** **Tourism Study for tourism inbound markets** **Support Study for Tourism SMEs –**	**Review of the star rating system through independent international experts taking into account soft skills HR – factors as well as reinvestment need with regard to the hard ware** **Consider the specific needs of the boutique hotel sector**	**X**			**X**	**X**

	extension Value chain **PRIORITY**						
Intangible Heritage **PRIORITY**	**Loss of traditional folklore** **Commerciali-sation**	**Establish a whirling Dervish centre in Damascus** **Promote a Bedouin Folklore Centre in Palmyra**	**X** **X**			**X** **X**	**X** **X**

8. Annex

8.1. Annex Medical Tourism..

To show the challenges of developing a medical tourism industry at a larger scale it is helpful to look at one of the most important "would be competitors" of Syria which is Jordan to understand the complex topic of this highly specialized niche tourism quality product. Two separate studies with regard to the Syrian market should be undertaken, one on the topic of "Potential of Spa & Wellness Tourism" and another one with regard to the "Potential of Medical Tourism in Syria" to explore the impact SMEs and larger investors could play in the future.

Country benchmarks[8]	**Jordan**
Profile benchmarks	
Polices and scale of investments	The kingdom of Jordan has plans to become the healthcare vacation destination of the Middle East in four years. Kuwaiti investors have launched a medical city project in Amman at a cost of $3.5 billion. The city will include hospitals with the latest medical technology, hotels, entertainment centres, swimming pools and gardens. The Jordanian health care providers are subject to stringent regulations and inspection by different governmental bodies
Business structure and management	The government is taking serious steps in the upgrading of the health care system to international standards. Several research groups are continuously assessing the competitiveness of Jordan's medical tourism sector and determining the preparedness for international market requirements and competition conditions including gaps in the environment of care infrastructure, facility management, proper credentialing of clinical personnel, infection control, use and management of healthcare data, appropriate assessments and care of patients as well as the quality of care and the response to patient safety issues. The recommendations of the groups are implemented.
Healthcare providers	In total, Jordan has 101 hospitals of which 58 are privately run, not all of them are accredited and only a quarter of those are members of the Private Hospital Association. One of the main government plans is to apply a hospital accreditation programme that appraises private sector

[8] Dr Stefan Thelen et al, Medical Tourism Development Strategy, Progress Report 3,Ref: PS_401, 2008, Cairo

	hospitals, which will open a medical passage between Jordanian and foreign hospitals. A small clinic for psoriasis is opened at Mövenpick hotel on the dead sea. Kempinski spa is the latest and more advanced project (opening 2008). There are plans to establish a dolphin-assisted therapy for children with physical and neurological disabilities.
Product specialization	Kidney replacement, orthopaedic procedures, neurological operations and heart surgeries. Dental work is also popular with incoming tourists. Jordan is very reputed for its medical wellness and wellness products especially in Gulf of Aqaba
Product quality and price	Jordan became a leader in medical facilities in the region when it became the fifth nation worldwide to carry out a successful heart transplant operation. An open-heart surgery in Jordan costs $ 16000; kidney transplant $14000 and liver transplant $70000. There is one good company for wellness products (www.rivageline.com) which is now aiming for quality certification I to increase its international exports.
Labour/personnel (doctors, nurses, tourist staff)	Jordan is self-sufficient when it comes to competent doctors and nursing cadres—over 17,000 doctors—which is in turn a high number for a population of five and half million. However, there are shortages in personnel with qualifications and skills in the field of community medicine and its related fields including health policy and management, epidemiology, education, environment, and health economics. Efforts are ongoing in this direction by the public sector in collaboration with WHO, USAID, and the World Bank
Technology/research	With a planned increase in the number of private and public hospitals and medical facilities, as well as upgrading existing ones, there will be an increased demand of new medical equipment, technology and services.
Main product strength and weaknesses	Jordan can offer the three types of health tourism products, medical, medical wellness and wellness. International affiliations, a competitive marketing strategy and well trained personnel in certain specialties are among the weaknesses.

Service chain benchmarks	
Ambulance	The Jordan Red Crescent plays a complementary role through providing a variety of health services and programmes that are developed to fulfil local and international needs. The quality of service is high. Standards and training of ambulant staff is carried out specialised instructors.
Support Service Standards: Infrastructure (Airports, accessing roads…etc.)	Queen Alia Airport is considered the main airport in Jordan 30 KM away from Amman. An office is available at "Queen Alia Airport" to help patients upon arrival and Jordanian embassies abroad are notified. It offers services such as quick immigration desk processing, information brochures on all hospitals and tourist sites and direct transportation to the hospital. There is also Marka airport which serves which serves domestic parts within Jordan and also King Hussein Int'l Airport. Due to the country's small size, any destination within the country can be reached by road
Hotels and resorts	The new stream of luxury hotels emerging in Amman, Petra, Aqaba and the Dead Sea is just adding quality to a refined product that is distinct, accessible and friendly, making Jordan a preferred destination to travellers' especially medical tourism tourists. Mövenpick Resort, Dead Sea Spa and Marriot Jordan valley are the most famous resorts for wellness in Jordan. Novotel, Intercontinental and Kempinski will also soon be added as wellness resorts.
Main location standards: (Urban cities, entertainment, shopping...etc)	Travellers can enjoy the different tourist's attractions in Jordan including Amman, Petra, Aqaba, the Dead Sea and Jerash. They can enjoy the varieties of restaurants, shopping malls and museums in Amman, archaeological sites in Petra and Jerash and the resorts of the dead and red seas
Medical tourism visas	Tourists coming for medical treatment will need a visa to enter Jordan whether for themselves or any of their companions. Upon arrival, all entry procedures are facilitated at the immigration desk at Queen Alia Airport.
Performance benchmarks	

Medical tourism visitors	The Department of Statistics' latest figures show 130,000 persons entered the country for medical procedures in 2004. That same year, 180,000 persons entered with them as companions. A 20% growth is expected annually The majority of foreign patients still come from countries of the region. According to officials, Sudan is the number one country sending patients to Jordan, followed by Iraq and the Gulf states
Estimated revenues	Official figures show that within the past three years, the health sector has been generating around $650 - 700 million annually in hospital fees from more than 120,000 foreign patients alone. In 2004, the Ministry of Health set a plan with the public and private sectors to generate $1 billion annually in medical tourism income by 2010.
International/national accreditation	Since most of the hospitals in Jordan lacks accreditation, government is planning to apply hospital accreditation programme in an attempt to appraise private sector hospitals A number of local hospitals established links with reputable international hospitals such as Mayo Clinic, Cleveland Medical Centre and Guys and St. Thomas Hospitals in the UK.
Human resource competencies	There is a shortage in Para- medical personnel's qualifications and skills. The government has a tourism training strategy on the national level but no specific medical and wellness training strategies. The management level in most medical tourism providers are ex-pats
Marketing benchmarks	
Medical tourism marketing strategies	Although having a medical tourism strategy, marketing is still considered an obstacle for Jordan to meet its medical tourism plans Jordan depends mainly on the Arab markets (mainly from Sudan, Libya and Iraq) as generating markets and has yet to be well positioned in the international market as destination for medical tourism
Medical tourism websites	There are several governmental & non-governmental agencies websites that helps in promoting medical tourism such as: private hospital association, Ministry of Health, Ministry of Tourism and the Jordanian Tourism Board

Direct/relationship marketing	Poor direct and relationship marketing schemes by its providers especially those offering medical tourism. Promotional materials of wellness products are mainly distributed by the JTB (Jordanian Tourist Board) in several languages.
Specialist travel agents	Currently some international T/A utilises Jordanian service providers, however with the growth of Amman medical city local specialised travel T/A should come to the sector
Distribution through tour operators/airlines	National carrier -Royal Jordanian- is suitable for scheduled flights for up market wellness travellers. It is a member of “one world alliance”
Attendance by healthcare providers at trade shows, exhibitions…etc.	Jordan attends almost all travel trade shows were wellness and medical wellness tourism is well promoted. Fewer efforts in the global healthcare events.
Links with major health insurance companies	German insurance companies send their patients to the dead sea area for skin treatment as the dead sea saline water prosperities are highly recommended by doctors. The main completion being Israel who shares with Jordon the shores of the dead sea.
Image	Jordan is becoming the health vacation jewel of the Middle East. The Arab World Competitiveness Report 2005 places Jordan as the top ranking Arab country in terms of business impact of health issues

8.2. Annex: List of Consultations

Name	Position
Mohammad Said Al Emad	Board Chairman – Chamber of Tourism, Damascus
Samer Antoine Kozah	Entrepreneur & Art Consultant, Damascus
Wasseem Katt	Entrepreneur, Medical Supplies, Damascus
Arch. Bana Tamim	Marketing Manager, Ministry of Tourism, Damascus
Nashaat Sanadiki	Entrepreneur, Managing Director, Travel & Tourism Agency, Damascus
Riad Kahale	CEO & Managing Director Urban Development Group, Damascus
Gerhard Kröppl	Consultant Hospital Information Systems, Vienna- Damascus
Gianni Costa	Assistant Director Food & Beverage, Four Seasons Hotel, Damascus
Eyad Hallak	Station Manager, Sixt Rent A Car, Damascus
Mai Martakoush	Director of Sales & Marketing, Rotana, Latakia
Roula Rayya	Syrian Society for the Conservation of Wildlife- NGO
Poul Gadegaard	Team Leader, SEBC, Damascus
Bassam Barsik	Ministry of Tourism
Dr. Akram Issa Darwish	State Ministry for Environmental Affairs, Damascus
Ramez Barbahan	Directorate of Tourism, Lattakia
Ghada Kafa	Directorate of Tourism, Tartous
Ammar Ibrahim	Directorate of Tourism, Lattakia

Amani Rayya	Directorate of Tourism, Lattakia
Rana Ali	Directorate of Tourism, Lattakia
Dr. Suhier Rayyes	Syrian Coast – NGO, Damascus
Dr. Waed Sabour	Syrian Marine Life Protection - NGO
Dr. Fayrouz Darwish	Higher Institute of Marine Research
Shaden Khalouf	Ministry of Tourism
Ahmad Al -Sadat	Tourist Guide
Iyad Al Ghafari	Country Manager Syria, Austrian Airlines
Nizar Wassouf	Vice Chairman Moneta, Money Exchange
Sami Gammoh	Chairman, Jordan International Investments Co.
Mohanad Malhas	Managing Director, Abercrombie & Kent
Fayiz Khouri	Deputy Managing director, Jordan Tourist Board
Hannadi Al Hariri	Reservation Manager, Yasmeen d´Alep Hotel
Roula Rayya	Syrian Society for Conversation and Wildlife, SSCW, Damascus
Rami Martini	Head of Board, Federation of Syrian Chambers of Tourism, Aleppo
Samar Enayeh	Consultant, Damascus
Fayez Al Midani	General Manager, Talisman Hotel
Faisal Najati	Manager of Damascus Tourism, Ministry of Tourism
Tony Achkar	Owner, Achkar Atisanat & Antiquities
Mahmoud Shain	Artist

Tony Mezannar	Silk Manufacturing
Noha Chuck	CEO, SEBC
Nadia Khiyami	Team Leader, National Competitiveness Observatory
Marwan Arcouche	Managing Director, L´Hotelier
Mohammad Mirtaheri	Managing Director, Apple Hotel Furniture
Reem Sakour	Sales Manager, Moka Arabia
Ramziah Autabashi	Director of Tourist Services, Ministry of Tourism
Attendance at the Fair:	ATB Fair Damascus
Attendance at the Conference	10th Arab Tourism Forum of Low Cost Courier and Inter Arab Tourism, Damascus
Attendance of the Workshop	Sea Turtles and Tourism, Lattakia

8.3. Annex List of Documentation Reviewed

- Executory Instructions of Law 65 dated 20.11.2002 on Syrian tourism chambers and tourism chambers´ federation
- The 10th Five Year Plan of the Ministry of Tourism 2005-2010
- Commentary on the 10th Five Year Plan for Tourism, SEBC August 2005
- Cultural Tourism Development Programme, Final Report July 2005
- Tourism Investment Guide 2009, Ministry of Tourism
- Syria Report, World Travel & Tourism Council WTTC
- Analysis Study on the Competitiveness of the Travel & Tourism Sector in Syria 2008-2009. Ministry of Tourism
- Tourism & Investment Movement Report, 2008 , Ministry of Tourism
- Syrian Private Sector in the Development & of Cultural Tourism, CTDP
- The Local Heritage Development Programme in Syria (Feasibility Study), June 2006
- Identification Mission of the Cultural Heritage Development Programme in Syria, Mission Report, March 2006
- "Ministry of Tourism Strategy to encourage and develop handicrafts in Syria – 2007/2008"
- Tourism Promotion Material from the Public and Private Sector

8.4. Annex List of Products Inspected

Name	Location
Rent a Car Waha	Damascus
Sixt Rent a Car	Damascus
Hotel Four Seasons	Damascus
Hotel Riviera	Lattakia
Hotel Rotana	Lattakia
Historical Site	Ugarit
Historical Sites	Old Town Tartus
Historical Site	Crac de Chevalier
Hotel Le Meridien	Lattakia
Hotel Cote de Azure	Lattakia
Hotel Fardass Tower	Damascus
Hotel Sheraton	Damascus
Hotel Chams Palace	Damascus
Hotel Orient	Damascus
Hotel Talisman	Damascus
Hotel Yasmeen d´Alep	Aleppo
Hotel Beit Zaman	Damascus
Austrian Airlines	Damascus
British Midland	Damascus
Abu Jameel	Damascus
Tony Stephan	Damascus
Othman Orientals Gallery	Damascus

The Orient Gate, Handicrafts	Damascus
Mustafa Ali Gallery	Damascus
Al Fursan Restaurant	Crac Des Chevaliers
Restaurant Sawary	Tartus
Restaurant View	St Simenon
Queen Centre Arjaan	Damascus
Mosaic Factory Oriental	Damascus
Restaurant Old Town	Damascus
Restaurant Beroea	Aleppo
Restaurant Taj Alkalaa	Aleppo
Restaurant Bagdahd Café	Way to Palmyra
Historical Site Bosra	
Chams Palace Hotel	Bosra
Historical Site Swieda	
Historical Site Shahba	
Historical Site Maloula	
Restaurant Naranj	Damascus

8.5. Annex Surveying Tourists

SURVEY FOR TOURIST INTERVIEWS

Review Competitiveness and

Prepare Value Chain Analysis of the

Tourism Sector in Syria

Name of interviewer:

Date:

Begin of interview:

End of interview:

Time for interview: Introduction text:

1. **Which accommodation did you use in Syria?**

Hotel 5-Stars	
Hotel 4-Stars	
Hotel 3-Stars	
Hotel 1 or 2 Stars	
Pension	
Camping	
With friends/ relatives	

2. **How would you rate your accommodation?**

1	2	3	4	5	6
excellent	good	fair	Poor	Bad	Very bad

- **Are you a single Traveller - FIT?**
- **Member of a tourist group?**

3. **Did you book your holidays with a tour operators or travel agent?**

YES ☐ **NO** ☐

4. **Was your package good value for money?**

☐Yes No ☐

5. **Which type of holidays would you see as promising in Syria? (multiple answers possible)**

CROSS HERE

1. O Sun & Beach
2. O Recreation & leisure
3. O Cultural & Heritage holiday
4. O Wellness, health, cure
5. O City break
6. O Business & Convention
7. O Sporting holiday (golf, biking, diving etc…)
8. O Attend an event

Please can you rate them in telling us your satisfaction for the value you received related to the price you paid?

	1	2	3	4	5	6
	excellent	good	fair	poor	bad	very bad
Accommodation						
Food						
Drinks						
Sports offer						
Cultural sights						
Shopping						
Guiding						

Immigration procedures						
Traditional Syrian handicrafts & art objects						
How much did you spend on those items during your trip?	USD					

6. How much in US$ did you spend on average each day WITHOUT Hotel costs, arts and handicrafts?

Less than 20	50	100	More than 100

7. Over all, how much did you enjoy your stay/holiday in Syria?

1	2	3	4	5	6
excellent	good	fair	less	not	Not at all

8. Which of the following influenced your decision to visit Syria?

Travel Agents	
Previous Visit	
Friends and Relatives	
TV Programme	
Radio Programme	
Internet Site	
Syrian Tourist brochure/leaflet	
Other (Please Specify)	

9. Would you like to make a return trip to Syria?

Yes ☐ No ☐

10. What are the problems you faced during your visit?

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11. What should be improved?

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....

12. What are the most positive things did you experience during your stay?

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- **Thank you very much for your time!**

Trend - Comments from the Questionnaire & Survey

- Friendliness of the people – "Come Back"!
- Request for photography in Museums
- Wide range of hotel quality from "good" to "bad"
- Better immigration procedures requested
- Critical on food (safety) in tourist restaurants
- Request for better environment toilets & no litter!
- Critical on Syrian handicrafts – mass products
- FITs: Prices rising steep, critical quality of guides