



KURDISTAN REGIONAL GOVERNMENT - IRAQ
MINISTRY OF MUNICIPALITIES AND TOURISM
GENERAL BOARD OF TOURISM

TOURISM STRATEGIC PLAN FOR KURDISTAN REGION (IRAQ)

2013



MESSAGE OF THE GENERAL BOARD OF TOURISM

The tourism industry has emerged as an important pillar of modern economies, becoming one of the leading areas in the economic development of the 21st Century.

According to the World Tourism Organization, the number of global tourists exceeded 1 billion in 2012, and is expected to reach 1.8 billion by 2030. Therefore, the industry will realize greater progress and accessibility as it matures into a prominent economic sector.

The Middle East is considered to be one of the promising destinations that will have a strong presence in the future of global tourism. Since Kurdistan is one of the unique tourism destinations within the Middle East and contains many attractions, it is expected that it will realize significant growth in the quantity and quality of its tourism.

The Kurdistan Region Government has expressed a genuine commitment to the development of this sector; which embodies the aspirations and determination of the General Board of Tourism (GBT) and its intent to work towards specific technical plans utilizing diligent analysis of current data, and professional implementation for future needs. The GBT hosted its First Tourism Conference in 2011 to create a road map for the regulation and the strategic planning of the sector up to 2015. This was updated in the Second Tourism Conference (2012) with the participation of industry experts, academic specialists and representatives of the GBT directorates.

The vision for the future of Kurdistan tourism focuses on transforming it into a prominent global tourism destination by 2025. The GBT has commissioned international consultants in this endeavor to produce a strategic tourism “Master Plan” that will guide the development of the tourism till 2025.

We are determined to;

First; efficiently implement the Strategic Plan with assistance from the most capable and experienced international consultants in this field, in addition to mobilizing the necessary resources to accomplish this goal.

Second; annually evaluate the plan’s implementation and its innovation using Key Performance Indicators and tourism sector benchmarks.

The plan’s implementation has commenced, and the GBT is supporting and monitoring all the financial and human resources with direct assistance from the Head of Government and the Ministry of Municipalities and Tourism.

The core part of the Master Plan is the ‘Strategic Development Plan’ for the tourism sector up to 2025, which is based on 14 technical reports and an executive report that encompasses the essence of the plan. In addition, there are four complementary annexes that include 67 designated projects sites and their technical design.



Additionally, 350 potential project sites have been identified and are being incorporated into the tourist map of the Kurdistan Region.

This plan is the result of the determination of this organization which over time has evolved from a General Directorate into a ministerial government institution, and what has now become the General Board of Tourism. The endeavor is also the result of the hard work of our dedicated staff.

In conclusion, our gratitude to the Prime Minister of the Government of the Kurdistan Region for the commitment and continuous support extended to the tourism sector. Additionally, our appreciation is extended to The Economic Council of Kurdistan Region, the Ministry of Municipalities and Tourism, and the management of the GBT and their staff.

I would like to extend my gratitude to the committee overseeing the Master Plan project, and all the companies and individuals involved in the preparation of this plan.

Let us work together to achieve our Vision ‘to make Kurdistan a global tourist destination characterized by its natural beauty and authentic culture’.

Mawlawi Jabbar Wahab

President

General Board of Tourism



TOURISM STRATEGIC PLAN FOR KURDISTAN REGION (IRAQ)

The Strategic Plan for Tourism (Master Plan) is an initiative of the Kurdistan Regional Government - Ministry of Municipalities and Tourism. It is produced by the Lebanese and Austrian Consultative Groups **TEAM International and KOHL & Partner** under the supervision of the General Board of Tourism (GBT).

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TOURISM STRATEGIC PLAN FOR KURDISTAN REGION (IRAQ)

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TOURISM STRATEGIC PLAN FOR KURDISTAN REGION - IRAQ

1. INTRODUCTION

Kurdistan Region possesses the potential to become a major tourist destination within the Middle East. Kurdistan has numerous potential tourism qualities ranging from wonderful natural settings to a unique culture and history.

The Kurdistan Regional Government (KRG) regards tourism as a priority along with the Industrial and Agricultural sectors and has placed high importance on the development of Tourism in Kurdistan. The Strategic plan for the development of tourism outlined in this report is the government's initiative to prepare a roadmap for the development and sustainability of the tourism industry up to 2025.

1.1 Preface

The increase in the number of tourists during the last five years (0.38 million in 2007 to 2.2 million in 2012) shows the growing importance of tourism and its impact on the region's and local communities economies. Tourism is helping the economic, social, and environmental development particularly in:

- Combination with other economic activities (i.e. Agriculture, Industry, services and Finance).
- Creating economic diversity by developing new tourism facilities and products.
- Improving the quality of tourism services.
- Creating jobs in the Governorates which helps reduce unemployment and migration towards urban centers.
- Stimulating the development of infrastructure especially in areas with high tourism potential.
- Providing investment opportunities for foreign and domestic investors.
- Aiding the preservation of the Environmental, and Cultural Heritage and the integration of antiquities with other forms of tourism.
- Helping to promote better awareness towards tourism destinations through the development of religious, cultural, and historic sites.
- Facilitating the interaction between the various local cultures and communities with regional and international cultures.

1.2 Basic Pillars of Tourism

Tourists are usually interested in natural settings, cultural sites and the services the region has to offer. The primary purpose for the majority of tourists is recreation, leisure and entertainment.

First Pillar: Nature

Kurdistan is a region rich with natural beauty ranging from rivers and lakes to mountains and forests. These natural wonders can be used to help develop and promote tourism.

Second Pillar: Culture

Kurdish culture and the availability of historical sites are major assets for the development of tourism.

Third Pillar: City Tourism

Erbil, the provincial capital of Kurdistan region, is the model for this approach. Erbil is a vibrant city characterized by its blending of Kurdish tradition and heritage with the dynamics of modernization.

Fourth Pillar: Recreation and Leisure

The primary mover of tourism in the world is Recreation and leisure travel. Tourism thrives during the periods of long vacations and/or annual leaves. Kurdistan has a lot to offer tourists who want to travel for recreation and leisure.

1.3 Strategy for the Systematic Development of Tourism

The launch of the Tourism Strategic Plan and the development of the plans objectives commenced with a comprehensive analysis of the current situation and status of tourism in Kurdistan. It encompassed a PESTEL Analysis, interviews and field surveys to gain a solid understanding of the economic, social and investment environments that the region operates in.

Figure (1) illustrates the main points of the strategic plan in this report.



Figure (1): Elements of Strategic Plan

2. CURRENT STATUS OF TOURISM IN KURDISTAN REGION

2.1 Introduction: Tourism World

The tourism industry is considered an export commodity that provides high earnings and has multiple effects, especially when it utilizes low cost domestic products, such as climate, environment, archaeology, and the local labor force. Many have even stated that tourism is one of the most important economic sectors in the 21st century.

Tourism positively affects long term economic and social development goals and strategies.

Tourism has evolved worldwide, and currently there are many branches and services that fall under the title. The tourism industry has also shown that it can easily adapt to economic and social changes, which is the reason why many states have been investing into making their tourism industry more competitive on a global scale.

Examples of the growing interest in tourism:

- **Turkey**, which is currently the sixth most visited international destination, has a plan to improve its tourism industry and to become the fifth most visited destination by 2023.
- **China**, has taken action to ensure that the tourist industry is included in its economic stimulus plan.
- **Thailand & South Korea**, have distributed tens of thousands of free airline tickets to encourage people to visit the two countries.
- **The Emirate of Dubai**, launched a massive advertising and promotional campaign, in conjunction with its annual tourism and shopping festival, which included price and tariff reductions of up to 60%, free days for guests, and incentives in hotels and restaurants.
- **Kingdom of Saudi Arabia**, has invested heavily in developing internal tourism on the Red Sea coast, and the Western & Southern parts of the Kingdom.

Tourism Global Indicators⁽¹⁾

- The global tourism share of developing countries has increased from 30% in 1980 to 47% in 2011, and it is expected to reach 57% by 2030.
- The annual growth rate of tourists globally is 3.3%, which implies that the expected number of tourists by 2030 will be approximately 1.8 billion.

(1) Based on data from United Nations World Tourism Organization (UNWTO).

- The number of global tourists and the revenues generated by tourism activities has increased between 1990 and 2011. (Revenues from the 1 billion tourists in 2011 exceeded 1,000 billion dollars).
- The tourism sector now accounts for around 10% of the global Gross Domestic Product (GDP).
- Tourism contributes 6% to Iran's GDP, 11% to Syria's and Turkey's GDP, 19% to Egypt's GDP, and 35% to Lebanon's GDP.

2.2 The Reality of Tourism in Kurdistan Region

Kurdistan Region has great potential as a tourist destination and yet it remains largely unknown. It does not only have historic and religious sites, it also has many undiscovered tourist attractions ranging from natural sites to undeveloped archaeological sites.

In addition to these, some areas of Kurdistan were and still are popular destinations for Iraqis' who come to the region to get away from the summer heat in the center and southern parts of Iraq. These summer tourists have stimulated the development of summer villages, compounds, hotels and resorts which were funded by private internal and external investors. However many areas with high tourism potential remain unknown and undeveloped.

Figure (2) shows the United Nations World Tourism Organization's (UNWTO) projected growth of international tourists until 2030.

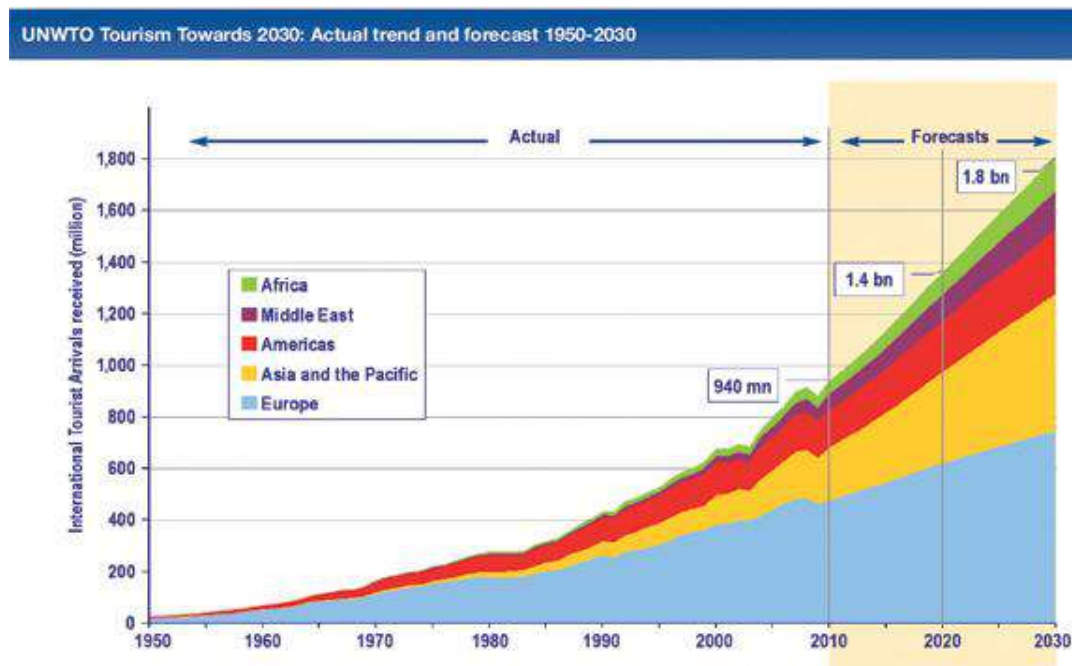


Figure (2): Tourism Traffic Development and Forecast - 2030

2.2.1 Tourism in Kurdistan Region

Tourism in Kurdistan Region has increased six fold between 2007 and 2012. The number of tourists to Kurdistan in 2007 was 377,000; in 2012 this had increased to 2,2 million.

Table (1): Increase in the Number of Tourists 2007-2012

Year		2007	2008	2009	2010	2011	Till 31/12/2012
From Kurdistan		137,118	190,230	209,611	329,536	315,161	313,144
From Iraq (excluding Kurdistan)		186,420	285,740	449,193	789,760	1,149,738	1,470,138
Foreign (Outside Iraq)		53,859	82,890	132,541	194,545	237,491	433,711
Gross Total	Numbers	377,397	558,860	791,345	1,313,841	1,702,390	2,216,993
	Growth %	-	48,1%	41,6%	66,1%	29,6%	30%

Source: General Board of Tourism

Erbil received two thirds of the number of tourists that visited the region accounting for 1.5 million tourists, or around 68.5%, followed by Governorate of Sulaimaniyah 17%, then Duhok 13.6%, and finally Garman with around 1% (Table 2).

Table (2): Visitors to Kurdistan based on Governorates 2012

Governorates	From Kurdistan	From Outside Kurdistan	Foreign	Total
Erbil	147,146	1,049,235	322,449	1,518,830
Sulaymaniyah	66,021	256,032	52,223	374,276
Duhok	87,735	158,444	55,825	302,004
Garman	12,242	6,427	3,214	21,883
Total	313,144	1,470,138	433,711	2,216,993

Source: General Board of Tourism

Note: The numbers are based on the number of visitors who came to the region through Land and Air entry points.

2.3 PESTEL Analysis

This technique is used to conduct an analysis of the external environment through the study of various external factors that affect the tourism sector.

The Six attributes of the PESTEL Analysis are:

- Political (current and potential Impact of political situation)
- Economic (the Impact of Local, national and global Economies)
- Sociological (Societal effects and impact)

- Technological (the impact of new and emerging technologies)
- Environmental (Local, national and Global Environmental Issues)
- Legal (the effect of national and International Legislation)

2.3.1 Political Situation

The Kurdistan Region is a part of the Iraqi Federation. The key institutions of Kurdistan consist of: the Presidency of the Kurdistan Region, the Government of Kurdistan Region and the Kurdistan Parliament.

Kurdistan Regional Government exercises legislative, judicial, and executive authority in its jurisdiction. These domains include budget planning, Security and law enforcement, Education and Healthcare Services, Natural Resource Management, and Infrastructural development.

Kurdistan Governorate Presidency

The Presidency of Kurdistan Region was announced as an Institution by the Kurdistan Parliament in 2005. The President is the highest executive authority and represents the people of Kurdistan nationally and internationally. The President oversees the relationship between the Iraqi Federal Government and Kurdistan Region. The President also represents the people of Kurdistan on the Iraqi Security Council and during negotiations with other political parties in Iraq.

The President of Kurdistan Region is responsible for ratifying the special appointments and promotions issued by the Prime Minister of Kurdistan. He is also responsible for the review and ratification of all bills issued by Parliament. He also has a onetime authority to veto a bill and return it to parliament for further debate and amendment.

Kurdistan Region Parliament

The Parliament of Kurdistan Region is an elected legislative body consisting of a single house with the following roles:

- Consideration of new law proposals
- Monitor government policies and administration
- Deal with the major issues of the day

The founding Principles of the Kurdistan Parliament are freedom, pluralism, accountability, openness, and representation of all people in Kurdistan region.

Kurdistan Regional Government

The Kurdistan Regional Government is a democratically elected body which exercises its powers in accordance with the laws enacted by the regional parliament.

The government is a coalition consisting of various political parties that reflect the region's diverse population which consists of Kurds, Turkmen, Chaldeans, Assyrians, Yazidis, and others who live together in peace and harmony.

The regional government seat is Erbil City, which is also the capital of Kurdistan. The three governorates that make up Kurdistan are: Erbil, Sulaymaniyah, and Duhok.

2.3.2 *Economic Situation*

In 2012, the estimated growth rate of Kurdistan Region fluctuated between 10% and 12%. The biggest factors driving growth were investments in oil and gas, construction, and electric sectors.

The growth in GDP has increased three folds since 2006 and the expected growth rate for 2013 is 8%. The annual per capita income has increased to \$4500 in 2009 (Statistics provided by Investment Authority).

These are attributed to positive economic growth and favorable investment laws.

The estimated growth rate for 2012 was 12% due to oil industry and production in the Region.

It is clear that the oil industry is the foundation of the region's economy; however other sectors have been contributing to the gross domestic product (GDP), such as construction and tourism sectors with 19%, and agriculture with 6%. These figures are based on data provided by the investment authority of Kurdistan. Kurdistan is currently working on developing its tourism industry in an effort to diversify its economy.

2.3.3 *Social Condition*

Kurdistan region is characterized by the diversity of its population, multiple ethnicities, and religious sects which share common cultural roots.

The younger generations in Kurdistan speak Kurdish exclusively, while the older generation speak both Kurdish and Arabic the two official languages in Iraq. When conducting business, administrative and commercial activities, Arabic and English are used.

Kurdish families tend to be large. There is no evidence of segregation or discrimination between the two genders in cultural or social events.

The various ethnic and religious groups live together under a constitution that guarantees their equal rights, exercise their rituals, religious and social customs freely and in mutual respect.

It is important to note that 65% of the labor force in Kurdistan is employed by the public sector.

2.3.4 Telecommunications and Technology Situation

The telecommunications sector in the region provides landline, mobile, internet and postal services. Kurdistan's main challenge is the lack of coverage (compared to the growing demand) and the slow expansion of the landline network.

Kurdistan has been working on improving its communications network and upgrading its landline systems to facilitate the use of internet technology. This has caused an increase in demand for internet access. Subsequently, there has been a boom in the wireless communications sector especially in the provision of internet services.

The regional government has adopted an integrated strategy for the development of information technology. The objectives of the strategy include the following:

- Developing a plan for a comprehensive and effective communications system.
- Connecting all government departments and offices through a secure network.
- Rehabilitating the infrastructure of all government services.

On a the business level; there is an increasing number of local small and medium enterprises (SME's) in Kurdistan which are not equipped with information technology systems (which effects there competitiveness). This has caused foreign investment companies operating in the field of information technologies to utilize their networks from head office rather than use the domestic option.

The communications and information technology sector in Kurdistan is constraint due to the following:

- Lack of standardization between the various sectors.
- Increase of procurement and maintenance costs.
- Lack of accessibility in remote areas.
- Lack of commitment by relevant authorities.
- Lack of training and awareness.
- Regulatory restrictions.

2.3.5 Environmental Situation

Kurdistan is a mountainous region whose mountains are a part of the Zagros Mountain range which extends east into Iran. The average height of the mountain range is 2,400 meters and in many parts, the range is between 3,000 and 3,600 meters.

Temperatures vary within Kurdistan Region. The summers are characteristically hot and dry while they are milder in the mountains, winters are cold and spring is mild and characterized by the festival Norouz. Kurdistan is also rich in water resources, many rivers which include Sirwan, the Tigris, the Great Zab and Little Zab cross Kurdistan.

The weather varies in the three governorates of Duhok, Sulaymaniyah, and Erbil which allows for a variety of tourism activities. In the cities, especially Erbil City, business and Leisure tourism are prominent.

These are part of the region's attractiveness for the residents of Iraq and neighboring countries. The region needs to address the issues of pollution and the treatment of organic and industrial waste to preserve the natural environment. The government has taken steps in this direction in order to reduce pollution levels in cities by regulating emissions, providing landfills outside cities for solid waste, and recycling wastewater.

2.3.6 Legal Situation

The Tourism Authority in Kurdistan Region is an independent entity working under the Ministry of Municipalities and Tourism. It was founded in 2010 by legislation number (12) for year 2010.

The investment laws offer many advantages to investors which include:

- Investment rights and privileges
- Amenities and guarantees
- Exemption terms
- Areas for investment

The government has adopted measures to facilitate entry into the region by providing exemptions for citizens of some Arab and foreign countries for tourism and travel purposes, and also for visa and residency procedures.

3. ANALYSIS OF THE COMPETITIVE ENVIRONMENT

3.1 Competitiveness

Competitiveness of the Region compared to neighboring states

Kurdistan Region has a positive image as a natural touristic destination on an international level. Statistics indicate that 2,216,993 tourists arrived in 2012, which is an increase of 30% from 2011.

It is expected that this figure will grow along with the development of Kurdistan's tourism and services sectors. The success of Kurdistan region's future plans will attract more visitors from neighboring countries.

Comparison with Neighboring Countries with Similar Characteristics

Types of Tourism	Kurdistan	Turkey	Jordan	Iran
Environmental tourism	✓	✓	✓	✓
Water tourism	✓	✓	✓	✓
Leisure tourism	✓	✓	✓	-
Business and Conference tourism	✓	✓	✓	-
Religious tourism	✓	✓	-	✓
Culture tourism	✓	✓	✓	✓
Adventure tourism	✓	✓	-	-
Med-cure Tourism	-	✓	✓	-
	Kurdistan	Turkey	Jordan	Iran
Number of tourists (2011)	**1,700,000	*34,038,000	*3,975,000	*3,354,000
Estimated time for Visa Process	2 - 3 weeks in general and citizens of some countries are exempt from the visa	One work day	3-5 work days	1-2 weeks
Stability and security	Stability and security	Stable and secure in the whole of Turkey (but the southeastern section is unstable and unsafe and there are no developed resources or tourist sites)	Stability and security	Stable and security (but Iran is suffering from international sanctions, isolation affected all economic sectors including tourism)
Electronic tourism	-	Available	Available	-
Rankings of the World Economic Forum for Tourism 2013	-	46	60	98
Arrangement in the price competitiveness of tourism	-	112	76	-
* World Bank Data 2011. ** GBOTR – Kurdistan Region				

3.2 Types of Tourism

Kurdistan Region has a range of geographical and geo-political characteristics, historical, cultural, security, and investment elements. These qualify Kurdistan as a competitive touristic destination, if the proposed strategy for tourism development, which is based on the principles for the development of many tourism products, is implemented.

3.2.1 *Natural and Summer Tourism*

Nature and summer based tourism is considered to be a very stable form of Tourism. Kurdistan is noted for its abundance of water covered areas, natural beauty, snow covered mountains, green fields, and relatively moderate climate.

3.2.2 *Religious Tourism*

Kurdistan is a popular destination for believers from around the world, and from different religious sects and creeds, because of the wealth of temples as well as religious shrines and tombs.

Religious tourism, along with other tourism activities, is an important economic resource for the region. The “General Board of Tourism” has compiled information about the various religious sites and included them in the various marketing campaigns.

3.2.3 *Historic and Archaeological Tourism*

The rich history of Kurdistan is considered a magnet for tourists interested in archaeological and architectural monuments, and the history of the region’s peoples. The region is rich with sites that mimic Kurdistan’s political, military, religious and cultural history.

With the increasing interest in tourism, the General Board of Tourism is working with the provincial general tourism authorities to highlight the rich history of Kurdistan Region.

3.2.4 *Leisure Tourism*

Leisure tourism includes malls, restaurants, parks, and tourism services provided by hotels and other establishments. It also includes amusement and gaming centers, as well as nightlife activities. Kurdistan Region has many events, celebrations, and festivals, especially during the spring season which starts with Nawruz Festival. These activities are strong tourist attractions.

3.2.5 *Business and Conference Tourism*

This type of tourism is closely associated with trips whose primary purpose is business opportunity exploration, project establishment/ implementation,

or participation in exhibitions, conferences, meetings, or workshops. Kurdistan has invested a lot in developing this sector by modernizing the required facilities such as conference and exhibition centers, hotels, airports, event organizational capacity, government policies, as well as human capital and marketing and promotion activities.

3.3 Tourist Geography of Kurdistan Region

3.3.1 Location

The region's area is 40,643 km² which includes the three governorates (Erbil, Duhok, Sulaymaniyah) and Garman (a Kurdish area outside the administration of the territory). The Region is in the northern part of Iraq, and borders Turkey to the north, Iran to the east, and Syria to the west.

Kurdistan is affected by its regional surrounding in many ways. From a Tourism Perspective, a destination's location can be both positive and negative

- **A positive**, because it represents an oasis of stability and security in an unstable area of the world.
- **A negative**, because the instability reduces the number of tourists from abroad.

3.3.2 Terrain

The geography of the region is mostly mountainous and is part of the Zagros mountain range which stretches eastward into the Iran.

3.3.3 Climate and Water

The climate of Kurdistan Region is hot and dry in summer, except in the mountainous areas, and cold in winter. Spring is the most beautiful season in Kurdistan during which the Kurds celebrate "Nowruz".

These benefits are part of the Region's attractiveness to the inhabitants of Iraq and neighboring countries.

3.3.4 Population

The population of the Kurdistan Region in 2012 was approximately 5.1 million. This number is expected to grow to reach 5.6 million in 2015 with an average annual growth rate of 3%. The population in the age group 1 – 14 years makes up 38% of the total population, which creates a significant burden on the state to provide health and education services.

3.3.5 Culture and Society

The Region is characterized by ethnic and religious tolerance, which is the result of coexistence between the various ethnicities and religions. The

majority of Kurdistan's population lives in mixed ethnic and religious communities consisting of Kurds, Turkman, Chaldeans, Assyrians, Yazidi, Shabak, Armenians, Arabs and Zoroastrians and share each other's cultural roots. The cultural environment in the Region is Islamic with the majority of the population belonging to the various Islamic sects.

The younger generation speaks Kurdish exclusively while the older generations are also fluent in Arabic. Arabic and English are used for business, administrative and commercial dealings.

The typical Kurdish family is often a large extended family, there is no discrimination or segregation between men and women, and there is no gender segregation in social and private events.

Ethnic and religious groups live together under a Constitution that guarantees the rights of all, and provides equality of rights and obligations to all. They practice their customs and rituals in freedom and mutual respect.

3.3.6 *Accommodation and Hotels Services*

The tax exemptions and amenities provided by the Government for investment in tourism projects, has increased the number of tourist hotels from 106 in 2007 to 259 in 2012, and the number of motels reached 168 in 2012, with total tourist villages reaching 54 in 2012, most of these facilities are concentrated in the provincial centers.

Bed occupancy rate in hotels recorded an increase of approximately 66% between 2007- 2011 (RDS-July, 2012- P.147). This figure coincided with improvements in the performance of other tourism facilities, and traveler and tourism services providers.

The following tables, whose data were provided by the General Board of Tourism, show the figure and categories of tourist accommodation facilities for the sector in 2012.

Tourist Arrivals to the Kurdistan Region by the Governorate for 2012

Governorate	From within KRG	From outside KRG	International	Total
Erbil	147,146	190,230	209,611	329,536
Sulaymaniyah	66,021	256,032	52,223	374,276
Duhok	87,735	158,444	55,825	302,004
Garman	12,242	6,427	3,214	21,883
Total	313,144	1,470,138	433,711	2,216,993

Tourist Facilities in the Kurdistan Region 2007-2012

Year Tourist Facilities	2007	2008	2009	2010	2011	2012
Hotels	106	116	131	168	202	259
Motels	49	53	72	96	128	168
Tourist Villages	29	33	37	42	44	54
Restaurants	129	151	233	305	338	482

Statistics for the Tourism Sector by the Governorate 2012

	Erbil	Sulaymaniyah	Duhok	Garmyan	Total
Hotels	159	52	47	1	259
Motels	64	53	50	1	168
Tourist Villages	22	27	5	-	54
Current number of Beds	18.971	9.342	10.905	269	39.487
Restaurants & Café	187	228	59	8	482
Rooms	7.131	3.483	3.252	32	13.898

Tourist Facilities in the Kurdistan Region by Category 2012

	5 stars	4 stars	3 stars	2 stars	1 star	Not rated	Total	Popular	General Total
Hotels	9	27	65	75	71	12	259	183	442
Motels	-	1	25	49	86	7	168	74	242
Tourist Villages	3	2	19	13	16	1	54	-	54
Restaurants	8	26	39	96	137	176	482	998	1480

3.4 Legislation Governing the Tourism Sector

3.4.1 Tourist Legislation Before 2003

Law Number (54) which regulated the establishment of Summer Destinations, and festival areas remained in effect in Kurdistan till 1991. In 1988, "the General Directorate of Tourism" was dissolved by resolution Number (681).

In 1992, decree Number (3) placed the development of the tourism sector under the supervision of the Ministry of Municipalities. In 1993, Law Number (15) established the "Ministry of Municipalities and Tourism in the Kurdistan region," with an article for the formation of a "General Board for Tourism" in the region linked administratively and organizationally to the ministry.

3.4.2 Tourist Legislation Since 2003

In 2004, the issuance of Law Number (39) established the "General Organization for Tourism" which had financial and administrative independence. The oversight for the General Organization for Tourism was placed directly under the Council of Ministers of the Kurdistan Region.

In 2006, Law Number (20) established "the Ministry of Tourism."

In 2010, "the Ministry of Municipalities and Tourism" was established under Law Number (12) 2010, with financial and administrative independence.

The budget allocated for the tourism sector was 16.1 billion dinars in 2010, this reached 39 billion Iraqi dinars (approximately 33 million \$ U.S.) in 2011. The budget in 2012 is estimated at \$28 million USD.

3.5 Tourism Development

Competitiveness is achieved through balanced development of resources and good governance. It requires an integrated approach that includes a complete development methodology that encompasses sharing of resources and experiences, using unified quality standards, and encouraging innovation and continuous improvement. The variables that support tourism development and help them to acquire high competitiveness are:

Heritage and Culture	Quality of Services	Quality of Life	Values	Tourism
- Natural beauty	- Skilled work force	- Comfort and well-being of residence	- Political Freedom	- Value v. Cost
- History & Heritage	- Advanced Technology	- Education System	- Tolerance	- Resorts and Accommodation
- Art and Cultural	- Investment Climate	- Health Care System	- Stable legislative environment	- Sites and Attraction
- Authenticity	- Regulatory Environment	- Standard of Living	- Freedom of Expression	- Food
		- Safety & Security	- Eco-friendly	- All Tourism offerings and services

4. SWOT ANALYSIS

A SWOT Analysis not only identifies the Strength, Weaknesses, Opportunities and Threats in the sector, it also works as a tool for the analysis of the circumstances, causes and consequences of the elements it captures in every area. It is necessary to have a comprehensive and integrated analysis to increase the chances of success to achieve the goals for which the “strategic plan” is developed.

The main challenge facing the development of the plan is to work on matching strengths with opportunities, and turn weaknesses into strengths, and overcome obstacles and challenges, in order to develop as many opportunities as possible for the plans success.

The SWOT Analysis was performed based on the methodology, shown in Figure (3) below, and includes:

- The analysis of opportunities based on KRG’s tourism assets and strengths.
- Analysis of threats, challenges, competition and market requirements.

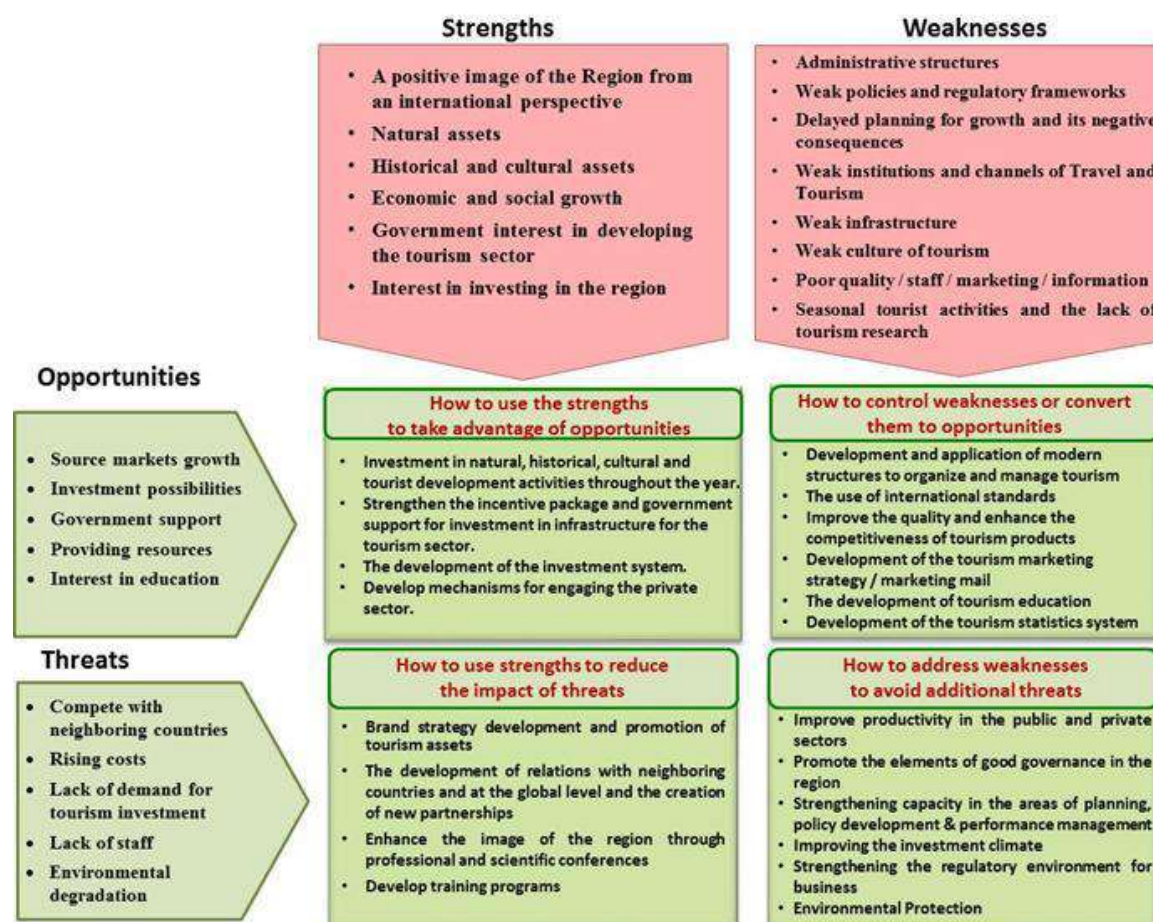


Figure (3): The Four Paradigms for SWOT Analysis to Create a Strategic Framework

5. VISION, MISSION AND VALUES

The preparation of the vision, mission and values was captured with officials and stakeholders from the relevant authorities in the public and private sectors, via interviews during the data collection axis to develop strategic frameworks for the development of tourism in the region.

Vision

Kurdistan Region is a global tourist destination characterized by natural beauty and authenticity of culture

The Strategic Plan for tourism aims to achieve the goals of the tourism vision, so that the region's tourism sector in 2025 can evolve to include:

- A sustainable tourism industry in the Governorates of Kurdistan, that contributes to the region economically, culturally and socially.
- The emergence of Kurdistan as a favorite tourist destination for the local and regional tourists.
- Turning the region into an attractive destination for various tourist target groups, from various sources and tourist markets.
- Providing the Governorates of the region with tourist attractions in line with international standards, and with various residential services for tourists.
- Making the tourism sector a supportive pillar for the economic development of the region and diversify its economic base.
- Building tourism education and training institutions for the advancement of tourist services quality (as a priority).
- Enabling the region to establish a strong tourist brand (Tourism Brand).
- Making the Region a benchmark for tourism sector development based on best practices, and creative projects via administrative and regulatory structures, that adopt the principles of performance management and continuous improvement.

Mission

Develop the administrative framework for marketing and planning of the tourism sector, strengthening partnerships with the private sector and local communities, to develop services, destinations and tourism facilities in accordance with international quality standards

This message gives a pivotal role to the General Board for Tourism, in order to:

- Strengthen the management of tourism policies, including the updating of legislation, classification, licensing, educational, tourism and statistical systems and the developing of international relations.

- Prepare and develop tourism plans and strategies, improve project planning quality and prepare tourism investment in partnership with the private sector.
- Develop the tourism brand and manage tourism marketing strategies and communication processes; media, advertising, and information technology.
- Enable the private sector to perform its role in developing tourism efficiently.
- Strengthen and enable the tourism sector to operate based on international standards.
- Manage archaeological and heritage sites as critical assets to the tourism sector.
- Build the institutional capacity of both the public and private sectors.
- Follow up the implementation of the strategic plan initiatives, programs and projects.

Values

- **Respect**
- **Ethics**
- **Transparency**
- **Cooperation and Teamwork**
- **Justice**

These values represent the foundation for building the future culture of tourism in the region which includes:

- The preservation of cultural diversity, and the continuous improvement of the touristic environment.
- The fusion of tradition and modernity in an ever changing environment.
- Promotion of tolerance, as the basis of communication between people of different cultures.
- Awareness to the different cultures and customs of visitors from outside the region.

Principles

- **Focus on results**
- **Sustainable Development**
- **Achieve benefits to society**
- **Optimize the use of resources**
- **To maintain the historical heritage**
- **Adoption of international quality standards**

6. THE POLICIES AND OBJECTIVES OF TOURISM DEVELOPMENT IN THE REGION

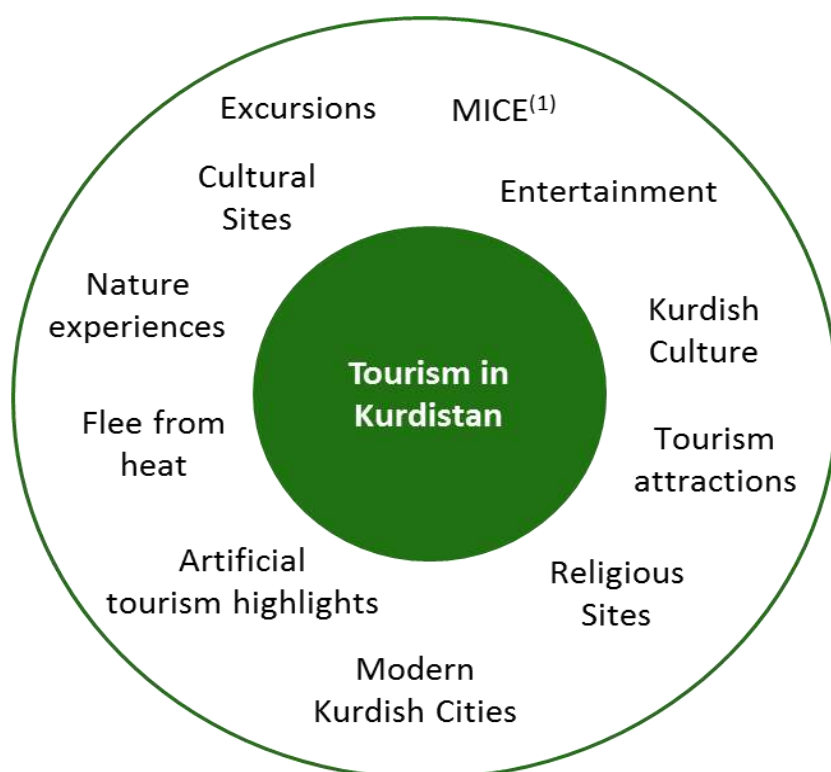
To support tourism development in the region based on the following key strategies:

1. Develop the structure of tourism institutions in the region, and the active management of tourism growth.
2. Create new tourist attractions as tourist destinations and develop facilities and tourism packages aimed for new markets. Expand the yield of the summer season and emphasis the historical heritage and cultural of cities.
3. Improve the quality of tourism facilities and services in the region.
4. Improve the image of the region through the creation of strong tourism marketing and promotional campaigns.
5. Launch a national and international program for tourism marketing highlighting the competitive advantage of KRG globally, and promote funding for partnerships with private tourism institutions.
6. Improve tourism education to increase the number of qualified personnel.
7. Create the necessary framework and secure the requirements for tourism development and allocate government financial resources to support modern tourism development in a professional way.
8. Adopt methods of planning and sustainable development in the tourism sector.
9. Make infrastructural development in the region among the priorities and requirements for the development of the sector.
10. Develop and update tourist legislation, laws and regulations.

7. TOURISM DEVELOPMENT STRATEGY

7.1 Foundations of Strategy Development

- Build on natural resources for the development of tourism, by turning them into modern tourist attractions, monitor the primary present source of visitors from Iraq and neighboring countries (refer figure 4).
- Develop tourism facilities and offer to attract new markets and various categories to expand summer season and develop tourism throughout the year.
- Convert the three provincial centers to modern cities with developed tourist sites.
- Highlight the Kurdish culture as an important element in tourism development.
- Adopt international quality standards in all elements and components of the tourism sector.



(1) Meetings/ Incentives/ Conventions/ Exhibitions

Figure (4): Elements of Tourism in Kurdistan

7.2 Competitive Advantage of the Tourist Sites in the Kurdistan Region

The touristic Unique Selling Points (USP) of Kurdistan Region consists of four permanent and one (most probably) temporary element, as shown in Figure (5).

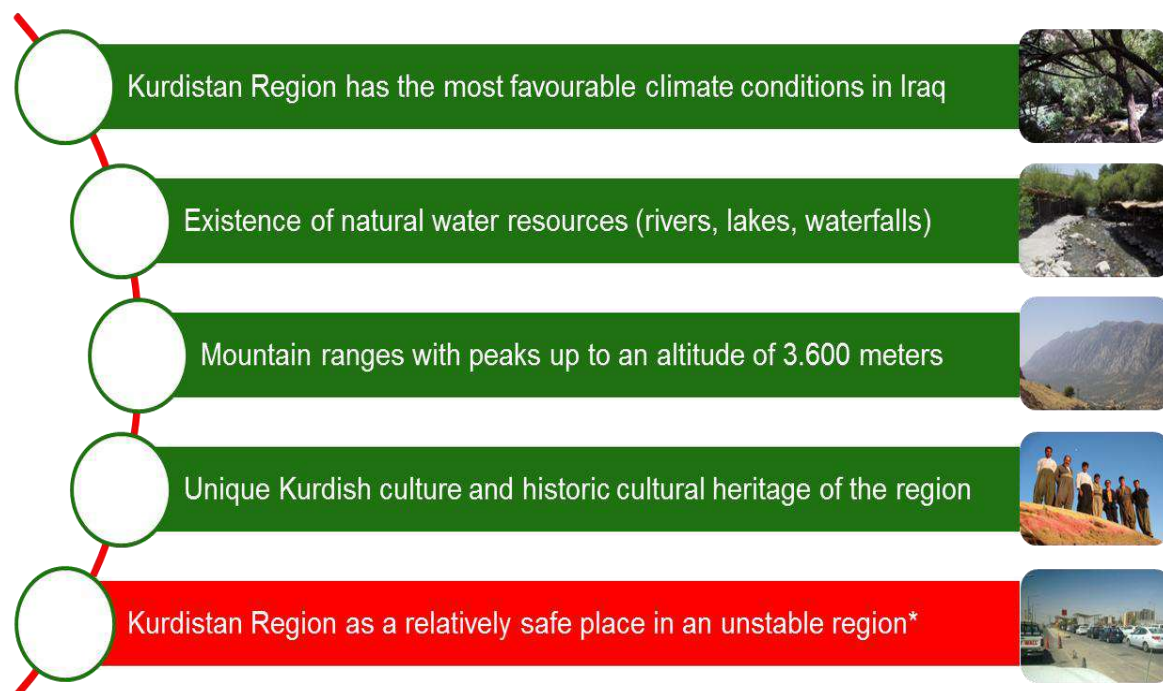


Figure (5): Competitive Characteristics of Tourism in the Kurdistan Region

8. STRATEGIC AXES FOR THE DEVELOPMENT OF THE TOURISM SECTOR

The Strategic Axes for the development of the tourism sector based on the SWOT Analysis, objectives and tourism development policies in the region, include:

- **The First Strategic Axis: The development of the administrative structure of tourism for sustainable tourism development management**
Focus on structural requirements for sector development, including the strengthening of policy development, planning, marketing, media, and communication strategies. Also there is a need for the private sector to participate and their input to support sustainable development.
- **The Second Strategic Axis: The development of tourism sites and products**
This includes the identification of tourism assets and promising sites for tourism and the development of tourism products on the basis of groups (zones / clusters) in every Governorate. Assets include natural sites; from mountains, lakes, caves archaeological sites recreational areas, historical heritage and provincial centers.
- **The Third Strategic Axis: The improvement of quality in the tourism sector and its competitiveness**
This includes the development of mechanisms for the overall quality and the adoption of international standards in the classification of tourism facilities and products. Additionally there is a need to encourage private sector organizations to develop and implement a quality management system.
- **The Fourth Strategic Axis: The development of tourism Brand Strategy**
The tourism Brand is the expression and competitive identity of the region. It is central to all marketing communication tools, and should be based on market research studies.
- **The Fifth Strategic Axis: The preparation of a tourism marketing strategy**
This includes strategic positioning and mechanisms for communication, media, and education. The channels of communication include traditional and modern tools required to create an image of the activities and events geared to the target markets.

- **The Sixth Strategic Axis: The development of tourism education**
This includes the development of tourism education and training based on; current situation, programs and curricula development, educational institutions empowerment, and program identification.
- **The Seventh Strategic Axis: The state's role in the development and support of the tourism sector**
This includes the role of government to enhance the attractiveness of tourism investment. By supporting the sector development via regulatory frameworks, legislation and programs to increase the attractiveness of tourism projects to investors and to create investment incentives.
- **The Eighth Strategic Axis: The environment impact and waste management**
It should include guidelines for tourism institutions on proper waste management methods to reduce the impact of their activities on the natural environment.
- **The Ninth Strategic Axis: The development of infrastructure**
Include components for infrastructure development of road and transport networks, airports, electricity, water and communications in support of the region's economy and the tourism sector.
- **The Tenth Strategic Axis: The development and modernization of legislation, laws and regulations for tourism**
This includes the preparation and development of legislation, laws and regulations that will support and strengthen the tourism sector. Which include standards contributing to the development of projects, institutions and tourism facilities for investment, and environment quality management to sustain competitiveness.

Figure (6) shows the tourism development strategy in tourism axes. The indicators prepared by the governorate are shown in Tables (3) (4) (5) (6) and (7) below.

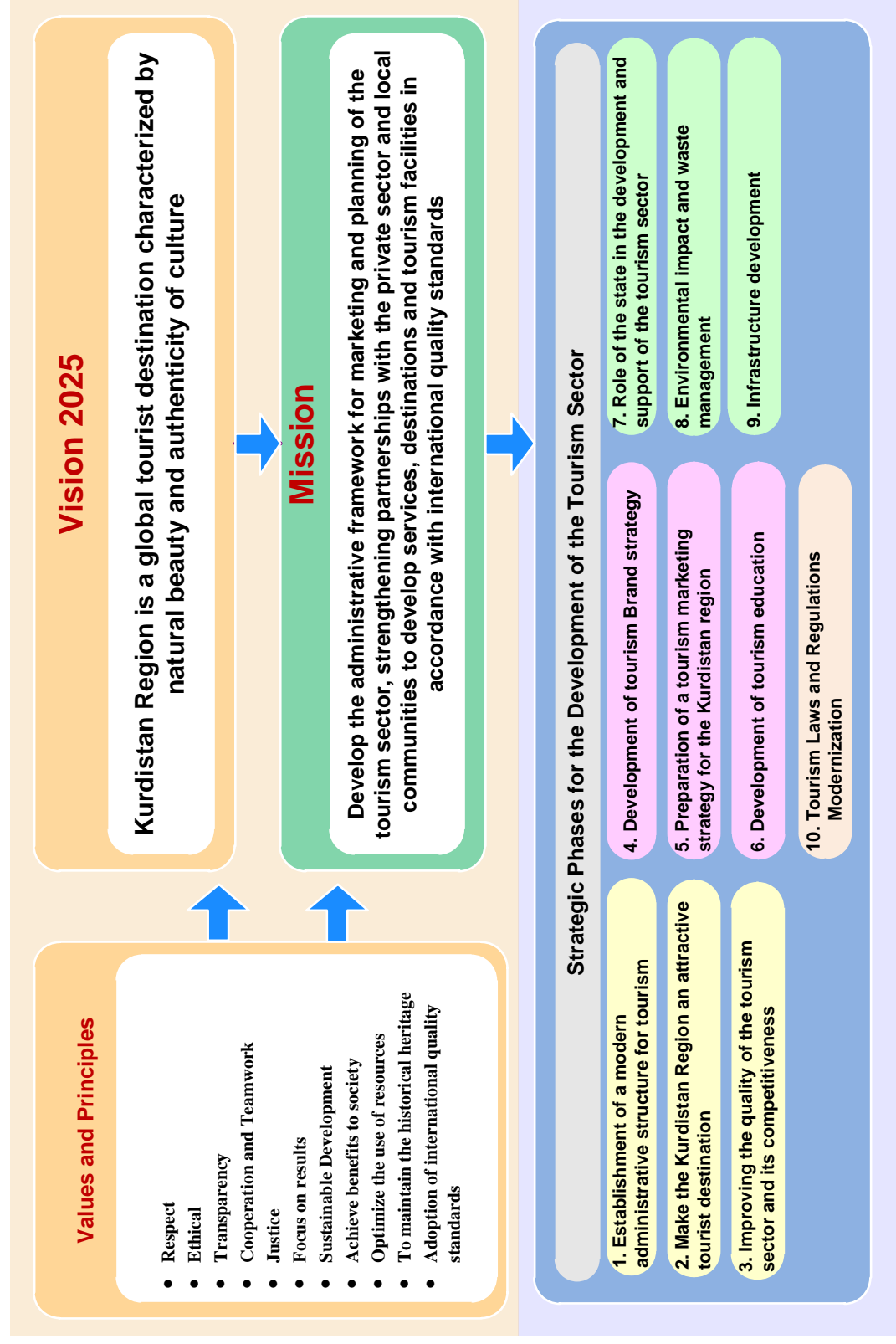


Figure (6): Map of the Tourism Development Strategy in the Kurdistan Region

Table (3): Tourism Development Indicators for Kurdistan Region

Kurdistan Region				
Indicator \ Year	2012	2016	2020	2025
Beds (thousands)	39.5	45.5	52.7	61
Number of tourist	2.216	3.560	5.1	7
Revenue (millions U.S. dollars)	910	1171	1680	2170

Table (4): Tourism Development Indicators for the Governorates

Governorates \ Year	Erbil				Sulaymaniyah				Garmyan				Duhok			
	2012	2016	2020	2025	2012	2016	2020	2025	2012	2016	2020	2025	2012	2016	2020	2025
Beds (thousands)	19	21.9	25.1	28.2	9.3	10.6	12.2	14.7	0.269	0.769	1.269	1.769	10.9	12.2	14.1	16.3
Revenue (millions U.S. dollars)	525	684	930	1160	169	228	355	468	50	8	22	34	170	250	375	511

Reference: Report No. (14)

Table (5): Tourism Development Indicators for Inflows to the Region

Tourists	2012	% of Total	Expected increase	2016	% of Total	Expected increase	2020	% of Total	Expected increase	2025	% of Total
Inside the Region	313,144	14.1%		516,000	14.5%		775,200	15.2%		1,055,700	15%
From the rest of Iraq outside the region	1,470,138	66.4%		2,420,800	68%		3,253,800	63.8%		3,444,300	49.3%
Outside Iraq	433,711	19.5%		623,200	17.5%		1,071,000	21%		2,500,000	35.7%
Total	2,216,993	100%	62%	3,560,000	100%	43%	5,100,000	100%	37%	7,000,000	100%

Table (6): Tourism Development Indicators for the Governorates

	Erbil				Sulaymaniyah				Duhok				Garmyan				Total			
	2012	2016	2020	2025	2012	2016	2020	2025	2012	2016	2020	2025	2012	2016	2020	2025	2012	2016	2020	2025
No. of Tourists (millions)	1.518	2.403	3.391	4.520	0.374	0.615	0.918	1.341	0.302	0.500	0.725	1.015	0.022	0.042	0.066	0.124	2.216	3.560	5.100	7.000
% of total	68.5	67.5	66.5	64.5	16.9	17.3	18	19	13.6	14	14.2	14.7	1	1.2	1.3	1.8	100	100	100	100

Table (7): Expected Direct Forecast Employment Opportunities in the Tourism Sector

Job Level	2016	2020	2025
Senior management	600	1,300	2,100
Middle management	1,200	2,600	4,200
Supervisory management	1,800	3,900	6,300
Operational functions	8,400	18,200	29,400
Total	12,000	26,000	42,000

9. THE FIRST STRATEGIC AXIS: THE DEVELOPMENT OF THE ADMINISTRATIVE STRUCTURE OF TOURISM FOR SUSTAINABLE TOURISM DEVELOPMENT MANAGEMENT

The “Ministry of Municipalities and Tourism in the Kurdistan Region – Iraq” is the ministry directly responsible for Tourism in Kurdistan. Established under Law No. 12 of 2010, its functions are “the planning and development of tourism, in the region”, its objectives include:

- Upgrading municipal services, in addition to the providing tourism services, and ensuring the needs of citizens in the tourist areas and parks.
- Enabling the ministry of tourism development in contributing to local economic development.
- Applying effective policies in land use and urban planning.
- Ensuring a clean environment and the infrastructure required, for the vitalization of tourism activity.

The ninth article of the law entrusts the Ministry of Municipalities and Tourism with the task of the management of all the antiquities, archaeological sites, and heritage buildings.

9.1 General Board for Tourism

The fourth article of law no. 12, tourism sector supervision and strategic management is entrusted to the General Board of Tourism.

The "Board" which is linked to the Ministry of Municipalities and Tourism for the Kurdistan Region has financial and administrative independence, and consists of:

1. The office of the President of the Commission: Headed by the director of staff.
2. Directorate General of Tourism in each of the governorates of the region.
3. The Board of Directors consists of:
 - The President of the Commission / President.
 - General Managers in the governorates.
 - Two ministry advisers.

It is headed by university level staff, with experience and competence in the field of tourism.

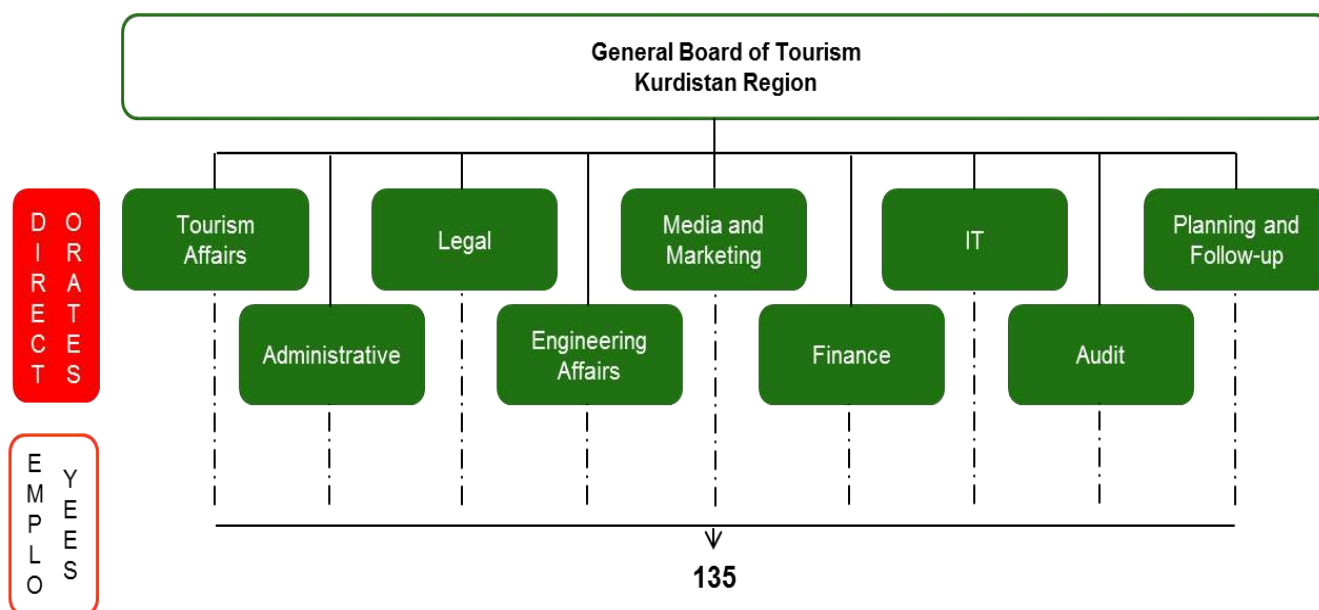
It also stated that the decisions of the Governing Council are subject to the approval of the Minister.

9.2 The Organizational Structure of the General Board of Tourism

The General Board of Tourism for the Kurdistan Region consists of ten different departments:

- Directorate of Planning and Follow-up
- Audit Directorate
- Directorate of Information Technology
- Directorate of Finance
- Directorate of Media and Marketing
- Directorate of Engineering
- Legal Directorate
- Directorate of Administrative Affairs
- Directorate of Tourism
- Quality Management Directorate

Currently the General Board of Tourism of Kurdistan Region (in 2012) has 135 employees of various ranks and functional disciplines; the figure below shows the organization of "The Board".



The organizational structure of the General Board of Tourism

9.3 General Directorate of Tourism in the Governorates and in Garman

The 3 Governorates and Garman have a Directorate General of Tourism tracking them administratively. These are professionally affiliated with the General Board of Tourism. The Directorate General of Tourism, Board of Directors in KRG should hold college degrees and competencies in the field of tourism (Law No. 12 of 2010, Article IV).

9.3.1 Organizational Structure of the Directorates General for Tourism in the Governorates and Garmyan

General Directorates for Tourism in the Governorates and Garmyan have the same organizational structure as the General Board for Tourism in Erbil; this in turn includes 9 Directorates.

The number of employees varies in the general directorates of tourism with 233 employees in Erbil, 343 employees in Sulaymaniyah, 244 employees in Duhok, and 30 employees in Garmyan. In Erbil there are 3 local districts in Koya, Soran and Shaqlawa, in Duhok the local directorates are in Sheikhan, Sarsank, Akre and Zakho, and in Sulaymaniyah, in Halabja, Dokan and Darbandikhan. Finally, Garmyan has two directorates in Kifri and Khanaqin.

9.4 Towards a New Organization Structure for the General Board of Tourism

The “General Board of Tourism” needs radical restructuring to focus on the strategic tasks of the body and the functions of tourism planning, and development and marketing.

The recommended plan to restructure the organization is shown in the figure below:



The above structure includes all the important areas that guarantee optimal performance for the Tourism Board of Kurdistan. It also takes into account Article 9; Law No. 12 of 2010, on the management of all the antiquities, archaeological sites, and heritage buildings. It is meant to retain all responsibilities and tasks of the "Board", and not to transfer any to the general directorates in the governorates.

9.5 The Core Functions for the Departments of General Board of Tourism

The General Board of Tourism undertakes a pivotal role in stimulating and streamlining the development of tourism in the region, through the development of appropriate policies and the preparation of strategic plans and marketing programs, media and public awareness and support of the general directorates in the governorates enabling them to perform their role efficiently and effectively.

The main tasks are as follows:

A) The major tasks of the Directorate of tourism policies are:

- **Classification / Licensing**, and related tasks:
 - Update the criteria for classification of accommodation facilities in the Kurdistan Region.
 - Set classification procedure.
 - Issue approval rating.
 - Grant construction and operation permits of tourism projects.
- **Tourism laws and regulations**, and related tasks:
 - Develop tourism laws and regulations aimed to regulate the tourism industries.
 - Monitor the proper implementation of the Tourism Law.
 - Act as the primary reference for professional opinion matters relating to tourism law.
- **Tourism**, and related tasks:
 - Set up a program to support tourism in the Kurdistan Region to help stimulate private investment in the sector.
 - Implement programs to support tourism.
 - Review requests for support.
 - Make decisions in regard to the granting of support for certain projects.
 - Monitor the implementation process of approved projects.
- **Tourism Awareness**, and related tasks:
 - Promote tourism culture among Kurdistan communities.
 - Work to raise the level of tourism awareness among different groups of people, to make tourism one of the pillars of economic and regional development.
 - Promote concepts to increase awareness within the educational curricula in schools and universities.
 - Work in cooperation with various media and communities across the region, at all levels.
 - Promote tourism concepts and tourism development plans within education and social programs, to highlight the importance of tourism to the economy in:

- Creating jobs across the region, particularly in areas with high tourist potential, which contain **archaeological** sites, historical heritage, natural landmarks scalable summer resorts.
- Encouraging investment projects in the tourism sector in the areas of tourism services.
- Supporting regional and sectorial development in the Governorates and Garman.
- Educate the community and the administrative authorities responsible in the Governorates about the importance of maintaining green areas and in being environmentally friendly.
- **Tourism education**, and related tasks:
 - Develop basic frameworks of educational facilities in the field of tourism.
 - Work closely with the Ministry of Education in Kurdistan Region.
 - Develop and implement a program of courses and seminars on tourism to raise the level of knowledge and skills in the tourist areas of Kurdistan.
 - Prepare workshops for destinations related to the tourism sector, to raise awareness about the positive effects of tourism.
 - Establish summer schools for tourism in collaboration with local universities.
- **Tourism statistics**, and related tasks:
 - Develop an exclusive statistical system for the tourism sector.
 - Work closely with the related statistical entities.
 - Prepare and publish statistical data on tourism in Kurdistan Region.
 - Analyze and distribute statistical data internally between different departments.
- **International relations**, and related tasks:
 - Represent Kurdistan Region in international organizations.
 - Coordinate international cooperation.
 - Establish projects/ initiatives for cross-border tourism.
 - Support the exchange of information with tourism boards in neighboring countries and with Baghdad.

B) The main functions of the Department of Tourism Marketing

These tasks revolve around:

- **Strategy, Development and Branding, and related tasks:**
 - Develop a marketing plan with a long-term strategy for Kurdistan Region.
 - Prepare annual marketing plan for Kurdistan Region.
 - Develop and promote Kurdistan Region Brand.
 - Develop and register logos.

- Prepare Brand Guide for stakeholders in the tourism sector.
- Develop partnerships (i.e. with the producers of goods in Kurdistan territory).
- Create and oversee marketing agencies and coordinate their activities.
- **Market research**, and related tasks:
 - Determine a model for regular statistical surveys (with visitors).
 - Initiate tourism studies, and monitor the current trends in the field of tourism which are relevant to Kurdistan Region.
 - Analysis the development of tourist destinations similar to KRG.
- **Telecommunications**, and related tasks:

Advertising

- Develop and transmit promotional materials for Kurdistan Region on radio and television stations.
- Develop and implement advertising campaigns such as: (newspaper ads, billboards...) for the Kurdistan Region.
- Engage in tourism events.
- Coordinate joint promotions with large companies such as: major chain stores, supermarkets, telecommunications companies...).

Public appearances and Events

- Participate in exhibitions.
- Prepare and implement mobile exhibitions and seminars.
- Develop themes for special occasions.
- Organize and implement events of national importance on an annual basis and / or special occasions.

Information

- Prepare, print and distribute files, manuals, maps, posters, etc. over all Kurdistan.

Support the Tourism Sector

- Prepare and implement trips.

Media

- Prepare and distribute press releases and news items.
- Develop public relations campaigns to highlight the image of Kurdistan Region as a tourist destination.
- Organize and implement special flights for the press.
- Support activities that contribute to the image of Kurdistan Region, such as documentaries.

E-Marketing

- Develop and update the content of the official website for tourism in Kurdistan Region, and manage its content.
- Prepare e-newsletters and database of news bulletins.
- Create private accounts for tourism in Kurdistan Region, and on social network sites.
- Develop the central booking site as part of the web page on the official Home.

C) The Main Tasks of the Department of Tourism Development

- **Strategic planning and tourism development**, and related tasks:
 - Develop tourism strategies and annual work plans for Kurdistan Region
 - Oversee the implementation of the plans.
 - Guide the development of tourism in Kurdistan Region to be consistent with the proposed positioning in the tourism market.
- **Development of Tourism Products**, and related tasks:
 - Develop tourism products for sale in Kurdistan Region.
 - Create and promote tourism packages specific to the Kurdistan Region in coordination with Department of Tourism Marketing.
 - Develop products combining various tourism elements, such as tourist discount cards.
- **Improving Quality**, and related tasks:
 - Implement and apply a program to improve the quality of tourism in Kurdistan Region.
 - Develop a quality mark for tourism in Kurdistan Region.
 - Create an Annual Tourism Award for Kurdistan Region.
 - Promote private initiatives to improve the quality of tourism through workshops, brochures, etc.
- **Project Planning and Engineering**, and related tasks:
 - Prepare a guide for Tourism departments in the Governorates, regulating tourism projects that receive funding from the public sector.
 - Evaluate and approve tourism projects submitted by public administrations for tourism, which are eligible to receive funding from the public sector.
 - Supervise approved public sector tourism projects in the Governorates.
- **Tourism Investment**, and related tasks:
 - Support tourism departments in the Governorates to develop tourism projects appropriate for the private sector.
 - Select appropriate tourism projects in the Governorates for investment by the private sector.

- Provide favorable conditions for investors from the private sector.
- Promote tourism investment projects in collaboration with the Board of Investment in Kurdistan Region.

D) The Main Tasks of the Management Department

- **Human Resources**, and related tasks:
 - Recruit sufficient qualified staff in the General Board of Tourism.
 - Identify job descriptions in coordination with the directors of the directorates.
 - Deal with all human resources issues.
- **Legal Affairs**, and related tasks:
 - Prepare and review the contracts of General board of Tourism.
 - Deal with issues and disputes for land and property.
 - Address all the internal legal affairs.
- **Finance and Audit**, and related tasks:
 - Manage payments (staff and contractors) and budget distribution.
 - Manage account of the Board.
 - Manage all the internal financial affairs.
 - Oversee and audit Board finances.
- **Information Technology**, and related tasks:
 - Establish adequate infrastructure for information technology.
 - Secure computers and other technical equipment.
 - Deal with all matters related to information technology.
- **Administrative Services**, and related tasks:
 - Prepare meetings and correspondences.
 - Manage Director's Office.

E) The Main Tasks of the Antiquities Department

- Preserve archaeological sites in Kurdistan Region.
- Maintain existing archaeological sites.
- Support investment in archaeological sites.
- Develop and promote archaeological sites in an environmentally secure manner.

9.6 The Organizational Structure Proposed for Tourism Administrations in the Governorates

The objective of the proposed structuring of governorate tourism departments is to define their tasks and functions effectively in conjunction with its role for the governorate and its link with the Board in Erbil.

The proposed organizational structure corresponds to the direction of the strategic plan for tourism, to enhance the functionality of administrative

units, and improve the efficiency of operations. The figure below shows the proposed organizational structure:



Consistent with the proposed structure of tourism administrations in the governorates the organization structure (proposed) for the General Board for Tourism, eliminates duplication of responsibilities, and clearly defines the responsibilities at the national and governorate level.

A) The Main Tasks of Tourism Marketing Departments (in Governorates)

- **Strategy and development of the Brand**, and related tasks:
 - Develop a strategic long-term marketing plan
 - Prepare annual operational marketing plan
 - Coordinate marketing activities with the activities of the General Board
 - Support Board in Brand development
- **Market research**, and related tasks:
 - Survey travelers regularly, in accordance to the specific model prepared by the Board
 - Monitor the current trends in the field of tourism
 - Analyze the evolution of other similar tourism destinations
- **Telecommunications**, and related tasks:
 - **Advertising**
 - Prepare and implement advertising campaigns (e.g. newspaper ads, billboards...)
 - Sponsor events and activities
 - Develop promotional campaigns in cooperation with large companies, such as major chain stores, supermarkets, telecom companies.

- **Public appearances and events**
 - Participate in exhibitions and seminars organized and implemented by the General Board of Tourism
 - Develop themes for events held in the Governorate
 - Organize and implement annual events and special occasions.
- **Information**
 - Prepare, print and distribute files, manuals, maps, posters...
- **Support for the tourism sector**
 - Organize and implement trips.
- **Media**
 - Prepare and distribute press releases and news items on a regular basis.
 - Organize campaigns and public relations initiatives.
 - Organize and implement special flights for the press.
 - Support activities that contribute to the creation of tourists, such as, the production of programs and documentaries.
- **E-Marketing**
 - Develop and update the content of the official tourism site for the governorate.
 - Prepare e-newsletters, and a database of news bulletins.
 - Create private accounts for tourism on the social network sites.
 - Manage content on Web sites, such as: Wikipedia.

B) Main Tasks of the Department of Tourism Development (in Governorates)

- **Strategic Planning and Tourism Development**, and related tasks:
 - Develop tourism strategies and the annual action plans.
 - Oversee the implementation procedures.
 - Guide the development of tourism in line with the proposed strategic positioning to maintain the tourism market.
- **The Development of Tourism Products**, and related tasks:
 - Develop tourism products offerings, such as, tours.
 - Develop special packages.
 - Develop products that combine elements for different types of tourists, such as, reductions tourist cards.
- **Project Planning and Engineering Affairs**, and related tasks:
 - Identify tourism projects that should receive public funding and prepare them for bidding.
 - Implement approved tourism projects.

- **Tourism Investment**, and related tasks:
 - Develop tourism projects for the private sector
 - Act as a contact point for potential investors
 - Support investors in the private sector, during the preparation and implementation of their projects.

C) The Main Tasks of the Department of Administrative Affairs (in Governorates)

- **Human resources**, and related tasks:
 - Recruit sufficient qualified staff in the departments of tourism.
 - Determine the job description in coordination with sub-departments.
 - Deal with all matters and issues relating to human resources.
- **Legal Affairs**, and related tasks:
 - Prepare and review contracts to manage tourism.
 - Address emerging issues related to land and property
 - Handle all internal legal affairs
- **Finance and Audit**, and related tasks:
 - Manage payments (such as employees and contractors) and budget distribution.
 - Manage Accounts.
 - Deal with all the internal financial affairs.
 - Assume oversight and auditing functions.
- **Information Technology**, and related tasks:
 - Establish infrastructure for information technology appropriate for the management of tourism.
 - Acquire the needed computers and other technical equipment
 - Deal with all matters relating to internal information technology
- **Administrative services**, and related tasks:
 - Prepare meetings and correspondences.
 - Manage Director's Office.

D) The Main Tasks for the Management of Tourist Sites and Facilities (in Governorates)

- Maintain and operate tourism facilities financed by the public sector
- Appoint staff for facilities
- Handle accounting functions (such as annual budgets and profit and loss statement)
- Work on the development of facilities
- Promote marketing of facilities.

10. THE SECOND STRATEGIC AXIS: THE DEVELOPMENT OF TOURISM SITES AND PRODUCTS

This axis handles the competitiveness of tourism types and tourism product development in various areas of tourism development in the region (Zones / Clusters).

10.1 Major Types of Tourist Attractions

The global demand for tourism includes 9 major tourism types. These areas may vary in quantity and quality between one country and another, some countries specialize in one or two tourism areas, such as, Monaco, Emirates other countries will have all tourism types and offers i.e. Turkey.

Each of these 9 tourism types has certain characteristics and advantages. The following is a grid matrix of these types and there characteristics:

Cultural Tourism	Cities Tourism	Tourism “Beaches and Sun”
<ul style="list-style-type: none"> • Important historical places • Cultural activities • Cultural museums • Tourist guides 	<ul style="list-style-type: none"> • A large number of sites and events • Attractive city center • Attractive shopping possibilities 	<ul style="list-style-type: none"> • Sea view • Protected and maintained beaches that are easily accessible • Suitable climatic situations
Mountain Tourism	Health / Fitness Tourism (SPA)	Business Tourism and Conferences (MICE)
<ul style="list-style-type: none"> • Attractive mountains • Easy access throughout the year • Favorable climate • Secure and safe 	<ul style="list-style-type: none"> • The availability of mineral warm water • Facilities for natural treatments and fitness • The potential for sports activity • Hunting tourism potential • The potential for health tourism 	<ul style="list-style-type: none"> • A large number of national and international companies • Enact legislation and government MICE • Various kinds of conferences and exhibitions • Availability of many facilities for meetings, conferences, concerts and events (MICE)
Religious Tourism	Natural Eco-Tourism	Adventure Tourism
<ul style="list-style-type: none"> • Shrines and religious buildings • Spiritual places • Important religious occasions 	<ul style="list-style-type: none"> • Natural sites • Plant and animal life • Culture and traditional way of life • Rural and village life 	<ul style="list-style-type: none"> • Organized adventure trips • Variety of places of differing themes • Security and safety

Based on the geographical characteristics of the region, environment and nature, it can be said that the Kurdistan Region is characterized by the following areas of tourism: Natural / ecotourism, mountain tourism, cultural tourism, and religious tourism.

Culture Tourism



City Tourism



Religious Tourism



Sun and Beach Tourism



Health and Spa Tourism



Business / MICE Tourism



Mountain Tourism: i.e. Koizh Mount



Cultural Tourism; i.e. Pasha Castle



**Natural and eco-tourism;
i.e. Shandar Cave**



**Adventure Tourism;
i.e. Ahmad Awa waterfall**



The following figure (7) reflects a preliminary assessment of the appropriateness of each of the nine fields of tourism for the development of the region.

	General conditions	Current situation	Potential
Sun & Beach Tourism	-	-	+
City Tourism	+	-	++
Culture Tourism	++	~	+
Business/MICE Tourism	+	-	~
Health & Spa Tourism	~	~	++
Mountain Tourism	++	-	~
Adventure Tourism	~	~	++
Nature/Eco Tourism	++	~	++
Religious Tourism	+	~	++

++ Very good + Good ~ Average - Poor

Figure (7): Evaluating the Nine Areas of Tourism for the KRG

10.2 Kurdistan Region Tourist Destinations and Attractions

Internationally, there is a distinction between tourist destination and attraction.

Tourist destinations (according to the World Tourism Organization) are geographic area, where all the features are available for a holiday, such as landscapes, climatic conditions, accommodation facilities, recreational facilities, etc. Tourist destinations are marketed by travel agencies and tour operators, in order to highlight the tourist potential of country and provide the opportunity for tourists.

Attractions (according to the World Tourism Organization), has importance for tourists as a place of cultural, historical, archaeological, religious, and/or ecological value.

10.3 Tourist Destinations in the Kurdistan Region

There are in Kurdistan, nine promising geographic areas that can be developed as modern tourist destinations. These require development in recreational and business tourism facilities.

Suggested destinations (see map below) include (Erbil, Sulaimaniyah, Duhok) and Lake Darbandikhan, Lake Dukan, Shaqlawah, Rowanduz, Akre and Sarsank.

The following basic pillars are used to determine the tourist destination of attraction.

Nature: The Kurdistan Region is rich in natural resources such as waterfalls, rivers, lakes, mountains and forests - all the elements that can contribute to the development of tourism

Culture: the distinct Kurdish culture, with many of the old cultural sites, represents an important asset for the development of tourism in Kurdistan Region.

Tourism cities: the urban centers of the region which combine the traditional with the modern.

Recreation and entertainment: Fun and adventure facilities that create interest in Kurdistan Region.

Figure (8) below, shows the geographical distribution of the proposed tourist destinations:



Figure (8): Geographical Distribution of the Proposed Tourist Destinations

Tourist destinations are distributed on the basis of an integrated tourist route by connecting different types of sites and destination points. These cover the region geographically, to benefit the development of strategic plans that include transport facilitation and marketing campaigns.

10.4 Attractions in Kurdistan Region

Beside the potential tourism destinations, numerous tourism attractions can be developed all over Kurdistan Region.

Cultural attractions (examples)



Natural attractions (examples)



Artificial attractions (examples)



10.5 Tourism Horizon 2025: A Realistic Scenario

The success of the proposed projects implementation plan includes increasing the number of tourist and family facilities in the three governorates and Garmyan.

As part of this plan three scenarios have been developed to create the capacity to receive tourists and visitors for the years 2016 - 2020 - 2025 with emphasis on realistic scenarios.

Following are the details associated with this scenario, but the optimistic and pessimistic scenarios can be referred in Report No. 14 (attached).

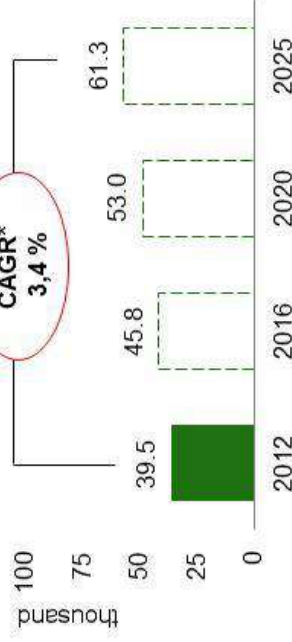
Realistic scenario

The realistic scenario assumes that a large number of activities and recommendations included in the Strategic Plan for Tourism will be achieved (or can be realized) gradually, and that the government will provide sufficient financial resources for tourism development.

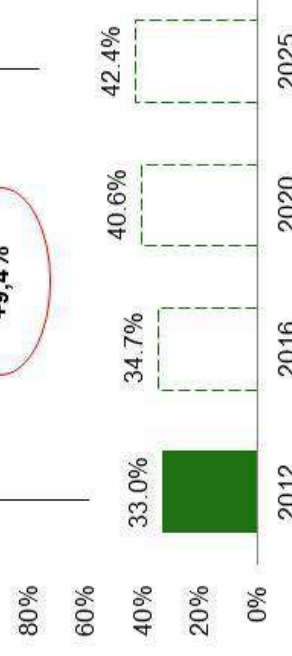
Realistic Scenario

In a realistic scenario additional 21,500 beds with an increase of more than 9% in occupancy are forecasted

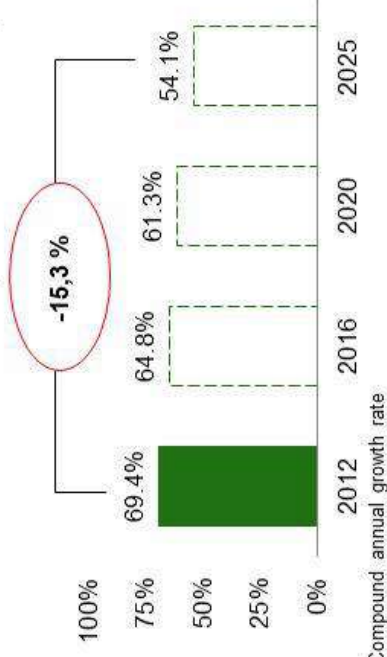
Beds (estimated development)



Bed occupancy (estimated development)

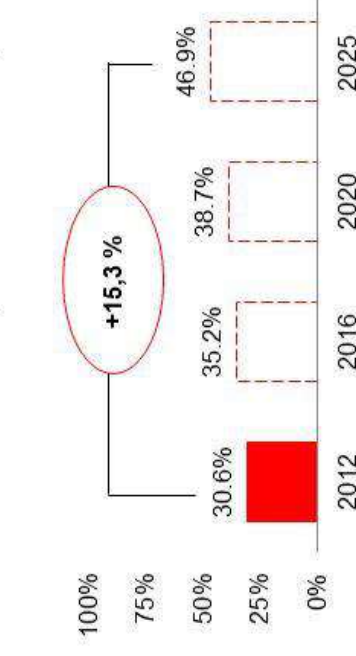


Share of business arrivals (estimated development)



* Compound annual growth rate

Share of leisure arrivals (estimated development)

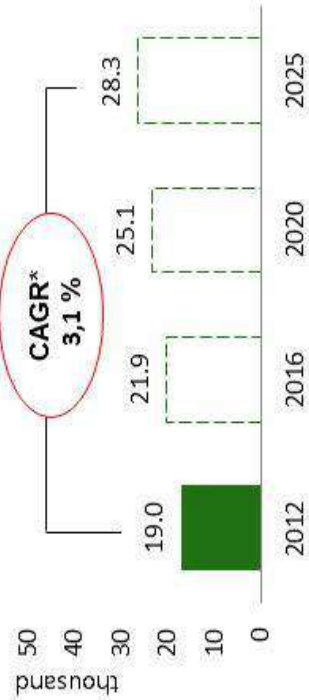


Realistic Scenario

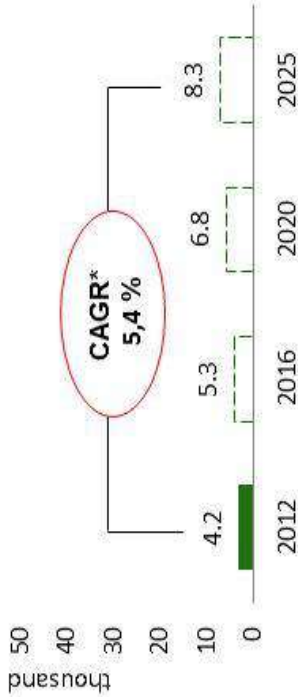
9,300 additional beds is a realistic forecast in Erbil Governorate up to 2025 (5,200 in Erbil and 4,100 outside the city)



Erbil Governorate

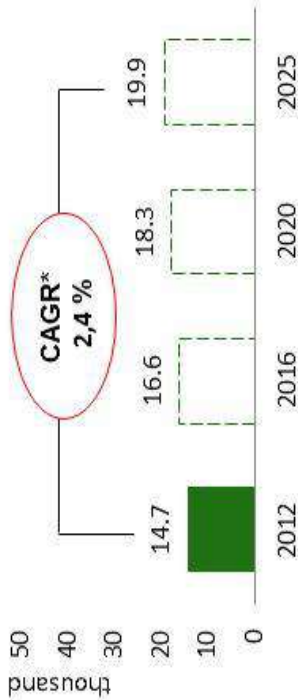


Outside City of Erbil

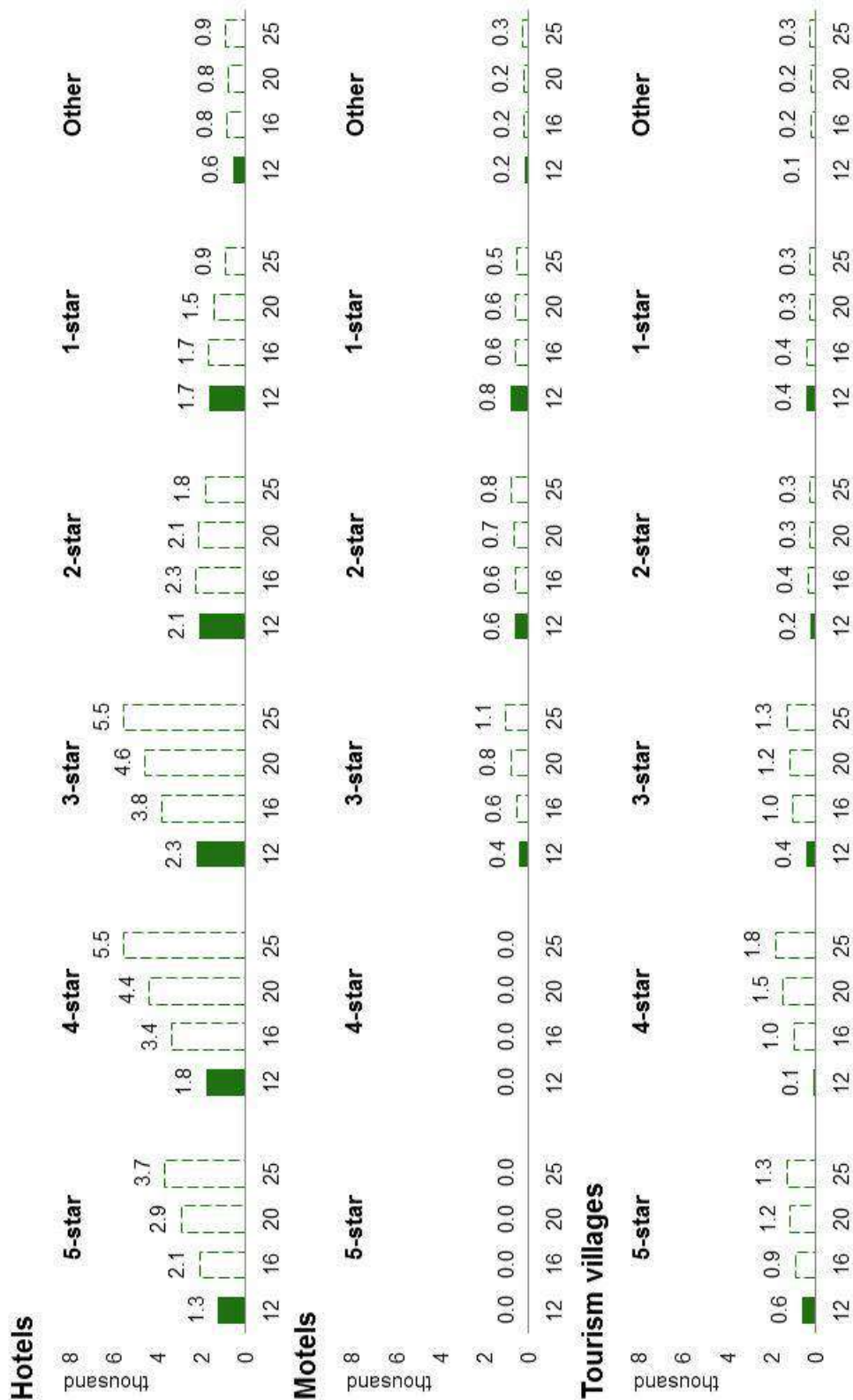


* Compound annual growth rate

Inside City of Erbil



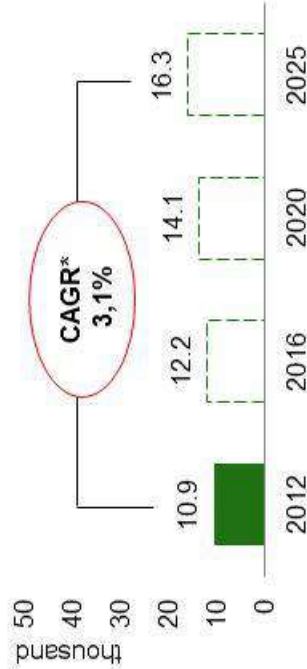
The number of beds in the 4/5 star segment will increase in Erbil Governorate from 3,800 to 12,300 beds in 2025



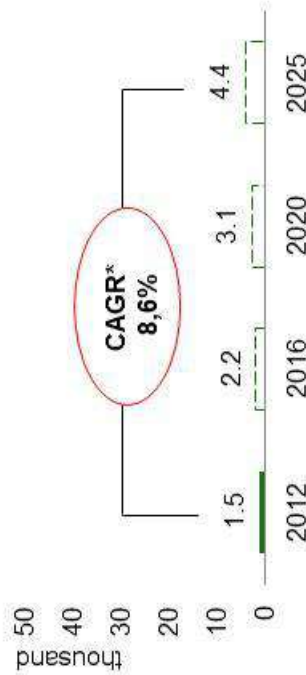
5,400 additional beds is a realistic forecast in Duhok Governorate up to 2025 (2,500 in Duhok and 2,900 outside the city)



Duhok Governorate

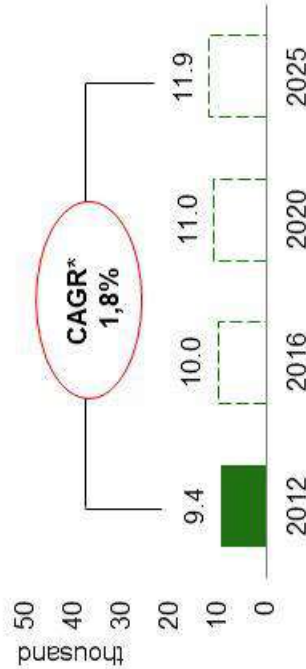


Outside city of Duhok

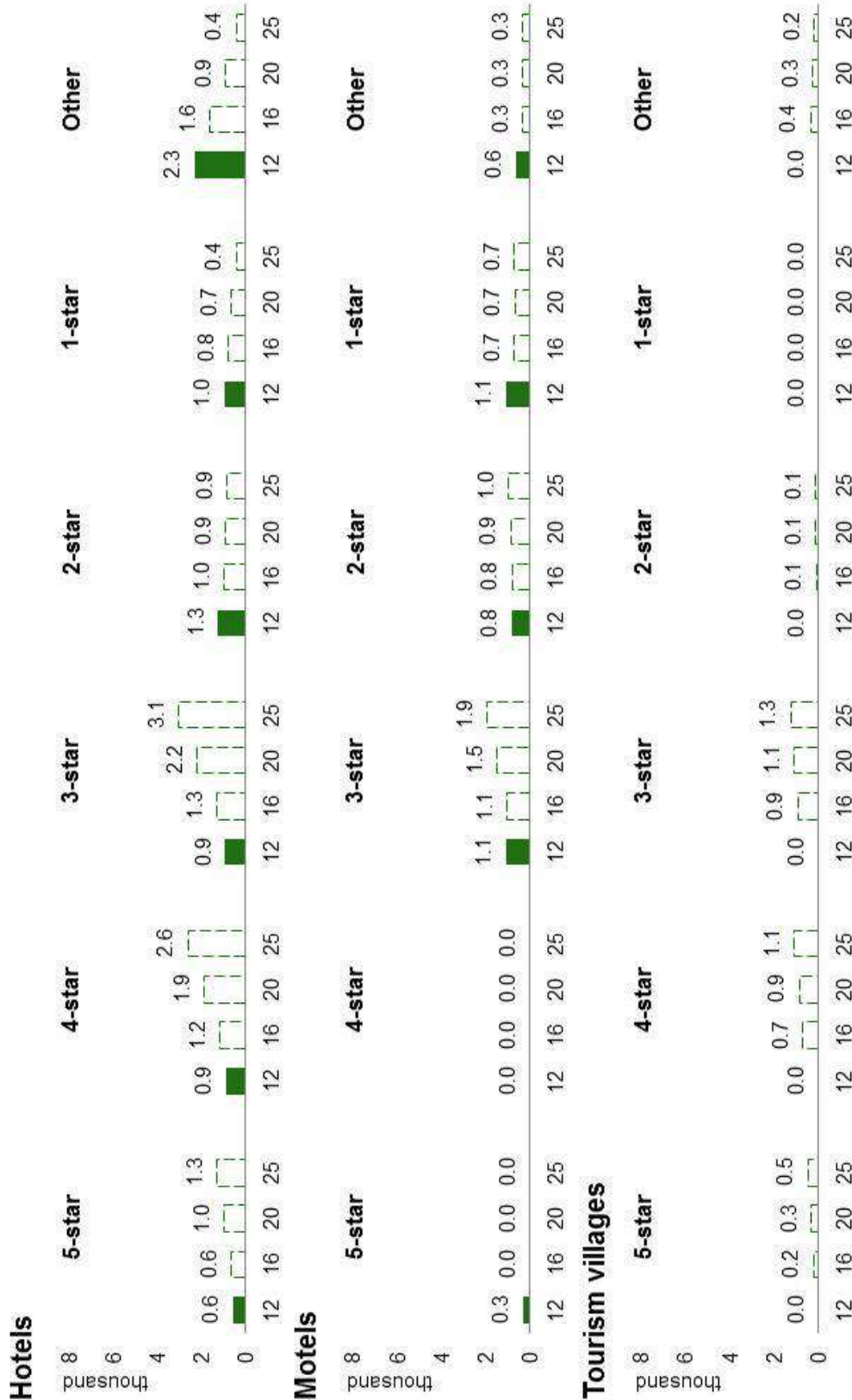


* Compound annual growth rate

Inside City of Duhok



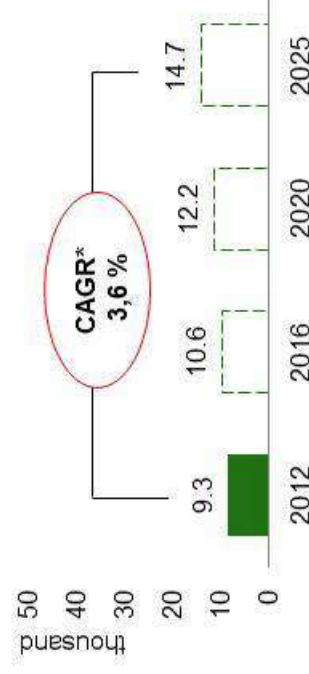
The number of beds in the 4/5 star segment will increase in Duhok Governorate from 1,800 to 5,800 beds in 2025



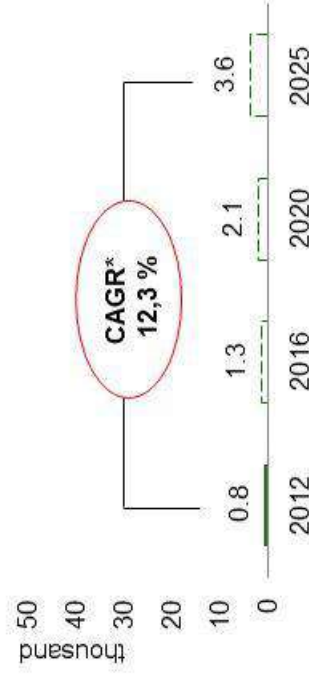
5,300 additional beds is realistic in Sulaymaniyah Governorate in 2025 (2,500 in Sulyamaniyah and 2,800 outside the city)



Sulaymaniyah Governorate

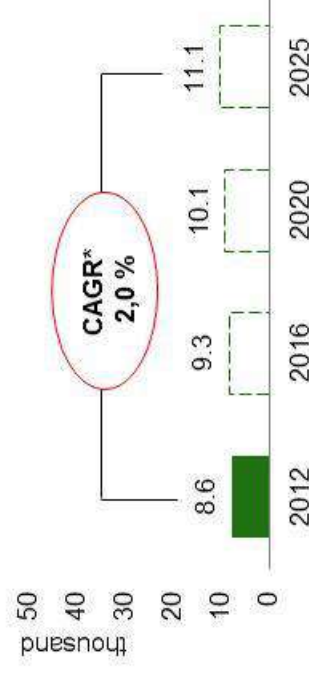


Outside city of Sulaymaniyah

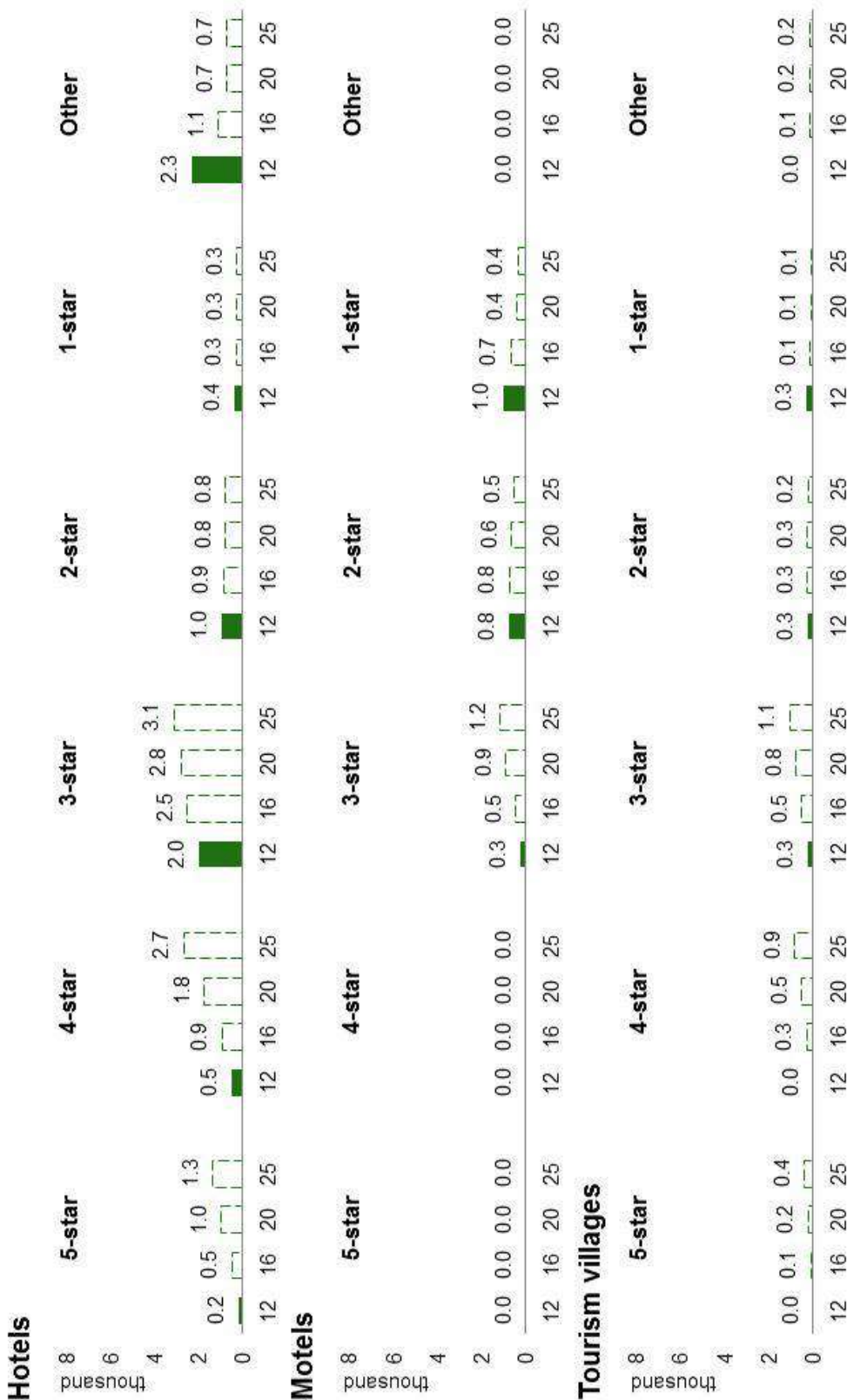


* Compound annual growth rate

Inside City of Sulaymaniyah



The number of beds in the 4/5 star segment will increase in Sulaymaniyah from 700 to 5,600 beds in 2025

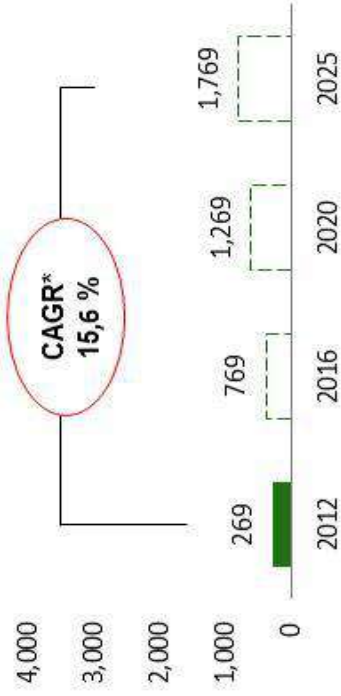


Realistic Scenario

1,500 additional beds is realistic forecast in Garmiyān by 2025



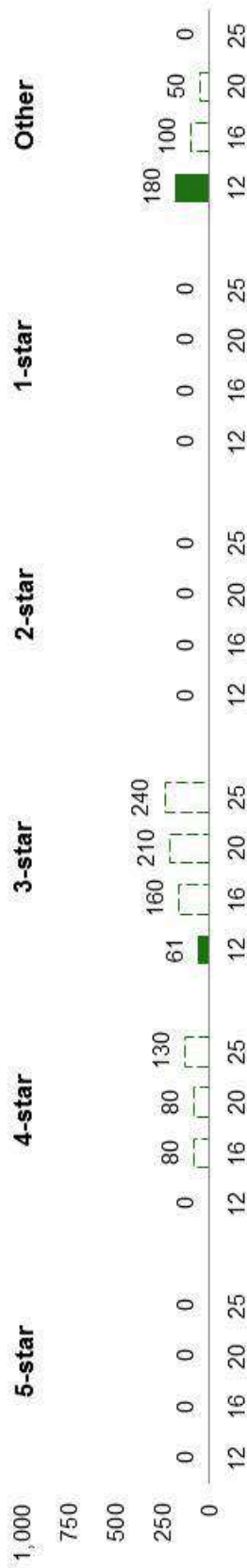
Garmiyān Region



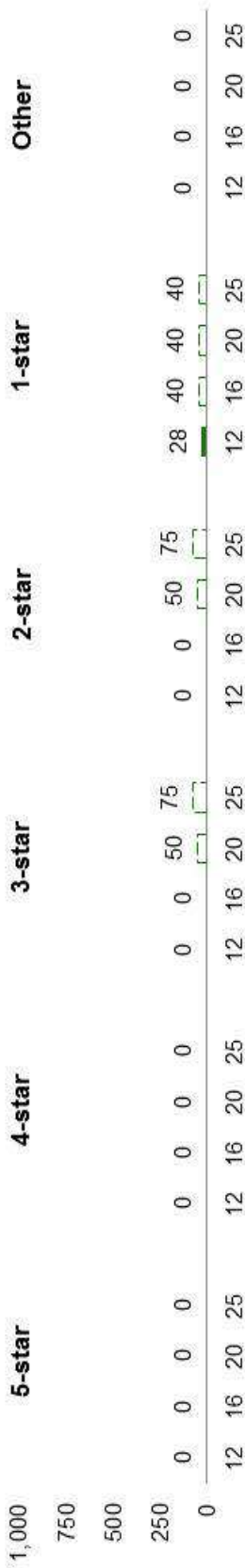
* Compound annual growth rate

The number of beds in the 4/5 star segment will increase in Garmyan Region from 0 to 734 beds in 2025

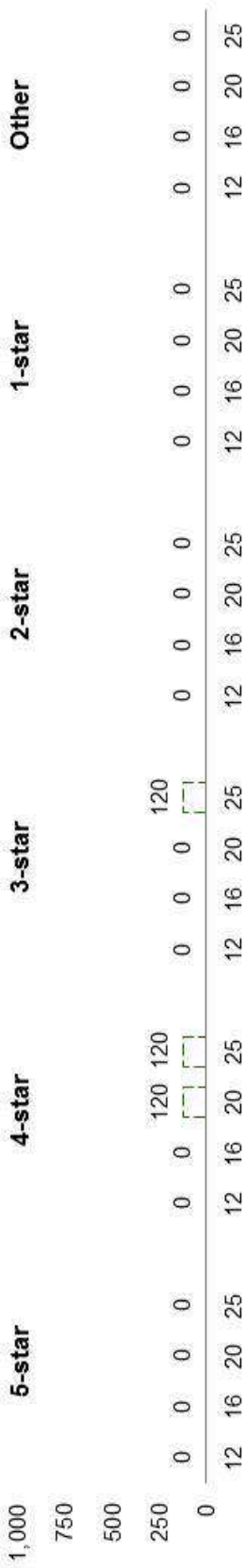
Hotels



Motels



Tourism villages



10.6 The Life Cycle of Tourism Investment Project

Each stage of the life cycle of the investment project specifies tasks that should be planned and completed to make the appropriate decisions that will help the successful completion of the subsequent stages.

The stages of the projects life cycle can be determine in tourism investment, as shown in Figure (9). This plan has been described in the first and second axes of the projects that have been studied, and the General Board of Tourism and tourism directorates in the governorates will follow these stages with the developers from the private sector and with the relevant government agencies.

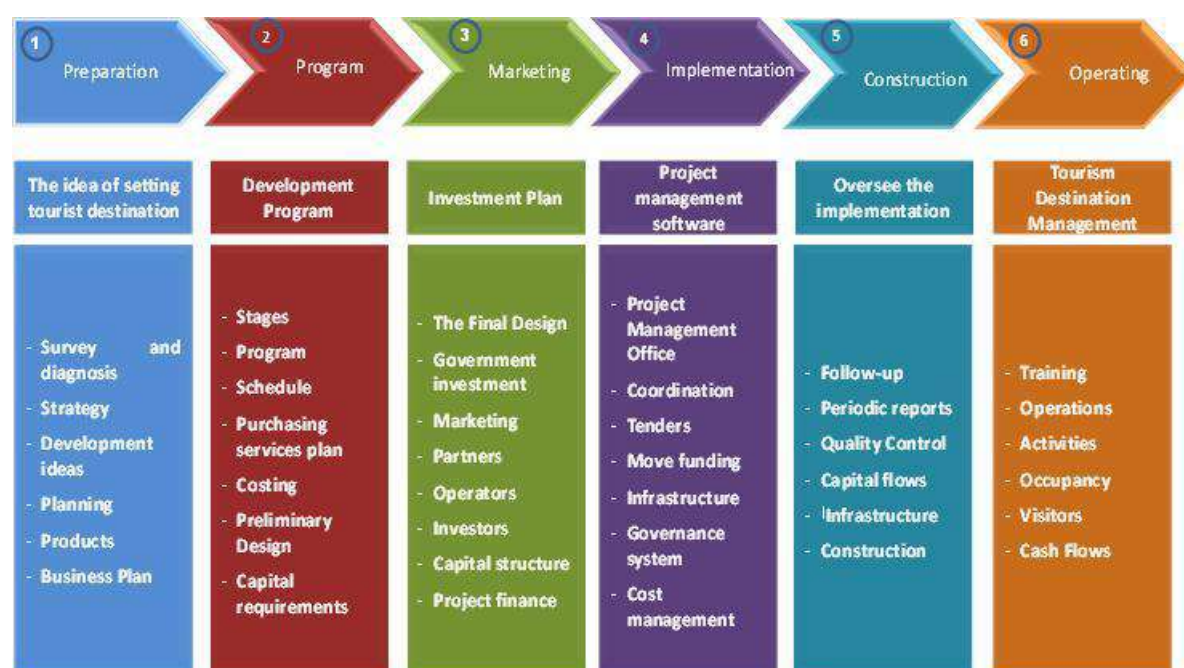


Figure (9): The Life Cycle of Tourism Investment Project

The following should be taken into account in the planning of investment projects:

- Procedures and duration required for the license (these procedures can be streamlined and accelerated).
- A feasibility study and environmental impact study.
- A categorization of projects, by design and specification, which will run parallel with availability of infrastructure in the region.
- Partners, Funders and capital structure of facilities provided to investors.
- The quality of contracts and project management system, quality control, periodic reports and capital flows in the construction axis.
- Operational management, training, tourism activities, occupancy, cash flows at the stage of operation and management.

10.7 The Proposed Development of Tourist Sites

The Plan's development objectives should be prioritized based on site importance and infrastructural requirements.

The following list of projects proposed by governorate (details found in Annex No. (1)).

Governorate	Projects No.
Erbil	19
Sulaymaniyah	20
Duhok	19
Garmyan	9

List of tourist sites proposed for development in the governorate of Erbil

District	Location	Project Size	
		Small	Large
Dashti Erbil	1. Dlopa	✓	
Shaqlawa	1. Jeniran Shaqlawa		✓
	2. Tawesca	✓	
	3. Dwin Castle	✓	
Koya	1. Molla Ziad	✓	
	2. Hamamuk		✓
	3. Kraw	✓	
Soran	1. Babishtian		✓
	2. Hassan Beik		✓
	3. Korek Mountainside		✓
Rawanduz	1. Bekhal Mountain		✓
	2. Jundayn Resort		✓
	3. Hindren Mountain		✓
Mergasor	1. Zarara River		✓
	2. Bastun Cave	✓	
	3. Wari Piran	✓	
Choman	1. Halgurd Peak	✓	
	2. Azadi		✓
	3. Kondi Rosti		✓
Total	19	9	10

Models for some of the proposed projects in the Governorate of Erbil:

Governorate of Erbil

Tourism Destination: Erbil – Shaqlawa

Diwn Citadel: Historic Tourism

Dlopa – Janiren Shaqlawa – Tawesca: Leisure & Recreational Tourism

Proposed theme	Accommodation needs	Infrastructure
<ul style="list-style-type: none"> Dlopa: playground-facilities for motorcycles of off-road-relaxation area-main square 		<ul style="list-style-type: none"> The road to the site is bare earth. electricity and water available. Need for a main parking area
<ul style="list-style-type: none"> Janiren Shaqlawa: Sports area (including golf tennis, soccer stadium, football stadium) - outdoor swimming pool with a bar - Theme park - main square (shops, restaurant) – attention to archeological and religious areas and cleanliness - attention to the cleanliness of the water - printed map / magazine for all religious and archaeological sites - training courses for staff - expand paths and walkways leading to the tourist sites - artificial waterfall 	A modern tourist resort (4 star standard) - hotel (100 beds) and 14 tourist Chalet	<ul style="list-style-type: none"> Road network is generally good, but there is a relative shortage in the availability of water in the summer Need for a main parking area
<ul style="list-style-type: none"> Tawesca: main square - a recreation area – park – restaurant and cafe's 		<ul style="list-style-type: none"> Good road network in general and the electricity and water is available on site Need for a main parking area
<ul style="list-style-type: none"> Diwn Citadel: Main square - Museum - Gardens 		<ul style="list-style-type: none"> The road network is not available, electricity and water is available on site Need for a main parking area

**List of tourist sites proposed for development in the
Governorate of Sulaymaniyah**

District	Location	Project Size	
		Small	Large
Sulaymaniyah Center	1. Derbandi Bazayan		✓
	2. Zargawizala		✓
	3. Hazard Merd Cave		✓
	4. Kordsat Hill	✓	
Halabaja	1. Ahmad Awa Waterfall & Resort		✓
	2. Ain Raishin	✓	
Bashdr	1. Julanan	✓	
	2. Kurdi Husni		✓
Dukan	1. Klak Smaq		✓
	2. Sartaka	✓	
Darbandikhan	1. Sirwan River		✓
	2. (Ashkuti) Kunaba Cave	✓	
	3. Bani Qouin (De Rea jah Darbandikhan)		✓
Rania	1. Rania Forest		✓
	2. Qurago	✓	
Mawta	1. Kuna Masi	✓	
Jawarta	1. Sarsir Park & Resort	✓	
Penjwin	1. Balkian		✓
Sayed Sadeq	1. Serail Subhan Agha	✓	
Chamchamal	1. Bani Maqan Forest		✓
Total	20	9	11

Models for some of the projects proposed in the Governorate of Sulaymaniyah

Governorate of Sulaymaniyah

Tourism Destination: Sulaymaniyah

Hazard Merd Cave – Kordsat Hill – Kuna Masi Park – Sarsing Park & Resort : Natural & Recreational Tourism

Proposed theme	Accommodation needs	Infrastructure
<ul style="list-style-type: none"> • Hazard Merd Cave : Eco chalets – cultural center – restaurant – park – scenic views – event hosting 	<ul style="list-style-type: none"> • 4-star hotel (120 beds) and 20 environmental chalet 	<ul style="list-style-type: none"> • The road to the site is not paved (800 meters length) , electricity and water are not available • The need for a major parking
<ul style="list-style-type: none"> • Kordsat Hill: Main square – restaurant – park – rest area 		<ul style="list-style-type: none"> • Road network available (2 km needs paving) • electricity and water are not available • Need for a main parking area
<ul style="list-style-type: none"> • Kuna Masi Park : restaurent – kids play area - Barbeque area – rest area 		<ul style="list-style-type: none"> • Good road network, water is available on site • Electricity supplied by electric generator. • Need for a main parking area
<ul style="list-style-type: none"> • Sarsing Park & Resort: Main square - Museum – Restaurants – Toilet area – park – barbeque area – rest area 		<ul style="list-style-type: none"> • The road network is not available, electricity and water is available on site • Need for a main parking area

List of tourist sites proposed for development in the Governorate of Duhok

District	Location	Project Size	
		Small	Large
Akre	1. Rafahiya Forest		✓
	2. Gary Sbilke		✓
	3. Begil Waterfalls		✓
	4. Sheikh Abdul Azizi al Kilani Shrine		✓
Amadiyah	1. Sersink Resort		✓
	2. Aynishki Resort		✓
	3. Ashawa Waterfalls		✓
	4. Kali Kani Mazi	✓	
	5. Sulav Resort		✓
	6. Bery Saly Park	✓	
	7. Kubhan Historical School	✓	
Zakho	1. Sharanish Resort		✓
	2. Kashan Resort		✓
	3. Kabour River		✓
Shikhan	1. Lalsh Temple	✓	
	2. Gali Bedil	✓	
	3. Khanis Ruins	✓	
Duhok	1. Khabor Baroshki		✓
	2. Kali Zawita	✓	
Total	19	8	11

Models for some of the proposed projects in the Governorate of Duhok

Governorate of Duhok

Tourism Destination: Akre City

Rafahiya Forest: Cultural Tourism

Abdul Aziz Al Kilani Shrine : Religious Tourism

Begil Waterfalls : Aqua & Recreational Tourism

Gary Sbilke: Eco and Natural Tourism

Proposed theme	Accommodation needs	Infrastructure
<ul style="list-style-type: none"> Rafahiya Forest: Main square – shopping outlets – restaurants – cultural center – cable car – ATV rental - waterfalls & gardens – rest & relaxation area 	<ul style="list-style-type: none"> Tourist village with 1,000 bed capacity (made up of different types of tourist accommodation; hotels, motels etc.) 	<ul style="list-style-type: none"> The road to the site is not paved (800 meters length) , electricity and water are not available The need for a major parking area
<ul style="list-style-type: none"> Begil Waterfalls : Main square – aqua sports area – rest area – shopping and trade area 		<ul style="list-style-type: none"> Road network, electricity and water available Need for a main parking area
<ul style="list-style-type: none"> Abdul Aziz Al Kilani Shrine : meeting area – mosque – lounge and rest area – main square 	<ul style="list-style-type: none"> Motels with 200 beds capacity 	<ul style="list-style-type: none"> Road, electricity and water available Need for a main parking area
<ul style="list-style-type: none"> Gary Sbilke: Restaurant – barbeque area – cable car – main square 		<ul style="list-style-type: none"> Need for a main parking area

List of tourist sites proposed for development in the Directorate of Garmyan

District	Location	Project Size	
		Small	Large
Kalar	1. Qula Barz		✓
	2. Benkerd		✓
	3. Essai	✓	
	4. Bardasur		✓
	5. Sartak		✓
	6. Sankar	✓	
Kifri	1. Bawashaswar		✓
Khanaqin	1. Al Wand Dam		✓
	2. Kalat	✓	
Total	9	5	4

Models for some of the projects proposed in the Directorate of Garmyan

Directorate of Garmyan

Tourism Destination: Kalar

Qula Barz: Eco Tourism

Benkerd: Recreational Tourism

Essai: Natural & Eco Tourism

Bardasor : Recreational Tourism

Proposed theme	Accommodation needs	Infrastructure
<ul style="list-style-type: none"> Qula Barz: children play area – waterfalls & parks – TVA – Barbeque area – rest area – restaurants – main square - park 	<ul style="list-style-type: none"> Eco chalets 	<ul style="list-style-type: none"> Road network, electricity and water available Need for a main parking area
<ul style="list-style-type: none"> Benkerd: Main square – museum – shopping area – and market place – chalets – restaurants and cafe – area to host major events - nature park 		<ul style="list-style-type: none"> Road network, electricity and water available Need for a main parking area
<ul style="list-style-type: none"> Essai: main square – restaurant – barbeque area – rest area – aqua & adventure park 		<ul style="list-style-type: none"> Need for a main parking area
<ul style="list-style-type: none"> Bardasur: Main square – horse riding – Karting – rest area – children play area – restaurant – park – aqua park – racing circuit – swimming pool (outdoor, indoor) – zoo – river restaurant – panoramic restaurant 		<ul style="list-style-type: none"> Road available Need for a main parking area

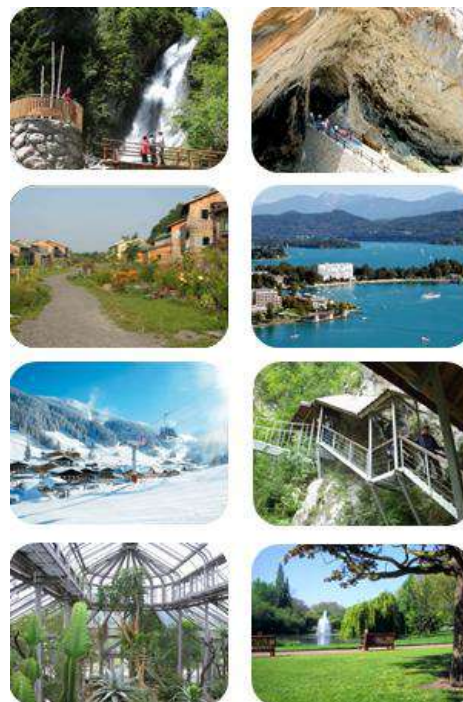
11. THE THIRD STRATEGIC AXIS: THE IMPROVEMENT OF QUALITY IN THE TOURISM SECTOR AND ITS COMPETITIVENESS

11.1 Enhance the Competitiveness of Tourism for KRG

Nature

Ten types of nature tourism exist in Kurdistan Region:

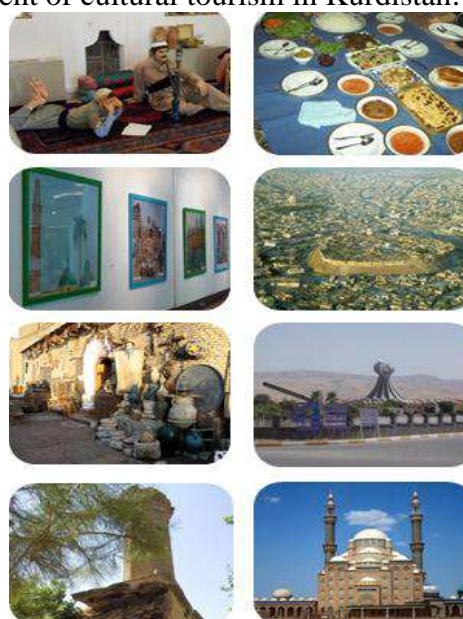
1. Develop caves to become tourist attractions
2. Develop waterfalls to become tourist attractions
3. Develop Eco-tourism and environmental camping areas
4. Develop Tourist destinations near lakes
5. Develop Tourist destinations in Mountain areas
6. Establish nature reserves as tourist sites
7. Develop valleys (canyons) as attractions
8. Develop other water attractions (aqua parks)
9. Develop facilities near natural mineral water locations
10. Establish parks and gardens with specific themes



Culture

Seven potential ways for the development of cultural tourism in Kurdistan:

1. Develop museums that reflect Kurdish culture and the region's characteristics
2. Develop historic places to become tourist attractions
3. Restore old buildings and monuments
4. Develop a range of activities related to the Kurdish culture (music, literature, art, festivals, cooking ...)
5. Convert some sites to World Cultural Heritage Site "UNESCO"
6. Develop unique souvenirs and handicrafts that represent the Kurdish Culture
7. Develop roads leading to cultural and religious sites in the region



Cities Tourism: ERBIL

Eleven possibilities for the development of city tourism for "Erbil":

1. Establish annual special events for the city of Erbil
2. Restore the citadel to become one of the most prominent landmarks in the city
3. Develop the area around the citadel to attract tourists
4. Develop the Museum of Modern History
5. Create an "Aqua Park" with "health centers"
6. Develop an art gallery and establish Kurdish cultural activities
7. Transform one of the city center parks to the "Garden of Paradise"
8. Create an indoor entertainment complex
9. Develop a modern public transport system with banners and sign posts
10. Create an entertainment center near the city center that offers activities, events and special festival dates
11. Assign a main street for the establishment of tourist hotels and restaurants for global Brands.

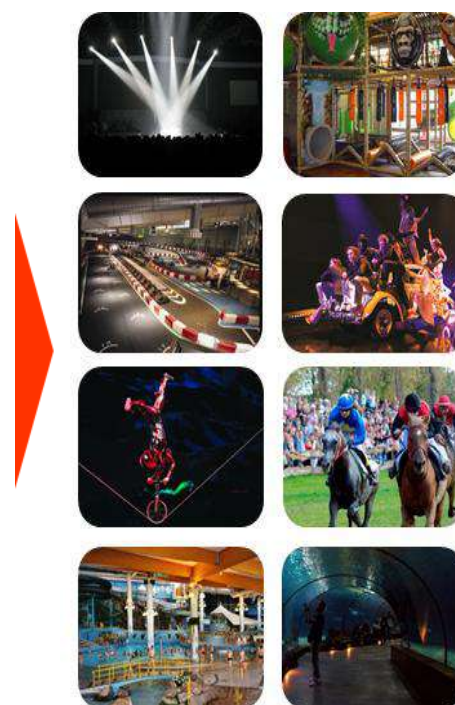


Entertainment Tourism

Tourism Themes for the Development of Entertainment Services:

More attention should be given to Entertainment tourism to broaden the tourist base and cater to locals and Iraqis:

1. Develop indoor entertainment complexes (including restaurants, children's playgrounds, cinema, bowling, ice skating rink, etc.).
2. Establish indoor water parks
3. Create Adventure Gardens
4. Create family attractions (for example, "Legoland", or the land of fairy tales such as "Disneyland", etc.).
5. Create exhibition facilities
6. Establish a permanent circus
7. Establish a center for music
8. Establish a horse racing course
9. Establish concert halls (for the reception of music stars)
10. Oceanium
11. Casinos
12. Zoos



11.2 Additional Tourism Product Developments across the Region

A) Tourist Routes across the County

Tourist routes should be developed in conjunction with the positioning of Kurdistan Region on the international tourism map. This requires development of road networks for "roaming tourism", which has become internationally popular.

Tourist routes should be built across the region based on the four proposed pillars, namely: nature tourism, cultural tourism, city tourism (Erbil) and leisure tourism.

Routes should include the development of attractions, facilities and amenities, for a more meaningful experience. For this purpose it is important to identify and classify the main attractions and implement a guide for each type of tourism offering.

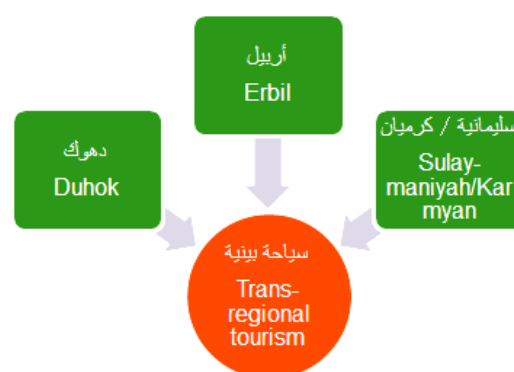


Figure (10) is a framework of requirements for the development of tourist routes:



Figure (10): Frameworks and Requirements for the Development of Intra-tourist Routes

11.3 Quality Management in Tourism Services

Tourism establishments measure success based on two criteria, quantity and quality. Along with quantity measures, establishing Quality Management Measures in all tourism operations enhances their success and ensures their sustainability. It also increases customer trust and satisfaction with the provided services.

The purposeful application of this concept on multiple levels leads to positive results including:

- Reduced errors and faster processing.
- Reduced operational costs.
- Increased work dynamics and improved production quantity.
- Improved services quality.
- Improved attractiveness for tourism enterprises and increased demand.

11.3.1 Current Initiatives for Quality Tourism

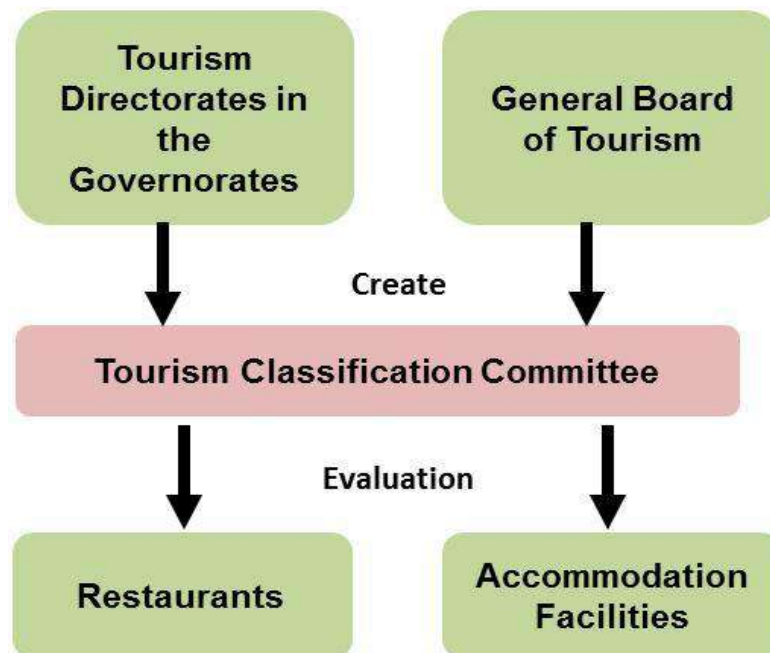
The current quality initiative in Kurdistan is the established classification system of tourism accommodation and facilities.

The star system classification of tourism in Kurdistan

- The star rating is the quality standards system utilized in Kurdistan for the classification of accommodation facilities.
- At the beginning of 2012 new guidelines were issued to re-organize and re-evaluate the system.

- The significant increase in the number of new hotels (20% increases between 2010 and 2012) is the reason for the re-organization process.
- The new system should implement international quality standards as stated in "The guide to the principles and criteria for classifying tourist facilities in the Kurdistan Region."

The Structure of the Star System



11.3.2 *Quality Improvement Initiatives in the Tourism Sector*

1. Develop and implement a program «Quality of Tourism in Kurdistan»

Base the program on two elements:

A) Quality of Service

- Education and training of staff in accommodations, restaurants, travel agencies, tour operators and management companies, tourist sites, etc.
- Establishment of monitoring mechanisms to ensure the quality of service.
- Investment in software and support services for quality standards in tourism companies.

B) Quality Equipment

- Improvement of quality through renovation and re-habilitation of facilities, tourist accommodation, restaurants, travel agencies, tour operators, and attractions.

2. A Quality Program shall include all segments of the tourism industry in Kurdistan



3. Success of the Quality Program is based on the application of four main pillars

- Training of Employees

Organize training courses for workers in all sectors of tourism in coordination with the General Board of Tourism.

- Support Programs

Develop programs to support tourism enterprises in equipment, renewal and quality improvement.

- Quality Standards

Expand the application of quality standards systems (not just accommodation facilities and restaurants).

- Annual Quality Award

Reward the leading tourism institutions and companies in Kurdistan for quality, (which stimulates other institutions to improve their performance).

4. Develop a centralized training program to increase the efficiency of existing workers

Key components of the training program:

- Special Seminars for quality improvement in tourism.

- The program should contain study and training modules for all categories relevant to tourism industry workforce.
- Certifications are awarded to employees who complete specialized modules of the program – the “quality mark” award can be given to tourism organizations that have a certain number of certified employees.
- This program should be supported by the government and the employer should cover the training costs.

5. Support programs focusing on quality improvement for existing tourist facilities

- Key Principles

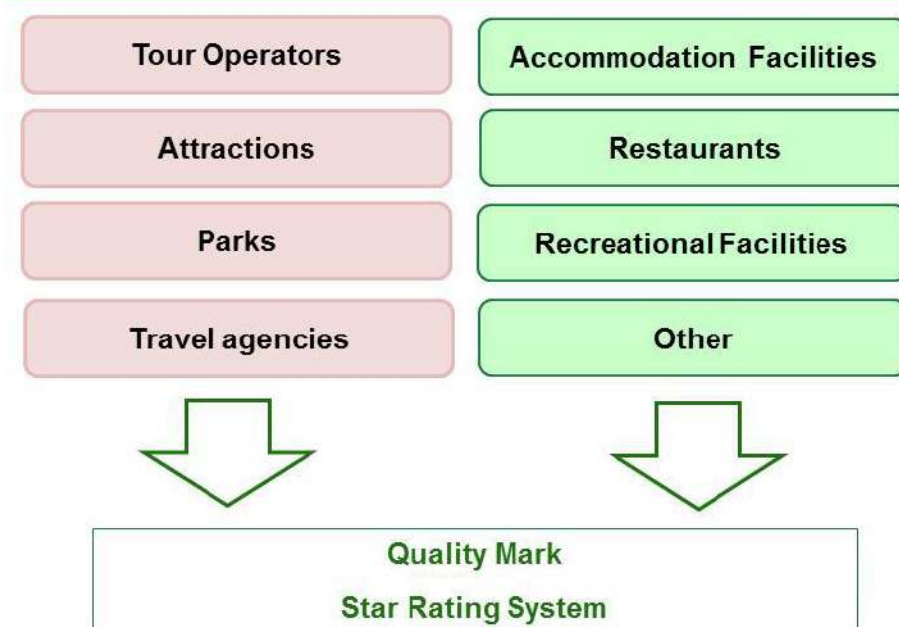
- Quality improvement is a requirement to support projects in the private sector.
- Companies operating in the tourism sector (i.e. hotels, restaurants, transport, tourist attractions, parks, travel agencies and tour operators) can apply for support.
- The support given to facilities should focus on tourist attractions.
- Part of the support should be allocated to funding project launch.
- Preference is given to facilities located in promising tourism areas.

- The Main Components of Training Support Program

- Grants up to 20% or to a maximum of U.S. \$ 0.5 million can be considered per project.
- The support program should have specific time duration and the grant should be commensurate to the projects size.
- The grant should be given in installments based on project completion.

6. Quality standards systems to raise the level of quality for all tourism service providers

Quality Standard System



- Star rating system

- A star ratings program for accommodation facilities and restaurants currently exists. The current system should be aligned with international standards.

- Quality Mark

- The goal is to development a 'quality mark' to ensure the quality and safety of provided services.

7. Enable tourism projects based on a quality standard

Proposed incentives in this area:

- An annual distinction award in tourism to be handed out in a grand ceremony is recommended to increase tourism awareness.
- The award can be presented for various tourism categories (accommodation facilities, restaurants, parks, and departments of the major tourist attractions, tour companies, etc.).
- Any tourism related organization can participate and should be evaluated by a specialist committee.
- The award should be prestigious and it should highlight the tourism brand of the Kurdistan Region.

12. THE FOURTH STRATEGIC AXIS: THE DEVELOPMENT OF TOURISM BRAND STRATEGY

The term “brand” means the competitive identity “of a product” – in our case: “of a destination”.

Competitiveness in the tourism industry requires the adoption and development of effective marketing and management tools to reach desired goals. The success of a tourism destination is evaluated by the number of tourists who visit and the revenues generated from tourism activities.

- A brand is what makes a destination distinctive and memorable. It differentiates the destination from all others. It is the foundation of the destination’s international competitiveness.
- A destination brand represents the core essence and enduring characteristics of a destination. A destination can change its themes and the way in which it presents itself to different market segments. But its core brand characteristics are essentially always the same.
- A brand is the component that defines the destination. It should be included in every act of marketing communication and in the behavior of destination stakeholders.
- A destination’s brand represents a dynamic interaction between the core assets and the way in which potential visitors perceive them. It is the sum of their perceptions, feelings and attitudes towards the destination, based on the way in which they have experienced the destination or on how it has been presented to them.
- A destination brand generally cannot be manufactured like a consumer product brand. It inherits its core assets: its landscape, people, culture and history. It exists in the way in which these are perceived by potential visitors and the emotional value they attach to experiencing them.

12.1 Types of Brands

There are four different types of brands: service brands, place brands, destination brands and consumer product brands.

- **Service brands:** These brands are highly vulnerable because they ‘sell’ the service through reputation.
- **Consumer product brands:** manufacturing brand products is an advantage; they can easily be made or changed.
- **Destination brands:** contains the key points i.e. landscape, scenery, people, history, cultural heritage, languages, etc.
- **Place brands:** Place brands have a more holistic approach. They try to deliver the **spirit** of a place therefore a close link between place and destination is required.

12.1.1 Destination Brand

A destination brand is the competitive identity that provides the destination with a specific personality.

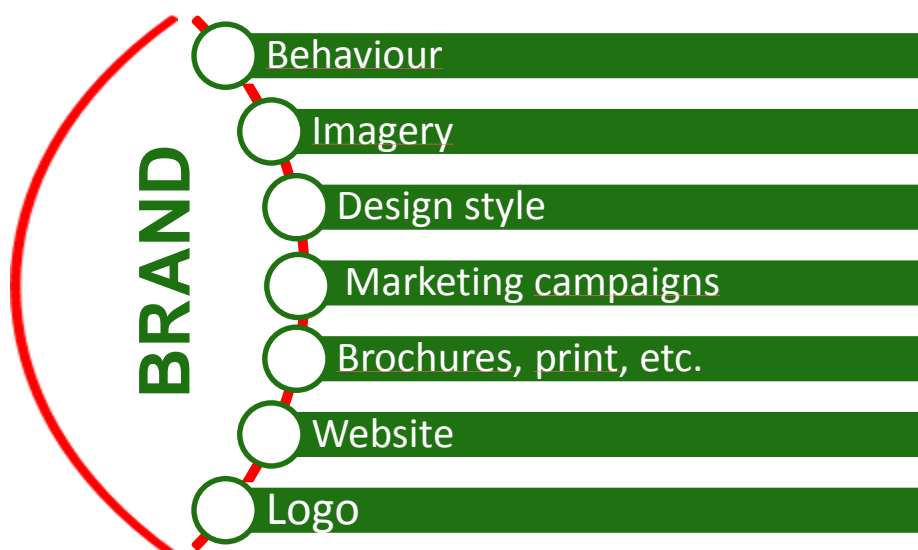
Attributes of a destination brand

- It is the enduring essence of the destination from the point of view of potential visitors.
- It is the dynamic relationship between the destination and the potential visitors.
- The brand essence gives it a unique identity that differentiates the brand and enables it to stand out from its competitors to gain the attention of potential visitors.
- The brand is a result of the emotions a place invokes.
- It is the mix of the core attributes of a place that make it distinctive and memorable.
- A destination inherits its brand - it cannot manufacture it (with a few exceptions: Dubai, Las Vegas) - it can enhance existing assets and add new products: theme parks, nature resorts, landmarks, hiking trails...
- The branding process is about identifying the most important assets, finding the essence that makes them different, appealing to visitors and promoting this essence consistently to gain a foothold in the imagination of potential visitors.

The balance involves an integrated approach to development, including the sharing of resources and expertise, using common standards and quality measures, encouraging innovation and continuous improvement

Destination Brand is Primary

A destination brand is a competitive identity that provides the destination with a specific personality that is committed to memory and has value in a specific source market.



A destination brand is an integral part of the country brand and benefits from leveraging value from the assets of other sectors.

Main characteristics of country brands

- The image of a country is like the brand of a company it has influence on the behaviors and attitudes of various stakeholders: businessmen, investors, tourists, trading, partners, consumers, students, other governments, donors, international organizations...
- The whole world has become a single market where countries are competing over opportunities and transactions: commercial, political, social and cultural.
- The brand image of a country helps make decisions and choices, like a company's brand which helps the consumer in the buying decisions.
- National image is critical to the tourism industry. The reputation of the country determines the ease, complexity and credibility of the process of "selling the country" in a touristic way.
- A good country brand reflects the image of a country that espouses a fair and prosperous society and good governance.
- If a product has strong brand equity, it will require less effort to promote.
- This brings up the responsibility to live up to the reputation of the place. Destination management should look for continuous improvement and innovation to retain and accumulate value and reputation.
- The branding process utilizes national aspirations and future development.

LIVING THE BRAND!

- A brand is not just about marketing communications.
- Behavior is critical – by the GBOT and its staff, by stakeholders, and by residents (i.e. everyone with whom the visitor comes into contact, whether face-to-face or as a recipient of information, service or products provided by anyone in the destination).
- Behavior – as in the way that visitors experience a destination through the people they encounter – has always been the most important element of a destination brand.

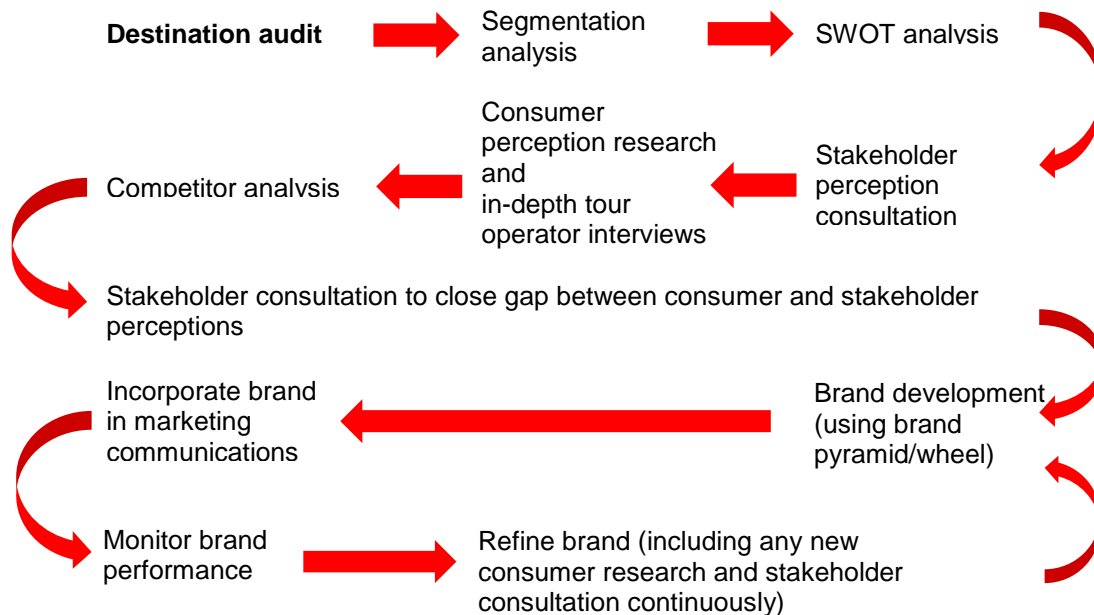
12.2 Brand Development

As the development of a tourism brand is a rather complex topic, there are several critical success factors.

The most important critical success factors:

- A good understanding of the destination's core market segments.




- A clear understanding of the destination's competitive position, its strengths and weaknesses.
- Leadership and support for the brand from the highest level (e.g. government), that is both enthusiastic and visible.
- Ongoing communication with stakeholders as involved participants.
- Adoption of the brand by commercial and other destination stakeholders in their own marketing communications – thereby expanding the brand's impact.
- Long-term commitment to enable sufficient brand equity to be built up for the brand to gain strength in the marketplace
- A mindset within the GBOT that positions the brand at the center of all marketing communications.



12.2.1 First Step in Brand Development

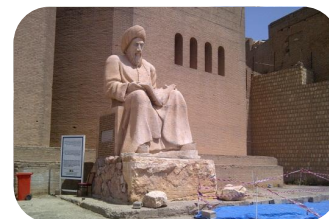
The first step in the (Brand) development process is to conduct a destination audit; the main assets of Kurdistan Region are currently the nature experience, Kurdish culture and the City of Erbil. What is needed is an assessment of the competitiveness and development potential of destinations.

Tourism Products

Nature	Culture	Erbil as Sample
<p>Currently the number one tourism asset of Kurdistan Region is its nature.</p> <p>For the majority of travelers from the most important source market (Central and Southern Iraq) the waterfalls, caves, mountain areas, lake/river zones and the “relaxing zones” are the main driver to visit Kurdistan Region.</p>	<p>Another very important asset, although not exploited in the best possible way, is the Kurdish culture.</p> <p>There are several historic places, ancient buildings or archaeological sites all over Kurdistan.</p> <p>Kurdish culture also offers a great chance to differentiate the region</p>	<p>The capital Erbil is another main asset of Kurdistan. It is a modern and buzzing city, constantly developing.</p> <p>It is also the location of the most remarkable touristic site of Kurdistan Region – the Erbil citadel.</p> <p>Modern accommodation, entertainment, shopping and business facilities exist.</p>
		

On a local level, all three main assets have a high level of competitiveness

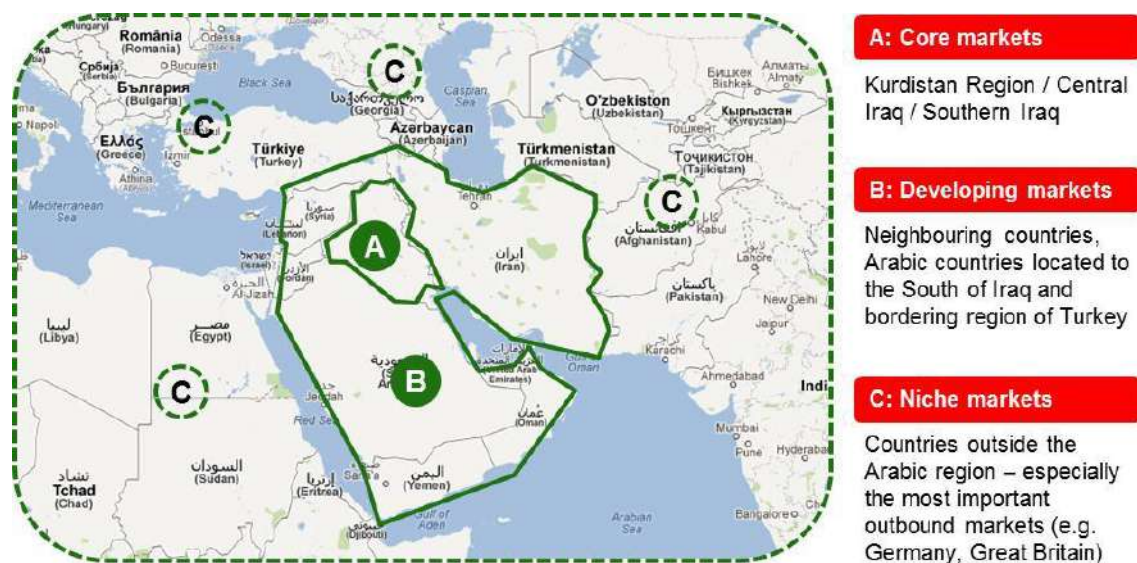
- On a local level Central and Southern Iraq have a high level of inward competitiveness for the KRG. As currently the majority of travellers visiting Kurdistan Region are from Central and Southern Iraq this segment is the most important one also in the mid-term and future.
- On a regional level the “nature experience” has a high competitiveness, since neighbouring countries do not have a high number of natural sites (like waterfalls, mountains, lakes, etc.).
- The “nature experience” currently has a medium level of accessibility. The main reason for this evaluation is the fact, that some of the “nature experience” sites are not yet developed in a touristic way (e.g. many of the caves).
- On an international level the “culture and heritage sites” have the highest potential for competitiveness due to their uniqueness. However, the majority of them are not developed in the best possible way for tourists.
- The third main asset “Erbil City” has a high accessibility and positive development.



12.2.2 Second Step Brand in Strategy Development

The second step in the brand development process is to conduct a segment analysis.

Kurdistan Region as well as Central and Southern Iraq are the core source markets for Kurdistan Region.



Core Market

Domestic travellers and tourists from Central and Southern Iraq will continue to be the most important target markets.

Characteristics of Core Market Travelers

- Most of the people in Kurdistan Region as well as Central and Southern Iraq cannot afford to go abroad for their holidays.
- They mainly travel during the summer holidays and around the main religious holidays (e.g. Nowruz festival, spring festival 1st of May).
- People from Kurdistan Region and Iraq escape the heat of the summer months to visit natural and cooler places mainly related to water (waterfalls, rivers).
- Security is a very important attribute when travelling from Central and Southern Iraq to Kurdistan Region.
- As family relations play a major role, they often travel with the whole family.
- Group travelling is very popular among tourists from Southern and Central Iraq.
- The purpose of travel in general concentrates on rest and relaxation.

It is expected that in 2025 the defined core markets (rest, relaxation / recreation) will still represent the vast majority of tourists, but their share in overall tourists will decrease. The same applies to the business tourism segment.

Emerging Markets

Neighboring countries as well as Arab countries will be target emerging markets for Kurdistan Region.

Characteristics of Emerging Markets Travelers

- Summer business is one of the promising markets.
- The total number of outgoing tourists, in particular from the Arabian Peninsula, has increased significantly over the years.
- Guests expect excellent and flexible service.
- For religious Muslims, it is very important to follow their faith during their vacations, which is called “Halal tourism” - destination and tourism businesses need to pay attention to specific needs of specialist tourism such as these.
- Most of the time only limited activities are conducted –in general no sport programs – popular activities are excursions and shopping.
- Kurds that live in bordering countries represent an important target group within the emerging markets.

It is expected that in 2025 the defined emerging markets will have a significantly higher share, especially in the leisure tourism segment. This can be achieved by developing tourism facilities in accordance with international standards.

Niche Market

Countries outside the Arab region can be considered as niche markets until 2025.

Characteristics of Niche Markets Travelers

- Countries outside the Arab region are different regarding their travel choices.
- Generally travellers from main markets (e.g. Germany, Great Britain) are very experienced and expect highly individual offers and professional implementation.
- Security is a basic requirement for visiting new countries.
- Authentic destinations make a strong impression and traditional places and classic heritage are becoming more popular.
- Online information and booking is already a critical tool.

- Travellers choose between a multitude of tourism types (culture, sun & beach, city, etc.) and forms (touring, packages, and individual).
- Kurds living outside the Arab region represent a healthy target group.

12.2.3 Third Step Brand Strategy Development

The third step in the brand development process is to conduct a SWOT analysis for the tourism industry in Kurdistan.

12.2.4 Fourth Step Brand Stakeholder's Analysis

The fourth step in the brand development process is an analysis of stakeholders' perceptions.

The feedback from stakeholders through interviews and workshops based on specialized tools to capture information that facilitates human development; such as;

How do you see Kurdistan Region?

- Kurdistan Region is a popular touring destination for people from Central and Southern Iraq during the summer months.
- Kurdistan Region has a great history and Kurdish culture offer a great chance to boost tourism development.
- Kurdistan Region offers great natural site in comparison to many other regions in the area.
- Kurdish people are proud and represent Kurdish heritage and Kurdish culture.

12.2.5 Fifth Step Brand Development

The fifth step is based on consumer research. Consumer perceptions are retrieved through a survey carried out at highly frequented tourism locations in Kurdistan Region. The Results are listed below:

Main Motivation to Travel to Kurdistan

Currently travellers visit Kurdistan for two main reasons:

- 36% of tourists visit Kurdistan for the nature, natural sites and locations.
- 30% of tourists come to enjoy the more moderate climate.

12.2.6 Sixth Step Brand Competitor's Analysis

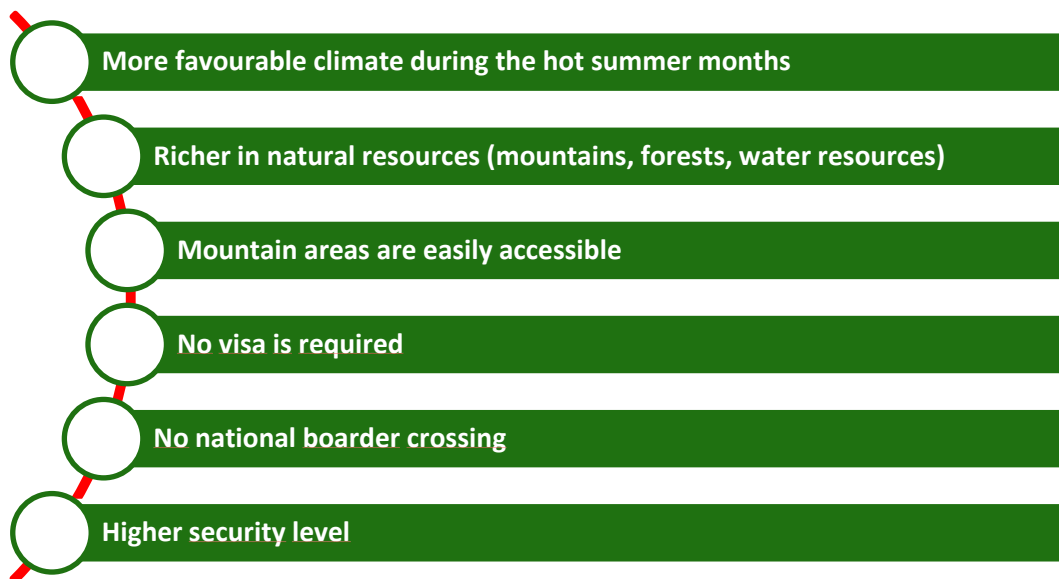
The sixth step is competitor analysis. The main competitors for Kurdistan Region vary depending on the source markets.



Main Competitors Core Markets

- The majority of the travellers from the defined core markets (Kurdistan Region and Central and Southern Iraq) arrive by car/bus.
- Beside the two large Kurdish cities (Erbil and Sulaymaniyah) 3 of the 4 largest cities of Central and Southern Iraq (Baghdad, Mosul and Kirkuk) can easily reach Kurdistan Region within 5-9 hours by car.
- The main competitors (from a core market point of view) for Kurdistan are therefore those destinations that can also be reached within limited hours by car.
 - Central and Southern Iraq
 - Southern part of Turkey
 - Northern part of Syria
 - Western part of Iran
 - Northern part of Saudi-Arabia
 - Kuwait
- The tourism industry is underdeveloped in all these countries, except in Kuwait.

Six main differentiating factors exist in Kurdistan, in comparison to the main competitors for the core source markets.



For emerging/niche source markets the main competitors are those countries in the region with a developed tourism industry.



- In general all neighbouring regions/countries of Kurdistan Region and the countries of the Arab peninsular are potential competitors
- Due to different circumstances (e.g. political restrictions or conflicts), some of the countries cannot be seen currently as competitors – although this might change in the future.
- Therefore the following countries can currently be seen as the main competitors:
 - Turkey
 - Jordan
 - United Arab Emirates
 - Lebanon

- Oman
- Bahrain
- Qatar

Kurdish Culture

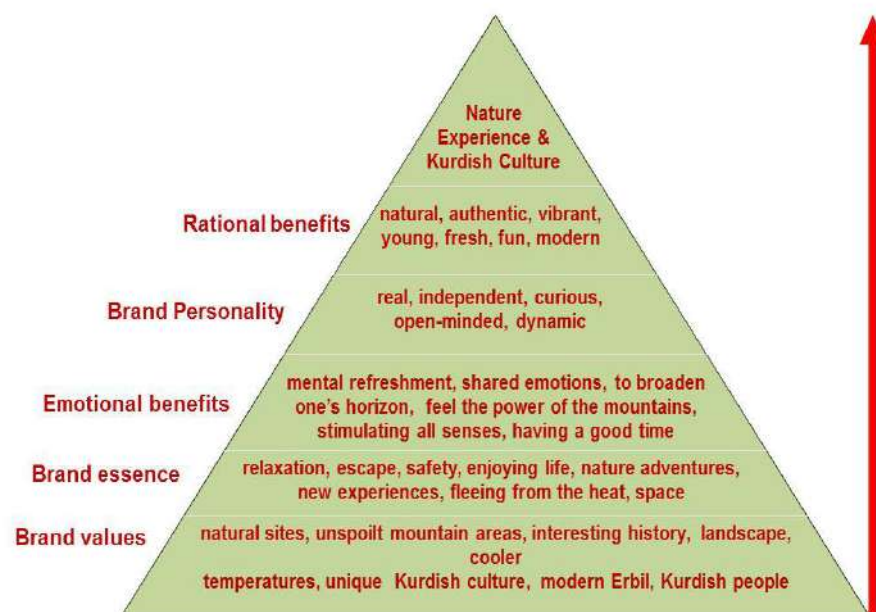
There is one main differentiation factor that exists when comparing the main competitors for the emerging/niche source markets, namely the Kurdish Culture.

- As tourism development is only in its initial axis, there are currently, beside the Kurdish culture, no clear differentiation factors in comparison to the defined main competitors.
- Some factors of the current Kurdish tourism product will be interesting to single markets (e.g. nature and mountain experience for people from flat countries like Saudi-Arabia, Syria or Kuwait) however these can also be found in Lebanon and Oman.
- With tourism development in Kurdistan, it should be possible to add elements to the list of differentiation factors – for example:
 - “The Great Kurdish Mountain Trail”.
 - The best developed mountain and natural tourism products in the region.
 - Specific target group orientation (e.g. families, students, mountaineers).

12.2.7 Seventh Step

The seventh step is brand development.

The six-stage brand pyramid builds up a brand logically from an assessment of the destination’s main strengths.



12.3 Logo

The logo should highlight the main strengths and USPs of Kurdistan Region regarding tourism.

Logo Recommendations

For Kurdistan Region the “Nature Experience” and the “Kurdish Culture” were defined as the brand’s essence and therefore, because culture is relatively difficult to include in the logo, we recommend focusing on integrating nature elements in the logo. The Recommended Logos are the following:

Proposed Logo (1): THE TULIP AND THE BIRD

The tulip flower known around the world actually originated in the Kurdish mountains. This makes the tulip a symbol of heritage and world-wide recognition. The Kew bird is the national bird of Kurdistan, it

represents aspiring for the better by ascending and is a symbol of freedom that the Kurds celebrate.

Merging them together we created a logo encasing both symbols in an abstracted and contemporary manner.



Proposed Logo (2): KURDISH SUN

With the 21 proud rays that represent the Kurdish sun which stand for the 21st of March marking the beginning of the year with Norouz. It is featured on the Kurdish flag.



The sun or star shape has been revisited to create a style of a never-ending cycle, encasing within it the array of colors chosen to represent the different elements from the Kurdish Landscape.

Proposed Logo (3): MOUNTAIN PRIDE

Inspired from the saying “Kurds have no friends but the mountains”, it indicates the importance and significance of mountains in the Kurdish culture and what they stand for.



They are one of the most sustainable and ongoing elements in nature that harbors life and provides shelter.

The mountains are paired with the Kurdish sun that shows up from behind the horizon.

Proposed Logo (4): THE 3 OFFERINGS

Deriving inspiration from Kurdistan's nature and what the country has to offer, this freeform logo shows a more organic representation.

Consisting of 3 values that Kurdistan stands for. The circular sun stands for versatility, the star for the entertainment while the leaf which is the most prominent is for Nature.



Proposed Logo (5): ERBIL CITADEL AND NATURE OF KURDISTAN

The Erbil Citadel is one of the most salient edifices in the history of Kurdistan. The castle is located on a hilltop overlooking the city, making it a source and symbol of national pride.



Proposed Logo (6): ERBIL CITADEL AND KURDISTAN's MOUNTAINS

This logo focuses on a combination of two main elements in the region; 'the Castle' and 'the Mountains'.



Proposed Logo (7): ERBIL CITADEL AND KURDISTAN's NATURE

This logo is derived from Kurdistan's nature and is more expressive and flexible.

The logo consists of three core values: 'the Erbil Citadel' symbolizing the Kurdistan heritage, the 'Star' reflecting the importance of ceremonies and entertainment, and the 'Leaf' representing the beauty of nature in the region.



12.4 Recommendations Slogans

According to the segment analysis as well as the evaluation of competitiveness, the slogan must be adapted to defined market segments:

1. **Local and regional level:** For travelers from this source markets nature is the core asset of Kurdistan Region and should be reflected in the slogan.
2. **International level:** For international markets (niche markets) Kurdish culture is a USP (Unique Selling Proposition) in comparison to other tourism destinations and should be reflected in the slogan.

Possible Slogans for Local and Regional Levels

- Ancient / natural / exciting
- Nature and much more
- Enjoy nature
- Nature at its best
- Natural beauty of Middle East
- Natural pearl of Middle East
- The green Middle East
- A natural beauty
- Surprisingly green

Possible Slogans for International Level

- Where history and nature meet
- Experience history
- The cradle of civilization
- Explore history
- Unique cultural highlights
- A cultural pearl

Important remark: If the final design is chosen, the exact same logo (design, font, elements) should be used on both local/regional and international levels – only the slogan can change.

13. THE FIFTH STRATEGIC AXIS: THE PREPARATION OF TOURISM MARKETING STRATEGY

Mainly due to a lack of human and financial resources, tourism marketing is currently underdeveloped in Kurdistan Region.

a) Public Body Responsible for Tourism Marketing

- In Kurdistan, the General Board of Tourism, as part of the Ministry of Municipalities and Tourism, is responsible for marketing.
- Since 2008 the General Board of Tourism has had a marketing department with only five employees.

b) Marketing Budget

- Currently the annual marketing budget of the General Board of Tourism is USD 2.4 million.
- Approximately USD 300,000 is allocated to marketing activities.

c) Marketing Material

- The General Board of Tourism prints tourism marketing materials for the Kurdistan Region (e.g. brochures / guides highlighting the attractions in each Governorate).
- The provincial Tourism Directorates also produce some informational materials.

d) E-marketing

- Currently Kurdistan Region does not have a modern tourism website in accordance with international standards.
- Social media networks are not used and no electronic newsletters are available.

e) Tourism Brand

- Kurdistan Region has not yet developed a country specific tourism brand.
- Currently there is no Logo or slogan for Kurdistan tourism in place (the logo and slogan are currently under development).

f) Communication

- Currently only a limited number of possible communication channels and tools are used for promoting Kurdistan.
- No major PR (Public Relations) or image campaigns are possible due to budget constraints.

g) Information Technology (Internet)

The General Board of Tourism is currently developing a new homepage on the internet (www.kurdistantour.net).

13.1 Marketing Concept

The main goal of the marketing concept is to increase the awareness that Kurdistan Region is a tourism destination.

Goals of the marketing and promotion concept:

- Increase the awareness of Kurdistan Region as a modern and attractive tourism destination
- Increase the number of travellers to Kurdistan Region from the main source markets
- Promote particular tourism products which help to extend the tourism season in Kurdistan Region
- Increase the awareness for tourism in Kurdistan Region as an important source of incoming
- Promote tourism in Kurdistan as an attractive industry to work in

Implementation through...

Traditional Tools

- Printing materials
- Trade fairs
- Press & familiarization trips
- Product experience program
- TV Spots
- General advertising (newspapers, magazines)

Modern Tools

- E-marketing - website
- Social media
- Marketing Agencies abroad
- Sales Missions
- Road shows

Creative Image

- Infomercials
- TV movies /series
- Festivals
- Sponsorships
- Endorsements
- Commercial Information

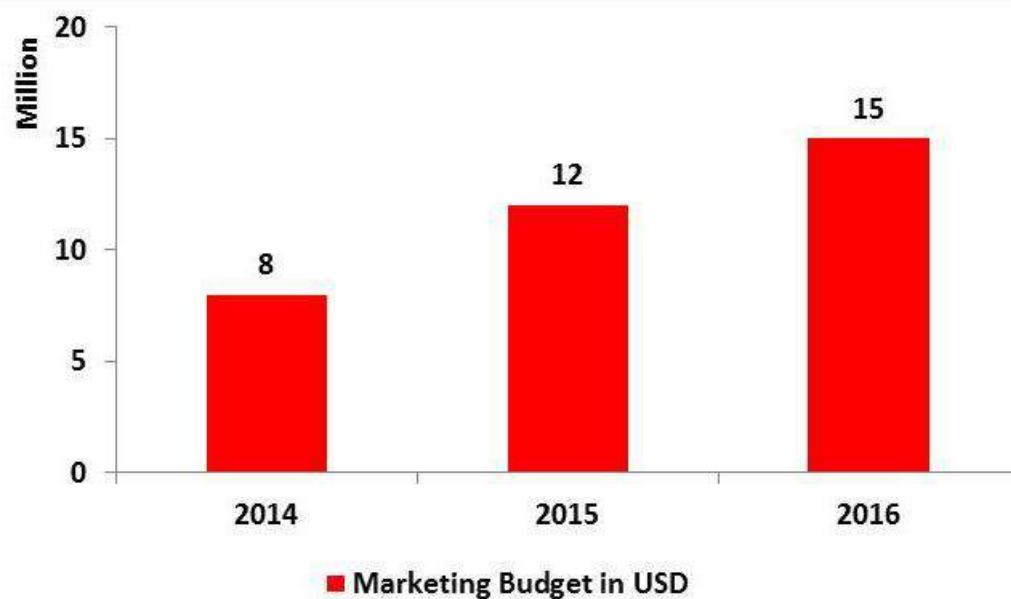
13.2 Requirements to Improve Marketing Efficiency

There are measures that can be taken to improve Tourism marketing including:

Increase in the Annual Marketing Budget

The current marketing budget is very limited. It needs to be increased to meet the requirements of a professional marketing department capable of funding various promotional programs to help stimulate Kurdistan's tourism industry through various media.

- In comparison to other departments within the General Board of Tourism, marketing currently plays a minor role concentrating on few activities (e.g. national tourism folder, tourism website, logo development).
- The implementation of professional tourism marketing should be based on a set strategic plan (3-5 years) and an annual operational plan.
- As 2013 will be a transition year, we assume that 2014 will be the first year with a significant budget for marketing - as a starting point it is recommended allocating a marketing budget of USD 8 million for 2014.
- The allocated budget should steadily increase throughout the next four years reaching a total sum of around USD 15.0 million in 2016 - furthermore provincial Tourism Directorates will require budgets for local marketing activities.

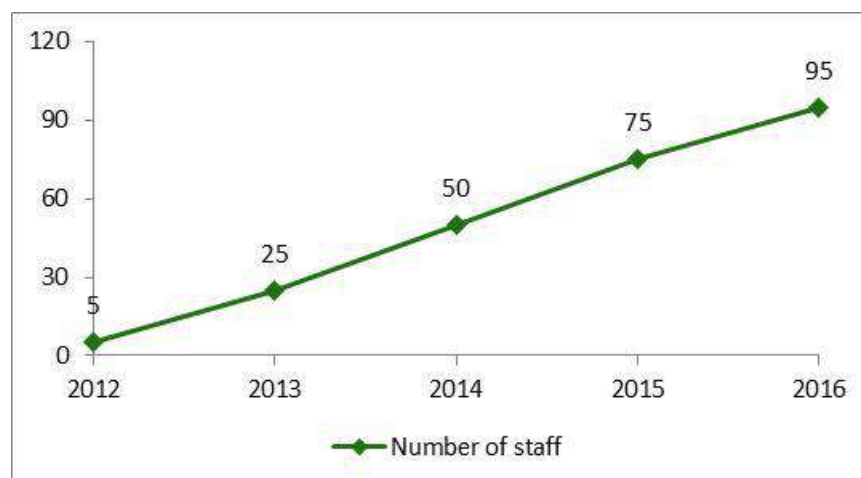


Modern Organizational Structure for Tourism Marketing

To perform the tasks required for tourism marketing a restructuring of the marketing department is needed, this includes, professional development of current staff, and hiring and training of qualified personnel.

Staff Development

- Budgets should steadily increase until 2016; therefore the number of marketing staff must be adapted accordingly.
- Benchmark figures show a minimum budget of USD 100,000 per employee in developed tourism destinations.
- To guarantee effective marketing a budget of USD 160,000 per employee is recommended for Kurdistan Region which results in 95 staff members in the marketing directorate by 2016.



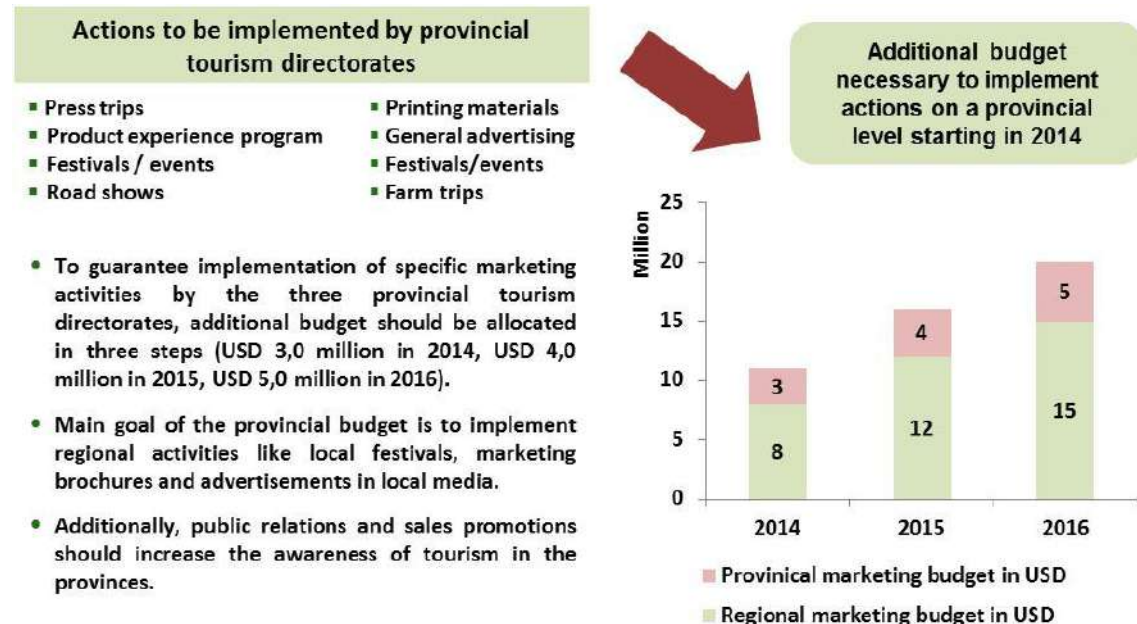
Organisational Chart

The organizational chart structures all operational units of the marketing directorate and defines communication channels, tasks and responsibilities.



Allocating Governorate Marketing Budget

To transform marketing into a professional entity requires an additional budget for the governorate directorates.



Budget Allocation

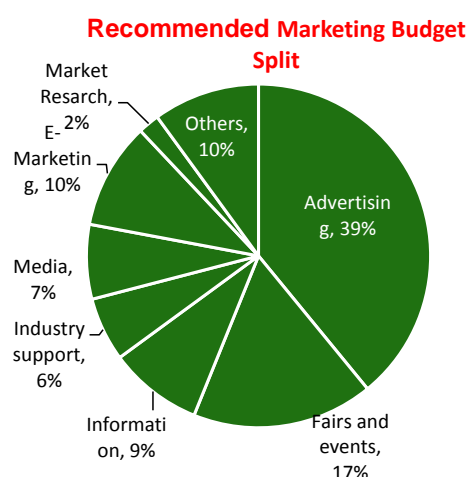
The marketing budget is divided into eight primary categories which are in line with best practices;

Marketing Activities

1. **Advertising:** Printing material, general advertising, radio & TV spots, road shows, endorsements.
2. **Fairs and events:** Fairs, sales mission, festivals/events.
3. **Information:** Info points, international tourism offices.
4. **Industry support:** Farm trips, product experience programs, sponsorship/partnership.
5. **Media:** Infomercials, TV series & movies, Press trips.
6. **E-Marketing:** Website, social media, newsletter.
7. **Direct Marketing:** Marketing in the region is often done through direct contact with International tourism agencies and companies through E-mail, text messaging, SMS and communication through smart phone applications. This also involves providing tourism agencies and companies with publications, newsletters, brochures, invitations to the specialized press conferences, and visits to source markets by regional tourism promoters, and members of the tourism authority.
8. **Market Research...**

Support and Encouragement for the Tourism Sector

Supporting tourism in Kurdistan requires the Board of Tourism to encourage competition between the tourism brokers on the one hand, and managing tourism projects and facilities on the other, to achieve the most competitive prices for tourism services. This will help promote tourism in Kurdistan and increase travel to the region by various categories of tourists coming from Iraq, the Region and internationally.



Therefore, it is important for the Board of Tourism to support the establishment of Tourism facilities and enterprises to promote competition among tourism companies to help provide various consumer groups with packaged deals that fit their needs and price ranges.

One method that can be used to promote healthy competition is to establish a publicized award ceremony to honor tourism enterprises with largest number of clients and the least number of complaints. Additional awards would include enterprises that offer the largest range of cost effective services etc.

1) Printed Media Material

High quality advertising materials are essential tools for marketing. Developing printed materials takes the strategic marketing concept into account as well as targeted groups, market segments, brand positioning, etc.

Objectives

- Building the basis for various marketing activities (fairs, events, press trips, tourism information, etc.)
- Providing target markets with information about tourism in Kurdistan Region.
- Increasing the awareness of Kurdistan Region as a tourism destination.
- Showing the professionalism of the tourism industry through high quality printing materials.

Important Factors

- Usage of high quality pictures that transfer emotions and create desire.
- Creation of image and information brochures in at least three languages (Kurdish, Arabic and English).
- Strong focus should be on pictures instead of using too much descriptive text ('power of pictures').

2) Advertising

Create general advertisements for different types of media (e.g. newspapers, magazines, billboards...) based on the four strategic positioning pillars.

Objectives

- Increasing the awareness of Kurdistan as a tourism destination in relevant source markets (focusing on the previously defined core and developing markets).
- Informing potential guests about 'state of the art' tourism offers.
- Creating ads that are image building and directly address people to come to the Region (e.g. 'Experience Kurdish Summer this Year', 'Discover Kurdish History', 'Kurdistan Now or Never').
- Reach a wide audience by a general advertisement plan.

Important Factors

- Use attractive formats to gain customers' attention.

- Choose the right channels for advertisements (main national newspapers, billboards at highly frequented roads or places etc.).
- Provide information that the customer is looking for and which leads to action.
- Include the official logo and slogan in advertisements.

3) TV-Spots

TV-spots visually portray the image of Kurdistan Region as a tourism destination.

Creating professional TV spots, presents the Kurdistan Region as a modern and emerging tourism destination.

Objectives

- Increasing the awareness of tourism in Kurdistan to relevant source market.
- Directly reaching a significant number of prospective future travellers.
- Feeding target markets with information about tourism in Kurdistan.
- Benefit from the vast growing internet/social media community by posting on the web.
- Creating a positive general image of Kurdistan through the TV spots.
- Using Advertisement at conferences, presentations and fairs.

Important Factors

- Advertising content should be professionally made by renowned and experienced media agencies.
- Establish a perfect mix between pictures, comments and music - highlighting the best attractions/ locations and Kurdish culture and traditions.
- Supported the advertisement by a professional logo and slogan.
- Distributed over appropriate TV channels with spot rotation.

When realizing TV spots, two main elements must be taken into consideration.

First: Ad-map

An ad-map must be designed prior to filming and editing the ad, this serves as an audit tool for the media agency.

Second: Media Chart

A media chart must be designed taking into consideration the following:



- **Airplay** - it is better to choose prime time and less rotation for the spot instead of having a high rotation outside the prime time.
- **Household penetration** - select channels based on the household penetration in a particular market.
- **Seasonality of tourism** - increase media presence two to three months before the main tourism season.
- **Spot selection** depending on the target market characteristics - country advertisement for prospective foreign tourists versus destination or product advertisement for the local market – other segmentation options are: type of tourists, preferred products and type of journeys (long vs. short stay).

4) Road Shows

Road Shows enable direct interaction with potential tourists at highly frequented locations.

Develop a road show concept for Kurdistan by inviting leading Kurdish tourism enterprises to participate (i.e. hotels, amusement parks, tour operators).

Objectives

- Increasing the awareness of Kurdistan as a tourism destination.
- Making potential tourists familiar with the different regions and the attractions.
- Presenting selected 'modern / state-of-art' tourism enterprises to showcase tourism in Kurdistan.
- Increasing people's enthusiasm to visit the Governorate by a unique supporting program which includes a holiday lottery (one week holiday as first prize), dance performances and give-aways.

Important Factors

- A very detailed concept for the road show has to be developed beforehand to maximize marketing efforts.
- Highly frequented places must be selected (ideally shopping malls or city centres where people go during their leisure time).
- Ensure professional media coverage before and after the road show to maximize attention.

5) Sponsorship

Sponsoring celebrities and sport stars are an innovative marketing tool to gain attention in selected target markets.

Establish endorsements with select celebrities and sport stars as a differential and comprehensive innovative marketing tool.

Objectives

- Directly impact final consumers especially in target regions A and B.
- Raising awareness of tourism in Kurdistan.

- Attaching the Kurdistan image to celebrities and top athletes to build relationship and brand credibility with tourists and stakeholders.
- Increasing the attractiveness of traditional promotional activities (e.g. branding, media, direct marketing, promotions, and general advertising) through the attendance of a celebrity / sports star.

Important Factors

- Select credible celebrities and sport stars to secure positive publicity.
- Develop a comprehensive supporting program to benefit from the increasing attractiveness of traditional marketing tools (e.g. radio or TV spot).
- Establish long term partnerships instead of endorsements for single events.

6) Fairs

Fairs are a good to present Kurdistan to the general public as well as to tourism experts.

Participate in the two most popular international tourism fairs (ITB in Berlin and WTM in London). Also, regionally in the Arabian Travel Market (Dubai), and three to four additional regional fairs (e.g. HT&T Tehran or WTE Kuwait).

Objectives

- Presenting Kurdistan as a tourism destination and putting the Region on the global map of tourism destinations.
- Creating a positive image.
- Informing travellers, partners (e.g. tour operators) and tourism experts about tourism in Kurdistan.
- Creating international attention for Kurdistan.

Participation in fairs requires good preparation in terms of display design, products, programs, and personnel participating in the fair:

- Professional and well planned appearance based on a modern fair concept.
- Appropriate size and stylish design of the booth characterising Kurdistan.
- Series of professional events, promotional activities and press conferences.
- Well prepared, multilingual and attractive personnel at the booth.

7) Festivals & Events

Festivals and events are powerful image creating tools attracting locals as well as tourists.

Establish a series of annual festivals & events which create recognition, especially in the main target markets.

Objectives

- Support initiatives to become a year round destination.
- Change perceptions and reinforcing a positive image of Kurdistan.
- Encourage first time visitors and returning visitors to choose Kurdistan for a holiday in order to participate in festivals & events.
- Increase media presence and publicity in the main target markets.
- Create festivals & events which fit Kurdistan and the desired overall brand positioning.

Important Factors

- Events need to strengthen the image of a destination.
- Events need to be repeated instead of being one-time stars.
- Events need to be an initiation for the development of tourism products.
- Events need to be Sustainable from an economic, ecological and social point of view.

8) Sales Missions

In selected target markets, sales missions should be conducted to introduce Kurdistan.

- Sales missions have the goal to inform travel agents and tour operators in their country about touristic offers.
- Builds personal relationships with decision makers.
- Enables operators to include Kurdistan in their programs and helps travel agents become involved in actual sales activities.
- Provide travel agents with marketing direction for their sales pitches by highlighting tourism attractions and facilities that meet international quality standards.
- Creates a positive image of Kurdistan abroad.

Important Factors

- A good strategy for sales missions has to be developed beforehand to determine the most favourable content for presentation.
- Concentration should be on leading travel agencies and tour operators in the defined target markets.
- A professional appearance is crucial (regarding material, outfit, language skills, etc.).

9) Info Points

Installing info points in tourism centres will further promote the tourism industry.

Install info points in the cities of Erbil, Sulaymaniyah and Duhok operated by the three provincial tourism directorates (i.e. Shaqlawa).

Objectives

- Increase the service quality for tourists by providing helpful information (accommodation facilities, attractions & sights, directions etc.)
- Provide printing materials (maps, tour booklets) free of charge.
- Utilize tourism info points to gather market research data (e.g. through guest surveys).
- Include a souvenir shop in the info point selling locally produced hand crafts.

Important Factors

- Selection of multi-lingual staff (Kurdish, Arabic and English).
- Modern and innovative info point concept generates attention among tourists.
- Location at highly frequented tourism spots (city centres, attractions & sights).

10) International Tourism Offices

International tourism offices are very important to further develop source markets.

Establishing international tourism offices in important source markets, starting in the defined core markets (i.e. Central and Southern Iraq) followed by offices in potential source markets.

Objectives

- Professionalising tourism marketing in important source markets.
- Increasing the awareness of Kurdistan as a tourism destination and the number of international tourists that visit.
- Gathering information which helps to adapt tourism marketing to local conditions (e.g. market research).
- Cooperating with key stakeholders for outbound tourism (tour operators, airlines etc.) to promote Kurdistan as an attractive holiday destination.

Important Factors

- Step-by-step development of international tourism offices starting in Iraq, currently the most important source market.
- Close coordination of marketing activities with the Tourism Marketing Directorate in Erbil City.
- Market research and regular market reports to improve marketing activities.

11) Organizing Trips for Travel Agencies

Invite tour operator employees and travel agents to view possible tourism destinations and attractions to convince them in including Kurdistan in their programs.

Objectives

- Building relationships with decision makers.
- Presenting facilities, attractions and “things to do” which meet the quality and quantity requirements of the tour operators and travel agencies.
- Provide travel agents first-hand experience of services and facilities and giving them the required information for their sales pitches, specifically stressing the Kurdish hospitality, national specialities and USPs.
- Endorsing operators to include Kurdistan in their program and enable travel agents in there sales efforts.

Important Factors

- Show the highest level of hospitality.
- Clear organization – from the overall program to the smallest detail.
- Focused familiarization trips (these are not holidays for the invited persons but professional awareness tours).
- Choose the invited persons carefully (source market, annual revenue, and specialisation).

12) Product Experience Programs (PEP)

Product Experience Programs (PEP) are permanent offers to people working in the hospitality and tourism industry.

Establish a platform for people working in the hospitality and tourism industry who can book price reduced tourism service.

Objectives

- Increase the awareness of people working in the hospitality and tourism industry that Kurdistan is a viable holiday destination.
- Experiencing the main tourism products and facilities.
- Increasing ‘word of mouth’ reputation of tourism professionals.
- Boosting sales-talk of travel agency employees through positive and affordable first-hand experience and detailed knowledge of services.
- Giving travel agents information for their sales pitches.

Important Factors

- Price reduction on rack rates of around 20 % are recommended – the difference should be covered by the DMO (Destination Management Organization).

- Whole packages should be offered (flight, transfer, accommodation, excursions).
- Ensure a smooth and professional implementation of the program.

13) Sponsorships / Partnerships

Sponsorships / partnerships are a collaborative tool in promoting tourism.

Kurdistan Region should sponsor several selected partners within consumer brands, culinary associations, cultural organizations and tourism enterprises in defined target markets that fit the overall positioning of the region.

Objectives

- Elevating brand / image by sponsorships and partnerships with selected companies.
- Showcase important tourism facilities and sights.
- Expanding marketing efforts by integrating Kurdistan tourism with the daily lives of people.
- Direct impact on final consumer.
- Use the positive image of a consumer good in combination with holidays in Kurdistan.
- Benefit from positive public relations of sponsorships and partnerships.

Important Factors

- Select reliable cooperation partners for sponsorships according to the strategic marketing plan.
- Approach potential national and international partner proactively.
- Ensure professional implementation by close cooperation with partner companies.

14) Press Trips

Invite opinion leaders and journalists for press trips – at least 5 to 10 events - each year.

Objectives

- Building relationships with journalists to generate positive direct and indirect media coverage.
- Presenting facilities/attractions and “things to do” which meet the quality and quantity requirements of the people in the journalist’s home market.
- Creating a more positive attitude towards Kurdistan.
- Support target markets via journalists with continuous information about tourism in Kurdistan.
- Set up a database of media contacts which can be used later to send media newsletters.

Important Factors

- Show the highest level of hospitality.
- Clear organization – from the overall program to the smallest detail.
- Press trips are not holidays for the invited persons but professional events.
- Choose the invited persons carefully (source market, target group of the magazine/newspaper).

15) Infomercials (Information Commercial)

Infomercials aim to generate awareness and enable brand positioning in selected target markets.

Organize and support the production of infomercials for foreign TV channels in the defined target markets.

Objectives

- Showcasing Kurdistan in order to transmit the desired image.
- Raising curiosity to find out more about Kurdistan.
- Using infomercials to maximize the effects of other marketing campaigns.
- Strengthening presence and recognition in key markets.
- Raise the image of Kurdistan and the number of people considering a place to visit.
- Providing interesting information about Region.

Important Factors

- Be as supportive to foreign film crews as possible (organization, licenses, etc.).
- Initiate the production of documentaries and sell them to TV stations in main target markets.
- Ensure that a positive image is being conveyed.

16) TV Movies/ Series

TV movies or series are important public relation activities reaching a wide audience.

Enable national and international TV channels to produce movies or series in Kurdistan, using famous tourism sites as scenery (e.g. Erbil Citadel, Dukan Lake).

Objectives

- Increasing the awareness of particular tourism sights and attractions.
- Reaching a wide audience of potential tourists to increase their number.
- Using TV series and movies to maximize the effects of other marketing campaigns.

- Gaining significant media coverage while eliminating marketing costs (e.g. fares for TV-spots).
- Building trust and relationship via indirect marketing activity.

Important Factors

- Approach national as well as international TV stations/producers proactively.
- Support film teams to the best possible extent (i.e. selection of film locations by local tourism experts, providing tour guides, accommodation for film crews).
- Ensure that the overall impression is positive.

17) Newsletters

Newsletters are an effective marketing tool to attract new tourists and to inform about latest developments.

Implement a newsletter which is published regularly and contains the latest information about tourism in Kurdistan.

Objectives

- Increasing the awareness of Kurdistan as a tourism destination and subsequently the number of tourists travelling to the Region.
- Increasing the number of regular visitors.
- Keeping guests and potential visitors informed about latest developments in the tourism industry (e.g. hotels openings, seasonal specials, marketing activities).
- Offering packages which can be booked directly via the official website.
- Showing the professionalism of the Kurdish tourism industry through a high quality newsletter.

Important Factors

- Purchase of a professional newsletter tool which eases the sending process and provides additional functions (e.g. statistical evaluation).
- Reliable technical assistance from an external expert.
- Additional promotion of the newsletter to increase the number of subscribers.

18) Website

Nowadays a professional official tourism homepage is one of the key elements of tourism marketing.

Create and maintain a modern, professional and up-to-date tourism website for Kurdistan.

Objectives

- Providing information about tourism in Kurdistan to interested travellers and potential future visitors.
- Feeding the target market with up-dated news about tourism in the region.
- Enabling direct bookings via the website to facilitate the booking process for travellers.
- Increasing the image of Kurdistan as a tourism destination and the number of tourists.
- Feeding media with the latest news about tourism in Kurdistan.

Important Factors

- Picture oriented website using high quality pictures of attractive places.
- Links to social media channels and online booking tools.
- Constant maintenance/ updating, a clear structure and easy navigation.
- Full versions in at least three languages (Kurdish, Arabic and English).

a) Website Requirements

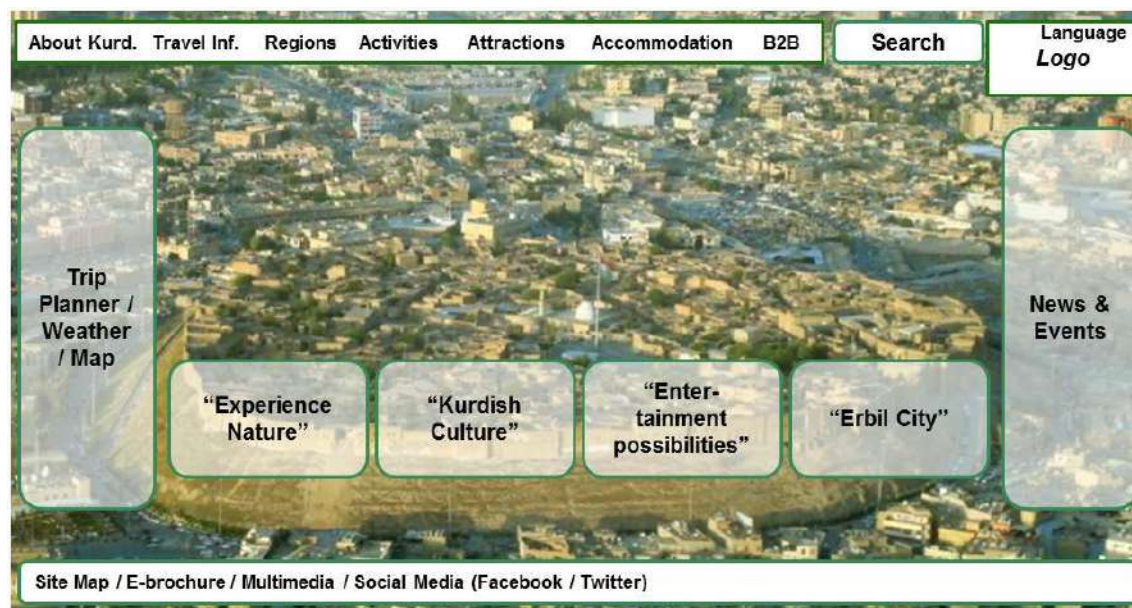
Different interest groups require different content regarding a tourism website.



b) Important Elements of Webpage

A modern structure, easy navigation and a focused starting page are some of the most important factors for a website.

The following is an example of how the Kurdistan Tourism main page might look like.



19) Social Media

Social media has become an important marketing tool; professional and up-to-date social media allows exposure to a larger audience and the global market (i.e.: via Facebook, YouTube or Twitter).

Objectives

- Using social media channels to transfer positive messages about tourism in Kurdistan.
- Gathering feedback and information from the online community.
- Increasing awareness of Kurdistan as a tourism destination.
- Having direct access to millions of potential future travellers.
- Creating interest in Kurdistan in general and its touristic offers in particular.
- Showing the world that Kurdistan is up-to-date regarding modern communication channels.

Important Factors

- High quality content.
- Constant up-dates.
- Sufficient human resource for maintaining social media tools.
- Full versions in at least three languages (Kurdish, Arabic and English).

20) Market Research

Market research is the starting point for all tourism product developments, as well as, the marketing cycle.

Develop a market research system for the collection, analysis and interpretation of data related to tourism in Kurdistan.

Objectives

- Obtaining an understanding of how visitors/potential visitors perceive the destinations and its principal competitors.
- Identifying the characteristics and profile of market/segments with the greatest potential for the destination.
- Creating the basis for tourism product development and tourism investment through advanced analysis.
- Benchmarking with competitors.
- Assigning companies to conduct tourism-related studies.

Important Factors

- Implementation of an extensive system for data collection.
- Professional preparation of data material free of charge for tourism professionals.
- Establishment of a specialized market research team within the Tourism Marketing Directorate.

Marketing Procedures




Approach the planning of the marketing process for the Kurdistan Region via the General Board of Tourism.

Action	Importance	Budget Intensity			Target markets (until 2017)
		Low	Medium	High	
Printing material	★★★★★				A, B, C
Fairs	★★★★★				A, B, C
General advertising	★★★★★				A, B
Website	★★★★★				A, B, C
Newsletter	★★★★★				A, B
Market research	★★★★★				A, B, C

	up to USD 200.000		USD 500.000 - 1,0 million
	USD 200.000 – 500.000		more than USD 1,0 million

Marketing Activities

It is highly recommended to implement the following marketing activities:

Action	Importance	Budget Intensity			Target markets (until 2017)
		Low	Medium	High	
Press trips	★★★★☆				A, B
Farm trips	★★★★☆				A, B
TV spots	★★★★☆				A, B
Sales missions	★★★★☆				A, B
Road shows	★★★★☆				A, B
Festivals & Events	★★★★☆				A, B
Tourism Info Points	★★★★☆				A, B, C
International Tourism Offices	★★★★☆				A, B
 up to USD 200.000  USD 500.000 - 1,0 million					
 USD 200.000 – 500.000  more than USD 1,0 million					

Optional Marketing Activities

An implementation of the following (optional) marketing activities would further strengthen tourism in the region:

Action	Importance	Budget Intensity			Target markets (until 2017)
		Low	Medium	High	
PEPs	★★★★☆☆				A, B
Infomercials	★★★★☆☆				A, B, C
TV movies & series	★★★★☆☆				A, B
Sponsor- & Partnerships	★★★★☆☆				A, B
Endorsements	★★★★☆☆				A, B
 up to USD 200.000  USD 500.000 - 1,0 million					
 USD 200.000 – 500.000  more than USD 1,0 million					

14. THE SIXTH STRATEGIC AXIS: THE DEVELOPMENT OF TOURISM EDUCATION

14.1 Current Status of Tourism Education

In tourism developed nations, tourism education and training is the main source of the sector's manpower. The more important tourism is to a country, the more emphasis is placed on specialized tourism training and education.

Since the Kurdistan Regional Government regards tourism as an important future economic sector, tourism training and education should be given special attention through policies, education and training programs and new facilities.

Currently there are a few tourism education institutes in KR which include:

1. Erbil Technical Institute (after junior high school)

- Few graduates work in tourism after graduation.
- Most of the graduates work in other economic activities seeking higher salaries.
- Professor and teacher knowledge is not based on international tourism standards.
- Only a theory Based approach to tourism education is presented.

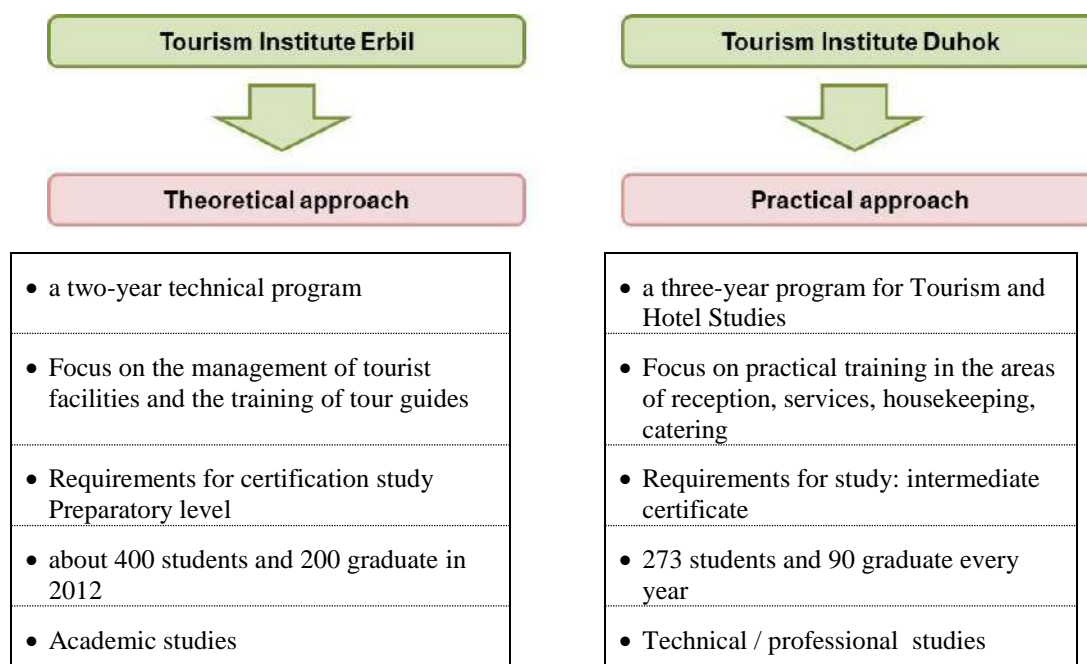
2. Duhok Tourism Institute (after intermediate school)

- The institute's buildings need renovation and modernization to increase their capacity and accommodate students.
- Insufficient budget to properly operate the institution.
- Travel to pursue study abroad is available to a limited number of graduates.
- The Students are from Duhok Governorate.
- Cooperation between tourism enterprises in the region and the institute is limited.
- Most graduates work in the field of tourism after they graduate from the institute.

3. The Koya Technical Institute (tourist section after high school)

- The institute currently has 160 day students and 120 evening students.
- The institute lacks sufficient laboratories and equipment.
- The institute has a shortage of teachers.

Lack of facilities and qualified teaching staff are issues that should be addressed to develop tourism in the KR. The current status of the Technical Institute of Erbil and Duhok Institute are as follows:



14.2 Proposed Initiatives for Development of Tourism Education

1. Capacity Building

To address the shortage of personnel and increase knowledge transfer in the tourism industry requires a short term action plan, to develop competencies in specific topics, and a long term plan, to prepare generations who will be responsible for developing and managing the tourism sector in the future. The aim of these plans is to guide tourism and raise it to the required level.

2. Short-Term Measures

- Organize specialized training courses and seminars (i.e. one-week programs), for current and future managers. These should be conducted by international lecturers who will deliver up-to-date training programs that include practical cases.
- Deliver training courses for existing staff with specialist trainers in the all areas of tourism (i.e. management, marketing, hospitality etc.).
- Plan tours for managers to courses/ seminars that focus on best practices in tourism.

3. Long-Term Measures

- Establish tourist education departments in universities.
- Create professional tourist academies in cities.

- Establish a tourism academy affiliated with the Tourism Authority (managed by a specialized international body).
- Sponsor graduate students to specialize in tourism management.
- Cooperation with the Ministry of Labor & Social Affairs to train young staff in the tourism sector, via training programs in centers belonging to the Ministry.
- Enable research studies and prepare tourism conferences in collaboration with the Ministry of Higher Education.

14.3 Tourism Human Resource Development Programs

Short-term measures can be implemented to address the current workforce's shortfalls through training courses addressing specific needs:

1. Annually Repeated Courses

These should be held for a set time period and International Lecturers are required to facilitate tourism knowledge transfer.

Project Objective

- Launch annual tourism programs in Kurdistan.
- Conduct 5-7 day programs for local and international students and managers.
- Speakers should provide theoretical knowledge followed by practical cases.
- Practical cases improve the ability to work in multinational teams, and facilitate knowledge transfer.
- Participants cover only their travel costs.

2. Training Courses

Develop tourism training courses to increase the performance of existing manpower in the tourism sector.

Project Objective

- Special Seminars for tourism quality improvement.
- The program should contain study and training modules for all categories relevant to tourism industry workforce.
- Certifications are awarded to employees who complete specialized modules of the program – the “quality mark” award can be given to tourism organizations that have a certain number of certified employees.
- This program should be supported by the government and the employer should cover the training costs.

3. Visits to other tourism destinations

Ideas for improvement are gained by visiting developed tourist destinations.

Project Objective

- Study visits to well-known tourist places to increase the knowledge of tour managers and operators.
- These visits should be conducted on a regular basis (for example, twice a year), and include (20 to 30) tour managers and operators.
- These trips should last between 4 - 5 days, with the concerned government agency covering 50% of the costs.
- It is important to emphasize that these are not recreational trips; the main objective is to visit facilities that apply best practices, identify stakeholders' opinions and learn from this exposure.
- Each participant receives a report summarizing the visit.

14.4 Educational Initiatives - Long - Term Tourism Training

An Academy specialized in tourism education

The preparation of the next generation of tourism staff requires the adoption of long-term educational policies and programs. The tourism educational program should be based on internationally recognized programs and methods.

A specialized tourism education academy endorsed by globally renowned educational institutions, will support the image that Kurdistan is working to develop its tourism industry.

Project Objective

- An agreement with a tourism management academy to establish and manage a tourism management school in Kurdistan.
- The degree at the academy should be 3 years in length, and cover specialized programs and practical application courses.
- The number of new applicants should be limited to ensure educational quality.
- As well as the general curriculum (Economics, Statistics,...) there should be a focus on languages (at least two), along with tourism-related subjects such as (tourist Geography, tourist Accounting...).
- The Academy should provide specialty programs in the areas of cultural tourism, sports tourism or business travel.

14.5 Establish Vocational Training Institute

There is need for a large number of qualified staff in various fields and levels. A vocational institute should have modern curricula, equipment and qualified staff to prepare the new generation that will be prominent in Kurdistan tourism affairs.

Project Objective

- Establish specialized vocational schools to address tourism needs.
- The courses should include general topics like English Language, Information Management, Information Technology and topics related to tourism such as; tourism geography, tourism marketing, organizing and delivering various services.
- Training programs should include six-month practical training before entering the final year. The institutions should also enter into agreements with hospitality institutions to help their graduates find work after graduation.
- Alternatively, a small training hotel can be established to train students.
- Students wanting to attend vocational institutes are required to complete the 9th grade of schooling.

The table below shows, Tourism Training Courses needed to develop the skills and competencies of employees in the tourism sector.

**PROPOSED TOURISM TRAINING COURSES FOR VARIOUS LEVELS OF MANAGEMENT IN TOURISM ENTERPRISES
(BOTH INSIDE AND OUTSIDE THE REGION)**

Administrative Level	Educational Qualification	Competencies	
		Short courses (less than a month)	Long courses (one month and more)
Senior management in tourism enterprises	Graduate or equivalent	<ul style="list-style-type: none"> - Leadership - Strategic Planning - Leading Change - Decision-making 	<ul style="list-style-type: none"> - Sustainable development in the field of tourism
Executive Management	Bachelor or equivalent	<ul style="list-style-type: none"> - Strategic Planning - Organization of work - Information analysis and decision-making - Management teams - Event management (conferences, technical events, weddings)... - Total quality management in the tourism and hospitality institutions 	<ul style="list-style-type: none"> - Managing hotels, restaurants and tourist facilities - Hospitality Management - Tourism and hotel marketing - Sustainable development in the field of tourism - Human Resources Management
Specialists	Diploma or equivalent	<ul style="list-style-type: none"> - Courses in tourism management, hotels and transport - The preparation and training of trainers in the hotel and tourism - Code of conduct (Protocols and Etiquette) - Front office management - Customer service and complaints - Food safety - Public Relations and Media - Communication skills - Tourist information - Specialized English language course for Hotels and Tourism - Management and development team work - Time management and self-management - Tourist guides (beginners level, applicants, and licensing) - Catering 	<ul style="list-style-type: none"> - Front desk and hotel reservation - Office management, travel and tourism booking
Operators	High School or equivalent	<ul style="list-style-type: none"> - Food safety - Receptionist - Assistant Travel Agent - Fitness coach - Pastry cooking - Culinary cooking - English language courses - Mobile services - Basics Room Services 	-

14.6 Additional Job Opportunities in the Tourism Sector

The strategic plan aims at creating an additional 42,000 jobs in the tourism sector by 2025. The table below shows the projections for years 2016, 2020, and 2025.

Level of Job	2016	2020	2025
Senior Management	600	1,300	2,100
Middle Management	1,200	2,600	4,200
Supervisory Management	1,800	3,900	6,300
Operational Functions	8,400	18,200	29,400
Total	12,000	26,000	42,000

15. THE SEVENTH STRATEGIC AXIS: THE STATE'S ROLE IN THE DEVELOPMENT AND SUPPORT OF THE TOURISM SECTOR

15.1 Governing Framework for Tourism Development

The "General Board of Tourism" was established under Law No. (39) - 2004 as an initiative by the government to build a frame for tourism promotion and investment. Two years later, Law No. (20) 2006 established "the Ministry of Tourism" which was later merged with the Ministry of Municipalities to become "The Ministry of Municipalities and Tourism." The GBOT became an autonomous body with financial and administrative independence within this ministry. The Directorates General for Tourism in the Governorates and Garmanan Directorate were established and given the responsibility of overseeing and managing tourism in their respective area. Currently, there is an initiative for the GBOT to gain full independence, and be directly attached to the Council of Ministers.

The government's purpose is to increase national wealth through the development of tourism and create jobs especially in rural areas. It is committed to developing the natural and ecological resources in the region, which include mountains, waterfalls, rivers, lakes, springs, and areas of archaeological, historical and religious importance.

The government has passed legislation to develop tourism as an economic sector and to upgrade tourism facilities and services. It has also passed laws which support and facilitate private sector investments in new tourism facilities and products. Furthermore, it has also laid the groundwork for future development through its Tourism Master Plan. The plan is based on two main principles:

- Encouraging private sector investment in tourism.
- Partnering with the private sector on specific projects.

15.2 Increasing the Attractiveness of Tourism Projects to Investors

Investors prefer ventures which generate fast profits and are easy to manage. The government needs to encourage investment in long term viable tourism projects since tourism in the Middle East is a highly competitive. The Government has an interest in supporting tourism administratively and financially through a series of interdependent and integrated legislative and regulatory procedures. Such steps should enable the General Board of Tourism to manage the course of tourism development and to create investment initiatives and incentives.

Methods to increase project attractiveness to investors are:

1. Support programs for grants or government guarantees to develop tourism infrastructure and accommodation in tourist sites.

2. Tourism conferences aimed at attracting investors and showcasing available opportunities.
3. Annual awards for successful tourism enterprises, and creative tourism development ideas.
4. Information and communication technology as marketing tools used to promote tourism investment opportunities.
5. Designated zones with low tax and cost incentives for tourism projects.
6. An integrated group of conditions to attract investors (security, economic and political stability, property rights....)

The first method pertains to the investment law, tax exemptions and land grants. Included in these laws are guarantees to investors on transfer of profits & capital abroad, and facilitation of foreign worker entry.

The second method is a government initiative to organize conferences for tourism inside and outside the region; to identify potential destinations and market them globally. The objectives of the conferences:

- Highlight the local tourism market, offer investment opportunities and increase tourist flow to the Region.
- Bring together a tourism framework based on the collaboration of investors and decision-makers. This will facilitate investment discussions on projects, new products and services, as well as highlight new destinations.
- Conferences can be held on a regular basis, and may be specifically dedicated to tourism, or part of a larger conference on investment which is held locally or internationally. These conferences can be attended by dignitaries and are ideal for networking, business meetings, trade shows and seminars related to tourism.

The success of the proposed conferences depends on programs to attract industry experts and the participation of the various governmental bodies involved in their preparation, since they are the most important internal stakeholders. It is important for the government to participate actively in all relevant areas, including: advertising, management, administration, marketing, and investor relations.

The third method is to award successful tourism enterprises and creative tourism ideas. Tourism quality awards can be presented during an annual event, which is covered by the media, to honor the recipients.

The fourth method is to make the most of technology and social media to promote tourism in the region via the marketing of tourism products and opportunities globally (in addition to the publication and distribution of promotional brochures and informational publications).

The fifth method is to create regional incentives to encourage investment in projects. These incentives include establishing Low-cost project zones and tax reductions for investors in specified tourist areas as well as incentives aimed at improving tourism structures in general. The current Investment Act has some customized incentives to supporting tourism investment, the tables below shows some examples:

Investment incentives	Additional areas covered by incentives		Activities / tourist institutions benefit from additional incentives and / or government support	Other Catalysts Tourist Activity
	All Region	Certain Area		
Allocation of land for investment projects, including tourism projects	✓			
Exemption from income tax and customs tax on tourist facilities, according to certain conditions, for certain periods.	✓			
The establishment of economic zones provides additional incentives for tourism projects (discounted service fees, a longer period of tax exemptions, etc.).	×	×		
Provide an attractive environment for investment (security, stability, free transfer of capital and profits, administrative facilities ...)	×			×
The development of infrastructure (roads, water, electricity, communications ...) and the improvement of services in the special tourism economic zones	×			×
Support the establishment of hotel projects and restoration / renovation of hotels in accordance with international standards	×	×	×	
Grants, soft loans, facilities for basic tourism infrastructure projects (hotels, restaurants, parks, etc.). Projects and tourist services (tourist transport, tours programs ...) in tourist attractions	×	×	×	
Facilities and donations to support tourist festivals, theatrical, cinematic, musicals domestically and internationally	×	×	×	
Establishment of a competent governmental bank to support tourism and to ensure that loans given to tourism projects which are in accordance with international standards	×			×
Provide funding support for tourism projects 20% of the cost of the project in accordance with development priorities established in the tourist areas.		×	×	×
Establish an academy for tourism education, and provide grants in tourism management				×
Support institutions and vocational training programs in tourism, and provide training opportunities for students of institutes in the tourist field and with international tourism institutes				×
Develop a plan to promote tourism and tourist programs including promotional tools; tourist brochures, interactive Internet sites for tourism marketing				×
The launch of a number of annual awards to institutions for eco-friendly tourism, and institutions that are committed to international quality standards	×		×	×
Support the development of tourism, and the provision of facilities to support the application of the ideas and concepts of new tourism	×		×	×
Conferences for International Tourism and Travel Agents to be held in the region	×			×
Conferences to identify investment opportunities including a series of tourist activities, exhibitions and seminars and workshops.				×

The sixth method is to develop a PR and media campaign, based on relaying the favorable business conditions in the country, to attract investors.

15.3 Support for Tourism Projects

15.3.1 New Accommodation Facilities

Subsidies are exclusively allocated for new accommodation facilities or modification of present projects meeting global standards. Accommodation projects in leisure destinations included in the strategic plan should also be eligible for this subsidy. It is recommended:

- To determine the minimum number of beds (i.e. at least 100 beds) as a condition to apply for support.
- To determine the non-recoverable support amount as a percentage of the investment (up to 20%), or a maximum of U.S. \$ 0.5 million.
- To allocate US \$20 to 30 million over 3 years, to support the development of new accommodation facilities in leisure destinations.

15.3.2 New Infrastructure for Tourism / Visitor Attractions

The public sector has two options to support the development of infrastructure facilities for tourism:

1. Provide direct financial support to private sector investors who retain 100% ownership and management of their facilities.
2. Partner with the private sector and share in the ownership and management of the facilities.

Public sector supports for tourism infrastructure projects should be provided to projects that are committed to achieving the goals of the Tourism Strategic Plan. Investors, in this case, can apply for financial support (10% to 70% of project value). Therefore, it is recommended to allocate \$100 to 125 million over a period of 3 years to support these projects.

15.3.3 Tourist Recreational Areas

The plan includes identifying potential sites to become tourist attractions and destinations:

Erbil	Duhok	Sulaymaniyah	Garmyan
- Erbil-Shaqlawa	- Akra City	- Sulaymaniyah	- Kalar
- Suran – Ruwanduz	- Amadiya - Sarsank	- Bashdar - Rania	
- Kuya	- Duhok - Sheikhan	- Dukan	
		- Darbandikhan	

During the first axis, the government should focus its financial support on projects that are within the above areas to attract investment in tourism, entertainment and recreation. The government should also provide incentives that encourage investment in tourism complexes located in these areas.

15.3.4 Creation of New Tourist Facilities

The proposed support includes providing incentives for investors to develop new tourist facilities that adhere to global standards. The programs could provide support on several levels:

- The allocation of \$30-40 million per year, to support building new tourist projects in leisure destinations.
- Government support for accommodation projects in attraction / entertainment venues specified in the strategic plan.
- It is recommended to focus subsidies on new accommodation and rehabilitation projects with at least a hundred beds.
- Determine the amount of support for proposed loans which are not to exceed 70% of project cost, or not to exceed a maximum of \$0.5 - 0.6 million.
- Provide support to tourism sector through a series of incentives including:
 - o Facilitate governmental support and tax exemptions granted to projects that are committed to the tourism plan and international standards.
 - o Provide plots of land for the establishment of tourism facilities identified in the strategic plan.
 - o Support the acquisition of land allocated for tourism.
 - o Allocate a special annual budget to support tourism infrastructure projects.
 - o Develop the infrastructure in targeted areas.
 - o Engage the private sector to implement tourism projects according to specific legal and financial formulas matching the nature and location of the project and its economic importance (i.e. social, its technical and material requirements).
 - o Establish a fund to support tourism sector activities such as participation in international exhibitions and conferences.

15.4 Conditions for Support

Support is to be provided for new facilities, infrastructural projects, and tourist sites. The government sets support (quality and quantity) targets by project, and the conditions to meet support. Varied forms of support and

different conditions apply to different regions and projects, and are generally subject to the government's priorities in the field of investment (in the areas of tourism and regional development).

Investments in accommodation facilities projects should undergo feasibility studies related to site conditions, supply & demand, infrastructure and basic services availability. Subsequently, studies will also help investors estimate the cost & return of the project, and aid the public sector identify investments for potential support. The existence of credible feasibility studies gives decision-makers in the public and private sectors sufficient flexibility to identify projects and decide whether to manage them on their own or in partnership with other entities.

The Tourism Authority has a mandate to act on tourist sites identified in the Master Plan in relation to license issuances and tourism project approvals.

Classification and protection of tourism areas is the responsibility of the Tourism Authority:

- Area types: historical, archaeological, heritage, ecological bodies, highlands and mountains, forests, etc...
- Public interest for the use of the various sites.
- Heritage, historical monuments and architectural preservation
- Preservation of the ecosystem.

15.5 Proposals to Develop the Investment Law and Procedures

15.5.1 The Legal Text

1. The Tourism Authority should be represented in the Region's Investment Authority committee and in the governorates' sub-committees. This is meant to improve coordination and cooperation between the committees and the Authority.
2. Investment projects that have special legal status and amenities should be identified.
3. Clarify the benefits and amenities that local and Iraqi investors have.
4. Illustrate the advantages and amenities that the law provides to tourism investments on private property, and tourism projects on public land.
5. Clarify the requirements for exemption for areas where tourism investment is subject to environmental regulations, security concerns, etc., and the compensation for projects that will be subject to such restrictions in the future.
6. Develop mechanisms to allocate lands for tourism investment.

7. Clarify the legal status of land that has been transferred to a tourism project after the project is suspended.
8. Clarify the legal status of land transferred to joint tourism project between the public and private sectors after the project is suspended.

15.5.2 Administrative Procedures

1. Official announcement on the conditions and legal requirements for the various categories of tourism projects in media and specialized publications, brochures and investment guides.
2. Simplify the procedures for obtaining a tourism licenses (where possible), dispensing with unnecessary transactions, automating the process, and applying the concepts of e-government.
3. Introduce the One Stop Shop service.
4. Develop licensing conditions for tourism investment projects, determining the process and stakeholders' roles.
5. Work on the introduction of SME (small and medium enterprise) tourism projects within the private investment law and projects contained in the strategic plan.

15.6 Public and Private Sectors Partnership for the Development of the Tourism Sector (PPP)

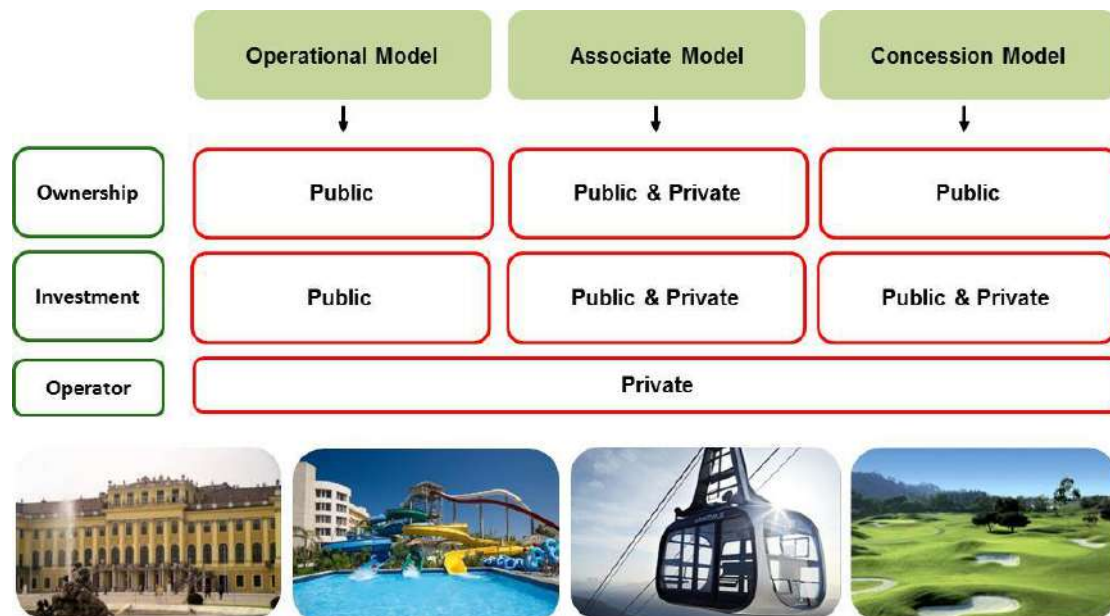
Partnership between the public and private sectors (PPP) is a contractual agreement between a public body (federal, national or local) and a private organization. Under this Agreement, the sharing of skills and assets is meant to provide a service or facility for public use.

The partnership generates suitable conditions for both parties to achieve their goals. The benefits include:

1. Bypass of budget constraints.
2. Private sector participation in the development of tourist infrastructure.
3. Benefit from private sector expertise and operational capabilities.
4. Accelerate the implementation of tourism projects.

15.6.1 Partnership

There are three main public private partnership models for tourism projects;



- (i) Operation of public properties by private companies based on an operator contract.

Main characteristics operation model

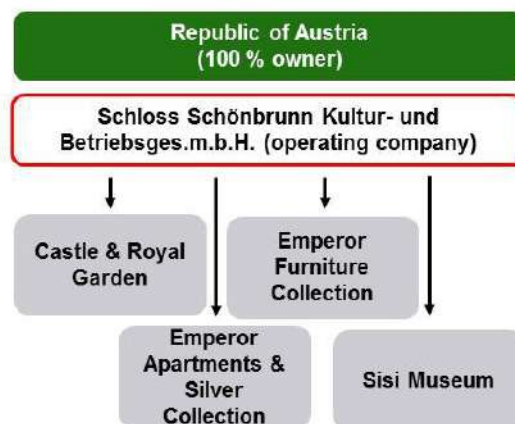
- Public sector assigns a private company for operating a publicly owned property
- Public entity receives fixed annual amount of money
- An operator contract as the legal basis with detailed task description

typical tourism facilities

historic sites, parks, waterfalls, gardens



PPP-structure Schönbrunn Castle



- No public subsidies – operating company keeps operational revenue
- All investment and renovation financed by the operational revenue

- (ii) Private and public entities jointly invest in a tourism project and the operator receives the profits.

Main characteristics concession model

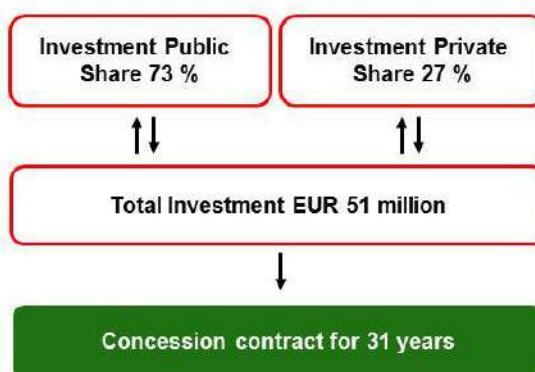
- A concessionaire (private sector) is granted the right to use an existing facility
- The facility stays in the ownership of the public sector
- The concessionaire generates the revenues through direct selling of the services to customers

typical tourism facilities

golf courses, aqua parks, spa centers, ropeways



PPP-structure Cable Car Innsbruck



- Connecting the provincial capital Innsbruck (560 m) with the mountain peak "Nordkette" (2.269 m)
- Total investment for the project of around EUR 51 million

- (iii) Private and public entities jointly invest in a tourism project and the operator receives the profits.

Possible tourism PPP projects in Kurdistan Region

Operational model

- Waterfalls
- Caves
- Gardens
- Historic sites
- Museums

Remark:

The operational model for a tourism PPP project should either be chosen for facilities/objects that have a specific value for Kurdistan Region and it is important to maintain them or for important tourism attractions/facilities that do not generate profit or not enough to be profitable.

Association model

- Aqua parks
- Amusement parks
- Cable cars
- Conference centers
- Golf course
- Museums
- Tourism resorts

Remark:

It is important, that the planned project has a certain (significant) size in order to qualify as an associate model PPP project.

Concession model

- Aqua parks
- Amusement parks
- Cable cars
- Conference centers
- Golf course
- Museums
- Tourism resorts

Remark:

It is important, that the planned project has a certain (significant) size in order to qualify as a concession model PPP project.

If tourism PPP projects with the association or concession model are possible highly depends on the willingness of the government to invest public money, through a public investment company, in tourism projects.

15.6.2 *Initiatives Required from the Government of the Region to Promote Tourism*

1. Review the license conditions of institutions and enterprises to simplify procedures and develop single-window service (one-stop shop) facilitating investor relations.
2. Strengthen partnerships with the private sector (PPP) for infrastructure projects to benefit both parties, including:
 - Mechanism for managing joint ownership projects.
 - Outsourcing key tourism projects through various contractual frameworks, such as BOT (build, operate, transfer), BOO (build, own, operate), BOOT (build, own, operate, transfer), BLT (build, lease, transfer), DBFO (design, build, finance, operate), DBOT (design, build, operate, transfer) and the DCMF (design, construction, management, finance).
 - Issuance of floating shares on the stock market.

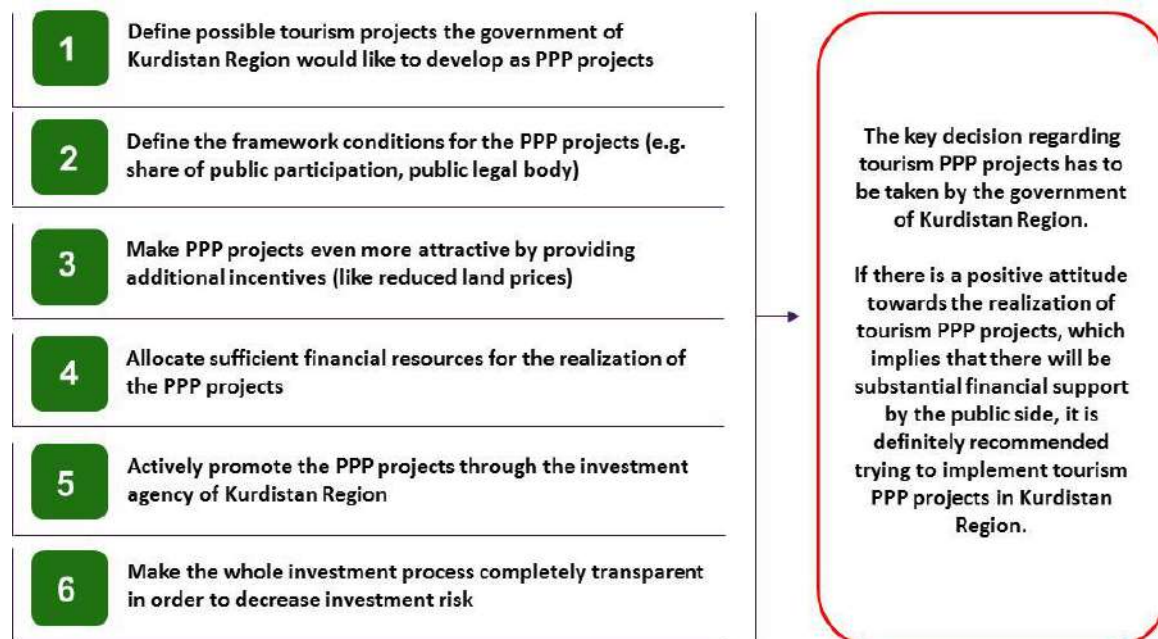
Public Sector Financing of Tourist Projects

Types of Agreements:

Minimum Financial Participation	Moderate Funding	Important Funding	Core Funding
<ul style="list-style-type: none"> Marketing budget Investment in projects not profitable for private sector The development of tourism education Infrastructure projects 	<ul style="list-style-type: none"> Marketing budget Investment in important projects not profitable for private sector the development of tourism education infrastructure projects Travel subsidy programs 	<ul style="list-style-type: none"> Marketing budget Investment in important projects not profitable for private sector the development of tourism education infrastructure projects Travel subsidy programs Projects in partnership with the private sector (PPP) Programs to improve the quality of tourism 	<ul style="list-style-type: none"> Marketing budget Investment in important projects is not profitable private sector The development of tourism education Infrastructure projects Travel subsidy programs Projects in partnership with the private sector (PPP) Programs to improve the quality of tourism Investment in profitable tourism projects owned by private sector

15.6.3 *Measures to Increase the Attractiveness of Tourism Projects between the Private Sector and the Public Sector*

If the public sector decides to invest into PPP projects several actions can be implemented to increase the attractiveness;



16. THE EIGHTH STRATEGIC AXIS: ENVIRONMENTAL IMPACT AND WASTE MANAGEMENT

16.1 Introduction

Tourism has an important role in the economic and social development of the region. However, tourism activities have had a negative impact on the environment by increasing the waste in rural areas, placing pressure on the ecology especially in areas marked for tourism development.

With the steady increase in tourist numbers, and the increase in resources consumption and the expansion of the industry, the impact on the environment will increase (in terms of solid waste and water usage). This requires waste management for the preservation of the environment and maintenance of tourism service quality.

16.2 The Current Situation

Tourism development needs to increase environmental awareness and to reduce environmentally harmful behavior.

Field visits, interviews, and personal observations have shown that many tourist sites suffer from environmentally harmful practices, such as improper waste disposal and maintenance practices. For example, at the conclusion of the Noruz Celebrations, large quantities of plastic water bottles and other waste items are left behind in natural places which lead to landscape degradation. This has a negative impact on location attractiveness to tourists and on the natural environment.

There is a need to handle environmental issues responsibly by various parties. During the first stage, “quick fix” initiatives are important for environmental preservation. These include:

- Establishing fire stations and fire alarm systems in forest areas to ensure rapid intervention and to reduce risk of fire.
- Creating special teams for maintaining and cleaning tourist sites, public parks and designated green areas. This should include a plan for care and maintenance of popular natural habitats.
- Requiring the use of environmentally friendly materials in the construction and operation of tourism facilities and projects, especially in tourist areas outside the cities. This should also include the processing of waste, which should be located in areas far from sewage and waste collection services.
- Determining the percentage of green spaces in tourism projects, especially in cities to reduce pollution and to provide eco-friendly spaces.
- Establishing waste management, and environmental & resource conservation guidelines for tourism institutions to follow.

16.3 Volume of Solid Waste

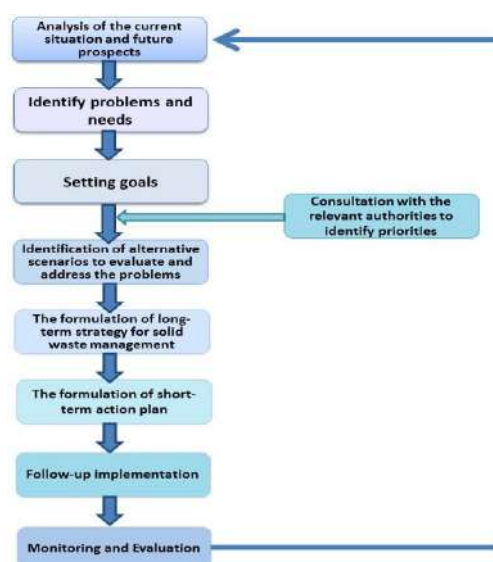
It is estimated that the average tourist in Europe produces more than 1 kg of solid waste per day, and in the United States about 2 kg per day. In 2025, it is expected that 14 thousand tons of solid waste will be generated by visitors to KR. This estimation is based on 1.3 kg of solid waste per visitor, with a projected 11 million overnight stays.

16.4 Solid Waste Management Strategy

Key elements for a solid waste management strategic plan include analyzing the current situation, identifying obstacles, developing goals to address challenges, evaluating priorities, and preparing initiatives to achieve objectives. Subsequently, detailed plans (including financial plans) should be prepared to monitor work progress and adjust strategy based on lessons learned.

Waste management strategy can be applied at national, governorate, and local / municipal levels. This strategy aims to address all types of waste, including: hazardous waste, domestic waste, construction waste etc. The strategy should cover all parts of the solid waste system from waste collection, recycling, conversion, processing, disposal, and cost recovery (with private sector participation where possible).

Strategic Planning Cycle for Waste Management

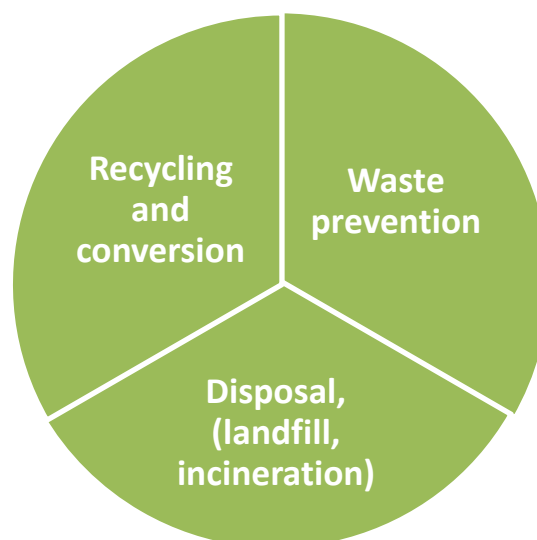


16.5 Solid Waste Management Process

The attached figure shows a comprehensive framework for the management of solid waste. The process begins by understanding the nature of the waste management problem in any area or tourist site. It can be done through inspection or diagnosis of the current situation, and helps identify which methodology to utilize; these methods include; disposal of waste at dumping site, the adoption of green procurement methods, waste reduction, and recycling. When determining the appropriate methods to deal with solid waste, a waste management plan should take into account the operational structure & procedures, budget, and human resources. The implementation of a monitoring and follow-up program is crucial for its success.



16.6 Integrated Management of Solid Waste



Elements	Questions	Steps
Regulatory (Laws and regulations)	Are current laws and policies sufficient to allow the application of the integrated management of solid waste?	<ul style="list-style-type: none"> • Implementation of a national policy on solid waste management standards • Identify if the responsible parties have the means to apply regulations in the region
Social Local customs, education, culture ...	Types of waste and how to treat it	<ul style="list-style-type: none"> • Citizen approval and participation
Funding	What are the necessary financial sources for the development of integrated management of solid waste?	<ul style="list-style-type: none"> • Identify the sources of funding for solid waste management - government, municipality fees, private sector, loans and subsidies.
Economy	What is the cost for the application of the total solid waste management system	<ul style="list-style-type: none"> • Calculate the costs of capital investment and long-term costs of operation and maintenance • Assess citizen's ability to pay • Evaluate the effectiveness of waste treatment and its economic impact (cost/benefit)
Technical Equipment and locations	Where to build? Volume of waste? The equipment needed?	<ul style="list-style-type: none"> • Geographical elements; distance, size and quantities of waste • Identify equipment and training...
Environmental	How will solid waste management effect the environment?	<ul style="list-style-type: none"> • Systems and procedures for the protection of groundwater - and air quality • Monitor compliance with national health standards

The Need for Sustainable Waste Management Practices

Solid Waste has significant effects on the environment and the use of energy: The problems of pollution resulting from the disposal of waste in open spaces, landfill, and / or randomly in sites by tourists poses a health hazard and adversely affects wildlife. It also destroys the beauty, attractiveness and reputation of tourist sites.

16.7 Negative Environmental Impacts

16.7.1 Impact on Groundwater

The improper disposal of waste can pollute groundwater resources, and affect its quality. Given the dynamics of water leakage, even places far beyond the waste site can become polluted and toxic.

16.7.2 Impact on Water Resources

Solid waste landfills can contaminate water resources such as rivers, lakes and ponds. Pollution can have direct effect, if landfills are close to water resources, on the availability of potable water and the cost of providing drinking water for residents and tourists.

16.7.3 *Impact on Wildlife*

Waste from landfills spread by the wind can damage plants and effect animals adversely over large areas.

16.7.4 *Impact on Lake Shores*

Solid waste that is dumped on lake shores and riverbanks affects harmful algae growth and reduces biodiversity resulting in health hazards which reduces the likelihood of a site becoming a tourist attraction.

16.8 Types of Solid Waste

Solid waste can be divided into three categories: hazardous waste (Hazardous), biodegradable/ none-biodegradable waste and combustible waste. Each type of waste requires special treatment methods:

(1) Hazardous Waste

Hazardous waste contains harmful chemicals and produces harmful effects when burned or dumped in landfills. In tourist sites cleaning supplies, oils, batteries, and pesticides can have a significant impact on the environment if left untreated.

Hazardous waste requires special measures to be treated before disposal and should not be placed in open dumps or burnt in an uncontrolled manner.

(2) Biodegradable / Non-Biodegradable Waste

This type of waste materials can be processed and recycled into useful materials such as compost or gas. Waste that is Non-biodegradable includes; clothes, chemicals, rubber and plastic maintain their qualities for lengthy time periods.

(3) Waste for Incineration and Non-Incineration

Refuse that includes; paper, oils, rubber and leather burn easily, giving out high thermal energy. Whereas, waste such as glass and aluminum do not burn.

16.9 Reducing the Amount of Waste

To reduce the amount of waste is the first step in sustainable solid waste management (before recycling, transfer, treatment or disposal).

The most important consideration in the approach to solid waste management is to avoid or prevent harmful waste in the first place.

There are several ways to reduce waste generation in tourism facilities:

Accommodation Facilities

- Sorting and recycling glass, aluminum, paper and plastic from rooms.
- Providing materials in large packages and avoiding the use of individual bottles.
- Placing Laundry in re-usable bags.
- Providing low turnover items, such as sewing kits, to guests on request.
- Giving instructions to room service staff not to replace the toilet paper rolls and tissue paper boxes that are partially used.
- Applying preventive maintenance programs for devices and equipment to increase battery life.

Food and Beverage Facilities: Restaurants and Cafes

- Implement a procurement system that encourages the use of devices with long-life and easy to fix (also high-quality products that can be used repeatedly).
- Use containers for sugar, salt and other foods that can be refilled.
- Use of washable goods instead of disposable ones.
- Use kitchen towels or hot air drying machines instead of paper.
- Donate unwanted items to charitable organizations.
- Return wooden containers to wholesalers for reuse.
- Apply waste sorting policy for recycling (paper, glass, plastic, etc.).

Administrative and Clerical Jobs

- Use media boards (bulletin boards) and brochures instead of sending paper copies of the designs to all staff.
- Use e-mail.
- Use refillable ink cartridges for printers.
- Rationalizing the use of paper

16.10 Green Procurement Methods

"Green Procurement" is one of the most important elements in waste management. The purchase of "green" products can achieve cost savings, preserve natural resources, reduce solid waste amounts and conserve energy and resources.

There are three dimensions in the green procurement:

The Environmental Dimension of Products

- Make sure that the products do not leak toxic substances into the environment through the stages of production, usage and disposal.
- Provide energy saving methods during the production, usage and disposal.
- Choose products that do not contain toxic materials.
- Take into account the total cost of products over its life cycle.
- Use non-toxic cleaning products and find alternative ways to protect against pests instead of using pesticides.

The Possibility of Recycling and Re-using Products

- Give preference to products made from Recycled materials or renewable resources. These products include paper, packaging materials, plastic, glass and metal.
- Buy products that can be reused (pens, clothing, mugs, food kits...)
- Choose products that can be recycled easily.

Products that Use Less Packaging

- Buy products in large containers (bulk).
- Buy from suppliers who are committed to environmental improvement.
- Limit the use of packaging that cannot be recycled.

16.11 Methods of Solid Waste Management

16.11.1 Current Status

There should be an initial diagnosis of the current situation to find out the current problems, the amounts & types of waste, and the current methods used to manage the facility. Additionally, there should be a system for capturing information and designing an effective waste management program.

This should include:

A. Determine the Types and Quantities of Existing Waste in Tourism Facilities

Identify the type and volume of waste produced from a tourist facility as a whole and for each activity separately, if the facility is large (accommodation, restaurants and cafes, parks etc.).

Waste can be measured in the following form:

- Size or weight.
- Percentage of the total waste.
- Cost

Materials	Recycled	Re-use off-site	Sent to the landfill	Composting	Incineration
Paper					
Plastic					
Glass					
Metals					
Organic materials					
Fabrics					
Rehabilitation and construction waste					
Chemicals and chemical products					
Rubber and rubber products					
Animal remnants					
Other					

B. Identify Possible Improvements

Identify the areas in which waste management can be improved in terms of increasing proportion of waste that can be recycled or re-used.

Subsequently, Management of the tourist facility can estimate savings based on sustainable waste management practices.

16.11.2 Solid Waste Management Options

Solid waste management options include:

- Re-use (Re-use)
- Recycling (Recycling)
- Waste conversion (Waste Recovery)
- Disposal (Disposal)

1. Re-Use

This is done by collecting and sorting the waste materials that can be reused.

Examples of re-use:

Food and Beverage

- Donate empty containers to schools or staff for use in storage.
- Donate old kitchen tools to employees or charitable bodies.
- Work to repair appliances / refrigerators instead of throwing them in a landfill or dump.

Maintenance of open spaces

- Donate old devices to employees or charitable bodies.

Administrative and clerical jobs

- Reduce paper usage, by using both sides.
- Donate computers and other devices to schools or charities.
- Re-use packaging materials.
- Re-use cardboard boxes.
- Use re-fillable cartridges for laser printers.
- Treat wastewater and use it to irrigate parks.
- Convert garden waste into organic fertilizer.
- Reduce the use of plastic that does not decompose.
- Cooperation between the various tourism facilities to find common solutions to waste management in the region and launch eco-friendly solutions initiatives.

2. Recycling

Recycling into valuable resources has many benefits environmentally, financially and socially. Recycling reduces the amount of waste going to landfills, saves energy & water and reduces air pollution.

Simple methods can be applied in the context of successful recycling programs by:

- Contacting local Recycling authorities to determine what materials interest them.
- Collecting flowers from the tourist rooms to be used in compost.
- Providing recycling containers in tourist rooms which are collected periodically.
- Providing containers in kitchens and bars for glass, aluminum and plastic.
- Collecting and sorting of waste.
- Recycling motor oil, paint and other materials used in cleaning and maintenance.
- Recycling paper and cardboard boxes.
- Recycling materials such as printer and copier cartridges.

3. Waste Recovery

Fermentation (composting)

Most of the remnants of the food and beverage industry are biodegradable and can be converted into organic fertilizer.

The fermentation process converts organic material into carbon dioxide, and plant nutrients. This type of compost is less susceptible to the impact of pest and plant diseases.

Benefits of composting waste:

- Reduction in the amount of waste transported to landfills.
- Reduction in organic matter in the output of the treatment process.
- Production of rich fertilizer for parks and green spaces.
- Promotes environmental image of the tourist destination.

Incineration (Combustion)

When all options for waste treatment, are exhausted, burning waste in a controlled manner to avoid the release of toxic gases in the air can be used as a last resort.

4. Waste disposal

After utilizing previous waste treatment methods (reducing the amount of waste recycling and converting organic material into compost), the safest way to dispose of the remaining waste is in well-designed dumps organized at a municipal or private sector level.

The following reference should be used to take advantage of detailed methods for treating solid waste - 'A Manual for Water and Waste Management: What the Tourism Industry Can Do to improve its Performance' (UNDP and GEZ).

17. THE NINTH STRATEGIC AXIS: THE DEVELOPMENT OF INFRASTRUCTURE

The development of tourism infrastructure (roads, airports, transport networks, tunnels, water, sanitation, electricity and telecommunications) is an essential element in the development of tourism products and services. The government sector is responsible for providing these facilities to stimulate tourism investments and enhance the competitiveness of the sector.

The Government has made significant achievements on the basic infrastructure and superstructure levels for the tourism sector. The rest of the chapter is a summary of achievements and suggestions for development.

17.1 The Basic Tourism Infrastructure in Kurdistan Region*

The importance of infrastructure development for tourist destinations:

1. Essential factor for tourist flows.
2. Advantageous for tourist site operations.
3. Strong supportive foundation for the sector.

Infrastructure Development Goals

- To facilitate the arrival of tourists to different parts of the country.
- To transfer air passengers safely.
- To provide rapid communication between source countries and the Region, through a communications infrastructure that provides valuable information about tourist sites.
- To provide amenities for tourist comfort at sites, such as; water, electricity and emergency services.

Interconnecting factors of tourism and infrastructure

Infrastructure and tourist facilities are the basis for the development and promotion of the tourism sector. Investment to develop road networks, communication services, public utilities, accommodation, and information services, are critical success factors in tourism. The following are considered essential factors in attracting tourists to tourist destinations;

* See details in Annex No. (3).

Fundamental Factors Affecting Tourism Infrastructure

- Transportation is the foundation for successful tourism development; it helps to access new areas and attractions and accelerates development.
- Transport systems are crucial for tourist movement between source and destination countries, and between tourist areas in the Region.
- The majority of tourists in the world's developed countries are accustomed to advanced transportation infrastructures and high-quality services. They prefer to receive the same level of services they have in their home countries.
- Integrated infrastructure that caters to tourist needs makes a place more attractive for visitors.
- The success of open recreation areas is based on providing the necessary services, which include; drinking water, toilets, health facilities for camping, BBQ places and containers for waste collection.
- Management of areas for visitors should include tourism guides and instructional materials.

17.2 Sample of Infrastructure Requirements in Proposed Tourism Projects: Current Status and Development Proposals

The responsibility of infrastructure and facilities belongs to a number of ministries in the region, such as; the Ministry of Construction and Housing, Ministry of Electricity and the Ministry of Municipalities. This demands cooperation between the relevant Ministry and the Tourism Authority to meet the required infrastructure improvements - set forth in Annex (1).

The following are examples of the current status and the needs for development of infrastructure in some of the sites covered by the tourist plan. For more details refer to the Annex (1).

Governorate of Erbil

Tourism Destination: Soran - Rawanduz

Hendrin Mountainside: Winter & Health Tourism Jundyan Resort: Recreational Tourism Hasan Beik Mountain: Health & Recreational Tourism Babishtian Peak: Recreational Tourism Bekhal Resort: Aqua Tourism Bastun Cave: Nature & Eco Tourism Korek Mountainside: Health Tourism		
Proposed theme	Accommodation needs	Infrastructure
<ul style="list-style-type: none"> Hendrin Mountainside: Spa and beauty center (indoor)- recreational area (including events hall, skating rink in the winter, and a bicycle path) 	<ul style="list-style-type: none"> A modern tourist resort (4 star standard) with 250-bed hotel and 40 eco-chalets 	<ul style="list-style-type: none"> Needs a main parking area
<ul style="list-style-type: none"> Hasan Beik Mountain: Recreational area -Spa- health center - main square 	<ul style="list-style-type: none"> Hotel (3 stars standard) with a capacity of 200 beds 28 eco-chalets 	<ul style="list-style-type: none"> Needs a main parking area
<ul style="list-style-type: none"> Bekhal Resort: Aqua playground for children – panoramic view pints of the waterfall (eg: towers, platforms, etc. ...) - pedestrian area in front of the waterfall – hygiene management - 	<ul style="list-style-type: none"> 90 eco-chalets 	<ul style="list-style-type: none"> Good road network Electricity and water available Needs a main parking area
<ul style="list-style-type: none"> Jundyan Resort: Recreational area – children playground – new chalets – market area - restaurants 		<ul style="list-style-type: none"> Good road network Electricity and water available Needs a main parking area
<ul style="list-style-type: none"> Babishtian Peak: Events area (indoor and outdoor)-sports and recreational area (motorcycles, ATV, paintball etc.)-main square 	<ul style="list-style-type: none"> The 3-star tourist resort, with a capacity of 1,040 beds Main hotel with 200 beds 140 eco-chalets 	<ul style="list-style-type: none"> Road is below standard, needs tarring over 2 km distance Electricity and water are not available Needs a main parking area
<ul style="list-style-type: none"> Bastun Cave: Concrete path inside the cave - lighting system inside the cave – illustrated cave guide in main languages- coffee shop and ticket booth - bathrooms and souvenir shop - a relaxation area 		<ul style="list-style-type: none"> The road below standard. Electricity and water are not available Needs a main parking area
<ul style="list-style-type: none"> Korek Mountainside: Spa – relaxation & therapy center – restaurant – pedestrian & walking trail – ecological area (gardens & greenery) 	<ul style="list-style-type: none"> Health resort (4 star standard) with 500 beds 	<ul style="list-style-type: none"> Needs a main parking area Electricity and water are not available

Governorate of Sulaymaniyah

Tourism Destination: Pshdar – Rania

Julaynan: Entertainment Tourism Rania Forest: Nature & Eco Tourism Kurdi Husni: Recreational Tourism Qurago: Recreational Tourism		
Proposed theme	Accommodation needs	Infrastructure
<ul style="list-style-type: none"> Julaynan: Main square-restaurant and cafes-entertainment area 	<ul style="list-style-type: none"> 10 eco- chalets 	<ul style="list-style-type: none"> Road network available Electricity and water available Needs a main parking area
<ul style="list-style-type: none"> Kurdi Husni: entertainment area (evening) – main square-restaurant and cafes- mall - relaxation area 	<ul style="list-style-type: none"> Hotel 4 star standard (120 beds) 45 eco- chalets 	<ul style="list-style-type: none"> Electricity and water available Lack of a water network Needs a main parking area
<ul style="list-style-type: none"> Rania Forest: Large playground for kids – cable car-panoramic view area from cable station- Zoo – large restaurant-artificial lake – decorated utilizing Kurdish culture and heritage 	<ul style="list-style-type: none"> 51 eco- chalets 	<ul style="list-style-type: none"> Good & accessible road network available Electricity and water available Needs a main parking area
<ul style="list-style-type: none"> Qurago: Recreation area – cafes - spa 		<ul style="list-style-type: none"> Road under-construction (1.9 km tarring) Water, sewage and electricity under installation The need for a major parking

Governorate of Duhok

Tourism Destination: Amedi - Sersink

Serink Resort: Aqua & Nature & EcoTourism

Aynishki Waterfalls: Health & Recreational Tourism

Ashawaw Waterfalls: Aqua Tourism

Kali Kani Masi: Recreational Tourism

Sulav Resort – Bery Saly Park: Nature & Eco Tourism

Kubhan Historical School: Heritage Tourism

Proposed theme	Accommodation needs	Infrastructure
<ul style="list-style-type: none"> Serink Resort: Cable car to mount Gara- a path to walk to the mountain top - cable car station-water park – restaurants - fountains – marketplace recreation area – hygiene & health management – public notices and guides 	<ul style="list-style-type: none"> 1200 beds (upgrading of current tourist village) 	<ul style="list-style-type: none"> Road network available Electricity and water available Needs a main parking area
<ul style="list-style-type: none"> Aynishki Waterfalls: Variety of restaurants – green spaces – events & festival area – ATV – horse riding area - mountain sports 		<ul style="list-style-type: none"> Road network available Electricity and water available Needs a main parking area
<ul style="list-style-type: none"> Ashawaw Waterfalls: Aqua playground (water fountain, water cannons, etc.)-picnic area-relaxation & entertainment includes; theatre, floating cafe, horse riding-shops- boat rental 		<ul style="list-style-type: none"> Road network available Water available Needs a main parking area
<ul style="list-style-type: none"> Kali Kani Masi: Recreational area – ATV –park-BBQ area 		<ul style="list-style-type: none"> Road under -construction Needs a main parking area
<ul style="list-style-type: none"> Sulav Resort: Cable car- big swing -ATV- recreation area-restaurant and shops- children's area-s ports area-BBQ area-camping area 	<ul style="list-style-type: none"> Hotel (100 beds) and 80-85 eco - chalets 	<ul style="list-style-type: none"> Road network available Electricity and water available Needs a main parking area
<ul style="list-style-type: none"> Bery Saly Park: Main square- picnic and camping area -restaurant and cafe -cable car – horse riding facility 		<ul style="list-style-type: none"> Road network available Electricity and water available Needs a main parking area
<ul style="list-style-type: none"> Kubhan Historical School: Main square – Museum – Café – garden 		<ul style="list-style-type: none"> Needs a main parking area

Directorate of Garman

Tourism Destination: Kalar

Qula Barz: Eco Tourism

Bankard: Recreational Tourism

Sankar: Nature & Eco Tourism

Essai: Nature & Eco Tourism

Bardasur : Recreational Tourism

Proposed theme	Accommodation needs	Infrastructure
<ul style="list-style-type: none"> Qula Barz: Development of separate areas on the island for rent – various restaurants - grill area- entertainment area - playground for mini golf, sport etc.. - create a landscaped park –a bridge to link the West side and East side of the River 	<ul style="list-style-type: none"> Eco chalets on the East bank of the river 	<ul style="list-style-type: none"> Good road network available Electricity and water available Needs a main parking area
<ul style="list-style-type: none"> Bankard: Convert the Museum inside the castle to “The Castle Museum of Kalar” the castle a historic identity – a garden located on the Eastside of the site -restaurant with a terrace near the river-waterways -water fountain – river walkways – events area – antiquity & craft market 		<ul style="list-style-type: none"> Good road available Electricity and water available Needs a main parking area
<ul style="list-style-type: none"> Essai: Main square -relaxation area- restaurant-barbecue area - boat rental 		<ul style="list-style-type: none"> Needs a main parking area
<ul style="list-style-type: none"> Sankar: Main square -restaurant-barbecue area (relaxation area-boat rental-adventure area and water games 		<ul style="list-style-type: none"> Needs a main parking area
<ul style="list-style-type: none"> Bardasur: Main square – horse riding facilities – bicycle path - Karting – indoor recreational area - children's playground -restaurant - a sculpture park - park – boat rentals – water games 	<ul style="list-style-type: none"> 120-bed Motel 	<ul style="list-style-type: none"> Good road available Needs a main parking area

17.3 Development of Infrastructure Facilities for Tourism Services

The following recommendations are proposed to make locations more attractive:

- Create artificial lakes in areas with distinct tourism properties, where tourism beaches, accommodation services and recreational facilities can be developed.
- Take advantage of the artificial lakes behind the dams to build tourism facilities and link them via transport networks and infrastructure services, as described in annex (1).
- Create rest areas on all main roads that include fuel stations, accommodation facilities, restaurants and mini market to serve travelers and tourists.
- Establish a railway linking the major cities in the region, with the possibility of connecting tourist areas to facilitate the arrival of visitors and enable them to enjoy the picturesque landscapes on the way.
- Create a public transport system with buses and electric trains in major cities to provide efficient transport service with access to parks and sites.
- Create market locations for traditional craft workshops, with exhibits and gift centers for craft products inside and around tourist sites.
- Develop areas for adventure tourism equipped with appropriate infrastructure and services.
- Create camping and caravan sites in a number of parks with appropriate services.

18. THE TENTH STRATEGIC AXIS: THE DEVELOPMENT AND MODERNIZATION OF TOURISM LEGISLATION, LAWS AND REGULATIONS

The tourism sector needs legislation that provides a regulatory framework for the development of facilities and integrated projects. It should also develop systems for monitoring, evaluating and controlling quality standards that are sustainable and competitive.

The region should have a legislative entity with the regulatory mandate to empower tourism authorities to effectively enforce tourism laws.

This requires legislation, laws and regulations in the following areas:

- Controls for licensing of tourist facilities.
- Guidelines and criteria for classification of tourist facilities.
- Controls and inspection for works on tourist facilities.
- Regulation for the work of tourism intermediaries (i.e. operators, agents, guides etc.).
- Regulation for the work of tour companies.
- Licensing for festivals and events.
- Organization of brochure issuance and tourism publications.
- Organization of tourism land areas and procedures governing their management and conditions for operation or transfer.
- Private land expropriation legislation to benefit the tourism sector.
- Legislation of the public-private partnership (PPP) projects.
- Development of the Investment Act to facilitate investor requirements.
- Revise visa process to facilitate the entry of tourists and residents.
- Organization for the work of tour companies and their relationship with the tourism authorities.
- Organization for the work of foreign workers in tourism sector.
- Control and regulation of festivals and tourism events in cooperation with the relevant authorities.

19. IMPLEMENTATION PLAN

This section of the report describes the strategic implementation and operational plans to achieve Vision 2025. This entails the projects that will improve the tourism sector and advance institutions to a competitive level, which should generate income, create jobs and investment opportunities.

To achieve tourism strategic objectives, the vision is required to determine the responsibilities and milestones for projects, plans, and program implementation which are vital to the sector's success.



19.1 Elements of the Operational Plan

The operational plan should include the following actions:

- Prepare plans and choose team supervisors for implementation.
- Identify responsible units for the planning and implementation of each project, and oversee the work of planning, implementation and necessary assessments.
- Determine responsibilities of project managers / program supervisors.
- Select the team that will work on the project / program.
- Identify municipal and government agencies that should be consulted and involved during the project axes.
- Estimate the time required for the implementation of the program / project and starting and completion dates. In principle, each program and project determines the time it requires for completion. However to accomplish each specific action (or step), the operational plan must also take into account the obstacles that could arise from the project environment. Possible obstacles that may arise include:
 - o Time needed to reach consensus between stakeholders, plan priorities.
 - o Lack of funding or delayed approval.
 - o Delays in enactment of laws and decrees applied for implementation.
 - o Emergence of technical difficulties / delays.
 - o Reconsideration of project / program for economic or political reasons (regionally and globally).

Model Schedule to Implement Operational Plans

The schedule below gives a visual estimation for project / program step completion. It also determines the starting and end points. This applies to all projects and programs included in the schedule of the strategic plan.

Measures Stages	I	II	III	IV	I	II	III	IV	I	II	III	IV
	Starting point											
Stage 1					Execution period							
Stage 2					Execution period							
Stage 3					Execution period							
Stage 4					Execution period							
												Endpoint

Schedule to Implement Operational Plans



19.2 Operational Plans

First Axis: Administrative Structure Development and Sustainable Tourism Development Management

The restructuring of the General Board of Tourism's organizations makes it responsible for developing the tourism sector which include, policy setting, plan implementation, studies, quality, and marketing strategies (Act No. 12 of 2010).

The Strategic Plan sees the need to restructure the General Directorates which are responsible for the procedural aspects of tourism planning and investment, product development, project planning, license issuance and tourist-related facilities development and management.

The restructuring process requires a number of actions by the General Board of Tourism and Directorate General for Tourism in the Governorates and in Garman Directorate:

Stages \ Measures	I	II	III	IV	I	II	III	IV	I	II	III	IV
Name a project manager and form a work group for project follow up and determine the responsibilities and functions of the Group 	Starting Point											
Allocate the financial resources and necessary approvals for the budgets of the General Board for Tourism and General Directorates of Tourism in the Region												
Study the developmental needs of the existing structures that are compatible with and meet the objectives of the strategic plan												
Prepare relevant regulations, and submit draft laws for approval by the Government and Parliament of the region												
Implement the development and proposed structural changes												
Complete the project												Endpoint



Stages of project development plan and the timetable for implementation

Second Axis: Development of Tourist Sites and Products

The second axis is divided to two parts:

- Identify tourist attraction areas by their geographic and intrinsic characteristics, e.g. history, customs, traditions and ceremonial occasions. The identification of these elements accurately predicts the attraction types that can be developed to stimulate tourism.
- Identify potential attractions and sites and prioritize them based on swift returns and accessibility of location. It is important to ensure equitable geographical distribution of tourism development for different areas in the region.



This requires the development of tourist sites and products be a coordinated effort by the General Board of Tourism, the Directorates of Tourism, and the concerned ministries and municipalities as illustrated below:

Stages \ Measures	I	II	III	IV	I	II	III	IV	I	II	III	IV
Name a project manager , form work groups for project follow up and determine the responsibilities and functions of the Group 	Starting point											
Allocate the financial resources and necessary approvals for the budgets of the General Board for Tourism and General Directorates of Tourism in the Region												
Studies of tourism trends in the region and the world to determine the types of tourism that can be developed in Kurdistan Region and the tourist groups to attract												
Identify locations suited to different types of tourism , get tenders for feasibility studies, and develop areas based on established priorities												
Coordinate with other ministries and municipalities to develop infrastructure and provision for various facilities and services												
Complete study and start of projects	Endpoint 											

Stages of the project's development plan and the timetable for implementation

Third Axis: Improving Tourism Sector Quality and Competitiveness

Implementing a plan to raise tourism sector quality and competitiveness begins with the formation of a team which consists of members from the General Board of Tourism, the directorates in the governorates to oversee the plan. The focus should be on quality and marketing management. Refer to table below:



Measures / Steps	I	II	III	IV	I	II	III	IV	I	II	III	IV
Name a project manager, form work groups for project follow up and determine the responsibilities and functions of the Group 	Starting point											
Allocate financial and technical resources required and get the necessary approvals for the budget												
Form a classification committee and monitor its operations												
Implement the accommodation facilities classification system												
Monitor the implementation of Kurdistan Tourism Quality Program and oversee its implementation												
Oversee workforce training program and support facilities upgrades												
Establish Annual quality award for the various Tourism Categories												
Follow-up implementation of Various programs regularly 												

Stages of the draft plan for improving quality in the tourism sector,
and the timetable for implementation

Fourth Axis: Develop a Brand Strategy

Brand development is an on-going process which will vary depending on the time and place. Since it is directly linked to marketing strategy, it is a foundation that allows the creation of an identity and image for the region that and communicates the different types of tourism in various areas.

Below are a schedule and the responsible parties in the relevant marketing activity (which includes the production of print materials, website development, television and radio advertisements, press trips, newsletter, social media and market research).

Measures / Steps	I	II	III	IV	I	II	III	IV	I	II	III	IV
Name a project manager, form a work group for project follow up and determine the responsibilities and functions of the group 	Starting point											
Allocate financial and technical resources required and get the necessary approvals for the budget												
Announce the Brand and introduce it in tourism facilities												
Brand Launch (based on Strategic Plan)												
Brand Management (based on Strategic Plan) in relation to marketing needs												
Brand Impact Measurement (based on tourism statistics and opinion Surveys)												
Follow-up implementation of Various programs regularly 												

Stages of Brand development, and timetable for implementation (chapters)

Fifth Axis: Tourism Marketing Strategy Preparation

The marketing action plan for the tourism marketing directorate is split into three modules and takes into account the data that is gathered in axes 2, 3, 4. The marketing of tourism is illustrated below:



Table explanation

Module I:	Q1	Q2	Q3	Q4	Responsible
Action					

Q1 (April to June) / Q2 (July to September) / Q3 (October to December) / Q4 (January to March)

GBoT (General Board of Tourism), SD (Strategy Department, CD (Communication Department), MRD (Market research department)

Module I: Setting up the tourism marketing directorate within the General Board of Tourism

Module I: Setting up the tourism marketing directorate	Q 1	Q 2	Q 3	Q 4	Responsible
Ensuring the allocation of a transitional marketing budget for 2013 (recommended is an amount of around USD 2 million)					GBoT
Approving the recommended new Tourism Marketing Directorate within the General Board of Tourism					
Approving the recommended structure (three departments) within the Tourism Marketing Directorate and their responsibilities					
Starting the hiring process for key positions within the new Tourism Marketing Directorate (head of directorate and heads of departments)					
Setting up the necessary office infrastructure (offices, work desks, IT-infrastructure)					
Approving the marketing budget for 2014 (recommended is an amount of around USD 8 million)					GBoT, SD
Evaluating the current tourism marketing know-how within the General Board of Tourism and identifying gaps which need to be closed					GBoT together with newly hired key employees
Starting hiring experienced employees for the three departments within the Tourism Marketing Directorate in order to increase the expertise					

Module II (a) and II (b): Planning and implementing marketing activities for Kurdistan Region for 2013

Module IIa/IIb: Planning and implementing marketing activities 2013	Q 1	Q 2	Q 3	Q 4	Responsible
Deciding about those marketing activities, in line with the available approved budget, which implementation can be started in 2013					SD, CD
Deciding on the budget split for single marketing actions which will be started to be implemented in 2013					SD, CD
Continuing the brand implementation process (including finalizing the logo and slogan process)					SD
Starting the implementation of the agreed on marketing activities for Kurdistan Region for 2013					CD

Tourism marketing activities should commence in 2013 as follows:

Printed Materials

- Develop a new "Brochure" for Kurdistan.
- Use professional photographers to take pictures of tourist places, people, and cultural activities.
- Engage professional designers.
- Prepare tourist brochures in several languages by professional translators.

- Coordinate between the various relevant agencies to prepare and print brochures.
- Distribute new brochures in tourist establishments, ministries and regional directorates of tourism.

Website Development

- Develop and design a professional website.
- List key elements of Kurdish tourist sites on the Internet and in accordance with the recommendations of the tourism strategic plan.
- Prepare website content in three different languages with links to other known tourism sites on the internet.
- Launch the new website officially during a press conference.
- Update website content continuously (dedicated content management).

Radio ads

- Taking brand strategy into account, produce several versions of radio ads in two different languages (Arabic and Kurdish), inviting people to visit the Kurdistan while.
- Sign contractual agreements with radio stations in Kurdistan and Iraq, stating the frequency and the number of times these ads are broadcast.

TV ads

- Taking brand strategy into account, produce versions of TV commercials in three languages (Arabic, English and Kurdish), inviting people to visit the Kurdistan.
- Sign contractual agreements with television stations in Kurdistan, Iraq, neighboring countries and other target countries.

Press Trips

- Develop a structured program and attractive press trips.
- Invite local and international journalists from major emerging markets to participate in press trips.
- Accompany journalists on trips to the most important tourist attractions in Kurdistan.
- Follow-up with reporters after completing the trip to ensure favorable reviews are presented.
- Publish articles on official sites and the relevant ministries sites as well.

Newsletters (on the Internet)

- Designate an information technology company, to develop tools to provide professional newsletters in three languages (Kurdish, Arabic and English).
- Design the layout of newsletters.
- Organize training courses for internal marketing staff on how to use newsletters.
- Prepare newsletters on a regular basis (preferably monthly).

Social Media

- Establish sites on social networks Facebook, Twitter or YouTube...
- Update the information published on tourist sites and international tourist social networks, by uploading new information periodically.

Market Research

- Develop and implement an annual survey of the tourist movement in the region.









Module III: Planning activities for marketing Kurdistan Region in 2014 in accordance with the available marketing budget

Module III: Planning activities for marketing Kurdistan Region in 2014	Q 1	Q 2	Q 3	Q 4	Responsible
Developing an advertising concept for the defined core and emerging markets for 2014					CD
Deciding which tourism fairs to attend in 2014 and developing a fair participation concept for Kurdistan Region					SD, CD
Developing of info point concept for Kurdistan Region					SD
Developing a concept for setting up international tourism offices outside Kurdistan Region					SD, MRD
Developing a concept for farm trips, product experience programs and press trips for 2014					CD
Developing a E-marketing concept for 2014					CD
Defining the market research activities for 2014					MRD
Developing a festival & event concept for Kurdistan Region for 2014					CD

Sixth Axis: Tourism Education Development

Education is the first pillar in the tourism development process, enabling the upgrading the quality of tourism services. This is a key element in the success of tourist facilities and their ability to attract visitors. The ultimate goal of education is to achieve tourist satisfaction, and advance the



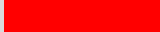




reputation of the region. In addition, tourism education creates new job opportunities in related disciplines, and makes tourism attractions more competitive.

Measures / Steps	I	II	III	IV	I	II	III	IV	I	II	III	IV
Name a project manager and form a work group for project follow up and determine the responsibilities and functions of the group 	Starting point											
Allocate financial and technical resources required and get the necessary approvals for the budget												
Prepare manpower tourism studies												
Prepare long and short term programs and plans for tourism educational development (based on Strategic plan)												
Monitor tourism training and curricula development												
Monitor the establishment of tourism departments in Universities and Professional schools (based on strategic plan)												
Follow-up implementation of Various programs regularly 												

Stages of the development plan for tourism education, and its timetable

Seventh Axis: The State's Role in the Development and Support of the Public and Private Tourism Sector

The state's role in developing and supporting the tourism sector is essential for attracting private sector investment. The commitment taken by the Government to support the tourist sector is evident in the formation of the General Board of Tourism. The board is responsible for producing specific proposals in this regard, which identifies areas in need of support:









Measures / Steps	I	II	III	IV	I	II	III	IV	I	II	III	IV
Name a project manager and form a work group for project follow up and determine the responsibilities and functions of the group 	Starting point											
Allocate financial and technical resources required and get the necessary approvals for the budget												
Prepare studies for tourism investment needs and project support capabilities												
Coordinated with concerned ministries the development of required infrastructure in designated areas.												
Develop support programs for investors (based on specific criteria) and implement them												
Follow-up implementation of Various programs regularly 												

Stages in the Development of Tourism Sector Support, and Implementation Timetable

Eighth Axis: Environmental Impact and Waste Management

The role of the General Board of Tourism and its directorates in environmental and health management is limited to coordination with government agencies concerned with the environment, and with municipalities in tourist areas. Its present scope of work includes collaborating in solutions that help maintain cleanliness in the cities, towns, locations and other destinations that cater to visitors.

Additionally, the Board has a specific role to manage tourist facilities through regulation and methodologies for environmental protection, i.e. licensing of remote tourist facilities which are away from networks (especially sewage) and solid waste collection services. Also, the board sets the provision and design requirements for environmentally friendly tourist facilities.

Measures / Steps	I	II	III	IV	I	II	III	IV	I	II	III	IV
Name a project manager and form a work group for project follow up and determine the responsibilities and functions of the group 	Starting point											
Allocate financial and technical resources required and get the necessary approvals for the budget												
Establish Environmental conditions for facilities in remote locations.												
Follow-up the implementation of the established environmental regulations												
Suggest specifications for environmentally friendly facilities												
Coordinate with concerned governmental bodies to implement the environmental regulations												
Follow-up implementation of Various programs regularly 												

Ninth Axis: Infrastructure Development in the Region

The development of tourism depends in large part on a suitable network of roads, electricity, water and sanitation. The relevant ministries and departments are encouraged to coordinate with the General Board of Tourism to ensure the linking of sites and tourist areas, and to allocate the necessary resources in their annual budgets.

Tenth Axis: Development and Updating of Tourism Legislation, Laws and Regulations

The updating of legislation, laws and regulations for the development of tourism is essential, especially those associated with tourism investment, tourist flows and procedures of the sector in general. It provides the legal governing framework for the development of projects, facilities, and tourism sites and establishes the foundation to monitor work, quality and management activities.

Establishing timelines for policy development, preparing draft laws and other regulations gives the board a measure of control, especially in cases which are beyond the board's jurisdiction.

19.3 Develop and Implement Detailed Plans for Tourism Development Projects

Annex (3) a mechanism for the implementation of programs and projects covering different plan types.

20. METHOD TO UPDATE THE TOURISM STRATEGIC PLAN

This process includes the following steps:

- Review tourism sector performance indicators. These indicators are; average annual number of tourists, hotel occupancy rate, number of beds available, number of jobs covered by the sector, points of success and weaknesses, analysis of problems, and lessons learned to help the formulation of future objectives.
- Review changes in the legal, economic and administrative environments.
- Assess the resources that were used in the implementation of the plan (to budget them in subsequent initiatives).
- Assess the achievements of tourism education and training.
- Assess the achievements of tourist area development.
- Prepare SWOT analysis to identify new trends.
- Revise the Strategic Framework for Tourism Development and review vision, mission, values and strategic objectives.
- Revise the objectives and targets in light of expected growth based on the new strategy.

CONCLUSION

The aim of the Tourism Strategic Plan – The Master Plan is to strengthen the capacity of the tourism sector in Kurdistan Region, resulting in the emergence of an attractive and favorable environment for domestic and foreign visitors. The main objective is to transform Kurdistan by 2025 into a preferred and favored tourist destination regionally and globally. The plan's implementation should place Kurdistan on the international tourist map; this will require the establishment of attractive tourist destinations based on knowledge of the modern tourist industry and its requirements. The involved government entities are capable and committed to following a development strategy with achievable goals based on short, medium and long term objectives for the sector.

This report provides a plan to develop tourism in the region up to 2025, and outlines the methodology and axes for creating the necessary investment climate including; legislation and regulatory framework, infrastructure and supra-structure needs, education and training systems, marketing guidelines and identification of relevant stakeholders.

It is also a guide for the development of basic infrastructure and rehabilitation needs of existing, potential and emerging tourist sites, highlighting the measures, administrative and regulatory procedures needed to provide a solid platform and supportive environment for tourism development. These developments aim at; creating business opportunities, developing projects and facilities, maximizing characteristics of sites and establishing a brand identity to enhance the competitiveness of the region globally.

Attracting tourists from outside the region is important and will depend upon the success of the plan, and the effective collaboration between the government, the General Board of Tourism and general directorates throughout the region. As such, the plan needs to focus on a cohesive and unified promotion and marketing campaign with a functional brand identity.

The role of tourism education and vocational training is vital to the success of the tourism sector. A specialized and efficient workforce is a fundamental component in building a good reputation for tourist organizations. This will help the region gain a positive image for its hospitality and help advance the competitiveness of the region and its destinations.

Tourism Culture should also perform a prominent role. In this domain, media and advertising have a critical role in highlighting the importance of tourism to the region's economy, building tourism awareness, and showcasing tourism positively. Such awareness can help give local communities a better understanding of the positive aspects of tourism and the need to participate in the sector's evolution. Since communities are what make the culture of the region vibrant and viable, they need to become involved through their traditions, festivals and celebrations. This will give the tourist an insight into the diverse lifestyle and ethnicity of the society, and ultimately becoming a source of interest to visitors (as much as the history, ecology

and geography of the land). Therefore, enrichment of the tourism culture becomes a crucial element in the overall offerings of the region.

The Master Plan also makes provisions for the necessary resources and their placement in the development strategy, these include; financial resources, human resource development (i.e. tourism education), regulatory foundations (i.e. enforceable laws and legislation). It also facilitates the establishment of an attractive environment for private investment with the capacity for public private partnerships (PPP).

The Master Plan engages a variety of value-added elements to create a successful tourist economy across the region. Its success will not just effect tourism destinations and sites but will create an expanded economic base. Therefore, it outlines a tourism economy that will support social and economic progress and will play a central role in the region's prosperity through job creation, infrastructure development and modernization initiatives across sectors, with a measurable contribution to the GDP of the country.

The government has recently achieved success in collaboration with the private sector in the tourism. As these collaborations evolve into more permanent partnerships and the sector grows into an economic pillar, the master plan will aid in creating the necessary framework for an organized method between the public and private sectors. Such a cohesive and organized approach (i.e. PPP initiatives etc.) will help accelerate the transformation of tourism and its role in the region's economy.

The need for this Master Plan signifies the government's increased awareness towards the importance of tourism. Since development needs have expanded and matured to the extent that they now require a framework for the creation of programs, policies and future plans that are viable and sustainable. The Master Plan is the platform to enable and enhance the government's commitment to advance tourism throughout the region.