Standing Committee
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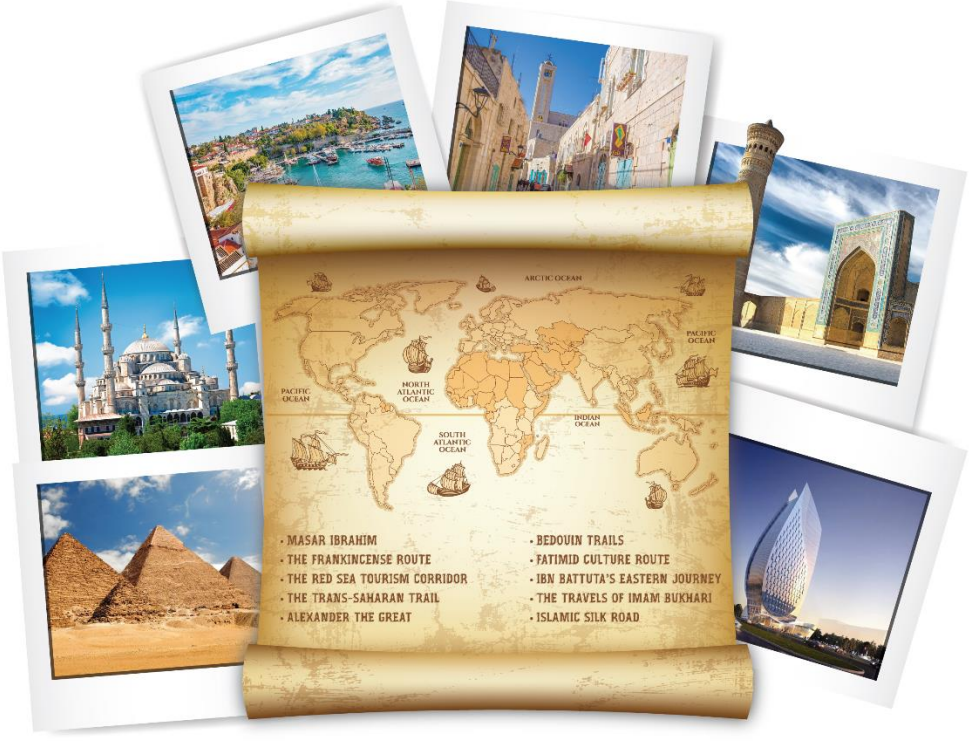
Developing Multi-Destination Tourism Corridors In the OIC Member Countries



COMCEC COORDINATION OFFICE
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List of Abbreviations

ASEAN	The Association of Southeast Asian Nations
ATRIUM	The Architecture of Totalitarian Regimes in Europe's Urban Memory
COMCEC	The Standing Committee for Economic and Commercial Cooperation of the Organization of the Islamic Cooperation
ECOWAS	Economic Community of West African States
EU	European Union
GCC	Gulf Cooperation Council
GMS	Greater Mekong Subregion
ICOMOS	International Council on Monuments and Sites
MDT	Multi-Destination Tourism
MDTC	Multi-Destination Tourism Corridor
MTCO	The Mekong Tourism Coordinating Office
OIC	The Organization of Islamic Cooperation
SADC	South African Development Community
SESRIC	The Statistical, Economic and Social Research and Training Centre
TC	Tourism Corridor
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization

Executive Summary

Study Background and Methodology

The rising interest in Multi-Destination Tourism (MDT) is evident in the efforts of international organizations, as well as regional organizations, to champion and support cooperation between multiple destinations in the tourism sector. MDT combines assets and attractions from various destinations to form a "cumulative attraction." For destinations with similar assets, the array of experiences within the tourist interest area is expanded, adding to their appeal. For complementary destinations, they can gain a competitive advantage as a group. The Development of Multi-Destination Tourism Corridors (MDTCs) could be an essential tool in fostering cooperation between countries in the area of tourism.

Recognizing the importance and potential of MDTCs for the member states of the Organization of Islamic Cooperation (OIC), this study aims to provide tourism stakeholders and policymakers in member states with recommendations to successfully plan, establish, manage and market MDTCs. To fulfill the study's objectives, the study used primary and secondary research tools and sources. The secondary sources used include previous market studies, trade and sector reports, academic articles and research papers, government, international organizations, and press publications — the primary research tools were comprised of in-depth interviews and four case studies.

Tourism Corridor Concept and Typology

Some of the earliest tourism corridors (TCs) of the 19th century were associated with railways such as "The Orient Express," enabling tourists to embark on a journey from Paris to Istanbul in six days, the "Eastern and Oriental Express" journey between Bangkok and Singapore, and the "Orient Express" journey between Moscow and Beijing."[1] Initially, the concept of corridors was associated with transport, providing a connection between two or more urban areas using the most direct and shortest connections channeling economic and social activities.[2]

The use of the corridor concept started expanding in the 1990s and was adopted by various types of agencies, including urban planning, public infrastructure, development agencies, and, eventually, the tourism sector. The link between transport and tourism is evident in the development of tourism in general and TCs in particular, as evidenced by the development of the itineraries linked to railways such as the Orient Express.[3] Another important link is present between corridors and economic cooperation between corridor member countries, with cooperation in the tourism sector becoming an added area for cooperation, as in the case the Greater Mekong Subregion TC, which was initially an economic corridor.[4]

The concept of a Tourism Corridor is described as "an approach to tourism that offers travelers the opportunity to visit a variety of built and natural attractions along a themed route." In the context of this study, a Multi-Destination Tourism Corridor (MDTC) is defined as a route represented by a theme covering more than one country. With the launch of UNESCO's Route

[1] Plokhikh R. V., Sakypbek M. A., and Asipova Zh. M. 2018. Cooperation in the field of tourism development according to «Almaty – Bishkek Corridor Initiative (ABCI)». Technologies of Business and Service. – Vol.4, № 2.

[2] Alampay, Ramon Benedicto, and G. Rieder, Ludwig. 2008. Developing Tourism in the Greater Mekong Subregion Economic Corridors. Journal of Greater Mekong Subregion (4): 59-76.

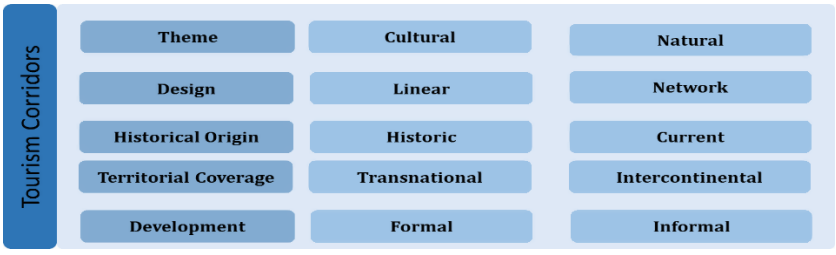
[3] Ibid.

[4] Please refer to the Greater Mekong Subregion tourism corridor case study for references and more details.

Program in the late 80s and the involvement of UNWTO in the Silk Road and Slave Route initiatives in the early 90s, the concept and development of MDTCs gained increasing attention. The inclusion of the Spanish section of the Camino Francés of Camino de Santiago routes in the World Heritage List in 1993 started the debate on cultural routes and led to the addition of a specific category for cultural routes on the list.[5]

From a thematic perspective, corridors can be classified as cultural or natural heritage corridors. Cultural corridors are based on historical, cultural, spiritual, and economic ties that are part of the "collective memory" of society.[6] They may combine various elements, including religion, cultural traditions, gastronomy, art, and architecture, such as the Camino de Santiago, or may focus on a single element, such as the cave art route focusing on prehistoric art.[7] Cultural corridors can be formed on the basis of religious heritage such as the Santiago de Compostela Route, arts and architecture such as the Transromanica Route, famous personalities' lives, and activities such as Destination Napoleon and the Mozart Ways, and the movement of people such as the Phoenicians' Route.[8]

Figure 1: Classification of Multi-Destination Tourism Corridors



Source: DinarStandard Analysis

Natural corridors are based on natural resources, such as landscapes, plants, and wildlife, which are underdeveloped to a certain extent. Natural corridors may combine various elements, including experiencing adventure, natural landscapes and wildlife, and educational and conservation nature-related tourism activities.[9] An example of nature-based corridors is the Great Limpopo Transfrontier Park, the largest conservation area in Africa, consisting of the Limpopo National Park of Mozambique, Kruger National Park of South Africa, and Gonarezhou National Park of Zimbabwe, offering a variety of trails including walking and wilderness trails as well as self-drive trails across Mozambique, South Africa, and Zimbabwe.[10]

From a design perspective, MDTCs can be classified as either linear or network corridors. Linear corridors can have either one or several start points and one end point, such as the Camino de Santiago, which has various start points but ends at one particular point - the Cathedral of Santiago de Compostela in Spain. Linear corridors are sequential, going from the various start points to the final point, as opposed to network corridors, which consist of various

[5] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[6] Valkova Shishmanova, Maria. 2015. Cultural Tourism in Cultural Corridors, Itineraries, Areas and Cores Networked. Procedia - Social and Behavioral Sciences 188: 246 – 254.
[7] UNWTO Global Report on Public-Private Partnerships: Tourism Development
[8] ROUTES4U. 2018. Feasibility Study: The Cultural Routes of the Council of Europe and the Baltic Sea Region (EUSBSR).
[9] Hamzah, A. and Ismail, H. N. 2008. A design of Nature-Culture Based Tourism Corridor; A Pilot Project at Kelantan Darul Naim. Universiti Teknologi Malaysia.
[10] Hawkins, D., et al. 2015. Multi-Country Destination Development: An Opportunity to Stimulate Tourism in the Americas. International UNWTO Seminar on Multi Destination Opportunities for Regional Integration.

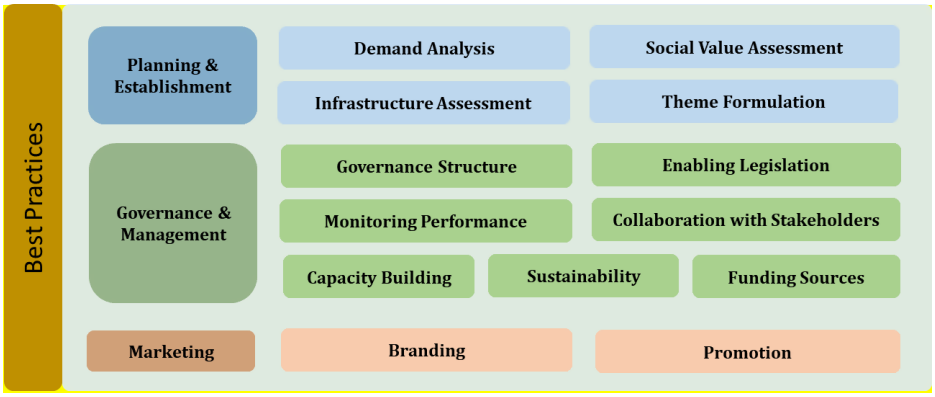
points that are not necessarily linked physically or consequentially but connected by a common theme. Network corridors do not have start or end points, such as the European Cemeteries Route and the Phoenicians' Route. In many instances, network corridors may not be connected by a specific sequence, and their cohesion relies mainly on their shared theme rather than territorial linkages.[11]

From a historical perspective, MDTCs can be classified as either of historical origin or based on current narratives. MDTCs with historical origins have well-founded and factual historical roots, such as the Camino de Santiago, while those based on current narratives build on a historical association strengthened by current narratives, such as the European route of thermal heritage and thermal towns.[12] Based on their territorial coverage, cultural routes can be transnational only or intercontinental as well.[13] MDTCs can also be classified as formal or informal. Informal corridors are formed by tourists, and in some instances, tourism agencies create itineraries that connect attractions of interest, while formal corridors are generally developed or supported by local authorities in territories along the corridor.[14]

Multi-Destination Tourism Corridors Best Practices

In this report, best practices from select global MDTCs are explored in planning and establishment, governance and management, and marketing of MDTCs. The following framework illustrates the various areas covered under each category. In the planning and establishment stage, best practices form global corridors and show extensive research with the aid of experts in analyzing potential demand for the corridor, assessing the infrastructure in terms of transport networks along the various nodes of the MDTC and formulating corridor theme, as well as ensuring benefits for local stakeholders in the planning and establishment of the corridor.[15]

Figure 2: Tourism Corridor Best Practices Framework



Source: DinarStandard Analysis

[11] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[12] Ibid.
[13] Valkova Shishmanova, Maria. 2015. Cultural tourism in cultural corridors, itineraries, areas and cores Networked. Procedia - Social and Behavioral Sciences 188: 246 – 254.
[14] Hamzah, A. and Ismail, H. N. 2008. A design of Nature-Culture Based Tourism Corridor; A Pilot Project at Kelantan Darul Naim. Universiti Teknologi Malaysia.
[15] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.

In terms of governance and management best practices, best practices from global MDTCs indicate the development of management organizations with clearly defined roles for the various bodies involved in the corridor's management and promotion, creation of legislation for travel facilitation, monitoring performance, formal platforms for collaboration with stakeholders, ensuring sustainability and diversifying corridor funding. Marketing best practices include ensuring branding consistency, highlighting the corridor's unique selling proposition, and using storytelling to enhance branding as well as the traditional and innovative digital tools for promotion.

Best Practices versus OIC Planning and Establishment of MDTCs

Demand Analysis: Best practices from global MDTCs show solid examples for researching demand as well as the use of research in targeting potential visitor segments, as illustrated by the research for the Iron Curtain Trail and European MDTCs. However, in the case of the OIC MDTCs, analysis of demand seems to be quite limited. For the Silk Road, TripAdvisor has carried out research on travel trends for the area; however, in the case of the Holy Family, no research was undertaken to estimate demand.

Table 1: Demand Analysis - Best Practices versus OIC Examples

Best Practices	-	The Iron Curtain Trail TC demand estimate based on a model using bed density and day trips based on population density and the national share of cycling as the main transport mode.
	-	The Council of Europe study of inbound tourism trends and subsequent targeting of China through the "Chinese Virtual Tourism Fair."
OIC	-	Limited research efforts into Silk Road travel trends conducted by TripAdvisor in support of the UNWTO Initiative.

Infrastructure Assessment: The presence of a solid infrastructure is one of the critical success factors for establishing corridors. In Europe, reliable infrastructure and transport networks connect European countries and facilitate mobility for tourists along European MDTCs. In the case of the GMS TC, the existing infrastructure networks were assessed with plans made to improve ports.

Infrastructure development represents a challenging area for the OIC MDTCs, especially for countries facing financial constraints. In 2016, OIC countries' rail network density per million people was 68.8 km of total rail lines, which is markedly lower than the world average (160.2 km). It is important to note that efforts to improve connectivity are underway in some OIC regions, which can enhance mobility for tourists along MDTCs in these regions.

Table 2: Infrastructure Assessment - Best Practices versus OIC Examples

Best Practices	- The Greater Mekong Subregion TC study reviewed the infrastructure along the nodes of the corridor and transportation networks to identify ports and landings along the river that needed improvement. - The Eurail pass provided by railways of Europe connects the railway networks of 27 countries and facilitates travel between European countries using a single pass, which supports the development of TCs in the region.
OIC	- Efforts being made to improve connectivity in Africa with the Standard Gauge Railway project and the Dakar-Port Sudan railway. - In Kazakhstan, the state highways program "Nurlijol" planned to improve accessibility to different nodes along the Silk Road TC as well as a railway connection between Tashkent to Turkestan.

Social Value Assessment: Engaging local stakeholders and ensuring their support of the corridor, as shown by in the ATRIUM and Wadden Sea TCs, is also essential for the success of MDTCs. The examples from the OIC MDTCs, as shown in the following table in the examples of the Abraham Path and the Umayyad Route, also show efforts to engage stakeholders in establishing the corridors, especially in terms of providing local communities with added value. Both the Abraham Path and the Umayyad Route have supported the development of community-based tourism initiatives.

Table 3: Social Value Assessment - Best Practices versus OIC Examples

Best Practices	- The Wadden Sea TC research to explore potential local communities' opposition to new conservation regulations associated with the corridor. - The ATRIUM route consultation with local communities in the development of TC. In Italy, the Municipality of Forlì conducted research to ensure that residents accepted the promotion of this controversial tourism product.
OIC	- Abraham Path supporting local communities in the development of guesthouses using a "shared cost approach." - Umayyad Route support for community-based tourism initiatives and local handicrafts.

Theme Formulation: Examples from global MDTCs, summarized in the following table, suggest the successful planning and establishment of MDTCs involves extensive research with the aid of experts from historical, cultural and practical perspectives to formulate the corridor's theme and assess its potential tourism assets, as in the case of the Prehistoric Rock Art Trails. The OIC MDTCs seem to also be performing well on theme formulation and asset identification as well as stakeholder engagement in the planning and establishment of corridors.

The existing OIC MDTCs, as shown in the examples of the Silk Road and the Umayyad Route, have equally succeeded largely with support from international and regional organizations in formulating the themes and identifying the tourism resources to be included in the corridors. In the case of the Holy Family TC, the Coptic Church in Egypt played an important role in identifying the sites to be included in the corridor.

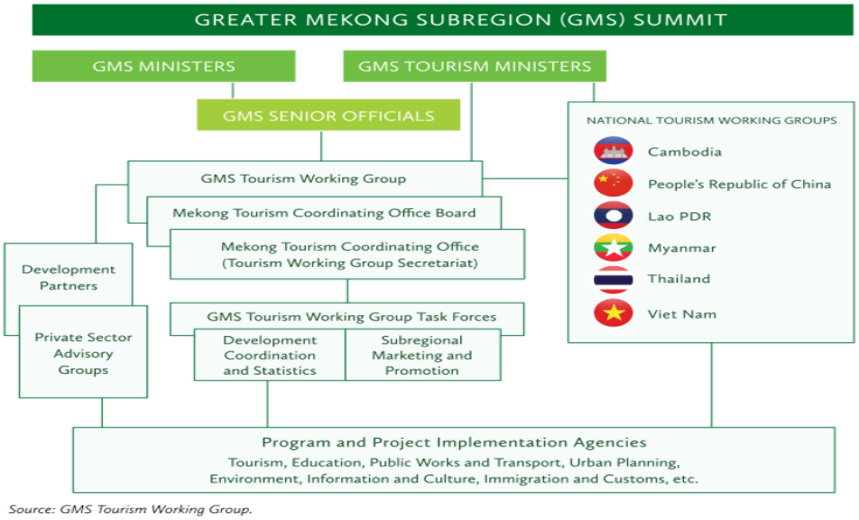
Table 4: Theme Formulation - Best Practices versus OIC Examples

Best Practices	-	The HANSA Culinary Route creating a culinary theme with elements such as visits to local producers and markets, special menus in restaurants, and culinary festivals.
	-	The Prehistoric Rock Art Trails use criteria for the evaluation of the quality of rock art sites to be included in the route.
OIC	-	The ICOMOS analysis of sites along the Silk Roads in terms of uniqueness and distribution. Identifying major nodes or large cities along the Silk Road and route segments between those nodes.
	-	The Jordanian NGO Cultural Technologies for Heritage and Conservation researching the historical value of the sites to be included in the Umayyad corridor and assessing their condition.
	-	The Egyptian Ministry of Tourism, in cooperation with the Coptic Church, researched the Holy Family sites to decide on the sites to be included in the TC.

Best Practices versus OIC Governance and Management of MDTCs

Governance Structure: In terms of governance structure, the GMS TC offers an excellent example of best practices, with bodies representing the various stakeholders and having distinct functions. GMS tourism ministers appoint NTO officials to represent GMS countries in the GMS Tourism Working Group, which meets to set GMS tourism strategies and initiatives, approve resources for their implementation, and monitors implementation. The GMS Tourism Working Group cooperates with development partners and private advisory groups as well as acts as an advisory body to the Mekong Tourism Coordination Office. The Mekong Tourism Coordination Office promotes cooperation among GMS governments and assists in coordinating and implementing programs. The GMS Tourism Working Group Task Force sets priorities for national implementation for GMS TC countries. Programs and initiatives are implemented by the various national agencies of the GMS TC countries.

Figure 3: Greater Mekong Subregion TC Governance Structure



Source: GMS Tourism Working Group.

The Silk Road demonstrates a less hierarchical structure in comparison with the GMS TC. As the following figure illustrates, UNWTO leads the efforts in providing a platform for coordination and alliance building as well as fundraising for the corridor with other UN agencies, such as UNESCO and UNDP, providing support for the various Silk Road initiatives. The Silk Road Task Force, which includes representatives from the National Tourism Organizations and the tourism businesses of Silk Road countries, formulate strategies and prescribe actions while Silk Road member bodies collaborate on Silk Road activities as well as implement local action plans and strategies.

Figure 4: Silk Road Governance Structure

Source: UNWTO (2014)

Enabling Legislation: Best practices from global MDTCs show efforts at travel facilitation, whether through the provision of unified visas, as in the case of the Schengen visa, or facilitating entry requirements and entry procedures, as in the case of the Global Entry and Nexus Programs. While there are some initiatives for cooperation in travel facilitation in the matter of some of the existing OIC MDTCs, there is still a long way to go to ease restrictions within existing travel corridors. There were many talks regarding unified visas for several tourism corridors; however, only the three countries of the East Africa Northern Corridor have this currently.

Table 5: Enabling Legislation - Best Practices versus OIC Examples

Best Practices	- Europe's Schengen visa facilitating travel between country members of European TCs and revised Schengen visa regulations facilitating procedures for a short-stay tourist visa. - Facilitation of entry procedures using Trusted Traveler Programs, such as the United States' Global Entry and Nexus Programs.
OIC	- With the notable exception of the three East Africa Northern Corridor countries, no OIC TC has a unified visa. - 88% of the global population needs a visa before traveling to Silk Road countries. Kazakhstan and Uzbekistan working on developing a unified Silk Road visa for Central Asian countries.

Monitoring Performance: Best practices from global corridors show efforts at a comprehensive evaluation of performance with European cultural routes using the European Tourism Indicators System, which measures governance, communication both internal and external, sustainable management, the impact of cultural activities, and the economic and environmental implications of the route itineraries. The GMS TC also uses visitor metrics and organizational effectiveness, as well as sustainability metrics.

Monitoring performance for the OIC MDTCs seems to be lagging behind best practices from global MDTCs. While visitor metrics are typically collected by OIC MDTCs' countries, assessment of impact, whether economic, social, or environmental, as well as organizational and marketing communications, is not a common practice among the OIC MDTCs. The Abraham Path TC provides an excellent example of incorporating economic impact metrics. However, there is a range of other metrics that still need to be covered for proper governance to be ensured.

Table 6: Monitoring Performance - Best Practices versus OIC Examples

Best Practices	- Currently, 7 of the Council of Europe routes monitoring their performance with the use of the European Tourism Indicators System (ETIS). - The Greater Mekong Subregion TC using visitor metrics, organizational effectiveness, and sustainability metrics.
OIC	- The Silk Road uses visitor metrics. - The Abraham Path uses visitor metrics, organizational effectiveness, and marketing communications metrics.

Collaboration with Stakeholders: Best practices from global MDTCs also show that collaboration with stakeholders uses formal platforms, as in the case of the Mekong Tourism Advisory Group and the Destination Napoleon local steering committees, which include representatives from various stakeholder groups. Some of the existing OIC MDTCs seem to be performing well and creating public-private partnerships that allow for cooperation between the multiple stakeholders.

In the case of the Silk Road, collaboration with stakeholders was facilitated by the creation of the Silk Road Task Force and the establishment of its office in Uzbekistan. In the case of the Umayyad Route, the layered organizational structure with local support groups composed of public and private sector entities allows for interaction and collaboration among the various stakeholders.

Table 7: Collaboration with Stakeholders - Best Practices versus OIC Examples

Best Practices	- The Mekong Tourism Advisory Group, including representatives from the private sector and industry associations. - Destination Napoleon local steering committees, including public and private sector entities, universities, think tanks, and professional associations.
OIC	- The Silk Road Task Force, including representatives from National Tourism Organizations and tourism businesses of Silk Road countries responsible for formulating strategies. - The Umayyad Route advisory committee and the local action groups include various groups of stakeholders, from public to private and NGOs. - The Holy Family TC collaboration between government bodies, NGOs, and the Coptic Church without the existence of a formal platform.

Capacity Building: Training and capacity building efforts are also evident in the best practices from global MDTCs. In the case of European routes, the Council of Europe and the French Federation of European Cultural Routes have launched training and knowledge-sharing initiatives targeting the European MDTCs. In the case of the GMS TC, capacity building for entrepreneurial initiatives is provided through boot camps or incubators.

Most of the existing OIC MDTCs have also launched initiatives aimed at capacity building for tourism stakeholders along the corridor. In the case of the Silk Road, a handbook was developed, and training was provided for tour guides, in addition to training for tourism officials on sustainable and transnational tourism development. For the Umayyad Route, training was provided to tourism officials in the areas of marketing and management, while tour guides were provided training and certification as Umayyad Route guides.

Table 8: Capacity Building - Best Practices versus OIC Examples

Best Practices	- The Heritage and Cultural Tourism Open Resource project for innovative training associated with the Cultural Routes of the Council of Europe. - The French Federation of European Cultural Routes sessions for exchange of best practices in physical and digital accessibility, local community involvement, and social inclusion for tourism stakeholders from more than 15 cultural routes. - The GMS TC Mekong Innovative Start-Ups in Tourism Program, training through intensive boot camps with the help of mentors and facilitated through incubator access.
OIC	- The Silk Road Quality Guide Training Initiative and Handbook, tourism officials' training on sustainable and transnational tourism development, and use of digital media tools. - The Umayyad route in Jordan training for the tourism industry in the areas of management and marketing in addition to cultural itineraries. Training also provided in Tunisia and Lebanon.

Sustainability: This area stands to be improved for both global and OIC MDTCs, especially in terms of monitoring tourism impacts. Examples from global corridors show cooperation in the preservation of shared assets, as illustrated by the "Joint Declaration on the Protection of the Wadden Sea" between the Wadden Sea TC countries. Examples also show the use of demand management to preserve corridor assets and ensure benefits to local communities. In the case of the Silk Road, UNWTO has led the efforts for preservation and conservation of cultural heritage in Silk Road countries, as illustrated by the 1999 Khiva Declaration calling on Central Asian countries to preserve their cultural and natural heritage and to promote sustainable tourism. In the case of the Holy Family, in Jordan, the TC sites are protected through heritage legislation with a construction moratorium issued preventing any new construction except that exclusively dedicated to the protection of archaeological remains.

Table 9: Sustainability - Best Practices versus OIC Examples

Best Practices	-	**The Netherlands, Germany, and Denmark sign a "Joint Declaration on the Protection of the Wadden Sea" in 1982.**
	-	**In the case of the Danube TC, well-known destinations are combined with lesser-known tourist destinations in tour packages offered by travel agents to improve the traffic to these sites and lower the pressure on the highly frequented sites.**
OIC	-	The Silk Road 1999 Khiva Declaration calling on Central Asian countries to preserve their cultural and natural heritage and to promote sustainable tourism.
	-	In the case of the Holy Family, in Jordan, the TC sites are protected through heritage legislation with a construction moratorium issued preventing any new construction except that exclusively dedicated to the protection of archaeological remains.

Funding: Funding is a major challenge for MDTCs in general, with global MDTCs trying to diversify funding sources, both external and internal, to ensure the sustainability of MDTCs, as shown by the example of European routes in general and Destination Napoleon in particular. Most of the OIC MDTCs seem to be dependent on financial and/or technical support from international and regional organizations, while other OIC MDTCs are mainly financed through the governmental allocations of corridor countries. In the case of the Silk Road, which has a more diversified funding strategy, its funding levels are still reportedly low. Diversifying funding needs to be a top priority to ensure the sustainability of the existing OIC MDTCs. Encouraging private sector investment and contributions can play an important role in diversifying and increasing the OIC MDTCs' funding.

Table 10: Funding - Best Practices versus OIC Examples

Best Practices	- The routes of the Council of Europe diversifying funding from internal and external sources, including country corridor public and private contributions, as well as EU funding. - Smaller towns part of Destination Napoleon raising funds from tourism professionals and local communities.
OIC	- Silk Road diversified funding from external sources such as international organizations and internal sources in the form of TC countries' public and private sector contributions. - Holy Family TC, in Egypt, dependent on government funding. - Abraham Path dependent on external funding through the World Bank and bilateral donors. - Umayyad Route 80% funded by EU instruments.

Best Practices versus OIC Marketing of MDTCs

Branding: Best practices from global MDTCs show the use of various branding strategies, from designing logos to creating a narrative highlighting the TCs story and characteristics as well as capitalizing on storytelling and user-generated material to reinforce branding - as illustrated by the GMS TC example. Consistency of branding is also another critical element, with the Wadden Sea TC providing an example of best practices with its development of a brand manual for stakeholders.

In comparison with best practices, the OIC corridors seem to be performing equally well in terms of creating narratives for the corridors and disseminating them through documentaries. However, no data support their use of storytelling or user-generated material to reinforce their branding. Concerning logo design, on the one hand, the current logo for the Silk Road, created by the UNWTO as a logo for its program, is not used consistently in the various TC countries. On the other hand, the Umayyad Route has more consistent logo use in all its communication materials.

Table 11: Branding - Best Practices versus OIC Examples

Best Practices	- The "Mekong Moments" platform using storytelling to complement GMS branding strategy by aggregating, curating, and filtering social media posts by tourists visiting the TC and sharing them on the platform in the form of a searchable interactive map. - The Vennbahn Cycle Route creates a story using the railway history of the road and its transformation into cycling routes and linking it to generations passing on stewardship of things of value to each other. - The Wadden Sea, ensuring consistency of branding messages by developing "Stakeholder Toolkit for Communication and Marketing," comprising a brand manual, fact sheets, and brochures.
OIC	- Silk Road Programme logo not uniformly used. Silk Road documentaries to increase awareness of the history of the road and put forward the narrative associated with the TC on the global stage. - The Umayyad Route uses its distinct logo in all communications. The route has also created its own narrative and produced a documentary for the TC to facilitate storytelling.

Promotion: Best practices from global corridors show the use of both traditional and digital promotional tools. While familiarization trips and participation in travel fairs remain essential promotional tools, the introduction of digital tools has become an integral part of promoting MDTCs. Utilizing user-generated content on MDTCs' digital platforms has become an essential promotional tool with the increased importance of storytelling. In comparison to best practices, the OIC MDTCs seem to be using mainly traditional promotion methods. The OIC MDTCs have not incorporated the use of digital media platforms, including social media in an integrated marketing communications strategy to promote the corridors.

Table 12: Promotion - Best Practices versus OIC Examples

Best Practices	- The St. Olav Ways invited British journalists to experience the route leading to the publishing of blog entries and articles in various outlets. - The Council of Europe's cultural route participation in the "Chinese Virtual Tourism Fair" to promote Chinese tourism in Europe. - Council of Europe website "Crossing Routes – Blogging Europe" highlighting the experiences of travel bloggers in certified cultural routes countries, including user-generated multimedia content. - The GMS TC presents website "MekongTourism.org," combining traditional promotional materials from newsletters and destination information with interactive tools such as the "Mekong Moments," which shares user-generated content from social media platforms on an interactive map.
OIC	- Silk Road documentaries, the participation of corridor member countries in travel fairs, and blogger competitions. - Umayyad Route website featuring documentary videos and guidebooks for corridor member countries, participation in travel fairs, and familiarization trips. - Holy Family familiarization trips for tour guides to Holy Family sites in Egypt.

Recommendations

The recommendations present a policy framework for the OIC countries to establish and manage tourism corridors. It provides countries with an overview of the assessment required to establish policies and an overview of policy areas as are necessary for tourism corridors. It also offers corridor-specific recommendations based on tourism resources available to a destination, in addition to its stage in the destination life cycle and with consideration to where the countries are located in the Tourism Readiness Index in relation to each other. The following scatter graph plots the tourism readiness of the OIC countries in terms of their openness.

With the scatter graph, tourism readiness, and openness can be compared between the OIC countries, enabling classification into four categories, namely tourism ready and open, tourism ready and closed, not tourism ready and open, and not tourism ready and closed. For tourism readiness, which is displayed on the horizontal axis, a high tourism readiness indicates that the government has created an enabling environment for tourism, has infrastructure in place, natural and cultural resources, as well as policies and enabling conditions, such as environmental sustainability, price competitiveness, and a focus on travel and tourism.

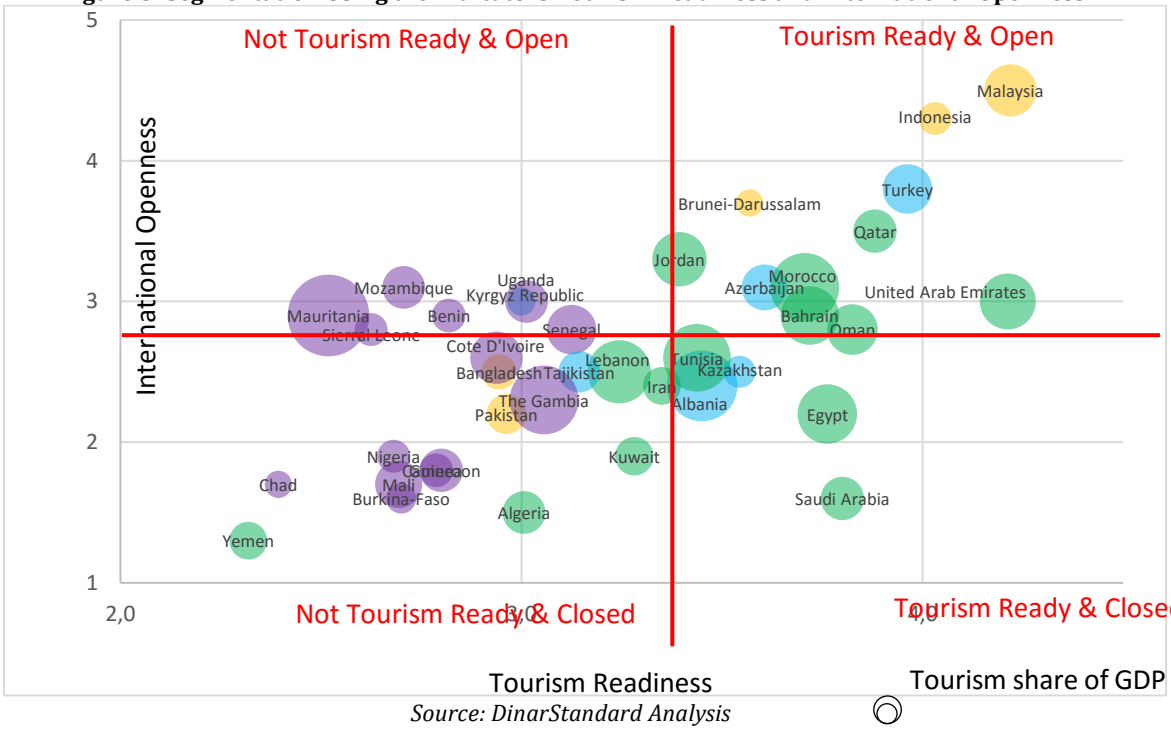
International Openness is displayed on the vertical axis in this graph. Developing competitive travel and an international tourism sector requires a certain degree of openness and travel facilitation. This is especially true for MDTCs, where restrictions in one country have an impact

on the overall performance of the corridor. Restrictive policies, such as cumbersome visa requirements, diminish tourists' willingness to visit a country, and indirectly reduce the availability of crucial services. Components measured in international openness include the openness of bilateral air service agreements which the government has entered, and which impact the availability of air connections to the country, and the number of regional trade agreements in force, which is a proxy for the extent to which it is possible to provide world-class tourism services.

An additional component in this scatter graph is the share of tourism to the overall GDP. This is indicated by the size of the circles per country. The higher the share of tourism to the GDP, the higher the impact of tourism development on the country, or the lower the development in other economic sectors in comparison with tourism. Generally, the higher the share of a sector in the overall GDP, the more a government is inclined to focus on that sector. Dividing the scatter graph into four quadrants shows four general groups of countries. Those that are in the not tourism ready & closed group, which are mostly Sub-Saharan countries, require the most development work in tourism. These countries are mostly emerging destinations, which did not have the resources to develop their tourism industry or have just recently opened up to international arrivals.

Countries in the not tourism ready & open quadrant are also mostly Sub-Saharan. Their infrastructure and visa policy are already allowing easier travel for international tourism. However, they need to develop the sector in terms of policies, capacity, and standards to cater to more tourists and build a sustainable tourism industry. Countries that are closed but tourism ready are generally those that offer a wide variety of attractions but, due to political reasons, are closed to international visitors. Asian countries are the leaders in the ready and open quadrant.

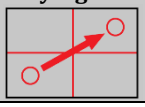
Figure 5: Segmentation Using the Indicators Tourism Readiness and International Openness



Source: DinarStandard Analysis

The following policy framework is used to provide recommendations for OIC tourism corridors based on whether they are new or established corridors, as well as whether they are closed on the tourism readiness of the OIC countries and openness spectrum.

Table 13: Policy Framework for Cross-Border Tourism Corridors

	New corridors	Established corridors
Planning & Establishment	Demand Analysis	
	Infrastructure Assessment	
	Social Value Assessment	
	Formulating Theme	
Governance & Management	Governance Structure	Governance Structure
	Monitoring Performance	Monitoring Performance
	Stakeholder Management	Stakeholder Management
	Capacity Building	Capacity Building
	Funding	Funding
	Monitoring	Monitoring
Marketing & Promotion	Branding	Branding
	Promotions	Promotions
	Product Development	Product Development
Countries on a corridor with similar indicators	Joint development of a new corridor with equal shares	Joint enhancement of established corridor with equal shares
Countries n a corridor with varying indicators 	Knowledge transfer from developed countries to less-developed countries	Knowledge transfer from developed countries to less-developed countries

Source: DinarStandard Analysis

Demand Analysis: For new corridors, before deciding that a tourism corridor should be promoted to increase tourism collaboratively, an explorative framework should be set up with participants from all involved governments, NGOs, development organizations, and the private sector. This framework should be in the form of a working group, which jointly assesses the viability of a tourism corridor. This includes the assessment of tourism assets, demand analysis, and infrastructure assessment. Using specific indicators as described in the sample above, the working group should look at existing policies, highlight gaps in the policy framework, and set realistic goals for collaboration. The working group put together for this purpose may also be a preliminary structure for a more permanent sone once the viability has been assessed, and the corridor established. This approach was used for the Baltic Sea Route, albeit it never became a sustainable structure due to the difficulty of establishing a sustainable funding model in time.

Infrastructure Assessment: When looking at the infrastructure that would be part of a cross-border tourism corridor, it is wise to take a strategic look at the current landscape and keep in mind realistic yet possible future developments. Depending on the tourism corridor, it might start as a point-to-point experience for travelers via a regional airline and can be developed into an overland experience with many smaller experiences in the future. Keep in mind the development and inclusion of small sustainable businesses will benefit the tourism corridor in

the future. The Danube Competence Center, for example, is extending its cycling route network to include new experiences over time.

Social Value Assessment: The measurement of the impact of tourism corridors is often a challenge for multilateral corridors. Distinct data are often not available at the country level. Nevertheless, it is vital to assess the impact any initiative can have on stakeholders. Consulting local stakeholders on the potential implications the tourism corridor will have on them is highly recommended. This can be done through direct interviews or meetings in small groups. Through technology, a larger sample group can be assessed for quantitative research.

It is a good idea to set strategic goals that the collaborative framework aims to achieve through the jointly invested resources. Goals and strategies should be published in a joint strategy document (e.g., The Greater Mekong Subregion Tourism Sector Strategy[16]), which should then be renewed every two to five years rolling and also includes a promotion plan and action steps. It is also recommended that strategies should be based on UN Strategic Development Goals. This would also connect the strategy directly with any benefits stakeholders, especially local communities.

Formulating Theme: This helps stakeholders to collaboratively and efficiently promote a tourism corridor. The theme can be simple, such as the HANSA Culinary Route, or broad, with sub-corridors, such as Mekong Tourism. The final theme should be defined clearly by the working group and agreed upon by all parties. Brand consultancy is recommended at this stage to find the best solution for the destinations.

The Danube Competence Center, for example, benefits from a strong existing brand, "The Danube River," and products created around this brand. They didn't need to create a new brand. In contract, the Mekong Tourism Coordinating Office (MTCO) created Mekong Tourism as a new brand, which had to be promoted as a single destination. The Mekong river was not well known internationally and was not associated with the six countries it crosses. This allowed the MTCO to have a "clean start," which benefits any online activity because of limited online competition for a similar theme/brand. Once a theme has been established, more detailed branding activities should be conducted — more on this under Marketing and Promotions.

Once a tourism corridor has been established, and depending on its type, it can be extended. Policies to extend a corridor usually involve the member countries, which need to decide if another country or region should be added to the corridor.

Setting Up a Governance Structure: To set up and create successful tourism corridors, countries must develop policies for cooperation in the field. A long-term approach might be a separate secretariat, such as the Mekong Tourism Coordinating Office, which administers a joint working group among the participating countries. Another option would be to create a public-private partnership that promotes products in the corridor, such as the Danube Competence Center. Then, depending on the importance of the region and the prospective benefits for stakeholders, it is advisable to create official policies and define responsibilities for each corridor (or a group of corridors). Also, the scope of the corridor has to be defined. Does it only concern tourism or also other economic factors related to tourism, such as infrastructure, education, ICT.

[16] https://www.mekongtourism.org/gms-tourism-sector-strategy-2016-2025/

The general recommendation is to follow the best practice examples of a public-private partnership model. Using a tourism advisory group, similar to the Mekong Tourism Advisory Group, helps to gain valuable insight from industry experts from the public and private sectors. Every structure should also incorporate operational considerations. Even though partners in a framework might decide not to endorse a corridor formally, it will create administrative and operational work. It is thus recommended for multi-lateral partners to decide how to address any work raised through a formal or informal corridor. Administrative action might be taken over through a working group, one of the partners, or a management structure within the corridor.

There is a wide range of structures to manage cross-border corridor initiatives. The governance can be hands-off with little cooperative involvement from a regional organization, hands-on, where a regional tourism organization manages all aspects of the corridor or a mixture of both with a high focus on individual local projects.

An example of a hands-off approach would be the Holy Family Corridor, where Egypt and Jordan conduct very little joint management, and private stakeholders have taken over the promotion and management of the corridor to the public. An example of a more controlled approach is the Danube Competence Center, which does direct product development and marketing of the region centrally in collaboration with the public and private sectors.

The Mekong Tourism Coordinating Office uses a mixed approach, where different initiatives are managed with varying direct involvement. For example:

1. The Mekong Tourism Forum is handled directly through the MTCO in collaboration with one different tourism ministry every year.
2. The Mekong Moments initiative is managed by a public-private framework, called Destination Mekong
3. The Mekong Innovative Startups in Tourism Initiative was led by the Mekong Business Initiative

It is best to assess which governance structure is more suited to each corridor. The more countries a corridor includes and the more initiatives it is tasked to manage, the more complex the governance will become. On the other hand, budgetary considerations have a massive impact on governance structures. The lower the budget, the more support will be required from other organizations, and the private sector will be required to execute initiatives.

Enabling Legislation: Tourism corridors are often dependent on multi-lateral government relations, long-term development, and changes in legislation. These factors are usually not directly influenced by the respective tourism ministries but by other government bodies. These development areas, however, have a significant impact on the success of cross-border tourism and thus should be taken into consideration when formulating policies for cross-border tourism corridors. It is essential to include the following goals, depending on the format of the TC.

a) Air connectivity approvals, especially for regional carriers, are required to enable easy connectivity for travelers once they are in the region and for domestic travelers.
b) Visa facilitation to enable easy border-crossing. It is recommended that countries partner on visa facilitation regionally. The planned “Silk Visa” of the Turkic Silk Road is a good example. Another example of this would be the development of the

ASEAN, which allows citizens of ASEAN countries to travel freely within the region (Chapter 1.3.2). Even though it did not address border crossings of non-ASEAN travelers, the Mekong region benefited from easier traveling facilitation.

c) Strategic transportation (cross-border roads, bridges, railways) and other tourism infrastructure are important.
d) ICT connectivity infrastructure is very often one of the most important factors for travelers, and governments should consider the importance of mobile connectivity to enable open travel and inclusive growth.
e) Developing new air, land, and sea routes connections.
f) Creation and implementing common tourism and competency standards.
g) Undertaking programs to build supply chains in the region and allowing local businesses to have access to local sources to sustainable products.

Sustainability: A strong focus should be placed on the sustainability of the tourism corridor as well as governance. Both are necessary to support any objectives set for a multi-country corridor. Some policies should jointly be developed to preserve the corridor. The primary experiences the corridor offers are the reason tourists are visiting. Making these and preserving supporting communities are the reasons the corridor exists. This can be achieved through policies to protect and preserve the environment, cultural sights, communities, or historical structures. It is recommended that multi-national policies align with each other to prevent confusion and to reach common high standards to preserve livelihoods and histories of communities in collaboration with stakeholders with the goal of building sustainable and inclusive growth for communities on the corridor.

Monitoring Performance: Once a tourism-corridor is formalized, multi-lateral policies to define data harmonization should be created. Only with a common data format and in-depth collection of data will it be possible for the partners to measure the success of a tourism corridor and to decide on strategies and action plans jointly. The Greater Mekong Subregion has a data harmonization working group, which meets regularly to develop a common framework for all countries. Countries might assess the use of technology for data collection and evaluation. Tourism cooperation can be an excellent vehicle for negotiating with technology providers and, at the same time, establishing common standards.

Collaboration with Stakeholders: It is highly recommended that a framework is created for stakeholder engagement and management (see chapter 1.3.4). It is important for any framework to be able to create passion and to identify champions amongst stakeholders, who will be ambassadors for the project. Such a program could be informal or formal, such as the Tourism Advisor Group of the MTCO.

In addition, small and medium-sized and especially sustainable businesses on a corridor must be aware of activities they can use to enhance their offerings and create pride in being part of the tourism corridor and subsequently inviting and engaging visitors. Collaborative branding is a robust tool for creating sustainable marketing for a tourism corridor through engaged stakeholders. Policies that define how stakeholders on the ground can be involved in activities, collaboratively promote them, and directly benefit them, are highly recommended. One such structure is the Experience Mekong Collection of the Mekong Tourism Coordinating Office, which provides social enterprises in the Mekong Region with a framework to directly benefit and, at the same time, align with all other activities.

Focus on local communities and associations first is recommended while working with international organizations on a more strategic and supporting level. Local universities have been seen as competent partners in tourism activities for cross-border corridors. The Mekong Tourism Coordinating Office works with various universities on their activities. They publish showcase studies of best practice social enterprises in collaboration with Mahidol University to allow other businesses to learn.

Capacity Building: Capacity building is an essential component of corridor development, the building of tourism standards, and ensuring inclusive growth (chapter 1.3.5). It is crucial for the effective management of MDTCs to ensure unified standards and seamless tourist experiences. For this, educational institutions, such as universities and training centers, need to be involved. Policies to ensure common standards and joint capacity building initiatives are recommended in any tourism corridor. Often, capacity building can be conducted in partnership with international development or training agencies. The Abraham Path, for example, provided training through the private sector and partner organizations with funding from the World Bank.

UNWTO works with several educational partners. Countries may consider using domestic training centers, asking international providers to provide training, or arranging for knowledge transfer from international providers to the country. This depends on the tourism sector development in the country. Corridors with a high variance in HR development benefit from inviting the leader in this area to provide knowledge exchange to the other countries.

Funding: It is further advised to create a financial framework for collaboration. The financing should be created with sustainability in mind and can come from various sources, public or private (chapter 1.3.6). Membership fees, whether from public or private entities, are an important source of funding, especially as they promote a sense of ownership. Assistance from external sources, whether international or regional, can be sought out to complement internal funding. However, it must be ensured that a tourism corridor is not over-reliant on external funding, as this might influence its sustainability in the long term. It may also be decided to change the financing framework over time. For example, a corridor could be launched with shared public financing to build a critical mass of participating stakeholders, and it can then be transferred to private-sector stakeholders to manage.

An example of a mixed financing framework would be the Mekong Tourism Coordinating Office (MTCO). The operations of the MTCO as secretarial of the six governments involved are financed through fixed annual governmental contributions. However, for any initiative the MTCO is conducting, a separate public-private partnership framework is created. For their Mekong Moments initiative, for example, private and public partners become "founding partners." This financed the launch of the program. It is being made sustainable by charging affiliation fees to participating businesses in the future.

Financial sustainability should be kept in mind at the initiation of a corridor and throughout ongoing operations. Many international projects face challenges when financing is based on a single source. An example of this is Baltic Tourism, which, even though initially successful, faced challenges when public financing was stopped. A well-balanced business plan is required to ensure the long-term sustainability of the corridor. A mixed model is recommended with development funds and government contributions as well as private-sector funding of initiatives or commissions for direct sales generated.

Branding: It is advised to create strong branding for the tourism corridor. This should be conducted by a professional agency and involve the governance and operations committees, as well as industry stakeholders. A brand is a promise, and it should tell a story (see chapter 1.4.1). A brand toolkit should be developed to enable all stakeholders to understand the brand and use it effectively. Collaborative branding, which is the practice of using a large number of stakeholders to build and promote a brand collaboratively, might be applied. An example of this is the Mekong Moments campaign of the Mekong Tourism Coordinating Office (MTCO).

It should be decided as part of the branding exercise, how the brand fits into a larger structure. For example, how the Turkic Silk Road fits into the overall Silk Road Programme as well as into the country tourism programs, as well as how sub-level branding will be handled. The MTCO has multiple sub-brand, such as the Experience Mekong Collection, Mekong Trends, and Mekong Moments, which all have their specific designs but follow a standard language and structure.

Promotion: A joint marketing plan to promote the corridor as a single brand and to define initiatives, responsibilities, and channels is recommended. This marketing plan should include action plans as well as financing for marketing activities. The financing can be provided centrally through the collaborative framework, by creating financial frameworks for each initiative, or a mix of both, such as the Mekong Tourism Coordinating Office.

Creating promotional activities that benefit participating stakeholders directly and which can be executed collaboratively is recommended. This has the benefit of engaging stakeholders and driving direct business to them. The MTCO conducted the Mekong Mini Movie Festival as a collaborative campaign, allowing any business in the region to create their own social media campaign within the framework of the overall campaign. Overall, the campaign reached 22 million people with a limited budget. It won the Adrian Gold award for the best digital campaign in tourism in 2018.

Digital storytelling is recommended as an efficient tool for corridor promotion. Involving storytellers, such as bloggers or photographers, created engaging content and helps to increase online exposure of a TC. Promotional channels are depending on the budget recommended to have a large share online. It is recommended to combine digital tools with traditional tools, as shown from the best practice examples, such as participation in travel fairs and familiarization trips. The use of documentaries to raise awareness of the tourism corridor theme and disseminate its associated narrative can enhance the tourism corridor brand.

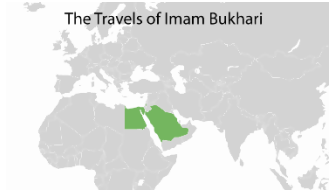
Product Development: A collaborative framework can also create products for stakeholders to sell directly. The Danube Competence Center has done this sucessfully. Creating products enhances marketing a region as a single destination and allows the framework a higher control factor. However, this is only recommended with a very hands-on approach by the framework.

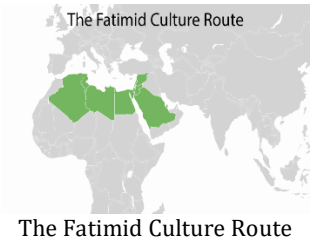
A corridor can also be enlarged by adding experiences in existing regions that enhance the corridor experience for travelers and make the corridor more sustainable in the long run. Also, policies to enhance the sustainability, inclusiveness, and competitiveness of the region and the corridor as a destination are recommended.

An example of corridor enhancement is the addition of Bagan in Myanmar as a World Heritage site in the Greater Mekong Subregion. Being added to the list of UNESCO World Heritage Sites enhanced the Mekong brand overall and helped the Mekong Tourism Coordinating Office to enhance their historical sub-corridor. Another example of corridor improvement would be the

addition of thematic wine routes by the Danube Competence Center. This is another theme for travelers and attracts new target groups of travelers.

Recommendations for Potential Corridors: After looking into existing tourism corridors between the OIC countries, this chapter is suggesting other possible cross-border corridors to promote specific themes or regions of the OIC countries collaboratively.

Islamic Silk Road Countries The Islamic Silk Road is at the center of where East and West meet. Representing robust Islamic tradition and a melting pot of cultures, it represents what most people associate with the historic Silk Road: A connection between Asia and Europe. As a sub-corridor of the UNWTO Silk Road Programme, this corridor can be a very powerful brand, showcasing Islamic history and its role in the Silk Road in contrast to Chinese and European influence.	**Alexander the Great** One of the best known ancient Greek emperors, Alexander the Great has high name recognition internationally. Most countries ruled by the Macedonian king are OIC countries. Taking over the leadership in an Alexander the Great Corridor in collaboration with Greece would position the OIC countries as a connector between East and West.	**The Travels of Imam Bukhari**  Imam Mohammed Al-Bukhari is considered one of the most distinguished scholars of Hadith in Islamic history. His book, Sahih al-Bukhari, in which the Prophet's words, actions, and habits were collected, is one of the greatest sources of prophetic influence in history. Even though this is not an "official" tourism corridor, it can be seen as the biggest influence on Muslim travel in the region.
Bedouin Trails Countries A corridor promoting the distinct Arabic heritage and tradition of the nomadic Bedouin people would open up the region to international travelers. With a focus on making the culture accessible, it would bring the magnificent natural and cultural heritage of the area closer to a larger number of visitors.	**Cross-Border Parks and Protected Areas** In 2006, the OIC had the first meeting of the Committee on the Regional Project of "Sustainable Tourism Development in a Network of Cross-Border Parks and Protected Areas in West Africa." At this point, numerous interventions were coordinated by member countries to discuss potential corridor development.	**The Frankincense Route** A network of trade routes established between the historical OIC countries, carrying goods such as salt, wheat, wine, weapons, dates, and animal skins from one fortified settlement to another. These paths were the basis of the frankincense trade routes between the kingdoms of southern Arabia, which formed the starting point of the route towards the north. For centuries, incense trade routes from Arabia Felix to the Mediterranean were specifically made with camel caravans, although, this was not just a single and permanent route. This distinct branding would promote the historical role of the region.

Masar Ibrahim Masar Ibrahim, a community-based walking trail, was mainly developed in Palestine, but with an ambition to include the whole of Abraham's Path, through Egypt, occupied Palestine, Turkey Syria, and Iraq.	**The Fatimid Culture Route**  The Fatimid Culture Route would place a focus on early Islamic history and its influence on the culture and architecture of the Middle East and Northern Africa.	**Red Sea Tourism Corridor** The Red Sea is a divider and also a connection between a number of the OIC countries. Since the opening of the Suez Canal, it has become even more critical than it was in ancient times as a trading route.
Trans-Saharan Trail Based on the old Trans-Saharan trade routes, this tourism corridor connects northern African countries with the Sub-Saharan OIC countries. With a strong association with caravans and deserts, this corridor could offer a strong message and branding.	**Ibn Battuta's Eastern Journey** Ibn Battuta was one of the most distinguished Muslim explorers and travelers. Born in Morocco in the 13th century, he visited most of the Islamic world, including Central Asia, Southeast Asia, South Asia, and China. This corridor could have a strong branding once formalized and part of the UNWTO Maritime Silk Road. It could be recommended to include China in this corridor to benefit from its healthy economic muscle and travel market.	

Background and Methodology

The rising interest in Multi-Destination Tourism (MDT) is evident in the efforts of international organizations as well as regional organizations to championing and supporting cooperation between multiple destinations in the tourism sector. MDT combines assets and attractions from various destinations to form a "cumulative attraction" or an integrated attraction. This can be beneficial for destinations, whether they have different or similar tourism assets.[17] For destinations with similar assets, the array of experiences within the tourist interest area is expanded, adding to their appeal. For complementary destinations, they can gain a competitive advantage as a group.[18]

The Development of Multi-Destination Tourism Corridors (MDTCs) can be an important tool in fostering cooperation between countries in the area of tourism. The concept of Tourism Corridors is described as "an approach to tourism that offers travelers the opportunity to visit a variety of built and natural attractions along a themed route."[19] In the context of this study, a Multi-Destination Tourism Corridor (MDTC) is defined as a route defined by a theme covering more than one country

Recognizing the importance and potential of MDTCs for the member states of the Organization of Islamic Cooperation (OIC), this study aims to provide tourism stakeholders and policymakers in member states with recommendations to successfully plan, establish, manage and market MDTCs. In this report, the introduction explores the concepts of MDT and TCs as well as presents a typology of MDTCs. Chapter One outlines the typology of select global MDTCs and best practices in planning and establishment, governance and management, and marketing of MDTCs.

Chapter Two outlines the practices of select OIC MDTCs in the areas of planning and establishment, governance and management, and marketing. Chapter Three presents four case studies from the OIC and the non-OIC countries to shed light on best practices planning and establishment, governance and management, and marketing of MDTCs. Chapter Four compares practices of the OIC and the non-OIC countries in the areas of planning and establishment, governance and management, and marketing of MDTCs. Chapter Five provides recommendations based on study findings for policymakers in the OIC member states for planning and establishment, governance and management, and marketing of MDTCs as well as proposes the potential OIC MDTCs.

Objective

The objective of this study is to:

- Identify best practices of global multi-destination tourism corridors for planning and establishment, governance and management, and marketing.
- Compare existing OIC multi-destination tourism corridors with global best practices.

[17] Orozco, Julio, and Charles, Amanda. 2014. Multi-Destination Tourism (MDT): An Opportunity for Diversification and Development. Asociación de Estados del Caribe.
[18] Hawkins, D., et al. 2015. Multi-Country Destination Development: An Opportunity to Stimulate Tourism in the Americas. International UNWTO Seminar on Multi Destination Opportunities for Regional Integration.
[19] Prideaux, B and Cooper, C. 2002. Marketing and destination growth: A symbiotic relationship or simple coincidence? Journal of Vacation Marketing 9(1): 35-51.

- Provide policy recommendations for planning and establishment, governance and management, and marketing of OIC multi-destination tourism corridors.
- Identify potential OIC multi-destination tourism corridors.

Methodology

Primary and secondary research tools are used to fulfill the study objectives:

- Primary Research: The tool used include:
  - In-depth Interviews: Face to face and telephone in-depth interviews were conducted with 23 tourism stakeholders who have experience in multi-destination tourism with an emphasis on respondents involved in tourism corridors to provide insights into best practices of MDTCs. Interviewees were identified using referrals from tourism professionals. The qualitative data insights from the content analysis of the interview transcripts is integrated into the relevant areas of the report.
  - Case Studies: Four tourism corridor case studies, two tourism corridors that with the OIC member countries and two non-OIC, were selected to provide insights into planning and establishment, governance and management, and marketing of multi-destination tourism corridors. The non-OIC tourism corridors covered were the Danube and the Greater Mekong Subregion corridors. The OIC tourism corridors covered were the Silk Road and the Holy Family Corridors. Secondary data was complemented with field visits and in-depth interviews.
- Secondary Research: A number of secondary sources were used, including:
  - Previous Market Studies: Market research on MDT and MDTCs including and destination management, including SESRIC's report on "Prospects and Challenges of OIC Member Countries: SWOT Outlook 2018," COMCEC's reports on "Sustainable Destination Management Strategies in the OIC Member Countries" and "Destination Development and Institutionalization Strategies in the OIC Member Countries."
  - Trade and Sector Reports: Information was gathered from the reports published by TripAdvisor and the European Travel Commission.
  - Academic Articles and Research Papers: Information was gathered from *Technologies of Business and Service, Journal of Greater Mekong Subregion, Journal of Vacation Marketing, Procedia - Social and Behavioral Sciences, and Historic Environment.*
  - Government Data: Information was collected from multiple government websites and reports, including the websites and reports of tourism ministries and official tourism organizations.
  - Regional and International Organizations Data: Information was gathered from websites and reports of international organizations, including UNWTO, UNESCO, and the World Bank.
  - Press Publications: Data was collected from the press releases of various tourism industry players in addition to articles covering tourism corridors in various publications and news websites, including the New Times Publication, Al-Monitor, e-Turbo News and Egypt Independent.

Introduction

Multi-Destination Tourism (MDT) has gained a lot of attention recently with international organizations such as the UNWTO and UNESCO playing an active role in the development and promotion of transnational tourism and MDTCs through various initiatives including the Silk Road and the European Cultural Route program.[20] MDT, as opposed to the traditional single-destination model that has one destination/country competing for a share of the tourism market, is based on the cooperation between two or more destinations/countries to realize several potential benefits from attracting new markets to collaboration in areas of product development, marketing strategies, and travel policies.[21]

MDT allows for the development of unique packages with a variety of products using the natural and cultural attributes of each destination/country, which has the potential of attracting niche markets and increasing market share.[22] It should be noted that while MDT can refer to visiting more than one destination in the same country, in this report, it is used only to refer to visiting destinations in more than one country. MDT can be classified into four patterns: the "trip chaining" pattern, the "regional tour" pattern, the "base camp" pattern, and the "en-route" pattern.[23]

Figure 6: Multi-Destination Tourism Patterns

Source: European Travel Commission (2018)

The "trip chaining" pattern is the traditional way that involves visiting several destinations that are distant sequentially, such as the European group tours organized for tourists. The "regional

[20] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[21] Orozco, Julio, and Charles, Amanda. 2014. Multi-Destination Tourism (MDT): An Opportunity for Diversification and Development. Asociación de Estados del Caribe.
[22] Ibid.
[23] European Travel Commission. 2018. Tracking Multi-Destination Travel in Europe from Long-Haul Source Markets – US, China, Japan and India.

tour" pattern also involves visiting destinations sequentially, but in this case, all visited destinations are near to each other. The "base camp" pattern involves using one destination as a base to visit multiple destinations, whether as day trips or overnight visits. The "en-route" pattern involves visiting secondary destinations on the way to or from two or more primary destinations.[24]

MDT combines a collection of attractions across various destinations/countries to form a "cumulative attraction," which adds to their appeal for tourists and increases product diversification as well as market penetration. It allows for the development of multi-destination packages with unique products using the natural and cultural attributes of each destination/country, which has the potential of attracting niche markets and increasing market share.[25] For similar destinations, they appeal to tourists who are interested in specific themes seeking an array of experiences within their interest area. For complementary destinations, they are poised to gain a competitive advantage as a group, each using their own resources efficiently in their area of strength.[26]

MDT expands the benefits of tourism across regions, tourism actors, and local communities, as opposed to the single-destination model, which in many instances, is dominated by "all-inclusive enclaves" promoted by international tour operators. It also appeals to tourists as it offers them the ability to have a multitude of experiences and adds value, especially for long-haul trips.[27] However, it is important to note that MDT still faces a number of administrative challenges such as the likely variations in visa requirements between the different destinations, the reluctance of countries and their DMOs to encourage tourists to visit other destinations outside their borders, and the complexity of coordination and collaboration between the various destinations on tourism strategic priorities and policies.[28]

The Evolution of the Multi-Destination Tourism Corridor (MDTC) Concept

Some of the earliest MDTCs of the 19th century were associated with railways such as "The Orient Express" enabling tourists to embark on a journey from Paris to Istanbul in six days, the "Eastern and Oriental Express" journey between Bangkok and Singapore, and the "Orient Express" journey between Moscow and Beijing."[29] Initially, the concept of corridors was associated with transport, providing a connection between two or more urban areas using the most direct and shortest connections channeling economic and social activities.[30] As a transport concept, corridors are defined as "a broad geographic area, defined by logical, existing and forecasted travel patterns served by various modal transportation systems that

[24] Ibid.
[25] Orozco, Julio, and Charles, Amanda. 2014. Multi-Destination Tourism (MDT): An Opportunity for Diversification and Development. Asociación de Estados del Caribe.
[26] Hawkins, D., et al. 2015. Multi-Country Destination Development: An Opportunity to Stimulate Tourism in the Americas. International UNWTO Seminar on Multi Destination Opportunities for Regional Integration.
[27] Orozco, Julio, and Charles, Amanda. 2014. Multi-Destination Tourism (MDT): An Opportunity for Diversification and Development. Asociación de Estados del Caribe.
[28] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[29] Plokhikh R. V., Sakypbek M. A., and Asipova Zh. M. 2018. Cooperation in the field of tourism development according to «Almaty – Bishkek Corridor Initiative (ABCI)». Technologies of Business and Service. – Vol.4, № 2.
[30] Alampay, Ramon Benedicto, and G. Rieder, Ludwig. 2008. Developing Tourism in the Greater Mekong Subregion Economic Corridors. Journal of Greater Mekong Subregion (4): 59-76.

provide important connections within and between regions of the state for people, goods, and services."[31]

The use of the corridors' concept started to expand in the 1990s and was adopted by various types of agencies, including urban planning, public infrastructure, and development agencies. While for urban planning and public infrastructure agencies the focus was on infrastructure and planning for urban areas, the development agencies' focus was on corridors being a vehicle for economic development, enabling the creation of economic zones benefiting the communities adjacent to the corridors. As development agencies adopted the corridor concept, the focus became on economic development along the corridors allowing communities easier access to production inputs as well as markets. Corridors were considered one of the tools that can promote regional economic development.[32]

Eventually, the concept of corridors was adopted by the tourism sector. The Link between transport and tourism is clear in the development of tourism in general and MDTCs in particular, as evidenced by the development of the itineraries linked to railways such as the Orient Express. [33] Another important link is present between corridors and economic cooperation between corridor member countries, with cooperation in the tourism sector becoming an added area for cooperation. An example of this is the Greater Mekong Subregion TC was initially an economic corridor, developed 20 years earlier with the support of the Asian Development Bank, comprising of six countries on the Mekong River, namely Cambodia, Laos, Myanmar, Thailand, Vietnam and Yunnan Province and Guangxi Zhuang Autonomous Region of China.[34]

Tourism corridors provided tourists with the chance to visit various attractions along a themed route and enjoy the landscapes and cultures of several destinations as opposed to focusing on a specific destination. With the launch of the UNESCO's Route Program in the late 80s and the involvement of the UNWTO in the Silk Road and Slave Route initiatives in the early 90s, the concept and development of MDTCs gained increasing attention. in 1994. The inclusion of the Spanish section of the Camino Francés of Camino de Santiago routes in the World Heritage List in 1993 started the debate on cultural routes and led to the addition of a specific category for cultural routes on the list.[35]

Currently, the transnational heritage routes inscribed on the "World Heritage List" include the "Andean Road System" or the "Qhapac Nan" in six countries, the "Silk Road" in twelve countries, the "St. James´s Way - Routes of Santiago de Compostela" in two countries, and the Heritage of Mercury in two countries. The Viking Routes in Northern Europe and the Buddhist Routes in South Asia are also currently being considered for inscription.[36]

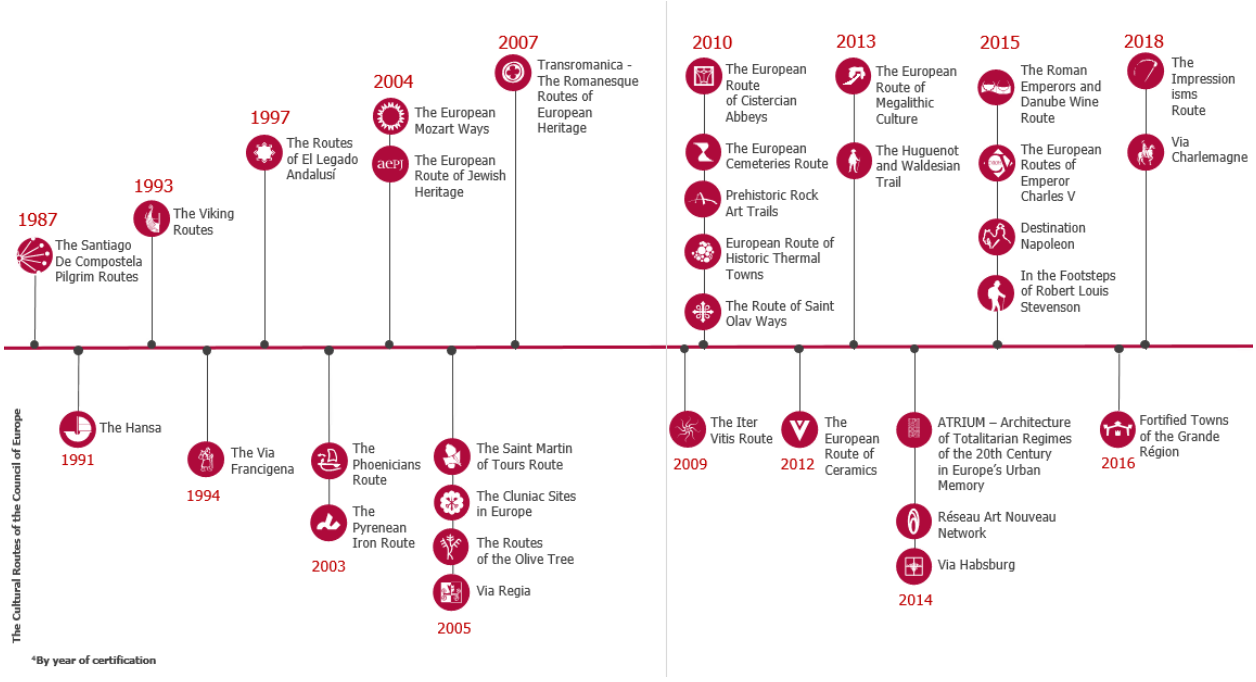
In Europe, the Council of Europe launched its Cultural Routes program in 1987 to encourage tourism cooperation and increase awareness of European heritage. The program, which started by certifying the Camino de Santiago de Compostela in 1993, has currently 33 certified cultural

[31] Hamzah, A. and Ismail, H. N. 2008. A Design of Nature-Culture Based Tourism Corridor; A Pilot Project at Kelantan Darul Naim. Universiti Teknologi Malaysia.
[32] Alampay, Ramon Benedicto, and G. Rieder, Ludwig. 2008. Developing Tourism in the Greater Mekong Subregion Economic Corridors. Journal of Greater Mekong Subregion (4): 59-76.
[33] Ibid.
[34] Please refer to the Greater Mekong Subregion tourism corridor case study for references and more details.
[35] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[36] Ibid.

routes, including the Route of Towns with Napoleonic Heritage (Destination Napoleon), the Iron Route in the Pyrenees, the Viking Routes and the Transromanica Route. To become certified, routes have to cooperate in areas of research and development as well as promote European heritage and cultural tourism in a way that ensures accessibility and respect to local and regional identities.[37]

A number of the Council of Europe certified routes extend beyond the European continent. The Routes of the Legacy of Al-Andalus, certified in 1997, celebrate the Spanish-Muslim civilization across many countries in the Middle East and North Africa as well as Latin America. The Phoenicians' Route, certified in 2005, connects nautical trade routes used by the Phoenicians, dating to the 12th century BC. The route goes through all Mediterranean countries, including a number of North African and Middle Eastern countries. Destination Napoleon, certified in 2015, covers sites of Napoleonic history from birth of Napoleon Bonaparte's till the defeat of Napoleon III in 1870; it extends through 13 countries, from Portugal to Russia.[38]

Figure 7: Council of Europe Certified Routes



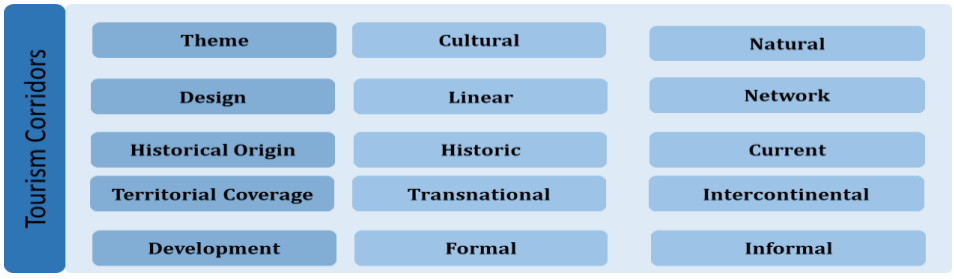
Source: Council of Europe (2018)

[37] Council of Europe. 2019. Cultural Routes of the Council of Europe 2019.
[38] Ibid.

Definition and Classification of Multi-Destination Tourism Corridors (MDTCs)

The concept of Tourism Corridors is described as "an approach to tourism that offers travelers the opportunity to visit a variety of built and natural attractions along a themed route."[39] As the focus of this report is MDT, a Multi-Destination Tourism Corridor (MDTC), in the scope of this report, is referred to as a route defined by a theme covering more than one country. MDTCs can be classified according to several criteria, including theme, design, historical origin, territorial coverage, and formality. The following figure illustrates the proposed classification adopted in this report.

Figure 8: Classification of Tourism Corridors



Source: DinarStandard Analysis

From a thematic perspective, corridors can be classified into cultural or natural heritage corridors. Cultural corridors are based on historical, cultural, spiritual, and economic ties that are part of the "collective memory" of society.[40] They may combine various elements, including religion, cultural traditions, gastronomy, art, and architecture, such as the Camino de Santiago, or may focus on a single element such as the cave art route focusing on prehistoric art.[41] Cultural corridors can be formed on the basis of religious heritage such as Santiago de Compostela Route, arts and architecture such as the Transromanica Route, famous personalities' lives, and activities such as Destination Napoleon and the Mozart Ways, and the movement of people such as the Phoenicians' Route.[42]

Natural corridors are based on natural resources, such as landscapes, plants, and wildlife, which are underdeveloped to a certain extent. Natural corridors can combine various elements, including experiencing adventure, natural landscape and wildlife, and educational and conservation nature-related tourism activities.[43] An example of nature-based corridors is the Great Limpopo Transfrontier Park, the largest conservation area in Africa, consisting of Limpopo National Park of Mozambique, Kruger National Park of South Africa, and Gonarezhou

[39] Prideaux, B and Cooper, C. 2002. Marketing and destination growth: A symbiotic relationship or simple coincidence? Journal of Vacation Marketing 9(1): 35-51.
[40] Valkova Shishmanova, Maria. 2015. Cultural Tourism in Cultural Corridors, Itineraries, Areas and Cores Networked. Procedia - Social and Behavioral Sciences 188: 246 – 254.
[41] UNWTO Global Report on Public-Private Partnerships: Tourism Development
[42] ROUTES4U. 2018. Feasibility Study: The Cultural Routes of the Council of Europe and the Baltic Sea Region (EUSBSR).
[43] Hamzah, A. and Ismail, H. N. 2008. A design of Nature-Culture Based Tourism Corridor; A Pilot Project at Kelantan Darul Naim. Universiti Teknologi Malaysia.

National Park of Zimbabwe, offering a variety of trails including walking and wilderness trails as well as self-drive trails across Mozambique, South Africa, and Zimbabwe.[44]

From a design perspective, MDTCs can be classified as either linear or network corridors. Linear corridors can have either one or several start points and one end point, such as the Camino de Santiago, which has various start points but ends at one point, the Cathedral of Santiago de Compostela in Spain. Linear corridors are sequential, going from the various start points to the final point, as opposed to network corridors, which consist of various points that are not necessarily linked physically or consequentially but connected by a common theme. Network corridors do not have start or end points, such as the European cemeteries route and the Phoenicians' route. In many instances, network corridors may not be connected by a specific sequence, and their cohesion relies mainly on their shared theme rather than territorial linkages.[45]

From a historical perspective, MDTCs can be classified as either of historical origins or based on current narratives. MDTCs with historical origins have well-founded and factual historical roots, such as the Camino de Santiago, while those based on current narratives build on a historical association strengthened by current narratives, such as the European route of thermal heritage and thermal towns.[46] Based on their territorial coverage, cultural routes can be transnational only or intercontinental as well.[47] MDTCs can also be classified as formal or informal. Informal corridors are formed by tourists and in some instances, tourism agencies creating itineraries that connect attractions of interest, while formal corridors are generally developed or supported by local authorities in territories along the corridor.[48]

The establishment of MDTCs involves a number of logistical and marketing requirements. From a logistical perspective, corridors require establishing an appropriate infrastructure, including transport, accommodation, and attractions, as well as the facilitation of accessibility. [49] Attractions need to have appropriate signage and access options for tourists with reduced mobility, including people with disabilities. Opening times need to take into consideration holiday schedules, availability of open amenities during opening hours as well as weather conditions. Attractions along the corridor also need to provide different ticket options such as offering suitable pricing for both residents and tourists as well as providing discounts for students and children. For cultural corridors, accessibility also includes customizing the experience to the different tourist segments, whether in terms of tailoring attraction-related background information, messages and signs, to enable tourists to access and interpret the relevance of the attraction. [50]

In Chapter One of this report, an overview of existing global MDTCs is undertaken, outlining their types, how they were developed, the entities and tourism stakeholders involved, the enabling infrastructure and legislation, how they are financed, marketed and managed, in

[44] Hawkins, D., et al. 2015. Multi-Country Destination Development: An Opportunity to Stimulate Tourism in the Americas. International UNWTO Seminar on Multi Destination Opportunities for Regional Integration.
[45] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[46] Ibid.
[47] Valkova Shishmanova, Maria. 2015. Cultural tourism in cultural corridors, itineraries, areas and cores Networked. Procedia - Social and Behavioral Sciences 188: 246 – 254.
[48] Hamzah, A. and Ismail, H. N. 2008. A design of Nature-Culture Based Tourism Corridor; A Pilot Project at Kelantan Darul Naim. Universiti Teknologi Malaysia.
[49] Ibid.
[50] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.

addition to capacity building and performance monitoring mechanisms. The success stories and challenges encountered in establishing and managing existing MDTCs are also presented.

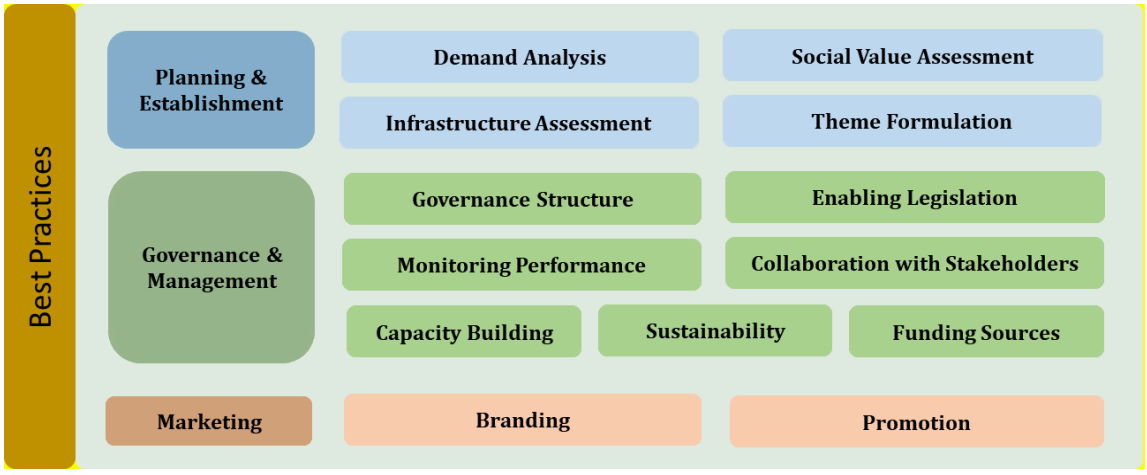
Chapter Two focuses on existing MDTCs, which include the OIC member countries outlining the corridor types, how they were developed, the entities and tourism stakeholders involved, the enabling infrastructure and legislation, how they are financed, marketed, and managed, in addition to capacity building and performance monitoring mechanisms. The chapter also highlights best practices and lessons learned in the development, management, and marketing of existing TCs.TC.

Chapter Three presents four MDTCs, including two OIC and two non-OIC corridors, outlining the corridor types, how they were developed, the entities and tourism stakeholders involved, the enabling infrastructure and legislation, how they are financed, marketed and managed, and the lessons learned from these corridors. In Chapter Four, MDTCs in the OIC region are compared with global best practices in terms of three main areas: planning and development, management, and marketing. Chapter 5 proposes policy recommendations for existing based on the classification of the OIC member countries using a set of criteria, including the countries' visa openness and tourism readiness. Chapter 5 also makes recommendations for the potential OIC MDTCs

1. Global Multi-Destination Tourism Corridors

In this chapter, an overview of the types of existing global tourism corridors is undertaken as well as best practices in terms of MDTC development and management. In the first section, select global MDTCs are classified according to their theme, design, historical origin, territorial coverage, and development. In the second section, best practices in the planning and establishment of MDTCs are explored with examples from global corridors. In the third section, management best practices are outlined in terms of selecting governance structure, formulating enabling legislation, monitoring performance, collaboration with stakeholders, capacity building, sustainability, and diversifying funding. The fourth section focuses on marketing best practices in the areas of branding and promotion. The last section of this chapter highlights the lessons learned from global MDTCs. The following framework covers the best practices areas explored in this chapter.

Figure 9: Multi-Destination Tourism Corridor Best Practices Framework



Source: DinarStandard Analysis

1.1. Overview of the Types of Existing Global Tourism Corridors

As outlined in the introduction, TCs can be classified according to several criteria, including theme, design, historical origin, territorial coverage, and formality. Examples of a culture-based MDTC include the Phoenicians' Route and the Camino De Santiago. The Phoenicians' Route, consisting of trade routes dating back to the 12th century B.C.E., connecting Phoenician towns on the Mediterranean in three different continents.[51]

The Camino de Santiago, also known as Saint James' Way, received the first certification from the Council of Europe as a cultural route in addition to being listed on UNESCO's world heritage list in 1993. This pilgrimage route was created in the 9th century following the discovery of the tomb of the Apostle Saint James. The Camino starts from the Iberian Peninsula extending throughout Europe, reaching as far as Egypt.[52]

[51] The Council of Europe. 2015. The Council of Europe's 29 Cultural Routes.
[52] Ibid.

Examples of nature-based corridors include the Great Limpopo Transfrontier Park in Africa and the Wadden Sea in Europe. The Great Limpopo Transfrontier Park, the largest conservation area in Africa, consisting of Limpopo National Park of Mozambique, Kruger National Park of South Africa, and Gonarezhou National Park of Zimbabwe, offering a variety of trails including walking and wilderness trails as well as self-drive trails across Mozambique, South Africa, and Zimbabwe.[53]

The Wadden Sea, a World Heritage Property visited by 10 million tourists annually, has the largest continuous system of intertidal sand and mudflats around the globe. The Netherlands, Germany, and Denmark are cooperating to ensure the protection of the Wadden Sea as well as its promotion as a tourism destination.[54] It is worth noting that many MDTCs possess a combination of natural and cultural attractions.

Table 14: Overview of Types of Global MDTCs

Global MDTC Types			
	Theme	**Cultural**	**Natural**
		Camino de Santiago	Wadden Sea
		Phoenicians' Route	Great Limpopo Trans-frontier
	Design	**Linear**	**Network**
		Camino de Santiago	Transromanica network
		Phoenicians' Route	Architecture of Totalitarian
	Historical Origin	**Historical**	**Current**
		Camino de Santiago	Transromanica Network
		Phoenicians' Route	Architecture of Totalitarian
	Territorial Coverage	**Transnational**	**Intercontinental**
		Transromanica Network	Phoenicians' Route
		Architecture of Totalitarian Regimes	Routes of the Olive Tree
	Development	**Formal**	**Informal**
		Camino de Santiago	Cape to Cairo
		Great Limpopo Trans-frontier	The Great Divide Mountain Bike

While both the Transromanica network corridor and the Camino De Santiago are culture-based corridors, they differ in design. On the one hand, the Camino De Santiago is an example of a linear corridor, having several start points but a single end point, namely the Cathedral of Santiago de Compostela, Spain. On the other hand, the Transromanica network corridor, which connects eight European countries using a common theme, namely their Romanesque architectural heritage, has no specific start or end point.[55]

The Architecture of Totalitarian Regimes in Europe's Urban Memory (ATRIUM) provides another example of a network MDTC; it includes eighteen destinations from southeast European countries, which were led by totalitarian regimes during the twentieth century. While both the Transromanica network and Architecture of Totalitarian Regimes in Europe's

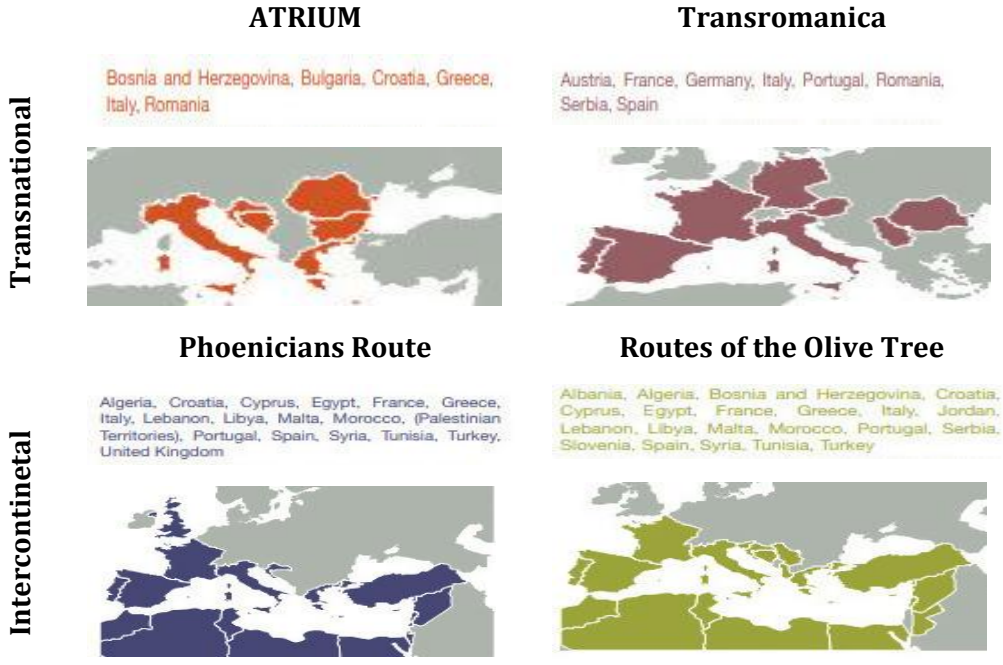
[53] Hawkins, D., et al. 2015. Multi-Country Destination Development: An Opportunity to Stimulate Tourism in the Americas. International UNWTO Seminar on Multi Destination Opportunities for Regional Integration.
[54] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[55] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.

Urban Memory (ATRIUM) routes have a historical basis, they do not have historical origins as routes as opposed to the Phoenicians' Route and the Camino de Santiago.[56]

With the help of a common theme, namely architectural Romanesque heritage, the Transromanica network corridor was created linking eight European countries. The same applies to the Architecture of Totalitarian Regimes in Europe's Urban Memory (ATRIUM) route, which also uses architecture as a common theme, namely that of totalitarian regimes to link eighteen destinations in southeast Europe.[57]

Many of the mentioned MDTCs are transnational, connecting destinations in more than one country, such as the Wadden Sea, the Great Limpopo Trans-Frontier Park, the Transromanica network, and Architecture of Totalitarian Regimes in Europe's Urban Memory (ATRIUM) corridors. Examples of intercontinental MDTCs include the Phoenicians' Route and the Routes of the Olive Tree. The Phoenicians' Route consists of trade routes across the Mediterranean encompassing three continents, namely Europe, Asia, and Africa. Similarly, the Routes of the Olive Tree, launched in 1998, encompasses the three continents, Africa, Asia, and Europe, offering itineraries based on the theme of the olive tree covering oil-producing Mediterranean countries.[58]

Figure 10: Territorial Coverage of Select Global Corridors



Source: Council of Europe

[56] Ibid
[57] Ibid
[58] The Council of Europe. 2015. The Council of Europe's 29 Cultural Routes.

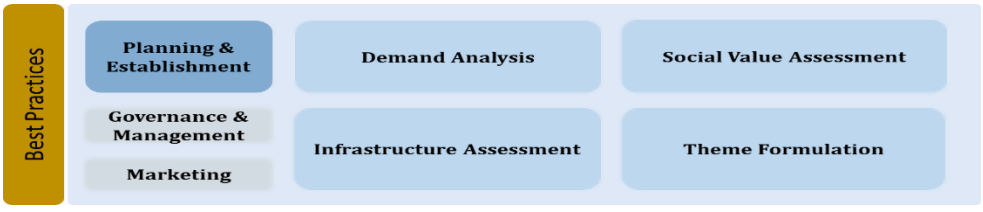
Examples of formal corridors that have been initiated or supported by government bodies include most of the previously mentioned corridors including the Camino de Santiago, the Wadden Sea, and the Great Limpopo Trans-frontier Park,[59] It is important to note that some formal corridors have started off as informal corridors, such as the Lake Constance corridor which was already a tourism destination for over 200 years before the countries on its shores, Switzerland, Germany, and Austria, decided to enter into a formal tourism trans-border cooperation.[60]

Examples of informal corridors include the Cape to Cairo corridor and the Great Divide Mountain Bike Route. The Cape to Cairo corridor developed by some tour companies in the 1970s offering modified truck trips from the north to the south of the African continent provides an example of informal MDTCs. The Great Divide Mountain Bike Route, developed by the Adventure Cycling Association in 1997, is the longest off-pavement cycling route; it follows the continental divide across Canada and the United States of America,[61] Tourism Corridors Planning and Establishment – Global Best Practices

1.2. Tourism Corridors Planning and Establishment – Global Best Practices

Establishing MDTCs is a challenging task that requires taking into consideration a number of elements starting from assessing the potential demand for the corridor to evaluating the feasibility of the corridor based on the presence of a solid infrastructure connecting the various corridor nodes. Assessing the viability of the corridor in terms of benefiting local tourism stakeholders along the corridor countries and tourism assets that can be included in the corridor attractions are also important elements in the planning stage. In this section, examples of global best practices in these areas are presented to highlight their importance to the establishment of MDTCs.

Figure 11: Tourism Corridor Planning and Establishment Best Practices



Best Practices in Demand Analysis

A critical element that needs to be taken into consideration in the planning stage of MDTCs in terms of assessing the feasibility of the proposed TC is whether this corridor will bolster the appeal of destinations along the corridor for potential tourists essentially increasing the number of tourists and/or tourist nights and/or spending. This entails researching tourism trends and current tourists' profiles for destinations along the corridors, the size, and nature

[59] Ibid.
[60] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[61] Hamzah, A. and Ismail, H. N. 2008. A design of Nature-Culture Based Tourism Corridor; A Pilot Project at Kelantan Darul Naim. Universiti Teknologi Malaysia.

of the domestic markets as well as comparing the potential corridor with other similar initiatives.[62]

Researching international tourism trends is an important component of demand analysis. Recent UNWTO figures indicate that the highest average annual growth in outbound tourism between 2010-2018 is from Asia and the Pacific (7.2%), followed by the Americas (5.3%). The latest figures also indicate that China is still the world's largest spender, accounting for one-fifth of international tourism spending, followed by the United States.[63] These trends were identified by the Council of Europe, which targeted Chinese markets by taking part in the "Chinese Virtual Tourism Fair" to promote Chinese tourism in Europe.[64]

Table 15: Outbound Tourism by generating Region

	Millions									Average Annual Growth (%)
	1990	**1995**	**2000**	**2005**	**2010**	**2015**	**2016**	**2017**	**2018***	**10-18***
World	438	531	680	809	952	1,196	1,241	1,329	1,401	5.0
From										
Europe	254.6	308.1	396.4	450.7	490.8	581.8	592.8	636.6	672.3	4.0
Asia and the Pacific	58.7	86.2	113.8	152.9	205.3	293.6	314.4	337.6	358.7	7.2
Americas	99.4	108.2	130.6	136.5	155.4	200.2	211.6	227.3	235.0	5.3
Middle East	8.2	8.5	12.8	21.5	33.5	39.7	36.3	36.8	40.6	2.4
Africa	9.8	11.5	14.9	19.4	28.3	36.0	39.6	42.5	45.5	6.1
Origin not Specified	7.6	8.7	12.0	28.4	38.3	44.2	40.4	47.7	49.0	

Source: UNWTO 2019

In the case of the Iron Curtain Trail, a continuous cycle trail over 10,400 km in length from the Barents Sea to the Black Sea across 20 European countries, an estimate of the demand was developed based on a model that uses bed density and day trips based on population density and the national share of cycling as a main transport mode. Estimated revenues were also calculated based on constant revenue per holiday trip and per day. The estimates showed that revenues are dependent on the length of the route, the tourism infrastructure, the daily use of the bicycle as a mode of transport, and population density.[65]

Best Practices in Infrastructure Assessment

The Tourism & Transport Forum defines tourism infrastructure as "the supply chain of transport, social, and environmental infrastructure collaborating at a regional level to create an attractive tourism destination."[66] As most MDTCs benefit from previously existing social and environmental infrastructure in corridor countries, the focus of cooperation and development

[62] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[63] UNWTO. 2019. International Tourism Highlights: 201 Edition.
[64] EU-China Tourism Year website.
[65] European Parliament. 2012. THE EUROPEAN CYCLE ROUTE NETWORK EUROVELO: Challenges and Opportunities for Sustainable Tourism.
[66] Tourism & Transport Forum. 2012. Tourism Infrastructure Policy and Priorities.

of MDTCs is the transport infrastructure needed to improve connectivity between the various nodes along the corridors.

From a logistical perspective, assessing the feasibility of MDTCs entails considering the enabling infrastructure in terms of transport networks along the various nodes of the TC.[67] Air connectivity is essential in a world where more than half of tourists (57%) traveled by planes in 2018. Roads are also used by 37% of tourists, making the availability of good road networks and their maintenance an important element for tourism.[68] Best practice examples show the presence of a solid infrastructure and transport networks connecting MDTCs' nodes. In Europe, the Eurail pass provided by railways of Europe connects the railway networks of 27 countries and facilitates travel between European countries using a single pass, which supports the development of MDTCs in the region.[69]

In the case of the Greater Mekong Subregion TC, UNWTO and the ASEAN have undertaken a study to review the infrastructure along the nodes of the corridor and transportation networks. The study identified 41 ports and landings along the river that needed infrastructure development as well as improving facilities in terms of provision of visitor information centers, medical facilities, public restrooms, fuel stations, and food outlets.[70]

Best Practices in Social Value Assessment

Another important issue in the planning and establishment of MDTCs is whether the proposed corridor presents an added value to various stakeholders from local communities, local authorities, local tourism operators and tourism industry in general in the destinations along the corridor. MDTCs should ensure the mitigation of the negative impacts of tourism as well as increasing the economic benefits for local communities. The Architecture of Totalitarian Regimes in Europe's Urban Memory (ATRIUM) route presents a good example of consultation with local communities in the development of MDTCs to ensure that the corridor theme is socially acceptable. In Italy, before investing in this project, the Municipality of Forlì conducted research to ensure that residents accepted the promotion of this controversial tourism product.[71]

It is worth noting that the engagement and consultation of local communities, local businesses, local tourism operators and tourism industry is necessary to both increase their awareness of the potential benefit of the proposed MDTC and their interest in and support for its establishment. The Wadden Sea corridor presents another good example of stakeholder engagement in the development phase. Prior to its creation, research was conducted to assess its viability as a transnational initiative and explore the challenges that needed to be addressed for the corridor to be viable, such as potential local communities' opposition to new

[67] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[68] The Statistical, Economic and Social Research and Training Centre for Islamic Countries (SESRIC). 2017. International Tourism in the OIC Countries: Prospects and Challenges.
[69] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[70] UNWTO Website. 2015. Mekong River-based Tourism Product Development Workshop was held in Da Nang, Viet Nam.
[71] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.

conservation regulations associated with the corridor and weak collaboration between tourism businesses in the proposed corridor area.[72]

Best Practices in Theme Formulation

The formulation of MDTC themes necessitates the cooperation between the various stakeholders in the destinations along MDTCs on several fronts in the planning stage, including the corridor's proposed theme and name as well as the decision on the tourism assets to be included in the corridor. This requires extensive research with the aid of experts from historical, cultural, and practical perspectives as well as a thorough assessment of the tourism assets that can be included and their potential appeal to tourists.[73]

Committees comprising of the various stakeholders from the destinations along the corridor need to be formed as well as advisory boards that include experts, from academic and professional backgrounds, in the various areas pertinent to the corridor development. An example of an advisory committee is the Scientific Committee of the Routes of the Olive Tree, which is comprised of experts in various areas including history, international relations, archaeology, museology, ethnology, economy, agriculture, tourism, and environment.[74]

A good example of tourism assets identification is provided by the Prehistoric Rock Art Trails, which has a set of criteria for the evaluation of the quality of rock art sites included in the route. It has also provided a "Handbook for the Certification of Rock Art Sites belonging to the "Prehistoric Rock Art Trails" Cultural Route of the Council of Europe. Certification is provided to the rock art sites which comply with the best practices included in the handbook.

With the increasing focus on experiences "experiential tourism" and the rise of special interest tourism, such as gastro-tourism, hiking, and biking, bird watching, etc. The focus on experience rather than assets and attractions entails that MDTCs need to consider also the unique and customized experiences they can offer to tourists. MDTCs need to combine experiences and attractions. [75]

MDTCs can offer ways to interact with local communities and to experience and get an idea of the local lifestyle. Natural MDTCs can customize tourist experiences by engaging them in environmental activities on their visits to the various natural sites, while cultural MDTCs can provide opportunities for interaction with local communities through planned activities and events.[76]

The HANSA Culinary Route used the local cuisines of corridor countries to create a unique tourism product. The activities developed for the route include visits to local producers and markets were organized as well as special menus and meals in restaurants in addition to holding festivals and distributing flyers with local recipes prepared by chefs. Furthermore, the "Hansa Culinary Label" was created to be used as a quality label for restaurants.[77]

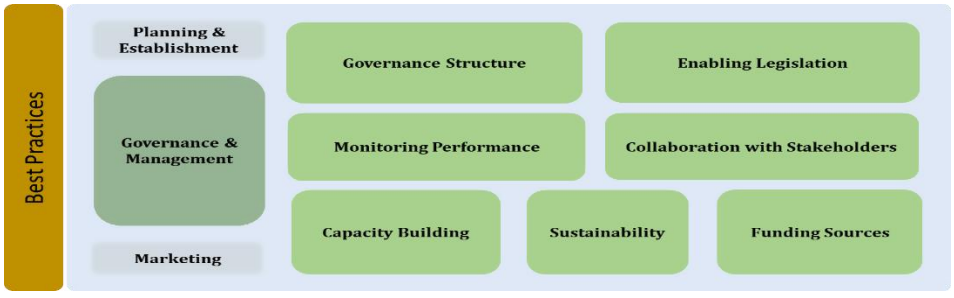
[72] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[73] Ibid.
[74] UNWTO and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[75] Ibid.
[76] Ibid.
[77] Ibid.

As the global MDTCs' examples show, extensive research with the aid of experts from historical, cultural, and practical perspectives was used to formulate corridor themes and assess their potential tourism assets, as in the case of the Prehistoric Rock Art Trails. The examples also focus on "experiential tourism" in the selection of assets to be included, as evident from the culinary experiences provided by the Hansa Culinary Route.

1.3. Tourism Corridors Governance and Management – Global Best Practices

Governance starts with the choice of the most suitable governance model for the MDTC as well as clearly defining the role of the various bodies involved in corridor management and promotion. Good Governance also involves ensuring that the legislative frameworks governing corridor member countries are in line with their efforts and aspirations for the MDTC. It is also directly linked to accountability, which requires monitoring performance, whether in terms of organizational effectiveness of the corridor management entity or the effectiveness of its marketing communications activities, in addition to tracking the satisfaction of various stakeholders.

Figure 12: Tourism Corridor Governance and Management Best Practices



Effective management of MDTCs also requires cooperation between multiple stakeholders at various levels, including cooperation between responsible entities from the corridor member countries and cooperation on national, regional, and local levels in each member country.[78] Capacity building for the various stakeholders in TC member countries is also crucial for the effective management of MDTCs as it ensures standards are unified and maintained to provide a seamless tourist experience.[79]

The sustainable management of the natural and cultural heritage assets of corridor countries is an important task for MDTCs, which can benefit from the cooperation between corridor countries.[80] MDTCs can help spread demand across the various sites in corridor countries in a way that preserves the assets redirecting tourists from high-traffic to less-known sites and spreading benefits to all communities.[81]

Diversifying funding sources is also essential to enable corridor management to undertake the needed activities to ensure the corridor's viability and success. In this section, and overview of select examples of global MDTCs management best practices is presented in addition to an overview of monitoring and evaluation approaches.

[78] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[79] UNWTO and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[80] Ibid.
[81] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.

Best Practices in Governance Structure

The Public-Private Partnership Model is arguably best suited for encouraging higher levels of collaboration between public and private entities needed for MDTCs to thrive. Public-private partnerships allow for higher levels of participation and ensure, to a greater extent, the support of the private sector for corridor development and management policies and strategies.[82]

Corridor management entities are typically composed of representatives from corridor member countries. Some MDTCs have a secretariat or a board of directors, which is responsible for coordination among the corridor partners, permanently located at one of its nodes, while other corridors shift the secretariat location between different nodes along the corridor according to the site of the entity responsible for managing the corridor at that point in time.[83]

In addition to the secretariat or board of directors, MDTCs typically have local steering committees with members from various stakeholder groups responsible for strategic planning and implementation. Destination Napoleon provides an excellent example of the layered organizational structure needed for MDTC management. It has a board of directors and an executive committee, in addition to local steering committees. The executive and local steering committees determine the strategies and implementation tools for the corridor. The local steering committees are composed of representatives of various stakeholders, including regional and local authorities, as well as public entities such as museums, universities, and think tanks. They also have representatives from the tourism industry and professional associations.[84]

In the case of the Greater Mekong Subregion (GMS) TC, the private-public partnership model is evident in the presence of the Mekong Tourism Advisory Group, which includes representatives from the private sector and industry associations. The Mekong Tourism Advisory Group is involved in coordinating support for GMS tourism products, participating in events to promote GMS tourism, and identifying constraints on the business environment. Besides this body, the GMS TC has a Tourism Coordination Office and a Tourism Working Group.[85]

The Mekong Tourism Coordination Office is responsible for coordinating and implementing programs, including continuously upgrading and maintaining the online portals such as the main portal of the TC "mekongtourism.org." The national tourism working groups set priorities for national implementation of programs and projects in corridor member countries. The GMS Tourism Working Group includes senior officials from each member country, NTO, and serves as an advisory board to the Mekong Tourism Coordination Office by providing technical guidance for planning, implementing, monitoring, and evaluating sub-regional activities.[86]

Best practice examples from global corridors show the existence of a formal structure with well-defined roles for the various committees and bodies in the management of MDTCs, as shown in the GMS TC example. The presence of local steering committees, as shown in the Destination Napoleon TC, can facilitate the development of plans and implementation at the local level in various nodes along the corridor.

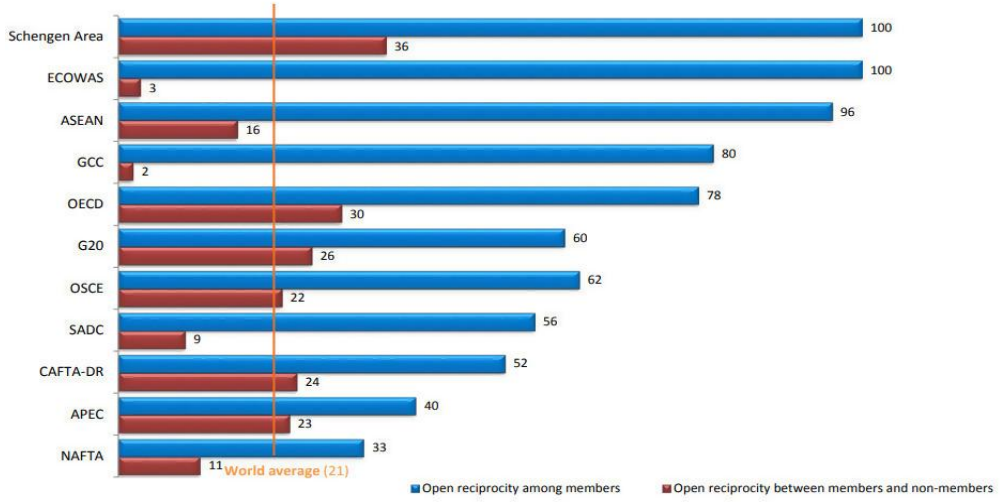
[82] Ibid.
[83] Ibid.
[84] UNWTO and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[85] Please refer to the Greater Mekong Subregion tourism corridor case study for references and more details.
[86] Please refer to the Greater Mekong Subregion tourism corridor case study for references and more details.

Best Practices in Formulating Enabling Legislation

The legislative frameworks of the member countries of any given MDTC, especially those relating to entry requirements and currency restrictions, can impact the potential success of corridors. Currency restrictions, as shown in a study by UNCTAD, have affected the African economy negatively with their tourism receipts being 10% lower growth in tourism compared to international receipts over the period 2005–2015.[87] A study published by the European Travel Commission in 2015 estimated the loss resulting from the current visa procedures for the Schengen zone to be around EUR 5.5 billion in direct contribution to GDP per year. [88] In 2019, the EU introduced revised Schengen visa regulations facilitating procedures for a short-stay tourist visa.[89]

Various regional blocs, such as the Economic Community of West African States (ECOWAS), the European Union (EU), the Gulf Cooperation Council (GCC), and the South African Development Community (SADC), have visa-free for citizens of member countries which facilitates intra-regional tourism.[90] The following graph shows the level of visa reciprocity among members and non-members of regional and economic blocs in 2018. As the graph illustrates, both the EU and the ECOWAS and the ASEAN have the most reciprocal visa apply 100% visa reciprocity for members of their blocs, closely followed by the ASEAN (96%). The lowest visa reciprocity among members of same economic blocs is that of APEC and NAFTA. The graph also clearly shows overall low levels of reciprocity among members and non-members of regional and economic blocs.[91]

Figure 13: Visa Reciprocity in 2018 (%)



Source: UNWTO (2018)

[87] The Statistical, Economic and Social Research and Training Centre for Islamic Countries (SESRIC). 2017. International Tourism in the OIC Countries: Prospects and Challenges.
[88] UNWTO and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[89] European Commission. 2019. EU visa policy: Commission welcomes final adoption of strengthened visa rules.
[90] Czaika, Mathias et al. 2018. "The Global Evolution of Travel Visa Regimes." Population and development review vol. 44 (3): 589-622.
[91] UNWTO. 2018. Visa Openness Report 2018.

Regional unified visas, such as Europe's Schengen visa, make multi-destination travel smoother for tourists. Visa waivers between neighboring countries can also be used to facilitate intraregional tourism along the corridor. In South America, Colombia, Ecuador, Mexico and Peru, all members of the regional economic bloc Alianza del Pacifico, allow citizens from the economic bloc countries to passport-free travel within the member countries.[92]

In the case of the Danube TC, the Schengen visa facilitates travel to mots corridor countries, which are European Union member countries. However, it is worth noting that for corridor countries which are non-EU members, such as Bulgaria and Romania, tourists need to apply for a relevant visa. In Bulgaria, a visa waiver was offered to Chinese tourists who possess a Schengen visa.[93]

In the case of the Greater Mekong Subregion TC, as opposed to European MDTCs, movement within the region is constrained by the absence of a standard visa system. The GMS TC countries have visa-free travel for ASEAN member countries for a stay of up to 14 days as well as visa waivers for priority markets. Visa on arrival is available for international visitors from up to 180 countries at 46 land checkpoints and about 20 airports across the corridor. E-visas are also offered by some of the corridor countries, namely Cambodia, Myanmar, and Vietnam. However, the lack of a common visa and the complexity of access to information about visa requirements and procedures, with different systems implemented by the various corridor member countries, remains an impediment to the growth of the corridor.[94]

Information on visa application procedures and entry requirements, including custom restrictions and security measures for countries along MDTCs, need to be readily available and accessible for tourists. The process of obtaining visas can be facilitated, whether through the provision of e-visas or providing visas on arrival for specific tourist segments.[95] Entry procedures can be facilitated using Trusted Traveler Programs, such as the United States' Global Entry and Nexus Programs, which allows low-risk tourists to use faster lanes and quicker processing at airports.[96]

Best Practices in Monitoring Performance

A number of complementary approaches, as outlined in the following table, can be used to monitor the effective management of MDTCs including the use of visitor metrics, the measurement of organizational effectiveness of the corridor management entity as well as the effectiveness of its marketing communications activities, the measurement of changes in consumer-based brand equity as a result of the corridor's management entity operations, gauging stakeholder evaluation of DMO performance, and evaluating the sustainability of tourism along the corridor.

[92] International Seminar on Multi Destination Opportunities for Regional Integration
[93] Please refer to the Danube Case Study for further information and details.
[94] Please refer to the Greater Mekong Subregion tourism corridor case study for references and more details.
[95] International Seminar on Multi Destination Opportunities for Regional Integration
[96] Ibid.

Table 16: Key Performance Indicators[97]

Measurement Approach/Model	Key Performance Indicators	Measurement
Visitor Metrics[98]	Visit Statistics	Number of Visitors, Average Length of Stay, Tourist Spending
	ROI	Ratio of Visitor Spending to Corridor Management Spending
Marketing Communications[99]	Activity	Number of Programs/Campaigns, Total Reach and Total Frequency
	Performance	Advertising Awareness, Brand Image Changes
	Productivity	Conversion Rates, Cost-per-Conversion Rate
Consumer-Based Brand Equity (CBBE)[100]	Brand Salience	Mindset, Decision Set
	Brand Associations	Cognitive Attributes, Affective perceptions
	Brand Resonance	Previous Visits, Intent to Visit
	Brand Loyalty	Repeat Visits, Word-of-Mouth Referrals
Organizational Effectiveness	Appropriateness of Objectives	Clarity of Objectives, Feasibility of Objectives
	Achievement of Objectives	Progress towards Objectives
	Implementation Efficiency	Efficient Resource Allocation, Cost-Effectiveness
Stakeholder	Tourist Evaluation[101]	Satisfaction with Access to Services, with Accommodation and Transport
	Local Industry Evaluation[102]	Satisfaction with Destination Promotion, Satisfaction with Industry Support
	Local Community Evaluation[103]	Satisfaction with Quality of Life
Sustainability Metrics[104]	Social Impact	Residents Satisfaction with Tourism Impacts on Destination
	Economic Impact	Percentage/Value of Local Products Sold to Tourism Facilities
	Environmental Impact	Water, Energy Consumption & Waste Production per Tourist Night Compared to General Population per Person

Source: DinarStandard Analysis

Performance metrics, collected at local levels along the MDTC nodes, need to be integrated to provide a comprehensive overview of the corridor performance. Visitor metrics such as tourist arrivals and the average length of stay can be collected through local immigration offices, while tourist spending can be tracked through tourist intercept surveys.[105] Monitoring the effectiveness of MDTCs' marketing activities is essential to gauge the efficiency of MDTCs management entities. Beyond evaluating total reach and total frequency of the various marketing campaigns, conversion rate, which is the percentage of tourists visiting the

[97] Adapted from previous DS studies for COMCEC; "Sustainable Destination Management Strategies in the OIC Member Countries" and "Destination Development and Institutionalization Strategies in the OIC Member Countries".
[98] Pike, S. (2008). Destination Marketing: an Integrated Marketing Communication Approach. London: Routledge.
[99] Destination Marketing Association International (2011). Standard DMO Performance Reporting: A Handbook for DMOs.
[100] Pike, S. (2008). Destination Marketing: an Integrated Marketing Communication Approach. London: Routledge.
[101] Epp, A. (2013). Assessing the Impact of Stakeholder Engagement on Perceptions of DMO Performance (Working paper). The International Centre for Responsible Tourism.
[102] A Manual for Evaluating the Quality Performance of Tourist Destinations and Services (2003). Luxembourg: Office for Official Publications of the European Communities, 2003.
[103] Crouch G.I., & Ritchie J.R.B. (2012) Destination Competitiveness and Its Implications for Host-Community QOL.
[104] Indicators sourced from the European Tourism Indicator System and Indicators of Sustainable Development.
[105] Pike, S. (2008). Destination Marketing: an Integrated Marketing Communication Approach. London: Routledge.

destinations as a result of marketing activities, need to be calculated to gauge the efficiency and effectiveness of these activities.[106]

As building a strong brand is essential to the development of MDTCs, there is a salient need to measure brand equity. The Consumer-Based Brand Equity (CBBE) model measures brand salience, brand associations, brand resonance, and brand loyalty. While brand salience focuses on tourists' mindset awareness of the destination and its inclusion in their "decision set" or in the destinations, they are considering visiting, brand associations studies the relationship strength between brand image and identity to gauge the efficacy of positioning strategies. Brand resonance investigates tourist intention to repeat their visit to the destination, while brand loyalty measures actual repeat visits and referrals.[107]

MDTC management entities' organizational effectiveness can be assessed using various indicators, including whether the mission statements and objectives are clear and feasible, the purposes are suited to the corridor's positioning strategy, the resources are efficiently allocated to fulfill goals, the objectives are achieved, and cost-effectiveness is ensured overall. [108] Measuring performance from stakeholders' perspectives is also essential for establishing the effectiveness of MDTC management entities, surveys can be used to assess the satisfaction of tourists, local communities and the tourism businesses along the corridor with performance in the areas relevant to them.[109]

Measuring the social, cultural, and environmental tourism impacts is essential to ensure the sustainability of tourism along the MDTC. Typically, economic impact indicators are used the most by tourism management entities; however, to ensure sustainability, both environmental and social impacts need to be taken into consideration by MDTCs management entities.[110]

In general, most MDTCs appear to focus on monitoring the economic impact of the corridor, from visitor metrics to the economic impact of local businesses and employment. In the case of the Council of Europe's cultural routes, seven routes are currently monitoring their performance with the use of the European Tourism Indicators System (ETIS), which was developed by the European Union in 2013. The system measures several areas, namely governance, communication, both internal and external, sustainable management, the impact of cultural activities, and the economic and environmental impacts of the route itineraries.[111]

The Camino de Santiago provides a great example of conducting continuous performance monitoring using an information system designed to monitor and analyze relevant data. The data collected is used to measure the impact of the various measures and strategies and to ensure that goals are met. Data on tourist satisfaction, tourist segments, spending, and their knowledge of the route are collected through face-to-face intercept surveys at different sections of the corridor. Data are also gathered from accommodation facilities on number of overnight stays and percentage of occupied rooms throughout the year.[112]

The Mekong Tourism Coordinating Office (MTCO) is in charge of monitoring and disseminating performance metrics and reports to the GMS Tourism Working Group (TWC) meetings, the

[106] Destination Marketing Association International (2011). Standard DMO Performance Reporting: A Handbook for DMOs.
[107] Pike, S. (2008). Destination Marketing: an Integrated Marketing Communication Approach. London: Routledge.
[108] Ibid.
[109] Crouch G.I., & Ritchie J.R.B. (2012) Destination Competitiveness and Its Implications for Host-Community QOL.
[110] WTO. (2004). Indicators of sustainable development for tourism destinations: A guidebook.
[111] ROUTES4U. 2018. Feasibility Study: The Cultural Routes of the Council of Europe and the Baltic Sea Region (EUSBSR).
[112] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.

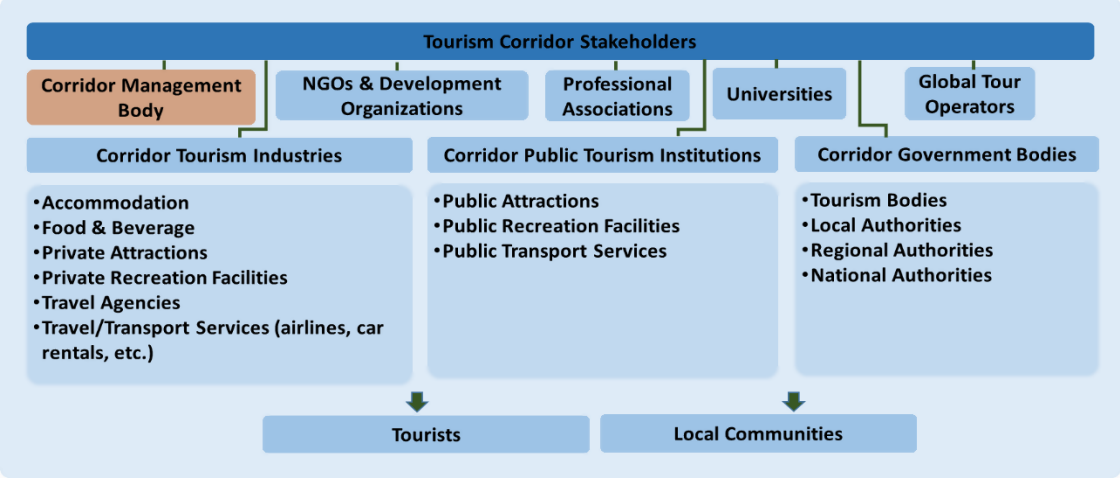
Mekong Tourism Forum, and GMS ministerial meetings. The performance indicators used by MTCO measure various areas, from visitor metrics to sustainability. The visitor metrics used include tourist arrivals using different modes of transportation (air, land, and sea) as well as tourist spending. The organizational effectiveness metrics used include the number of countries permitted to obtain tourist visas on arrival and the number of international border checkpoints (land, sea, air) offering tourist visa on arrival. The sustainability metrics used include the number of tour operators, the number of registered tour guides, tourism's direct contribution to employment, and tourism's direct contribution to gross domestic product.[113]

Best Practices in Collaboration with Tourism Corridor Stakeholders

Effective management of MDTCs requires cooperation between multiple stakeholders at various levels, including cooperation between responsible entities from the corridor member countries and cooperation on national, regional, and local levels in each member country.[114] A stakeholder is defined as "any person, group, or organization that can place a claim on an organization's attention, resources, or output or is affected by that output."[115]

MDTC stakeholders, as outlined in the following figure, consist of public, private, and non-governmental entities that need to cooperate together to ensure the success of the corridor and add value to both tourists and local communities along the corridor. The corridor management body is primarily responsible for coordinating and engaging with the various other stakeholders ensuring proper representation of all groups to foster collaboration for the success of the MDTC.[116]

Figure 14: Tourism Corridor Stakeholders



Source: DinarStandard Analysis

[113] Please refer to the Greater Mekong Subregion tourism corridor case study for references and more details.
[114] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[115] Gomes, R. C. (2005). Who are the relevant stakeholders to the local government context? Empirical evidences on environmental influences in the decision-making process of English Local Authorities. Revista de Administração Contemporânea, 9(Spe1), 177-202.
[116] Lally, A. M., O'Donovan, I., & Quinlan, T. (2015). Stakeholder Engagement in Destination Management: Exploring Key Success Factors. 11th Annual Tourism and Hospitality Conference. Ireland.

It is important to note that while the relative importance of the various stakeholders may vary, collaboration with all groups is important for the success of MDTCs. While MDTC government bodies can provide information on regulations and laws relevant to the development and operation of the corridor, both government bodies and tourism businesses can contribute in terms of technical expertise and financial support. Non-governmental organizations, especially development agencies, contribute in terms of technical and financial support. Tour operators' technical expertise and promotion skills are key to MDTC success. Social backing by local communities is essential for the continued operation of MDTCs.[117]

Global tour operators can provide valuable information and assistance in the development, branding, and promotion of MDTCs, as they have good knowledge of market segments that can be targeted according to the themes of MDTCs. Coffee based tourism in South America provides an example of the role tour operators can play in developing transnational itineraries, with tour operators such South America Travel, providing itineraries in South American countries to visit coffee museums dedicated to coffee history and coffee farms and producers to try local coffees.[118]

International development agencies, such and UNWTO and UNESCO, have played an important role in the development and promotion of tourism multi-destination corridors in several regions. Their continued involvement in the development of MDTCs has highlighted the importance of MDTCs as a vehicle for economic development.[119] Local non-governmental organizations can also play an important role in promoting MDTCs as well as the preservation of their assets. As an example, environmental NGOs can support ecotourism and the protection of wildlife.[120]

Universities and their associated research centers provide valuable information as well as educational material and training necessary for MDTC effective management. In Europe, the research centers of France's Pantheón Sorbonne University and Spain's University of Barcelona collaborate with the Cultural Routes of the Council of Europe to develop innovative training material.[121]

Professional associations can also play an important role in supporting MDTCs and promoting their themes. As an example, cycling clubs and federations can help promote and support cycling trails associated with natural MDTCs. In Europe, the Chocolate Way, celebrating the cultural heritage of chocolate, has the support of chocolate producers as well as retailers, academics and museums.[122] In the case of the routes of the Olive Tree TC, European and Arab Chambers of Commerce of TC countries came together to sign cooperation protocols to facilitate the development of Routes of the Olive Tree TC.[123]

Governmental entities, including MDTC member countries' tourism bodies, national, regional, and local authorities, are typically involved in the development of the TC, its management, and

[117] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[118] UNWTO and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[119] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[120] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[121] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[122] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[123] Interview with The Routes of the Olive Tree.

promotion. To ensure effective collaboration and cooperation, representatives from the various government bodies are usually part of the executive or steering committees for MDTCs. Local authorities are mainly responsible for delivery of services and day-to-day management issues related to their section of the MDTC. In the case of the Neusidlersee-Seewinkly and Ferto-Hansag Transboundary National Park, which was designated as a World Heritage Site in 2001, seven local authorities from Austria and Hungary manage the park according to the agreements between both countries.[124]

The local tourism businesses and the public tourism institutions are the actual service providers along the corridor, making their role quite instrumental for the success of MDTCs. MDTCs stand to benefit from the support of the local tourism industry in promoting the theme of the corridor.[125] The support of local communities is also instrumental to the success of MDTCs. In the case of the Columban Way, based on the memory of Irish monk, Columbanus, who traveled from Ireland to Italy, founding Celtic monastic communities, local communities support tourist offices by spreading information about events through word of mouth and fliers. Local artists and historians also participate in festivals and lectures.[126]

The Holy Grail Route presents a good example of public-private cooperation in the development of the corridor, with collaboration and coordination between local and regional authorities and the tourism industry as well as universities, NGOs, and cultural associations. The stakeholders involved in the Holy Grail Route include the Directorate General of Tourism, the Government of Aragón, the company Sargantana, and universities from Spain, the UK, Greece as well as the NGO My World from Bulgaria, and the company 5-Senses LTD from Malta.[127]

Involving local communities, starting from the planning process to the implementation and operation stage, is essential for the success of MDTCs. MDTCs need to provide added value to local communities along the corridor both in terms of creating job opportunities and improving their quality of life. MDTC management needs to research local communities carrying capacities along the corridor to ensure the corridor does not exceed the limits of acceptable change for these communities. MDTC management needs to set communication plans and create channels to improve communication and the encouragement of the flow of information and feedback from local communities.[128]

Offering a good example of involving local communities, the Réseau Art Nouveau Network provided training sessions for teenage school students through the "Home alone!" project to increase their awareness of the Art Nouveau heritage of the Horta Museum district. In the context of the training, the teenagers were given control of the Horta museum during the weekend of the European Heritage Days. They managed the reception and offered guided tours and workshops to museum visitors.[129]

In the case of the Greater Mekong Subregion (GMS) TC, various types of stakeholders, including private and public stakeholders as well as non-governmental organizations, are involved in the

[124] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[125] Ibid.
[126] Ibid.
[127] Ibid.
[128] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[129] Council of Europe. 2018. Cultural Routes of the Council of Europe Programme: Activity Report.

management and promotion of the corridor. Representatives of all corridor countries' NTOs are members of the GMS Tourism Working Group, while the private sector is involved through representation in the Mekong Tourism Advisory Group. The Asian Development Bank (ADB) provided the initial support for the development of both the economic and TC and continues to play an important role in supporting both corridors. Bilateral donors, such as GIZ, and Swisscontact, have provided technical and financial assistance to support multi-country product development, capacity building, and knowledge sharing on good practices.[130]

The best practice examples show a high level of collaboration between various stakeholders and their contribution to the effective management of MDTCs. The existence of formal platforms, as shown in the case of the GMS TC, can facilitate the collaboration between the various stakeholders, ensuring timely and efficient interaction and involvement in the management of the corridor as well as ensuring support their support for the policies and strategies related to the corridor.

Best Practices in Capacity Building

Capacity building for the various stakeholders in MDTC member countries is also crucial for the effective management of MDTCs as it ensures standards are unified and maintained to provide a seamless tourist experience.[131] Universities and training centers need to be involved in planning and delivering relevant and continuous training. In Europe, the Heritage and Cultural Tourism Open Resource (HECTOR) project for innovative training associated with the Cultural Routes of the Council of Europe benefits from the collaboration of the tourism research centers of several European universities, including France's Pantheón Sorbonne University and Spain's University of Barcelona.[132]

In the case of the Routes of the Olive Tree, one of the Council of Europe's certified cultural routes, "Experience Labs," focusing on the design and management of "experiential" tourism products, were organized to improve skills of tourism professionals in five countries.[133] A "Methodological Handbook" dealing with product and project management for sustainable tourism was also produced to disseminate knowledge and promote capacity building.[134]

The French Federation of European Cultural Routes organized sessions for the exchange of best practices among tourism stakeholders from more than 15 cultural routes. The sessions covered best practices in physical and digital accessibility, local community involvement, and social inclusion. The sessions were supplemented with filed visits and chances for interaction with local stakeholders. The information about best practices produced in the context of these sessions is intended to be shared through an online publication.[135]

In Scandinavian countries, St. Olav Ways corridor, comprising of historic pilgrimage routes ending at Nidaros Cathedral in Norway, is managed by a non-profit organization but dependent on services provided by local businesses including local guides and pilgrim hostels. The St. Olav

[130] Please refer to the Greater Mekong Subregion tourism corridor case study for references and more details.
[131] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[132] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[133] Council of Europe. 2018. Cultural Routes of the Council of Europe Programme: Activity Report.
[134] WellOlive.eu Website.
[135] Council of Europe. 2018. Cultural Routes of the Council of Europe Programme: Activity Report.

Ways Association provides training and tools to the local partners to refresh the trail markers, in addition to keeping regular contact with them to ensure standards are maintained.[136]

In the case of the Greater Mekong Subregion TC, various training programs, with support from the Asian Development Bank and bilateral donors, are provided to the tourism industry. In the context of the Mekong Innovative Start-ups in Tourism Program, initiated in partnership with the ADB and supported by the Australian government, tourism start-ups from corridor countries are provided training through intensive boot camps with the help of mentors. Start-ups have also facilitated access through the program to incubators and investors.[137]

Best Practices in Sustainability

UNWTO proposes that resource management, which fulfills the economic, social, and aesthetic needs of tourists and local communities, as a cornerstone of sustainable tourism. Management of MDTCs can play an important role in the pursuit of sustainable tourism, especially considering that the development of MDTCs essentially helps in the preservation of heritage whether tangible or intangible. MDTCs can be used to attract tourists to less-known destinations along corridors improving economic opportunities for local communities.[138]

The fact that MDTCs also offer a combination of various assets can help to spread demand across the various sites in corridor countries in a way that preserves the assets redirecting tourists from high-traffic to less-known sites and spreading benefits to all communities.[139] In the case of the Danube TC, well-known destinations are combined with less-known tourist destinations in tour packages offered by travel agents to improve the traffic to these sites and lower the pressure on highly frequented locations.[140]

The sustainable management of the natural and cultural heritage assets of corridor countries is an important task for MDTCs. Cooperation between corridor countries can be instrumental in this area, especially in the case of shared assets, as in the case of the Wadden Sea TC, when the Netherlands, Germany, and Denmark signed a "Joint Declaration on the Protection of the Wadden Sea" in 1982. In the case of the Neusidlersee-Seewinkly and Ferto-Hansag Transboundary National Park linking eastern Austria and western Hungary, bilateral agreements were signed to regulate water levels in Lake Neusiedl.[141]

Best Practices in Diversifying Funding Sources

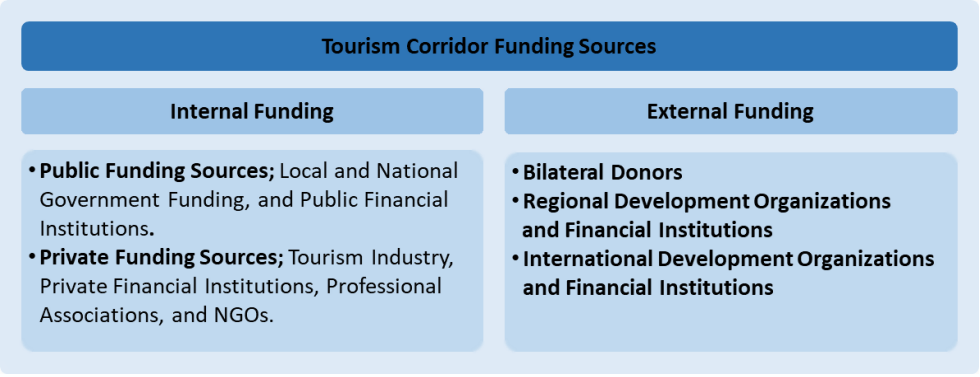
Funding is considered one of the major challenges for the development and promotion of MDTCs. Most MDTCs are mainly publicly funded by national governments of member countries, with some also benefiting from grants from bilateral, regional, and international entities. Local private tourism businesses and professional associations have also contributed to MDTC

[136] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[137] Please refer to the Greater Mekong Subregion tourism corridor case study for references and more details.
[138] Klarić, Vlasta. 2013. Managing Visitors on Thematic Cultural Routes Handbook. Ministry of Tourism of the Republic of Croatia.
[139] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[140] Klarić, Vlasta. 2013. Managing Visitors on Thematic Cultural Routes Handbook. Ministry of Tourism of the Republic of Croatia.
[141] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.

funding, as in the case of walking and hiking trails in Europe where hiking federations contribute to the maintenance funds of these trails.[142] As such, MDTC funding sources, as shown in the following figure, can be classified as either internal or external funding sources. Internal funding is from either public or private sources within the TC countries, while external funding refers to funding received from entities, not members of the corridor.

Internal public funding includes membership fees paid by the corridor countries towards the joint budgets as well as domestic funds committed by local and national authorities towards corridor related activities within their destinations. In the case of the Transromanica TC, membership fees, from regional government bodies, are used to cover the operational costs of the TC secretariat, which is based in Germany. Internal private funding refers to funding from professional associations and tourism businesses in corridor countries; it can be in the form of sponsorship of events and activities or membership fees. In addition to public organizations membership fees, the Transromanica TC also receives membership fees from private bodies in the seven corridor countries in return for using the TC logo and having their information on the website.[143] Internal funding can be challenging for smaller destinations along MDTCs. With fewer resources, smaller destinations are not making significant contributions to overall corridor marketing activities and are also facing financial constraints when considering local marketing and capacity building activities.[144]

Figure 15: Tourism Corridor Funding Sources



For smaller towns along the Destination Napoleon Corridor[145], covering sites of Napoleonic history from the birth of Napoleon Bonaparte to the defeat of Napoleon III at Sedan in 1870, to they have faced these constraints by encouraging collaboration between members in the area of capacity building as well as raising funds from tourism professionals and local communities.[146] The European Mozart Ways get funding for activities from the various

[142] Ibid.
[143] Council of Europe. 2010. Impact of European Cultural Routes on SMEs' innovation and competitiveness.
[144] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[145] Destination Napoleon includes 50 towns and cities from France, Italy, Belgium, Spain, the Czech Republic, Poland, Lithuania, the Russian Federation and Egypt.
[146] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.

municipalities in nodes along the corridor. This funding is financed through budgetary allocations and product sales, such as guidebooks.[147]

External denoting that funding is from sources outside of the TC countries such as bilateral donors, regional and international organizations, and financial institutions. Bilateral donors have been actively providing funding for the development and maintenance of MDTCs, as in the case of the Jesuit Routes with the Spanish Agency for International Cooperation providing grants to improve the services at the Santisima Trinidad of Parana and Jesus of Tavarangue missions in Paraguay.[148]

Several regional organizations offer funding for MDTCs, as in the case of the European Union (EU) and the Association of Southeast Asian Nations (ASEAN). The Baltic Sea Culinary Route is one of the MDTCs that received EU funding; the corridor promotes gastro-tourism across Estonia, Germany, Lithuania, Latvia, Poland, Sweden, Denmark, and Finland.[149] The European Mozart Ways also received EU funding through various programs, including the LEADER program.[150] It is important to note that access to EU funding is subject to conditions which may limit access to it for certain European MDTC countries. An example of this is the Transromanica TC, where some corridor member countries are unable to access EU funding as it requires that the funds provided be matched by recipients.[151]

International organizations have supported many MDTC initiatives by providing funding for research for initial and ongoing corridor development as well as technical advice. The UNESCO route program provided support for the Silk Road and the Slave Route. Both UNESCO and UNWTO helped promote the Silk Road. The United Nations Development Program (UNDP) and the United Nations Conference on Trade and Development (UNCTAD) have provided funding to the Silk Road and the Caravan Route in North Africa.[152]

Funding for the Greater Mekong Subregion TC comes from both internal and external sources, with each of the six member countries making annual contributions as well as bilateral donors and the Asian Development Bank providing support for its operations. The annual contribution of each country amounted to $15,000, with an anticipated increase in 2019 to $20,000, increasing total yearly contributions from member countries between $90,000 and $120,000. The Mekong Tourism Coordinating Office (MTCO) is currently in the process of making the necessary changes in its organization's legal standing, into an international organization, to enable it to apply for external funding.[153]

In the case of the Danube TC, both external and internal sources are used for funding the Danube Competence Center. External funding accounts for around 80% of the budget, while internal sources account for the rest. Various EU instruments contribute to the financing of the Danube TC, such as the European Regional Development Fund, the Instrument for Pre-Accession Assistance, and the European Neighborhood Instrument. Internal funding is mainly

[147] Federal Ministry for European and International Affairs.2013. European Cultural Routes: A Practical Guide.
[148] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[149] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[150] Federal Ministry for European and International Affairs.2013. European Cultural Routes: A Practical Guide.
[151] Council of Europe. 2010. Impact of European Cultural Routes on SMEs' innovation and competitiveness.
[152] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[153] Please refer to the Greater Mekong Subregion case study for references and more details.

provided through corridor countries' NTOs with some contributions from local tourism businesses.[154]

The best practices examples show concerted efforts at diversifying funding and at establishing various funding streams to ensure the sustainability of management and marketing efforts for MDTCs. Regional sources, namely through different EU instruments, have helped fund many of the activities of European cultural routes, however, access to these sources have proven difficult in some instances for certain corridor partners. Cooperation with the private sector in funding various activities seems to be a promising revenue stream for managing and marketing corridors, which can be used even in the case of small destinations, as evident from the Destination Napoleon TC.

1.4. Tourism Corridors Marketing – Global Best Practices

Among the major tourism trends witnessed in the last decade is the rise of "experiential tourism" with its focus on experience rather than assets and attractions which entails that MDTCs need to differentiate and position themselves by offering unique and customized experiences, in other words, have a unique selling proposition. MDTCs can provide added value to tourists by combining experiences and attractions by providing ways to interact with local communities and to experience and get an idea of the local lifestyle. Natural MDTCs can customize tourist experiences by engaging them in environmental activities on their visits to the various natural sites, while cultural MDTCs can provide opportunities for interaction with local communities through planned activities and events.[155]

Figure 16: Tourism Corridor Marketing Best Practices

Best Practices in Branding

Successful branding is built on the conceptualization of brand values or in other terms, the brand's unique selling proposition that differentiates it from other brands. Creating and focusing on a unique selling proposition, especially in terms of customized experiences, can help MDTCs differentiate and position themselves. MDTC themes can be used as a framework for positioning and differentiating corridors. An example of this is the use of a historical theme to frame the experience as "a journey back in time" related to the distinct theme of the corridor. The clearer and more developed the theme, based on the research undertaken in the theme formulation stage,[156] the more it can be used to differentiate the TC and the easier it is for the

[154] Please refer to the Danube case study for references and more details.
[155] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[156] Please refer to the theme formulation part in the planning and establishment of MDTCs section.

tourism industry in the corridor country to develop experiences that are consistent with them increasing its appeal to target markets.[157]

Theme-based branding involves creating a story or narrative to be associated with the corridor and communicating this story across the various channels to all relevant stakeholders. This entails that the success of branding requires that all major stakeholders are consulted in formulating the messages and the development of the brand strategy. An excellent example of an MDTC that has successfully created a narrative to attract potential tourists is the Vennbahn Cycle Route passing through Germany, Belgium, and Luxembourg. It has created a story using the railway history of the road and its transformation into cycling routes and linking it to generations passing on stewardship of things of value to each other.[158]

The creation of a unified branding message is a crucial task for MDTCs to increase awareness. Branding also involves ensuring content and design consistency for marketing messages across the various platforms used to promote the corridor.[159] The Wadden Sea provides a good example of ensuring the consistency of branding messages. The materials developed in the context of a joint marketing and communications strategy include a "Stakeholder Toolkit for Communication and Marketing" which comprises of a Brand Manual, fact sheets, and brochures in four languages as well as interactive communication tools on social media, a dedicated website, and phone app.[160]

Designing a logo for the MDTC and ensuring its uniform use by all TC stakeholders can also help in increasing brand awareness. In the case of the Council of Europe certified routes, both the logo of the route and that of the "Cultural Routes of the Council of Europe" are included in all communication materials, whether online on in print on brochures and maps as well as press releases and road signs.[161] The following figure features a select group of logos used by the Council of Europe certified routes.

Figure 17: Council of Europe Routes Logos

Source: Council of Europe

It is important to note that with the rise of social media, brand identity is becoming increasingly affected by consumers' narratives or their "storytelling." Storytelling has become an important part of branding and differentiating as well as promoting corridors. According to a study by Travel Competitive Intelligence (TCI Research), 35% of international tourists are influenced in their choice of destination by storyteller peers. Storytelling is estimated to be five times more effective than traditional advertising in attracting travelers. To harness the power of

[157] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[158] Federal Ministry for European and International Affairs.2013. European Cultural Routes: A Practical Guide.
[159] UNWTO (2017), The Potential of the Western Silk Road, UNWTO, Madrid.
[160] Ibid
[161] Federal Ministry for European and International Affairs.2013. European Cultural Routes: A Practical Guide.

storytelling, there's a need to choose the stories that suit the brand narrative and engage emotions and amplify them.[162]

Figure 18: Most Active Storytellers

Source: TRAVELSAT Pulse 2018

The Greater Mekong Subregion TC "Mekong Moments" platform presents a strong example in harnessing the power of storytelling. It aggregates, curates, and filters social media posts by tourists visiting the corridor and shares these posts on the platform in the form of a searchable interactive map currently containing over 10,000 experiences packaged with corresponding social media content and/or campaigns.[163]

Best Practices in Promotion

While both traditional and digital tools are used for the promotion of MDTCs, Big Data and social media are increasingly being used to customize marketing messages to targeted tourist segments. Based on their segmentation, MDTCs management needs to engage with the media channels relevant to the tourist segments they seek to target and provide continuous updates and relevant stories. MDTC management can also collaborate with the marketing communications departments of their stakeholders, including NGOs, associations, special interest groups, to promote the corridor.[164]

Familiarization trips remain an important traditional tool used by MDTCs, whether through inviting journalists, bloggers, or tour operators. The St. Olav Ways invited three American and three British journalists to experience the route. This led to the publishing of blog entries as well as several articles in various outlets, including The Telegraph, The Guardian and The Financial Times. These articles were estimated to have reached around 50 million readers.[165]

The Council of Europe and the European Commission Joint Program on Cultural Routes have organized a series of familiarization trips for bloggers, photographers, and videographers to experience a number of certified Cultural Routes across Europe. These trips covered Megalithic Routes, the European Route of Historic Thermal Towns and Via Francigena in 2014 followed

[162] TCI Research. 2018. How Storytelling impacts Travelers' choices
[163] Ibid.
[164] Ibid
[165] Council of Europe. 2018. Cultural Routes of the Council of Europe Programme: Activity Report.

by the Transromanica and the Danube Wine Route in 2016, The bloggers shared their experience of these itineraries by chronicling their trips using photography and videography as well as writing notes and articles.[166]

Collaborating with tour operators, from target markets as well as providers of inbound services, is essential for the marketing of MDTCs. MDTC managers need to provide tour operators with corridor information and marketing materials on a regular basis as well as offer them familiarization trips and chances to participate in trade events related to the corridor.[167]

The Council of Europe's cultural routes have taken part in the "Chinese Virtual Tourism Fair," organized by the European Commission, to promote Chinese tourism in Europe. The "Chinese Virtual Tourism Fair" is a 3D B2B platform that uses virtual reality technology to allow interaction between visitors and exhibitors. Exhibitors display their content in their virtual reality booths, which can be customized. Visitors can have access to various devices, from computers and smartphones to VR glasses. Interaction is happening in real-time online through the use of avatars whereby people meet each other, trade business cards, and have conversations in virtual reality.[168]

Events can be a useful tool to increase the appeal of MDTCs and attract tourists as well as strengthen the link between the destinations along the corridor. In West Africa, the Festival of Masks, celebrated across several West African countries, attracts tourists from around the world.[169] In Europe, the Huguenot and Waldensian Trail organized the "Voices of Exiles," which combined live music and theater shows as well as hikes. The event had 900 participants for four days. The Saint Martin of Tours Route organized an artistic event, including drawing and competitions, for French and German children in commemoration of the Armistice of the First World War and Saint Martin's celebration.[170]

MDTCs are increasingly using websites for promotion, whether through the creation of their own content or managing user-generated content. The Amber Road, based on the ancient trade route for the transfer of amber from the North Sea and the Baltic Sea to the Mediterranean Sea, has a website for the promotion of the corridor showcasing the attractions, services, and products associated with the route.[171] The European Institute of Cultural Routes has created a website "Crossing Routes – Blogging Europe" that highlights the experiences of travel bloggers in certified cultural routes countries. The website (blog.culture-routes.net) includes multimedia contents developed by the bloggers who participated in fam trips.[172]

The Greater Mekong Subregion TC presents a strong example of using interactive tools for marketing and promoting the corridor. The GMS corridor website "MekongTourism.org" combines traditional promotional materials from newsletters and destination information with interactive tools such as the "Mekong Moments." The website contains an e-library with documents available for free download, an event calendar, and a news feed with curated

[166] Crossing Routes – Blogging Europe Website.
[167] Federal Ministry for European and International Affairs.2013. European Cultural Routes: A Practical Guide.
[168] EU-China Tourism Year website.
[169] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[170] Council of Europe. 2018. Cultural Routes of the Council of Europe Programme: Activity Report.
[171] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[172] WellOlive.eu Website.

articles from various relevant sources. The website is completed also connected to active social media accounts.[173]

The "Mekong Moments" platform allows tourists to share visual content and experiences along the GMS corridor countries using specific hashtags for their social media posts, which are then collected, curated, and filtered on the Mekong Moments platform. These experiences are presented in the form of a searchable interactive map that currently contains over 10,000 experiences packaged with corresponding social media content and/or campaigns. The "Mekong Mini Movie Festival," which won the HSMAI Adrian Gold Award as best digital tourism campaign in 2018, represents another successful promotional initiative of the Greater Mekong Subregion corridor. It is the result of a competition that brought in over 500 video submissions, which reached over 22 million people globally.[174]

Best practice examples show the continued use of traditional methods, such as familiarization trips and events, is increasingly being supplemented with digital methods in the promotion of MDTCs. Websites are used in many instances as a tool to convey the narrative as well as promote MDTCs. The GMS TC "Mekong Moments" platform presents a good example of benefiting from storytelling and user-generated content in the promotion of a corridor.

1.5. Global Tourism Corridor - Lessons Learned

Area	Lessons Learned	Examples
TC Planning & Development	**Demand Analysis**: Researching tourism trends and current tourists' profiles for destinations along the TC, the size and nature of the domestic markets as well as comparing the potential corridor with other similar initiatives.	The Iron Curtain Trail TC prepared a demand estimate based on a model that uses bed density and day trips based on population density and the national share of cycling as the primary transport mode.
	Infrastructure Assessment: Assessing the enabling infrastructure from in terms of transport networks along the various nodes of the TC, whether road or railway networks, as well as air connectivity.	The Greater Mekong Subregion TC study reviewed the infrastructure along the nodes of the corridor and transportation networks to identify ports and landings along the river that needed improvement.
	Social Value Assessment: Engaging stakeholders in early phase of development to increase awareness and ensure their support of the TC as well as ensure that plans provide added values to them.	The Wadden Sea TC conducted research to explore potential local communities' opposition to new conservation regulations associated with the corridor and weak collaboration between tourism businesses in the proposed corridor area
	Theme Formulation: Research with the aid of experts from historical, cultural, and practical perspectives and thorough assessment of the tourism assets.	Prehistoric Rock Art Trails setting criteria for the evaluation of the quality of rock art sites to be included in the route as well as providing a certification guide for Rock Art Sites.

[173] Please refer to the Greater Mekong Subregion tourism corridor case study for references and more details.
[174] Ibid.

Area	Lessons Learned	Examples
TC Management	**Organizational Structure:** Public-private partnerships, using suitable organizational structures, provide the best model for encouraging higher levels of TC stakeholders' collaboration.	Destination Napoleon TC has a board of directors and an executive committee, in addition to local steering committees. The executive and local steering committees determine the strategies and implementation tools for the TC.
	Enabling Legislation: The provision of unified visas for TCs and/or visa waivers can facilitate travel.	Europe's Schengen visa allows seamless travel across the continent, which facilitates travel across European TCs.
	Collaboration with Tourism Stakeholders: TC stakeholders, including public, private, and non-governmental entities, need to cooperate together to ensure the success of the corridor and to add value to both tourists and local communities along the corridor.	Destination Napoleon TC local steering committees include representatives from various stakeholder groups, government bodies, and tourism businesses as well as educational institutions, cooperating to develop and implement strategies.
	Capacity Building: Training and capacity building are essential for ensuring quality service and unifying standards across TC countries. The involvement of educational organizations can be instrumental in providing tailoring and providing training.	The Heritage and Cultural Tourism Open Resource project for innovative training associated with the Cultural Routes of the Council of Europe is supported several European universities, including France's Pantheón Sorbonne University and Spain's University of Barcelona
	Sustainability: Cooperation between corridor countries can be instrumental in this area, especially in the case of shared assets.	The Netherlands, Germany, and Denmark signed a "Joint Declaration on the Protection of the Wadden Sea" in 1982.
	Funding: Funding remains the most challenging task for TCs. Diversifying financing is essential to TC sustainability.	Smaller towns that are part of Destination Napoleon TC have faced budgetary constraints by raising funds from tourism professionals and local communities.
TC Marketing	**Branding**: TCs need to use a unified logo and branding messages to communicate their unique selling propositions. Storytelling and user-generated content have become an essential component of branding.	The Greater Mekong Subregion TC "Mekong Moments" platform has harnessed the power of storytelling by aggregating, curating and filtering social media posts by tourists visiting the corridor and sharing these posts on the platform in the form of a searchable interactive map.
	Promotion: In the age of social media, TCs need to use innovative marketing communications tools to appeal to consumers.	The Greater Mekong Subregion TC uses digital and interactive tools for marketing and promotion. Its website combines traditional promotional materials from newsletters and destination information with interactive tools such as the "Mekong Moments" that includes user-generated photos and videos.

2. OIC Multi-Destination Tourism Corridors

Many of the existing OIC MDTCs have members from both the OIC and non-OIC countries, such as the most iconic MDTC in the OIC region, the Silk Road, which was initiated by UNWTO in 1994. The development of MDTCs in OIC countries has significant potential considering the variety of resources present across the OIC countries, from cultural to natural heritage sites, with some being shared by more than one OIC country.[175]

The prevailing cultural and natural heritage shared by some of the OIC countries, as in the case of the countries of the Arabian Peninsula, can facilitate establishing MDTCs around a common cultural theme. In addition to this common heritage, the robust infrastructure networks from modern airports to functional road networks in some of the OIC countries, such as the GCC countries, can provide a strong base for the development of MDTCs.[176]

However, there are several challenges that face OIC countries in developing MDTCs from differences in terms of infrastructure, resources, and tourism appeal to their different legal frameworks.[177] In this chapter, an overview of the select existing OIC MDTCs is undertaken, outlining their types, how they were developed, managed, and marketed. The successes and challenges in developing and maintaining the existing OIC MDTCs will also be presented.

2.1. Overview of the Types of Existing OIC Tourism Corridors

From a thematic perspective, the existing OIC MDTCs can be classified into cultural, such as the Silk Road, or natural heritage corridors, such as the East Africa Northern Corridor, based on the theme of attractions they offer. Based on their design, OIC corridors can also be classified as linear corridors having either one or several start points and one end point, such as the Silk Road, or network corridors consisting of various points that are not necessarily linked physically or consequentially, such as the Umayyad Route. MDTCs can be either based on historical origins, such as the Holy Family or current narratives, such as the Umayyad Route. They can also be transnational only, such as east Africa Northern Corridor, or extend beyond the borders of one continent, such as the Silk Road. Some the OIC MDTCs have developed informally, i.e., created by tourists or tourism companies with little or no support from government, such as the Holy Family Route. The following figure presents a classification of the select OIC MDTCs.

Table 17: Types of Select OIC Tourism Corridors

Corridor	Theme	Design	Historical	Territorial	Development
Silk Road	Culture	Linear	Historical	Intercontinental	Formal
Umayyad Route	Culture	Network	Current	Intercontinental	Formal
Holy Family	Culture	Linear	Historical	Intercontinental	Informal
East Africa Northern Corridor	Nature	Network	Current	Transnational	Formal
Abraham Path	Cultural	Network	Current	Intercontinental	Informal

[175] The Statistical, Economic and Social Research and Training Centre for Islamic Countries (SESRIC). 2017. International Tourism in the OIC Countries: Prospects and Challenges.
[176] Shackley, Myra. 2002. The Frankincense Route: A proposed cultural itinerary for the Middle East. Historic Environment, v.16 (2): 12-17.
[177] Ibid.

The Silk Road is a cultural trade route; it has allowed different civilizations and cultures to interact with one another over thousands of years. This interaction, which extended beyond a mere exchange of commodities to an intermingling of thoughts and cultures, has molded the world we live in today. The Silk Road is composed of a number of linear trade routes connecting the East to the West that include both land and maritime routes. [178]

The Silk Road consists of a number of trade routes with historical origins; they have been used over many centuries, mainly for commerce to transport commodities from perfumes and precious stones and carpets to slaves, gunpowder, and a multitude of other commodities between the East and the West. The first recorded mention of the Silk Road was in 100 BC as a Chinese expedition learned the high value of silk in the bazaars of Central Asia, where they headed to purchase horses.[179]

The Silk Road is classified as an intercontinental as well as a formal MDTC as it consists of thirty-four member countries from three continents, namely Africa, Asia, and Europe, cooperating formally in the context of the UNWTO Silk Road Initiative. The OIC countries involved in the Silk Road, as of February 2018, include Albania, Azerbaijan, Bangladesh, Egypt, Indonesia, Iran, Iraq, Palestine, Kazakhstan, Kyrgyzstan, Malaysia, Pakistan, Saudi Arabia, Syria, Tajikistan, Turkey, Turkmenistan, and Uzbekistan.[180]

The Umayyad Route is based on a cultural theme as it covers the Umayyad heritage from the beginning of the Umayyad dynasty in Damascus to its expansion to the countries on the southern shores of the Mediterranean and the Iberian Peninsula. The Umayyad Route is considered a network route connecting nodes in the Near East, North Africa, and Europe. While the route itself has a historical basis in terms of expansion of the Umayyad dynasty, it was redesigned according to current narratives with a suggested itinerary that starts in Jordan and Lebanon and ends in Spain and Portugal.[181]

The Umayyad Route is classified as an intercontinental TC since it consists of member countries in Asia, Africa, and Europe. The OIC countries' members of the corridor include Egypt, Jordan, Lebanon, and Tunisia. The development of the corridor involved the cooperation of both governmental and non-governmental entities in member countries with the support of the European Neighborhood and Partnership Instrument (ENPI),[182]

The Holy Family is a cultural TC tracing the Holy Family journey from Palestine to Egypt and back. It is classified as a linear corridor that started at Bethlehem in Palestine, going to Egypt through Northern Sinai and crossing many Egyptian cities before arriving at Asyut in Upper Egypt. The corridor is of historical origins, dating back to the Holy Family journey estimated to be in 4 BC. The corridor is intercontinental with both countries, Palestine and Egypt, being OIC member countries. As there is no governmental cooperation in the development of the corridor between the two countries, the corridor is classified as informal.[183]

The East Africa Northern Corridor is a nature-based MDTC offering various attractions from wildlife reserves to diverse flora. It is classified from a design perspective as a network MDTC

[178] UNESCO Website.
[179] UNWTO. 2019. Short Introduction to the Silk Road Programme.
[180] UNWTO Silk Road Website.
[181] The Umayyad Route Website.
[182] Ibid.
[183] Please refer to the Holy Family Tourism Corridor Case Study for references and detailed information.

connecting various natural attractions in the corridor member countries, such as Akagera National Park in eastern Rwanda and Lake Nakuru in Kenya. The corridor has no historical origin; it was designed in 2013 as part of a larger cooperation project between the three member countries in several areas. The corridor is transnational as the three member countries, Rwanda, Kenya, and Uganda, are in Africa. The corridor was developed formally by the government of the three countries.[184]

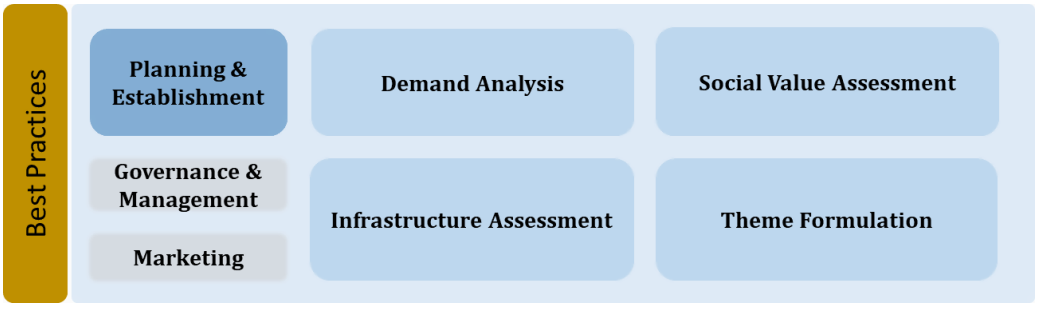
The Abraham Path is based on the journey of the Prophet Abraham, with his legacy of loyalty and hospitality, and his family across the Middle East. It is classified as a newly designed cultural TC as it was devised by a group from Harvard Law School in 2006. Later, the NGO Abraham Path Initiative, which is based in the U.S., collected information on Middle Eastern traditions, tales, and legends that can be linked with the Abrahamic heritage and used it for the thematic development of the route. With NGO and academic institutions spearheading its development and management, the Abraham Path is considered an informal corridor.[185]

Currently, the Abraham Path consists of 430 km of walking trails across four countries on three different continents and is expected eventually to cover 5000 km in 10 countries. The Palestinian part of the trail covers around 182 km in the West Bank.[186] Turkey's Abraham path trail, which was launched in 2012, covers 170 km. In Jordan, the trail, which was launched in 2017, covers 650 km trekking route that crosses the country in almost six weeks. In Egypt, Bedouin tribes and NGOs, in cooperation with the Palestinian NGO Masar Ibrahim as well as the Jordan Trail Association, have developed a 250 km trail in Sinai. The Abraham Path initiative is working on developing a trail in Saudi Arabia with specialists.[187]

2.2. Planning and Establishment of OIC Tourism Corridors

As outlined in the previous chapter, planning and establishing MDTCs is a challenging task that requires taking into consideration a number of elements, including the formulation of the corridor theme, assessment of the tourism assets to be included in the corridor, and the infrastructure connecting the various corridor nodes. Furthermore, the viability of the corridor has to be assessed in terms of being supported by local tourism stakeholders along the corridor countries as well as being appealing to tourists.

Figure 19: Tourism Corridor Planning and Establishment Best Practices



[184] Karuhanga, James.2018.10 things to know about the revamped Northern Corridor Integration Projects initiative. The New Times Publication Website.
[185] Teller, Matthew. 2018. Hike Palestine. Aramco World Website.
[186] The World Bank. 2013. Project Information Document: Concept Stage.
[187] Teller, Matthew. 2018. Hike Palestine. Aramco World Website.

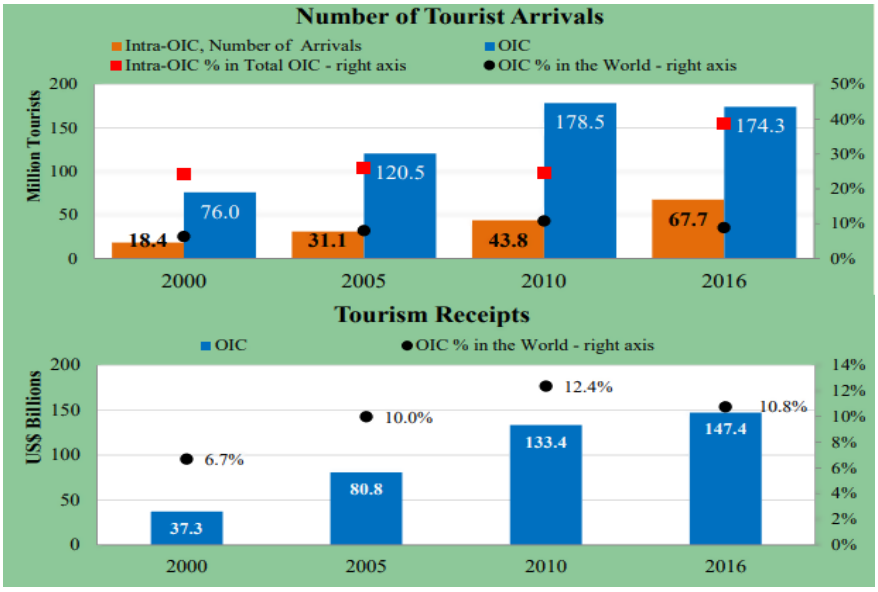
In many instances, the planning and establishment of the OIC MDTCs involved support from development agencies and regional associations, whether in terms of spearheading research needed for corridor theme development, determining the viability and feasibility of the corridor, and providing a platform for consultation with the various stakeholders during the development phase. An example of this is the Silk Road which was initially championed by the UNESCO before being adopted by UNWTO, which researched its potential as a tourism destination.[188]

Regional organizations have also played an instrumental role in the establishment of the OIC MDTCs. Examples of this include the East African Community support for the East Africa Northern Corridor. In some instances, corridors that have member countries from the OIC and non-OIC member countries and regional organizations with a majority of non-OIC member countries have played an important part in the development of MDTCs, as in the case of the Umayyad Route which was supported by the European Union.[189]

Demand Analysis

Estimating demand is an important step in planning MDTCs to assess their viability. As the graph below shows, the number of tourists visiting the OIC countries has been steadily increasing since 2000, reaching 174.3 million in 2016 and accounting for 8.9% of the world's total tourist arrivals. The number of tourists from the OIC countries has also increased from 18.4 million in 2000 to 67.7 million in 2017, accounting for 38.8% of tourists' arrivals. In terms of the OIC countries' tourism receipts, they amounted to $147.4 billion in 2016, accounting for 10.8% of the world's tourism receipts, which marked a slight decrease in share from 2010.[190]

Figure 20: OIC Tourist Arrivals and Tourism Receipts (2000-2016)



Source: SESRIC (2018)

[188] Shackley, Myra. 2002. The Frankincense Route: A proposed cultural itinerary for the Middle East. Historic Environment, v.16 (2): 12-17.

[189] ENPI CBCMED Website.

[190] SESRIC. 2018. Prospects and Challenges of OIC Member Countries: SWOT Outlook 2018.

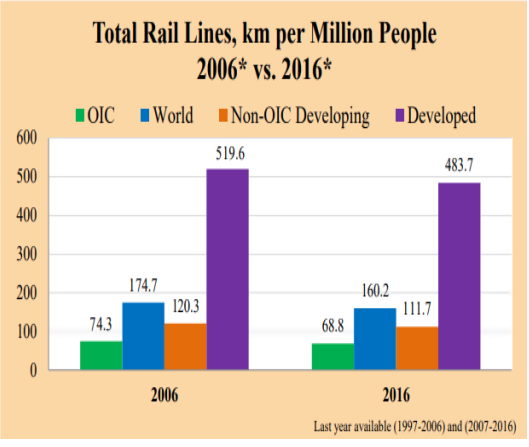
Research seems to be lagging behind in the case of the OIC MDTCs, with the exception of corridors supported by international or regional organizations. In general, tourist arrivals for corridor countries is collected by countries and can be gathered through the use of national and UNWTO platforms. In the case of the Silk Road, UNWTO provided support for the research and analysis of travel trends for the Silk Road. In 2015, the TripAdvisor, an affiliate member of UNWTO, prepared a Travel Trends Guide for the Silk Road based on researching Silk Road countries on the travel website. UNWTO also launched the Uzbekistan Tourism Insight report in cooperation with Uzbektourism and Monash University based on data collected by tourism students, which showed that 81% of tourists were interested in Uzbekistan due to its connection with the Silk Road.[191]

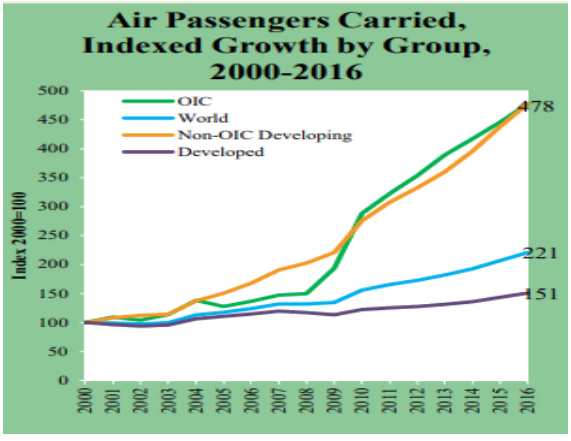
Infrastructure Assessment

In terms of enabling infrastructure essential for establishing MDTCs, specifically road and transport networks, existing transport infrastructure networks among the OIC countries are relatively weak. Many OIC countries, with limited financial resources, face constraints in investing in infrastructure and transport networks. As investments in the service sector in developing countries are considered high risk, financing for tourism projects is proving quite difficult for poorer OIC countries.[192]

Railway transport can facilitate tourism by improving mobility. In 2016, the OIC countries' rail network density per million people was 68.8 km of total rail lines, a decrease from 74.3 km in 2006. This is markedly less than non-OIC developing countries (111.7 km) and the world average (160.2 km) in 2016. The number of air passengers in the OIC countries was estimated at 517 million in 2016, representing 14% of the world total air passengers, which constitutes 478% from 2002.[193]

Figure 21: OIC Countries Rail and Trail Connectivity





Source: SESRIC (2018)

[191] UNWTO. 2016. Silk Road Action Plan 2016 / 2017.
[192] The Statistical, Economic and Social Research and Training Centre for Islamic Countries (SESRIC). 2017. International Tourism in the OIC Countries: Prospects and Challenges.
[193] SESRIC. 2018. Prospects and Challenges of OIC Member Countries: SWOT Outlook 2018.

In the case of East Africa Northern Corridor, the Standard Gauge Railway project was launched to connect the three countries. As of mid-2018, the Mombasa–Nairobi section of the railway was completed, and the Nairobi–Naivasha was 50 percent completed. Financing options were also being explored for other sections, including Naivasha-Kisumu, Kisumu-Malaba, and Malaba-Kampala.[194] It is also worth noting that there are currently various initiatives to improve regional connectivity for the OIC countries in Africa. As an example of these initiatives, the Dakar-Port Sudan railway, support by the OIC, links several OIC African countries, including Burkina Faso, Cameroon, Chad, Gambia, the Republic of Guinea, Mali, Niger, Nigeria, Senegal, Sudan, and Uganda.[195]

In the case of the Silk Road, in Kazakhstan, efforts are made to improve the road networks under the state program "Nurlijol," which will consist of a network of highways that will enhance accessibility to different nodes along the Silk Road TC. Land transportation services are also being improved with planned routes between China and Horgos or Turkistan and then from there to Tashkent or Bishkek. A railway connection between Tashkent to Turkestan is also being discussed by the governments of Uzbekistan and Kazakhstan.[196]

Furthermore, the UNWTO Silk Road Programme collaborated with UBM Routes, an Affiliate Member of UNWTO, to improve air connectivity and encourage "open sky" policies across the Silk Road. Two Silk Road events were held by UBM in Tbilisi, Georgia, in 2014 and 2015 for leading airports, airlines, DMOs, officials, and aviation stakeholders to improve air connectivity for the Silk Road countries.[197]

In the case of the Holy Family TC, in Egypt, the Egyptian Government has worked on improving the road network connecting the Holy Family sites. It has set a three-phase plan to improve accessibility to the corridor. It has allocated $3.5 million to improve the infrastructure in the first phase.[198]

The examples from the OIC MDTCs clearly show that infrastructure development represents a challenging area for the OIC MDTCs, especially for countries facing financial constraints. More efforts to increase connectivity are clearly needed for the OIC countries to benefit from the full potential of MDTCs. Regional cooperation, with support from regional organizations, may be instrumental in this area especially for MDTCs that consist of members from the same region.

Social Value Assessment

The success of MDTCs hinges on engaging and providing added value to various stakeholders in the corridor member countries. Engagement and consultation of the multiple stakeholders require establishing suitable platforms such as advisory boards, which include experts from academic and professional backgrounds. In the case of the Umayyad Route, both a Local Support Group and an Advisory Committee provide a platform for cooperation and engagement

[194] Karuhanga, James.2018.10 things to know about the revamped Northern Corridor Integration Projects initiative. The New Times Publication Website.
[195] The Statistical, Economic and Social Research and Training Centre for Islamic Countries (SESRIC). 2017. International Tourism in the OIC Countries: Prospects and Challenges.
[196] Please refer to Silk Road case study for detailed information and references.
[197] UNWTO. 2016. Silk Road Action Plan 2016 / 2017.
[198] Al-Monitor Website. 2019. Egypt to boost spiritual tourism through the Holy Family trail.

with the various stakeholders, including public sector bodies, the tourism industry, local and international organizations, as well as universities.[199]

Local communities also need to be involved in MDTCs' development as well as provided with support through various initiatives to encourage their involvement. Supporting local tourism businesses and local communities in the development and provision of tourism products and services can be instrumental in creating jobs and increasing economic benefits for local communities in corridor countries. In the case of the Umayyad Route, in Jordan, efforts were made to raise awareness of the local communities of Umayyad heritage and the benefits from the TC. Support was also provided for community-based tourism initiatives and local handicrafts to increase economic benefits and ensure value-added for local communities.[200]

In the case of the Abraham Path, support was provided to local communities in the development of guesthouses using a "shared cost approach" to fund guesthouses renovations and furnishing. The Abraham Path Initiative, the NGO managing the corridor, split the cost with the guesthouses' owners while retaining ownership of the furnishings for five years, after which ownership is relinquished to the guesthouses' owners. They have also assisted rural women in starting micro-businesses selling food and various products to the people following the trail.[201]

In the case of the Holy Family TC, in Egypt, the government is planning hospitality and language training for local communities in Upper Egypt to enable them to provide tourism services for tourists visiting the Holy Family sites. The fact that the Holy Family sites are located in areas that are economically disadvantaged will help create better employment opportunities for local communities.[202]

Theme Formulation

An essential first step in planning and establishment of MDTCs is the formulation of a transnational/intercontinental theme which requires extensive research with the aid of experts from historical, cultural and practical perspectives as well as a thorough assessment of the tourism assets that can be included and their potential appeal to tourists. In the case of the Silk Road, the UNESCO and governments of corridor countries have undertaken extensive research to identify the tourism assets to be included from ancient cities and forts to mountain passes as well as religious and archeological sites.[203]

A study conducted by the International Council on Monuments and Sites (ICOMOS), supported by the UNESCO's World Heritage Centre, provided an analysis of sites along the Silk Roads in terms of uniqueness and distribution. The study made use of historical accounts and tentative lists of locations provided by corridor member countries as well as published maps and online secondary data. In the context of the study, major nodes or large cities along the Silk Roads were identified as well as route segments between those nodes.[204]

[199] Taqniyat At-Turath (CulTech) and the Local Support Group. 2015.Strategic Local Action Plan for Jordan Umayyad Project: A strategic ENPI-CBCMED Project.
[200] Umayyad Route 8th Bulletin available from the Umayyad Route Website.
[201] Teller, Matthew. 2018. Hike Palestine. Aramco World Website.
[202] Al-Monitor Website. 2019. Egypt to boost spiritual tourism through the Holy Family trail.
[203] UNWTO. 2016. Silk Road Action Plan 2016 / 2017.
[204] ICOMOS. 2014. The Silk Roads: an ICOMOS Thematic Study.

In the case of the Umayyad Route, research was undertaken to analyze the tourism infrastructure in the corridor member countries and the design of the theme and itineraries as well as the identification of best practices for cultural MDTCs. [205] The Jordanian partner for the Umayyad Route, the NGO Cultural Technologies for Heritage and Conservation, has also researched the historical value of the sites to be included in the Umayyad corridor and also assessed their condition in terms of whether restoration is needed.[206]

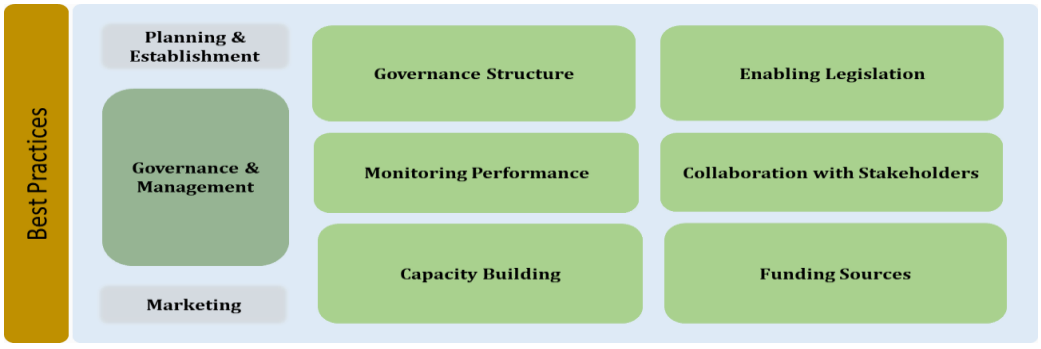
In the case of the Holy Family TC, in Egypt, the Ministry of Tourism, in cooperation with the Coptic Church, researched the Holy Family sites to decide on the sites to be included in the TC. The Coptic Church formed a committee of bishops to draft the map of the sites visited by the Holy Family during their journey in Egypt. Currently, the Ministry of Tourism is preparing to apply to UNESCO to consider designating some of the TC sites as World Heritage Sites.[207]

Examples from the OIC MDTCs show considerable and successful efforts at theme formulation and asset identification. In the Silk Road TC case, the support provided by UNWTO has also facilitated the identification of road segments between corridor nodes, which can be used to build itineraries.

2.3. Governance and Management of OIC Tourism Corridors

As illustrated in the previous chapter through the best practice examples, good governance starts with the development of an organizational structure with clearly defined roles for the various bodies involved in corridor management and promotion. Formulating legislation to facilitate travel to the various corridor member countries can also help in improving tourism flow to the corridor countries. To ensure effective management, monitoring performance is essential. Best practice examples from global MDTCs also show cooperation between multiple stakeholders and continued initiatives for capacity building of tourism stakeholders. Diversifying funding sources is also another area where there are concerted efforts by MDTC management to ensure their sustainability.

Figure 22: Tourism Corridor Governance and Management Best Practices



Governance Structure

Some OIC corridors have adopted the public-private partnership model, which encourages higher levels of collaboration between public and private entities, ensuring to a large extent the

[205] ENPI CBCMED Website.
[206] Taqniyat At-Turath (CulTech) and the Local Support Group. 2015.Strategic Local Action Plan for Jordan Umayyad Project: A strategic ENPI-CBCMED Project.
[207] Al-Monitor Website. 2019. Egypt to boost spiritual tourism through the Holy Family trail.

support of the private sector for corridor development and management policies and strategies.[208] As the figure below illustrates, there are various entities and involved in managing, promoting, and providing support for the corridor. As the initiator of the Silk Road, UNWTO leads the efforts, provides a platform for coordination and alliance building as well as fundraising for the corridor. Other UN agencies, such as UNESCO and UNDP, provide support for the various Silk Road initiatives. The Silk Road Task Force, which includes representatives from the National Tourism Organizations and tourism businesses of Silk Road countries, formulate strategies and prescribe actions while Silk Road member countries bodies collaborate on Silk Road activities as well as implement the local action plans and strategies.[209]

Figure 23: Silk Road Governance Structure

Source: UNWTO (2014)

The Umayyad Route, which is coordinated by the Spanish Foundation for the Legacy of Al-Andalus, was developed as a public-private partnership. The entities involved in its development in Europe included the Andalusia Council Chambers of Commerce and the European Association for the Professional and Cultural Development from Spain, the Algarve Tourism Board, and the Regional Direction of Culture of Algarve from Portugal, and the Medieval Castles and Boroughs Circuit of Association from Italy.[210]

In the OIC countries, the entities involved in the Umayyad Route are the Italian-Tunisian Chamber of Commerce and the Association Mediterranean Liaisons from Tunisia, the Safadi Foundation, the Urban Planning Institute, Municipality of Jbeil-Byblos, and Lebanese American University from Lebanon, the Cultural Technologies for Heritage and Conservation from Jordan, the International Development Co. AID-ME and the Federation of Egyptian Chambers of Commerce from Egypt, and the Arab League Educational, Cultural and Scientific Organization.[211]

[208] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[209] UNWTO. 2014. Silk Road Action Plan 2014/2015.
[210] Umayyad Route Website.
[211] Ibid.

MDTCs' management organizations are typically composed of representatives from corridor member countries, with local committees formed to fine-tune and implement strategies along the different nodes of the corridor.[212] In the case of the Umayyad Route, the corridor management consists of a Steering Committee, Advisory Committees, and Local Action Groups. The Advisory Committees and Local Action Groups are formed at the local level. In Jordan, both the Advisory Committee and the local action groups include various groups of stakeholders, from public to private and non-governmental bodies.[213]

In Jordan, the Advisory Committee of the Umayyad Route combines representatives from the public sector and the tourism industry as well as local and international organizations. It includes high-level representation from the Ministry of Tourism, Department of Antiquities, the Tourism Promotion Board, Jordan Museum, EU Delegation, the European Neighborhood Policy Instrument CBCMED Program, Petra Tours, Greater Amman Municipality, Plaza Tours, and the NGO Cultural Technologies for Heritage and Conservation.[214]

As the Jordanian partner for the Umayyad Route, the NGO Cultural Technologies for Heritage and Conservation formed a Local Support Group that included members from various stakeholder groups, including public sector bodies such as the Ministry of Planning and International Cooperation, Greater Amman Municipality, and the Department of Antiquities.[215]

The Local Support Group has also members from the private sector, including Jordan Travel Agency and Plaza Tours, as well as the Tourism Board, which is an independent public-private partnership. Representatives from universities also feature on the list of the Local Support Group members, including representatives from the Yarmouk University, the Hashemite University, and the German Jordanian University-School of Architecture and Built Environment. Both UNESCO and the European Neighborhood Policy Instrument CBCMED Program are represented in the Local Support Group.[216]

In the case of the Holy Family TC, In Egypt, the Tourism Development Authority is responsible for the coordination of efforts of the various government bodies that working together to manage and promote the corridor, including the Ministry of Antiquities, the Ministry of Tourism, and the Ministry of Local Development. In Jordan, the Ministry of Tourism and Antiquities and the Jordan Tourism Board (JTB) cooperate in the management and promotion of the MDTC sites. Although several agreements were signed in late 2016 between Egypt and Jordan for the development of the trail, there is currently no joint formal organization overseeing the MDTC.[217]

Examples from the OIC MDTCs illustrate some differences in the governance structure. On the one hand, both the Silk Road and the Umayyad Route have formal governance structures with well-defined roles for the various bodies facilitating management and coordination of activities for the TCs. On the other hand, the Holy Family TC, which is still in the process of formalizing the cooperation between two member countries, is reliant on state bodies for governance and

[212] Ibid
[213] Taqniyat At-Turath (CulTech) and the Local Support Group. 2015.Strategic Local Action Plan for Jordan Umayyad Project: A strategic ENPI-CBCMED Project.
[214] Ibid.
[215] Ibid.
[216] Ibid.
[217] Please refer to the Holy Family case study for details and references.

lacks formal platforms for collaboration with local stakeholders, which can enhance cooperation in the management and promotion of the corridor.

Formulating Enabling Legislation

Entry requirements are instrumental to the potential success of corridors. The OIC countries have very different entry requirements, with some countries being very restrictive, such as Saudi Arabia. The development of common tourist visas for the OIC MDTCs remains one of the most significant challenges faced for the development of MDTCs.[218] In 2016, a TripAdvisor Silk Road consumer survey with 10,678 respondents cited that 41% of the respondents reported that they are more likely to travel to the region if there was a unified visa for Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan. The percentage of respondents more likely to travel in the case of a unified region goes up to 51% for respondents from the Asia Pacific Region.[219] Currently, Kazakhstan and Uzbekistan are working on developing a unified Silk Road visa for Central Asian countries similar to the Schengen visa.[220]

In the case of the Silk Road, only 12% of the world's population do not need a visa to travel to Silk Road countries, while 73% need to apply for a visa before traveling to the Silk Road countries. Another 4% can apply for an e-Visa, and 11% can apply for a visa on arrival. As the table below shows, the percentage of the world's population needing a visa before travel decreased from 87% in 2008 to 3% in 2013. This improvement was mainly due to the increase in providing visa on arrival. It is worth noting, however, that the openness index score of Silk Road countries in 2013, which was at 21, was nine points lower than the global average. It can be argued that the fact that a small percentage of the Silk Road countries are members of well-established economic blocs hinders its tourism potential as generally commercial agreements can be a prelude for cooperation in visa facilitation and waivers.[221]

Table 18: Silk Road Visa Reciprocity (2008-2013)

		Openness	No Visa	Visa on Arrival	e-Visa	Visa Required
		% World Population Affected by Visa Policies				
2013	**World**	**30**	**18**	**15**	**3**	**64**
	Advanced Economies	26	24	1	3	72
	Emerging Economies	31	17	19	3	62
	Silk Road (SR)	**21***	**12**	**11**	**4**	**73**
	Advanced SR Economies	25	25	0	0	75
	Emerging SR Economies	21	9	14	4	73
2008	**World**	**20**	**17**	**6**	**-**	**77**
	Advanced Economies	24	24	0	-	76
	Emerging Economies	19	15	8	-	77
	Silk Road (SR)	**11**	**9**	**4**	**-**	**87**
	Advanced SR Economies	24	24	0	-	76
	Emerging SR Economies	10	7	5	-	88

Source: UNWTO (2014)

[218] Shackley, Myra. 2002. The Frankincense Route: A proposed cultural itinerary for the Middle East. Historic Environment, v.16 (2): 12-17.
[219] TripAdvisor. 2016. TripAdvisor Travel Trends for the Silk Road 2016.
[220] Please refer to the Silk Road case study for detailed information and references.
[221] UNWTO. 2014. Tourism Visa Openness Report for the Silk Road Countries.

The East Africa Northern Corridor provides a persuasive argument for unified visas in the OIC countries. The three East African countries that are members of the Northern Corridor, Rwanda, Kenya, and Uganda, have instituted a common tourist visa, the East African Tourist Visa, which allows tourists three-month multiple entries to Kenya, Rwanda, and Uganda. Visa fees are also waived for foreign residents of the three countries, while country citizens can travel using their national ID.[222]

Some of the OIC countries offer visa waivers for neighboring countries or member countries of the same economic blocks, which facilitate intraregional tourism, as in the case of the Gulf Cooperation Council countries.[223] In the case of the Silk Road, many of the OIC countries are providing visa waivers or simplified visa procedures to an increasing number of countries. Kazakhstan offers visa waivers for 63 countries, while the Kyrgyz Republic provides visa waivers currently to 45 countries with plans to extend it to an additional 18 countries.[224]

Monitoring Performance

As outlined in the previous chapter, the approaches that can be used to monitor the effective management of MDTCs include the use of visitor metrics, the measurement of organizational effectiveness of the corridor management entity as well as the effectiveness of its marketing communications activities, the measurement of changes in consumer-based brand equity as a result of the corridor's management entity's activities, gauging stakeholder evaluation of DMO performance, and evaluating the sustainability of tourism along the corridor.

The data available suggests that few of the OIC MDTCs use a comprehensive approach to monitoring performance. With the support of UNWTO, TripAdvisor has monitored travel trends and researched branding metrics. In the case of the Abraham Path, in addition to visitor metrics, namely the annual total number of walkers on the path, indicators for monitoring organizational effectiveness are used including the number of trained and certified local wilderness guides and the number of tour operators operating tours on the Abraham Path, in addition to marketing communications metrics including the number of journalists and local tour operators who participated in familiarization trips and the number of monthly visits to the Abraham Path online guidebook.[225]

Furthermore, the Abraham Path also uses many indicators for economic impact on the community including the annual direct and indirect income for involved communities along the Abraham Path, new jobs created in communities along the Abraham Path and the percentage of female and youth in those new jobs, the number of inhabitants that are trained on the project, and the number of local councils or associations with partnership agreements with the Masar Ibrahim. It is worth noting that these indicators were developed in the context of the World Bank project.[226]

Collaboration with Tourism Corridor Stakeholders

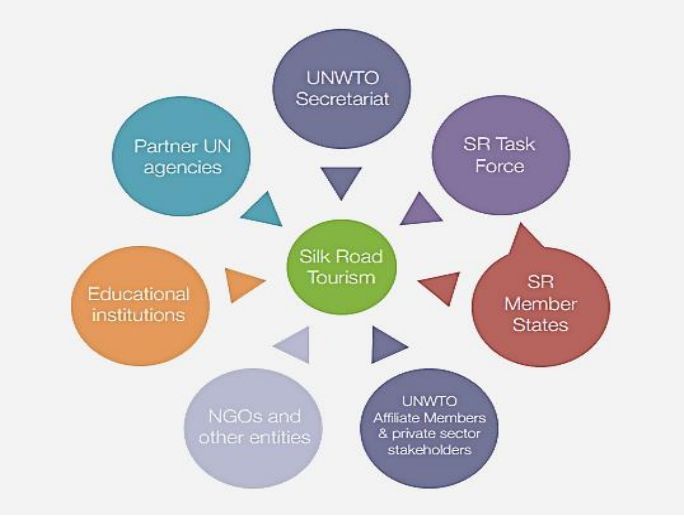
As indicated in the previous chapter, the success of MDTC requires collaboration of all stakeholders, including public, private, and non-governmental entities, to ensure effective

[222] e-Turbo News. 2015. Northern Corridor Integration Projects countries seek uniform tourism marketing approach.
[223] International Seminar on Multi Destination Opportunities for Regional Integration
[224] CAREC Institute. 2018. Regional Workshop Promoting Regional Tourism Cooperation under CAREC 2030.
[225] The World Bank. 2017. Implementation Status & Results Report Abraham Path: Economic Development across Fragile Communities.
[226] Ibid.

management and the sustainability of natural and cultural heritage assets along the corridor.[227] In the case of the Silk Road, as the figure below illustrates the stakeholders involved in the Silk Road include international development organizations, non-governmental organizations, public and private sector entities, as well as educational institutions.[228]

UNWTO plays a vital role in coordinating between the various stakeholders, with the support of various other UN agencies. The Silk Road Task Force formulates strategies and sets action plans while Silk Road member countries' bodies implement local action plans and strategies.[229] UN Affiliate members cooperate with UNWTO in various areas, as illustrated by the contribution of TripAdvisor to research on the Silk Road as well as airlines' contribution to UNWTO Silk Road events. Educational institutions have support research for the Silk Road, as illustrated by the cooperation of Monash University on the Uzbekistan Tourism Insight report.

Figure 24: Silk Road Stakeholders



Source: UNWTO (2013)

In the case of the Holy Family TC, in Egypt, several government bodies, such as the Ministry of Antiquities, the Ministry of Tourism, and the Tourism Development Authority, cooperate with non-governmental organizations such as the "Revival of the Egyptian Heritage Society" as well as the Coptic Church.[230] In the case of the Northern Corridor Integration Projects initiative, consisting of Rwanda, Kenya, and Uganda, The Stakeholders, involved in promoting the three East African countries as one destination, including the tourism industry as well as government bodies from the three countries, including Rwanda's Department of Tourism and Conservation, Kenya's Tourism Board, and Uganda's Tourism Board.[231]

The stakeholders cooperating in the Umayyad Route include public and private entities as well as non-governmental organizations from the seven member countries of the corridor. As an example, from Tunisia, the stakeholders involved include the Tunisian Chamber of Commerce

[227] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[228] UNWTO. 2014. Silk Road Action Plan 2014/2015.
[229] Ibid.
[230] Please refer to the Holy Family case study for detailed information and references.
[231] e-Turbo News. 2015. Northern Corridor Integration Projects countries seek uniform tourism marketing approach.

and Industry, the association "Mediterranean Liaisons" and the Arab League Educational, Cultural and Scientific Organization. From Lebanon, the stakeholders involved include the Safadi Foundation, the Urban Planning Institute of the Lebanese American University, and the Municipality of Jbeil Byblos.[232]

In Jordan, the stakeholders cooperating in the Umayyad Route include public and private entities as well as non-governmental organizations from the seven member countries of the corridor. As an example, from Tunisia, the stakeholders involved include the Tunisian Chamber of Commerce and Industry, the association "Mediterranean Liaisons" and the Arab League Educational, Cultural and Scientific Organization. From Lebanon, the stakeholders involved include the Safadi Foundation, the Urban Planning Institute of the Lebanese American University, and the Municipality of Jbeil Byblos.[233]

As the examples show, in the case of both the Silk Road and the Umayyad Route TCs, the existence of formal platforms for collaboration facilitates the involvement of various stakeholders in the activities of the TCs. The Holy Family TC, on the other hand, has no formal platforms for collaboration. However, efforts were still made to involve relevant stakeholders. It is worth noting that the existence of formal platforms can ensure better representation of various stakeholders and efficient communication, improving collaboration.

Capacity Building

Effective management of MDTCs necessitates the presence of qualified personnel, making capacity building an essential component for management. In the case of the Silk Road, the Quality Guide Training Initiative, launched by UNWTO in 2015, was organized for tour guides from five Silk Road countries, namely China, Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan. The training aimed to create an international pool of Silk Road heritage guides and Silk Road heritage guide trainers. A Silk Road Guides Handbook has also been developed in the context of this initiative. Another UNWTO capacity building initiative targeted tourism officials from corridor member countries providing them with training on sustainable and transnational tourism development.[234] UNWTO also organized a seminar on the importance of using digital marketing tools and enhancing the presence of the Silk Road brand on social media.

In the case of the Umayyad Route, Jordan, Lebanon, and Tunisia have provided training and capacity building to various stakeholders. In Jordan, training was provided to the tourism industry in the areas of management and marketing in addition to the provision of training to increase awareness of the Umayyad Route and cultural itineraries among professionals from the tourism industry as well as students of tourism and archeology faculties of King Hussien, Yarmouk, and Jordan Universities.[235]

In Lebanon, training is provided to tour guides to provide them with detailed information on the Umayyad Route theme and itinerary as well as storytelling in terms of the significance of the attractions to the theme. Tour guides are required to attend at least two training sessions and participate in one filed trip to be certified as Umayyad Route guides. In Tunisia, training organized by the Umayyad Route partners, Liaisons Méditerranéennes, the Italo-Tunisian

[232] Umayyad Route Website.
[233] Ibid.
[234] Please refer to the Silk Road case study for detailed information and references.
[235] Umayyad Route 9th Newsletter available from the Umayyad Route website.

Chamber of Commerce and the international organization ALECSO, focused on best practices and linking cultural MDTCs to existing tourism assets and activities through the presentation of the experience of "The Legacy of al Andalus" foundation in creating and managing cultural routes.[236]

In the case of the Abraham Path, training and capacity building were provided to the tourism industry as well as local NGO partners with the support of funding from the World Bank. Wilderness guides were provided training on trekking as well as the cultural and historical significance of the path. NGOs received training on financial management and funding strategies as well as management systems and procurement.[237]

Sustainability

As mentioned in the previous chapter, MDTCs are perceived as a tool for sustainable tourism in terms of ensuring the protection of both tangible and intangible heritage. The security and preservation of the natural and cultural heritage assets of corridor countries is a crucial part of the management of MDTCs. In the case of the Silk Road, UNWTO has led the efforts for preservation and conservation of cultural heritage in Silk Road countries. In 1999, the Khiva Declaration, on the occasion of the joint WTO/UNESCO Seminar on Tourism and Culture, called upon the countries of Central Asia to preserve their cultural and natural heritage and to promote sustainable tourism.[238]

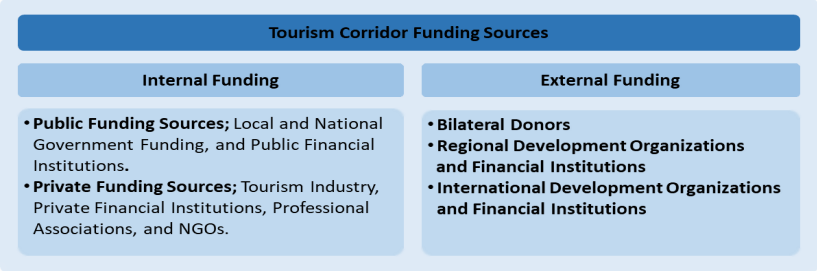
In the case of the Holy Family, in Jordan, the five main sites are protected through heritage legislation with a construction moratorium issued preventing any new constructions except those exclusively dedicated to the protection of archaeological remains. Laws are in place to protect the property from potential future threats, focused mainly on development and tourism projects that might jeopardize the nature and character of the site and its immediate surroundings.[239] The examples from the Silk Road and the Holy Family TCs show that corridor countries are aware of the importance of preservation of tourism assets along the corridor and are actively working to preserve them.

Diversifying Funding

Funding is considered one of the major challenges for the development and promotion of MDTCs. Funding for MDTCs, as shown in the following figure and as discussed in the previous chapter, can be classified as either internal or external, with internal funding sources being either public or private sources within the TC countries while external funding being from entities not members of the corridor. A number of the OIC MDTCs have benefited from external funding, whether from bilateral donors, regional or international organizations. The Silk Road has received funding from several UN agencies, including UNESCO, UNWTO, UNDP, and UNCTAD.[240] The Umayyad Route received funding from the European Commission.[241]

[236] Umayyad Route 8th Bulletin available from the Umayyad Route Website.
[237] The World Bank. 2013. Project Information Document: Concept Stage.
[238] Please refer to the Silk Road case study for further details.
[239] Please refer to the Holy Family case study for further details.
[240] UNWTO (2015), Affiliate Members Global Reports, Volume twelve – Cultural Routes and Itineraries, UNWTO, Madrid.
[241] CulTech. 2015. Strategic Local Action Plan for Jordan UMAYYAD Project: A strategic ENPI-CBCMED Project.

Figure 25: Tourism Corridor Funding Sources



Some of the OIC MDTCs seem to be reliant on external funding from to a large extent, while others such as the Holy Family depend solely on internal funding, more specifically, government funding.[242] In the case of the Abraham Path, the development of the corridor in Palestine has been utterly reliant on external funding. It has received funding of up to $2.3 million from the World Bank over a period of 4 years. It has also received an additional $1.7 million in funding from the French agency for international development as well as from various French NGOs.[243]

In the case of the Umayyad Route, funding comes from external sources is also quite substantial. The external funding provided by the European Neighborhood and Partnership Instrument (ENPI) amounted to 90% of the budget (3.7 million of 4.2 million) from 2012 to 2015, with public funding supplying the remaining 10%.[244] In Jordan, additional external funding options are being explored, including grants from USAID, UNDP, and the World Monument Fund as well as loans from the World Bank and the European Investment bank.[245]

Funding for the Silk Road TC combines external and internal sources. The UNWTO Silk Road Programme Office has faced budgetary constraints by seeking funding through EU instruments such as the VeroTour as well as private sector contributions such as in the case of the Maritime Silk Road, which was sponsored a Chinese company. Sponsorships by hosting countries and airline carriers is sought for hosting events, such as the Annual Silk Road Task Force meetings. Countries along the Silk Road TC use public funding to cover the activities launched to promote the corridor sites in their countries, as in the case of the State Committee of the Republic of Uzbekistan for Tourism Development (GosCom Tourism) in Uzbekistan.[246]

Examples from the OIC MDTCs show the use of a few sources of funding with heavy reliance, in some instances, on external funding. While the Silk Road seems to have a more diversified funding strategy, its funding levels are still reportedly low. While funding provided by external sources can provide support to MDTCs, diversifying funding is essential to help ensure the sustainability of the existing OIC MDTCs. The OIC MDTCs can work on exploring funding streams such as encouraging contributions from the private sector along corridor nodes, as in the case of the Silk Road TC.

[242] Please refer to the Holy Family case study for further details.
[243] Teller, Matthew. 2018. Hike Palestine. Aramco World Website.
[244] ENPI CBCMED Website.
[245] CulTech. 2015. Strategic Local Action Plan for Jordan UMAYYAD Project: A strategic ENPI-CBCMED Project.
[246] Please refer to the Silk Road case study for further details.

2.4. OIC Tourism Corridor Marketing

With the rise of experiential tourism and the shifting focus from assets and attractions to experiences, providing tourists with added value requires combining experiences and attractions through offering ways to interact with local communities and to experience and get an idea of the local lifestyle. In the case of the Umayyad Route, plans are underway in Jordan to involve the local communities of Druze and Bedouins to enrich tourists' experience through taking part in desert "badiya" experiences from folklore, and traditional cuisine to local sports such as camel and horse racing, which enrich the tourist's experience. [247]

Branding

Branding or the creation of a unified "corporate identity" is essential for increasing awareness of MDTCs. As discussed in the global chapter, MDTC themes play an important role in positioning and differentiating tourism corridors. The work done by UNWTO on developing the Silk Road theme has created a strong base for the Silk Road TC as a distinctive brand. Research indicates high levels of awareness of the Silk Road. According to the 2016 TripAdvisor consumer survey, which had over 15 thousand respondents, the top ten countries people associated with the Silk Road included three OIC countries, namely Turkey, Indonesia, and Egypt. In the same study, 61% of respondents indicated their interest in visiting old Silk Road cities while 58% cited interest in visiting UNESCO cultural heritage sites on the Silk Road.[248]

Figure 26: Awareness of Silk Road Countries

Source: TripAdvisor (2017)

UNWTO has also sponsored several Silk Road documentaries to increase awareness of the history of the road and put forward the narrative associated with the Silk Road on the global stage.[249] Logos are also an important component of branding. In the case of the Silk Road, UNWTO has created a logo of the program shown in the figure below. However, this logo was not initially designed for promotional purposes and is not uniformly used by the tourism industry in corridor countries. While some entities use the UNWTO logo, others have created

[247] Taqniyat At-Turath (CulTech) and the Local Support Group. 2015.Strategic Local Action Plan for Jordan Umayyad Project: A strategic ENPI-CBCMED Project.
[248] TripAdvisor. 2016. TripAdvisor Travel Trends for the Silk Road 2016.
[249] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.

their own logos to promote the Silk Road in their destinations. In Uzbekistan, the company, Silk Road Destinations, which organizes Silk Road tours for Uzbekistan, Turkmenistan, Kazakhstan, and Kyrgyzstan, has created its own logo.[250]

Figure 27: The Silk Road Programme Logo

The Umayyad Route, which is supported by the Council of Europe in the context of Legacy of al-Andalus Route, presents a good example of branding. The route has its distinct logo, which, as mandated by the "visibility charter" of the Council of Europe, is used in all communications. The route has also created its own narrative and produced a documentary for the TC to facilitate storytelling. In the case of the Umayyad Route, the Jordanian partner for the Umayyad Route, the NGO Cultural Technologies for Heritage and Conservation, analyzed the Umayyad cultural heritage to tie it to the sites and highlight their significance.[251] In Lebanon, the training provided to tour guides included storytelling elements from the Umayyad heritage to the significance of the attractions to the theme.[252]

Figure 28: The Umayyad Route Logo

In the case of the Holy Family TC, while the Pope visiting to the Holy Family TC sites in Egypt helped highlight the significance of the corridor, there were no concerted efforts to use the visit to reinforce the narrative of the corridor beyond the visit. As both Egypt and Jordan seem to be on the road to formalizing the corridor, branding is of utmost importance at this stage.[253]

Promotion

The OIC MDTCs have used a variety of tools for promotion, including advertising, holding events, and creating their own websites. In the case of the Silk Road, UNWTO has led the promotion effort with its support for Silk Road documentaries and sponsoring participation of corridor member countries in travel fairs. Several Silk Road documentaries were produced,

[250] Please Refer to the Silk Road Case Study for details and references.
[251] Ibid.
[252] Umayyad Route 8th Bulletin available from the Umayyad Route Website.
[253] Please refer to the Holy Corridor case study for more details.

including the 2017 series "Silk Road Journey" on Globe Trekker, the 2016 "David Baddiel on the Silk Road" aired on Discovery Channel Networks International as well as the three episodes of "The Silk Road" documentary series aired on BBC4. UNWTO sponsored Silk Road presence in key international travel fairs in Berlin, London, Madrid, and Moscow.[254]

In terms of digital tools, The Silk Road does not have a dedicated consumer-oriented website. However, there is a website for UNWTO's Silk Road Initiative, which mainly covers activities and research commissioned by UNWTO. In 2011, UNWTO organized a competition for bloggers from around the world "the Silk Road Challenge" to create a travel blog on the Silk Road. It helped set-up meetings between the competing bloggers and the Silk Road destination representatives at the World Travel Market in London to allow the bloggers to collect information.[255] Silk Road TC members from OIC countries have also invited travel bloggers to promote their destinations, as in the case of Uzbekistan's hosting the World Influencers Congress.[256]

In the case of the Umayyad Route, the corridor's website includes documentary videos and guidebooks for corridor member countries that provide information on the Umayyad heritage in these countries, including the significance of the sites.[257] In Jordan, familiarization trips to Jordanian attractions on the Umayyad Route were organized for Spanish public sector employees as well as Spanish and Jordanian tour operators. Jordan's Tourism Promotion Board (JTB), which has currently 12 international offices in key markets such as New York and Dubai, is also anticipated to play an active role in promoting and marketing the Umayyad corridor.[258]

In the case of the Holy Family TC, as Egypt and Jordan are still in the process of formalizing cooperation on the corridor, there are no dedicated sites or joint marketing efforts. Both countries currently use traditional tools to promote the Holy Family sites within their destinations. In Egypt, with the help of the Coptic Church, the Tourism Ministry has organized familiarization trips for tour guides to Holy Family sites, which was followed by a visit from an Italian religious delegation hosted by the Coptic Church in Egypt in 2018.[259]

The OIC MDTCs have also benefited from collaboration with various stakeholders in marketing efforts. Within the context of the East Africa Northern Corridor, local tourism businesses and government bodies, including Rwanda's Department of Tourism and Conservation, Kenya's Tourism Board, and Uganda's Tourism Board, cooperate in formulating joint tourism marketing strategies and campaigns for the TC.[260]

2.5. Successes and Challenges of OIC Tourism Corridors

The OIC MDTCs have been successful in a number of areas, including the formulation of TC themes and identification of assets, creating platforms for cooperation between public and private stakeholders, and supporting capacity building for tourism stakeholders. The examples brought forward in this chapter shows that the existing OIC MDTCs have succeeded to a large

[254] UNWTO (UNWTO) and European Travel Commission. 2017. Handbook on Marketing Transnational Tourism Themes and Routes.
[255] UNWTO website.
[256] Please refer to the Silk Road case study for further details.
[257] Umayyad Route Website.
[258] Taqniyat At-Turath (CulTech) and the Local Support Group. 2015.Strategic Local Action Plan for Jordan Umayyad Project: A strategic ENPI-CBCMED Project.
[259] Egypt Independent Website. 2018. Italian tourism in Egypt to witness boost after Holy Family Journey: Ambassador.
[260] e-Turbo News. 2015. Northern Corridor Integration Projects countries seek uniform tourism marketing approach.

extent in formulating the themes and identifying the tourism resources to be included in the corridors, whether in the case of the Silk Road, The Holy Family, or the Umayyad Route. It should also be noted that in two of these cases, namely the Silk Road and the Umayyad Route, assistance from international and regional organizations was instrumental in formulating the themes and identifying the tourism resources.

Another area where some of the existing OIC MDTCs seem to be performing well is creating public-private partnerships that allow for cooperation between the various stakeholders. In the case with the Silk Road, this was facilitated by the creation of the UNWTO Task Force and the establishment of its office in Uzbekistan. In the case of the Umayyad Route, the layered organizational structure with local support groups composed of public and private sector entities allow for interaction and collaboration among the various stakeholders.

Most of the existing OIC MDTCs have launched initiatives aimed at capacity building for tourism stakeholders along the corridor. In the case of the Silk Road, a handbook was developed, and training was provided for tour guides, in addition to training for tourism officials on sustainable and transnational tourism development. For the Umayyad Route, training was provided to tourism officials in areas of marketing and management, while tour guides were provided training and certification as Umayyad Route guides.

There are a number of areas that need to be improved for the existing OIC MDTCs to reach their potential, including improving infrastructure, travel facilitation, funding, and marketing, as well as conducting research and evaluation and monitoring activities. The improvement of infrastructure for the OIC MDTCs represents a major challenge, especially in the face of the financial constraints some OIC countries are facing. However, it seems that there are some efforts to improve connectivity in some of the OIC regions in Africa and Asia, which can be promising for the existing as well as the potential MDTCs in these regions. Support from regional organizations and financial institutions for infrastructure initiatives can be instrumental in improving infrastructure.

Funding is also one of the significant challenges of the OIC MDTCs. While some of the OIC MDTCs seem to be dependent on financial and/or technical support from international and regional organizations, other MDTCs are mainly financed through governmental allocations of corridor countries. Even with support from UNWTO, funding levels seem to be low for the Silk Road. Diversifying funding needs to be a top priority to ensure the sustainability of the existing OIC MDTCs. Encouraging private sector investments and contributions can play an important role in diversifying OIC MDTCs funding.

While there are some initiatives for cooperation in travel facilitation in the case of some of the existing OIC MDTCs, there is still a long way to go to ease restrictions within existing travel corridors. While there were many talks regarding unified visas for a number of tourism corridors, only the three countries of the East Africa Northern Corridor have one currently. Having visa-waivers for neighboring countries and top markets, as well as introducing e-visas and visas on arrival can enhance tourism along corridor countries.

A consistent strategy for marketing the OIC MDTCs needs to be developed. The examples show the efforts being made for branding and promoting the OIC MDTCs are limited, with the exception of the Silk Road, which is supported by UNWTO in its promotional efforts. Yet it seems that none of the OIC MDTCs, even the Silk Road, has incorporated the use of digital media platforms, including social media in an integrated marketing communications strategy to promote the corridors.

Research and monitoring performance need to be improved for the OIC MDTCs. As the examples suggest researching demand is limited. While visitor metrics are readily available for corridor countries, assessment of impact, whether economic, social, or environmental, as well as organizational and marketing communications, is not a common practice among the OIC MDTCs. The Abraham Path TC provides a good example of incorporating economic impact metrics. However, there is a range of other metrics that still need to be covered for proper governance to be ensured.

3. Case Studies

3.1. Global Tourism Corridors

3.1.1. The Greater Mekong Subregion Tourism Corridor

A. Background

The Greater Mekong Subregion (GMS) comprises six countries that are linked by the Mekong River: Cambodia, Laos, Myanmar, Thailand, Vietnam, and parts of the People's Republic of China (PRC), (Yunnan Province and Guangxi Zhuang Autonomous Region). Since the early 1990s, the GMS countries have seen exceptional economic growth, "facilitating region's transformation into regional economic powerhouse[261]." To counteract increasing disparities among these six countries and between urban centers and rural areas, the Asian Development Bank (ADB) has developed an economic corridor model focusing on transboundary roads between major commercial centers, aligning these roads through remote areas. In total nine corridors have been developed by the ADB in the GMS[262].

With its over 350 million inhabitants, the vast array of landscapes, a multitude of ethnic groups, and differing histories, the GMS is a diverse and dynamic region that includes a variety of outstanding tourism attractions. In recognition of the substantial contribution that tourism can make to poverty reduction, sustainable development, and inclusive economic growth, sub-regional tourism cooperation has been included as a flagship program, the so-called Greater Mekong Subregion (GMS) tourism program, in the GMS Economic Cooperation Program[263] by 1993. The focus during the first decade was sub-regional cooperation initiatives in the tourism sector based on marketing the GMS as a single destination, developing tourism-related infrastructure, improving the quality of human resources, promoting the dialogue between private and public sectors, and facilitating the movement of tourists in the subregion[264].

The GMS has abundant tourism assets, including the iconic Mekong River, many archaeological sites, lush tropical monsoon forests, rare wildlife, and pristine sea beaches. Diverse cultural heritage, such as religious and vernacular architecture, music, literature, cuisine, and diverse ethnic knowledge, enrich this subregion, and add to the appeal of its striking landscapes and vibrant urban centers. There are 22 properties inscribed on the United Nations Educational, Scientific, and Cultural Organization's (UNESCO) World Heritage List, and 692 internationally categorized natural protected areas covering 547,645 square kilometers. The expansion of the gaming industry is also a key driver of intraregional tourism[265]. Furthermore, the GMS is

[261] Asian Development Bank, *Economic Corridor Development for Inclusive Asian Regional Integration. Modeling Approach to Economic Corridors* (Mandaluyong City: Asian Development Bank, 2014. Retrieved from https://www.adb.org/sites/default/files/publication/31150/economic-corridor-development.pdf).
[262] Ibid.
[263] World Tourism Organization, *Mekong River-Based Tourism Product Development* (Madrid: UNWTO, 2016. Retrieved from https://www.e-unwto.org/doi/pdf/10.18111/9789284418015).
[264] Asian Development Bank, *Strategy and Action Plan for the Greater Mekong Subregion East-West Economic Corridor* (Mandaluyong City: Asian Development Bank, 2010. Retrieved from https://www.adb.org/sites/default/files/publication/27496/gms-action-plan-east-west.pdf).
[265] Mekong Tourism Coordinating Office, *Experience Mekong: Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020* (Bangkok: Mekong Tourism Coordinating Office, 2015. Retrieved from http://www.gms-

especially known for the Mekong River,[266] but there are many other major rivers that can be developed and promoted as cruise tourism products such as the Irrawaddy, Chao Phraya, and Red Rivers.[267] Based on these assets there are a diverse variety of leisure and soft adventure activities, niche market experiences, and local handcrafts in these six GMS countries depending on the destination's environment, history, culture, and local's livelihoods.

The six countries have the following tourism characteristics:

- Cambodia: Millions of tourists visit Cambodia every year to experience the country's rich cultural and natural heritage. Angkor Wat and Phnom Penh continue to be the main tourist destinations, while the coastal areas and unique Tonle Sap Lake are growing in popularity. In 2018, international tourist arrivals reached seven million for the first time, twice as many as in 2010.
- China (PRC), Yunnan Province and Guangxi Zhuang Autonomous Region: With towering glacial mountains, unique limestone karst formations, and pristine forests abundant in wildlife, Guangxi, and Yunnan attract especially huge numbers of domestic tourists every year. Visitors come to enjoy the local culture, especially in Yunnan, which is the PRC's most ethnically diverse province. The PRC is looking to attract more international visitors by improving destination marketing and tourism services.[268]
- Laos: Laos' tourist attractions include World Heritage sites such as the historical town of Luang Prabang and the ancient Vat Phou Temple complex (in Champasak Province). The country's many ecotourism opportunities also entice visitors from near and far. Of the GMS countries, Laos receives the highest proportion of international visitors relative to population size. National tourism priorities include local job creation, infrastructure improvement, and environmental sustainability.[269]
- Myanmar: Since the government launched its economic and social reforms in 2011, tourism has taken off in Myanmar. Among the country's many attractions are the spectacular pagodas of Yangon, Bagan (recently appointed as World Heritage Site), and Mandalay; the numerous unspoiled beaches and islands in the south; and the stunning landscapes around Inle Lake.
- Thailand: Thailand has long been a major tourist destination, and these days it is one of the most visited countries in the world. With its shopping, cuisine, and vibrant urban setting, Bangkok is hugely popular. Many visitors also enjoy other destinations, including the ancient capital Ayutthaya, Khao Yai, National Park, the northern city of Chiang Mai, and the pristine beaches of islands such as Phuket and Samui.[270]
- Vietnam: With its rich culture and abundant historical and natural assets, Vietnam now draws more than 10 million international visitors per year. Among its leading attractions are the stunning limestone pillars of Ha Long Bay, the beach resorts of Phu

eoc.org/uploads/resources/801/attachment/Experience-Mekong-Tourism-Marketing-Strategy-Action-Plan-2015-2020.pdf).

[266] "The Mekong.river is a transboundary-river in Southeast Asia that runs through six countries; measuring 4.350 km in length, it is the world's 12th longest river" World Tourism Organization, *Mekong River-Based Tourism Product Development*.

[267] Ibid.

[268] Asian Development Bank, *Greater Mekong Subregion. Twenty-Five Years of Partnership* (Mandaluyong City: Asian Development Bank, 2018. Retrieved from https://www.adb.org/sites/default/files/publication/470911/gms-25-years-partnership.pdf).

[269] Ibid.

[270] Ibid.

Quoc Island, and the Imperial City in Hue. The two main cities—Ho Chi Minh and Ha Noi— are also popular destinations.[271]

The tourism characteristics of these countries allow them to jointly provide a large variety of experiences, including man-made and natural attractions, cultural experiences, as well as dining and wellness experiences, which are unique to specific regions in the GMS. This provides visitors with the opportunity to travel to multiple countries in the region and have complementing experiences.

Overall, tourism in GMS is flourishing. The subregion's outstanding cultural and natural assets attract more than 65 million international visitors per year.

Table 19: Visitor arrival in 2017 in Mekong Tourism countries

Country	International tourist arrivals
Thailand	35,381,210
Vietnam	12,922,151
Cambodia	5,602,157
Yunnan/China	5,080,000
Laos	3,868,838
Myanmar	3,443,133

Source: ASEAN Travel (2019)

Across the GMS, tourism employs about 10 million people and contributes substantially to social and economic progress. According to the ADB, the steady economic growth enjoyed by developing Asia over the past two decades is expected to continue, especially as an enabler of short and medium-haul outbound tourism. Increasing wage employment with paid holidays is providing further impetus for both domestic and outbound tourism in that region.[272]

In order to support GMS tourism development, the GMS tourism sector strategy was completed in 2005 [273] .and updated in 2016 [274] Although there has been some progress in the implementation of some specific objectives, such as the implementation of capacity building initiatives, such as the Mekong Moments initiatives, overall progress has been slower than expected,[275] mainly based on its ambitious program of 29 priority projects, implemented by Mekong Tourism Coordination Office, with very limited resources (2-3 persons only). The GMS Strategic Framework 2012–2022[276] provides the overarching GMS vision of an integrated, prosperous, and equitable subregion. The strategic direction for sub-regional tourism cooperation is to develop and promote the Mekong as a single tourism destination. In this

[271] Ibid.
[272] Mekong Tourism Coordinating Office, *Experience Mekong: Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020*.
[273] Asian Development Bank, *Greater Mekong Subregion Tourism Sector Strategy 2005–2015* (Mandaluyong City: Asian Development Bank, 2005).
[274] Mekong Tourism Coordinating Office, *Greater Mekong Subregion Tourism Sector Strategy 2016-2025* (Bangkok: Mekong Tourism Coordinating Office, 2016. Retrieved from https://www.mekongtourism.org/gms-tourism-sector-strategy-2016-2025/).
[275] Asian Development Bank, *Strategy and Action Plan for the Greater Mekong Subregion East-West Economic Corridor*.
[276] *The Greater Mekong Subregion Economic Cooperation Program Strategic Framework 2012–2022* (Mandaluyong City: Asian Development Bank, 2011. Retrieved from https://www.greatermekong.org/sites/default/files/gms-ec-framework-2012-2022.pdf).

context, the vision for joint tourism marketing in the GMS is: "*The tourism industry in the Greater Mekong Subregion is integrated, prosperous, and equitable with effective partnerships and knowledge sharing.*"

Figure 29: Map of Greater Mekong Subregion

Source: DinarStandard

To work toward the overall goal and objective for the development and management of the tourism sector, seven core strategic programs were identified including: (i) marketing; (ii) human resource development; (iii) heritage and social impact management; (iv) pro-poor tourism development; (v) private sector participation; (vi) the facilitation of tourism to and within the subregion; and (vii) the development of tourism-related infrastructure[277]. The expected outcome of GMS cooperation is "more competitive, balanced, and sustainable destination development."[278]

According to the 'Tourism Sector Strategy 2016-2025', more than 20 years of GMS cooperation has laid a sturdy foundation for the future. GMS countries are committed to working together to build a prosperous and sustainable tourism industry. Strengths have been identified as the

[277] "About," Mekong Tourism, accessed August 14, 2019, https://www.mekongtourism.org/about/.
[278] *The Greater Mekong Subregion Economic Cooperation Program Strategic Framework 2012–2022*.

custom of welcoming guests, outstanding tourism assets, short travel times to and from major source markets, Asia's affinity for travel, and functional gateway connectivity[279].

Key issues to address include human resource and policy constraints that affect service quality and the business-enabling environment; infrastructure shortages, mainly in secondary destinations and institutional constraints that influence destination management.[280]

Another weak aspect identified is the actual implementation of joint marketing activities: The national tourism strategies of each GMS country emphasize joint marketing between countries because it can be a cost-effective way to raise market awareness and increase market penetration. However, while all GMS National Tourism Organizations (NTOs) appreciate the potential benefits of joint marketing, it is important to recognize that the subregion comprises a diverse group of countries with distinct cultures, histories, and unique selling points. This makes it challenging to develop a common Mekong brand identity that resonates with target markets, in particular, markets from within the GMS or the Association of Southeast Asian Nations (ASEAN).[281]

B. Corridor Development

Establishment of the tourism corridor including the roles of different entities

The GMS tourism cooperation program dates back to 1993 when the GMS Tourism Working Group (TWC) was established with senior representatives of the NTOs of each GMS member country.

The following institutions were and are currently responsible for developing of GMS tourism corridor:

- GMS national tourism organizations (NTOs) act as the lead public sector entities responsible for tourism in each country[282].
- The Asian Development Bank was chosen to serve as the program's secretariat for the GMS Economic Cooperation Program in 1992[283]. The GMS TWC was established with senior representatives of the NTOs of each GMS member country.[284]
- The Mekong Tourism Coordinating Office (MTCO) is the focal sub-regional entity tasked with coordinating the implementation of the Experience Mekong Marketing Strategy and Action Plan, which includes a detailed situational analysis and an action plan with key activities, forecasts, implementation arrangements, monitoring and reporting, and financing.[285]
- Development partners, such as ADB, GIZ, and Swisscontact have provided technical and financial assistance to support multi-country product development, capacity building, and knowledge sharing on good practices[286]. Especially the Asian Development Bank

[279] Ibid.
[280] Ibid.
[281] Mekong Tourism Coordinating Office, *Experience Mekong: Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020*.
[282] World Tourism Organization, *Mekong River-Based Tourism Product Development*.
[283] Asian Development Bank, *Greater Mekong Subregion. Twenty-Five Years of Partnership*.
[284] *Strategy and Action Plan for the Greater Mekong Subregion East-West Economic Corridor*.
[285] "Experience Mekong Tourism Marketing Strategy 2015-2020," Mekong Tourism, last modified 2015, https://www.mekongtourism.org/experience-mekong-tourism-marketing-strategy-2015-2020/.
[286] Ibid.

(ADB), in its role as the leading development partner in the GMS, has supported tourism development over the past decade through grant and loan projects including the Mekong Tourism Development Project, Sustainable Tourism Development Project and the Tourism Infrastructure for Inclusive Growth Project. These projects have provided tens of millions of dollars in investment in tourism product development, infrastructure, capacity development, and marketing.[287]

Infrastructure

There are notable improvements in air and land access across the GMS in recent years[288]. Transnational highways link most major GMS urban centers, and there are five international bridges spanning the Mekong River at strategic locations in the North-South, East-West, and central GMS economic corridors. Intra-GMS air traffic is proliferating in line with route expansion of low-cost and premium airlines. Overland travel is being made more accessible by the GMS cross-border transport agreement, which is facilitating growing investment in international tourist coach services and the movement of personal vehicles across borders[289]. However, it was stressed that the GMS countries, unlike those in Europe, still do not have open borders. Movement from one country to another by car, therefore, poses a challenge, because one must obtain permission from a tour operator up to six months in advance of such a journey.[290]

Furthermore, transport and urban infrastructure investment in many secondary destinations does not match demand. This is mainly due to funding and capacity constraints for construction and maintenance, along with a lack of decentralized planning[291]. Additionally, the range and type of tourism products and infrastructure along the core brand, the Mekong River, varies for several reasons: Boat landings, such as wharfs, jetties, and piers, tend to be well-developed in locations where overland tourists or cargo vessels most frequently visit such as Cambodia's capital, Phnom Penh, and Chiang Saen, Thailand. Conversely, less visited, more remote destinations, many of which offer CBT and nature-based activities, have less developed landing infrastructure, as they tend to serve mostly local river traffic.[292]

UN Sustainable Development Goals

Seven cross-cutting themes have been mainstreamed in all strategic programs and projects of GMS tourism projects as part of the Sustainable Development goals, which include gender equality, private sector development, environmental sustainability, partnerships, universal access, and community participation[293]: "The whole mandate is related to developing tourism in the region, is all looking at sustainable and responsible tourism development which is obviously crucial for especially this region."[294]

[287] Ibid.
[288] Interview with Executive Director, MTCO
[289] Ibid.; Mekong Tourism Coordinating Office, *Experience Mekong: Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020*.
[290] Interview with chairwoman of Myanmar Tourism Marketing
[291] Mekong Tourism Coordinating Office, *Greater Mekong Subregion Tourism Sector Strategy 2016-2025*.
[292] World Tourism Organization, *Mekong River-Based Tourism Product Development*.
[293] Mekong Tourism Coordinating Office, *Greater Mekong Subregion Tourism Sector Strategy 2016-2025*.
[294] Interview with Executive Director of MTCO

Integration of Capacity-Building, Start-Ups, and Local Communities

Through a large number of development projects being supported mainly by development banks or bilateral partners, numerous capacity-building initiatives are now underway and are focusing as well on community involvement. (An extensive list of these initiatives can be found in the annex, 'The Greater Mekong Subregion Tourism Sector Strategy 2016–2025').

In terms of start-ups, the Mekong Innovative Start-ups in Tourism (MIST) program was initiated in partnership with the ADB and is supported by the Australian government. Mentors annually select travel start-ups from both within the region to drive responsible tourism development in the Greater Mekong Subregion. Successful applicants will be invited to the MIST boot camp and will pitch their business concepts to investors and industry experts (mist.asia).

C. Funding sources

In recent years, the MTCO has received an annual contribution of $15,000 USD per country, for an annual total of $90,000 USD. From 2019 onwards, each country will contribute $20,000 USD, which means a total of $120,000 USD. These funds cover the operational costs and two full-time staff members, who are sometimes supported by interns and external advisors. According to the original plan, MTCO was to have been supported by a Development Director (which it was for a few years, as subsidized by the French Government) and a Project Coordinator; however, the latter position was never established.

MTCO is now trying to acquire status as an international governmental organization, which would allow it to do its own fund-raising.[295]

D. Governance

Legal framework of corridor including monitoring, transparency and data collection

The Greater Mekong Subregion TWC had its beginnings in the 'Workshop on Tourism Development in Countries along the Mekong River' held in Kunming, Yunnan Province, PRC, on 13-17 December 1994. During the workshop, it was agreed that the successful implementation of sub-regional tourism projects would require regular consultations among the NTOs of the six GMS countries, representatives of regional and international agencies concerned, and the private sector. The workshop recommended the establishment of the GMS TWC, which was subsequently endorsed by the Fifth Ministerial Conference on Subregional Cooperation.

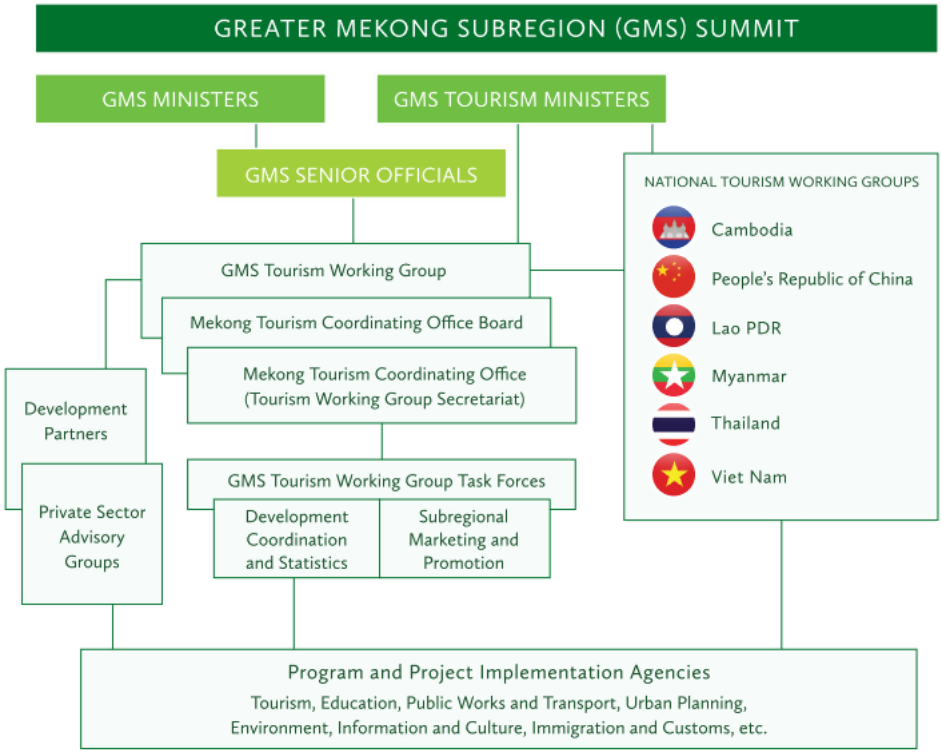
The GMS TWC reports to GMS ministerial-level conferences and the respective governments of each GMS country. The main objective of the GMS TWC is to provide guidance and professional support for the implementation of sub-regional tourism projects. The TWC is comprised of senior-level representatives of the six GMS NTOs, appointed by their respective governments.[296]

Arrangements to implement and monitor strategic programs and projects follow the existing institutional mechanism for the GMS Economic Cooperation Program. The ADB is acting as the

[295] Interview with Executive Director of Mekong Tourism Coordinating Office
[296] "Tourism Working Group," Mekong Tourism, accessed August 14, 2019, https://www.mekongtourism.org/about/tourism-working-group-twg/.

impartial coordination institution for the program and serves as a sub-regional secretariat.[297] The organizational framework for GMS tourism cooperation and the roles of various other public and private stakeholders are described below:

Figure 30: Greater Mekong Subregion Tourism Organizational Framework



Source: GMS Tourism Working Group.

[297] Mekong Tourism Coordinating Office, *Greater Mekong Subregion Tourism Sector Strategy 2016-2025*.

Figure 31: Greater Mekong Subregion Tourism Structure

Source: Mekong Tourism Coordinating Office (2018)

- *GMS tourism ministers* appoint NTO officials to represent GMS countries at GMS TWC meetings and other regional forums. They meet periodically to, among other activities, (i) endorse GMS and other regional tourism strategies; (ii) promote cooperation between tourism and other sectors, and (iii) approve resources to implement strategic programs and projects.
- *GMS senior officials* act as GMS national coordinators and head of each country's GMS national secretariat. They frequently meet to formulate strategies and policies for the evaluation of GMS ministers, review sector plans, and coordinate policy and operational aspects of the GMS Economic Cooperation Program.
- The *GMS Tourism Working Group* includes senior officials from each GMS NTO. It serves as an advisory board to the MTCO and provides operational leadership and technical guidance to plan, implement, monitor, and evaluate sub-regional activities;
- The *Mekong Tourism Coordination Office* promotes, among a range of many activities (i), the practical cooperation among governments, (ii) plans, coordinates, and implements programs, and (iii) continuously upgrades and maintains the online portals of such programs, including their main online portal, www.mekongtourism.org;
- The *National tourism working groups* set priorities for national implementation of sub-regional programs and projects;
- *Development partners* (international and bilateral finance institutions, CSOs, industry associations, academic institutions, and the media) engage in levels such as (i) finances to support strategic programs and projects or (ii) provide policy advice;

- *Private sector advisory groups* include members of industry associations, and the newly formed Mekong Tourism Advisory Group engages in (i) the coordination and support of multi-country products, (ii) supports and participates in events to promote GMS tourism and (iii) should identify constraints on the business environment;
- *Destination Mekong* has been created in 2017 to promote the Mekong region, comprising of Cambodia, PR China (Provinces of Guangxi and Yunnan), Laos, Myanmar, Thailand, Vietnam, and Yunnan (PRC) as a single tourism destination to stimulate responsible and sustainable development and investment, and drive inclusive growth. Endorsed by the Mekong Tourism Coordinating Office and aligned with the mandate of the regional collaborative tourism framework of the six member governments of the Greater Mekong Subregion, Destination Mekong executes targeted projects and initiatives via a public-private partnership investment structure. Destination Mekong is led by a private sector company, UNWTO Affiliate Member Chameleon Strategies.
- Program and project implementation agencies include, on the one hand, government agencies responsible for tourism, education, public works and transport, cultural and natural heritage management, safety and security, and urban planning.[298] On the other hand, the MTCO has established a strategic framework – Destination Mekong – to support programs through public-private partnerships.

Figure 32: Initiatives by the Mekong Tourism Coordinating Office[299]

Source: Mekong Tourism Coordinating Office (2018)

Mekong Tourism Forum

The Mekong Tourism Forum provides a cooperative platform for stakeholders in the tourism industry to discuss the development, marketing, and promotion of travel to, from, and within

[298] Ibid.

[299] "Mekong Tourism Overview 2018," Mekong Tourism Coordinating Office, last modified 2018, https://www.mekongtourism.org/mekong-tourism-overview-2018/.

the Greater Mekong Subregion (GMS). It presents an inclusive, interactive, and results-oriented opportunity to encourage public and private sector participation in representing the GMS as a single destination.

The Mekong Tourism Forum works to achieve three main objectives:

1. To raise the profile of the Greater Mekong Subregion as a single tourist destination
2. To provide an industry-wide platform for the public and private sectors to address sub-regional tourism issues
3. To expand marketing networks and opportunities for promoting the Greater Mekong Subregion and pool collective resources to create intra-industry synergies

Mekong Trends

Mekong Trends is a knowledge platform offering insights and trends related to travel and tourism professionals in the GMS. A public-private partnership that delivers valuable industry intelligence on specific and relevant topics, this Destination Mekong initiative is published for the industry on behalf of the Mekong Tourism Coordinating Office (MTCO) and National Tourism Organizations of the six government of the Greater Mekong Subregion (Cambodia, PR China, Laos, Myanmar, Thailand, and Vietnam).

Mekong Trends aims to provide Snapshots about specific travel and tourism issues, such as Aviation, Hotel Development, Community-based tourism, Food Tourism, Accessible Tourism, Heritage Tourism, Adventure tourism, and Human Capital Development, and others. Each trend report is accompanied by a seminar on the same topic.

Mekong Innovative Startups in Tourism (MIST)

Mekong Innovative Startups in Tourism (MIST) program is jointly managed by the Mekong Tourism Coordinating Office and Mekong Business Initiative (MBI. Organized by Destination Mekong, it is supported by the Australian Government and Asian Development Bank. Other partners join the program; for example, in 2019, the Tourism Authority of Thailand (TAT), as well as the Pacific Asia Travel Association (PATA), are also partnering to support the program. The mission of MIST is to support and integrate travel startups from the six member countries of the Greater Mekong Subregion into the travel and tourism ecosystem to ensure innovation in the globally competitive tourism industry.

Experience Mekong Collection

The "Experience Mekong Collection" showcases responsible and sustainable travel experiences in the Greater Mekong Subregion (GMS). The Mekong Tourism Advisory Group (MeTAG) is made up of tourism professionals active in responsible tourism, and the GMS endorses all nominations.

In partnership with Thailand-based Mahidol University, the program features one innovative business per country every year in the Experience Mekong Showcase and raise awareness of best practices to build capacity.

The programme is managed under the Destination Mekong framework.

Mekong Moments

Mekong Moments is a visual consumer marketing campaign and inspirational travel platform that collaboratively promotes the GMS as a single tourism destination and drives direct business to individual businesses through social commerce. Businesses, regardless of type and size, encourage their guests, staff, and stakeholders to share their experiences via their own social media accounts by tagging #MekongMoments and the respective hashtag of the experience (hotel, restaurant, destination, attraction, event, tour, shop, etc.). The user-generated content is collected on MekongMoments.com and directs traffic to the respective websites of the experiences and businesses.

A public-private partnership, Mekong Moments, is executed through a public-private partnership between the six tourism ministries and six companies, including IHG, Small Luxury Hotels, Yaana Ventures, and Odyssey Tours China to create a sustainable and efficient program for the GMS. Destination Mekong lead, UNWTO Affiliate Member Chameleon Strategies developed the concept, which is powered by their ENWOKE technology to build Mekong Moments with significant input from the travel and tourism industry.

Mekong Mini Movie Festival

The Mekong Minis is a unique film festival that celebrates the many faces and experiences of the Greater Mekong Subregion and promotes the region as a single tourism destination. It is an annual regional tourism marketing campaign with its first instance in 2018, supported by all Tourism Ministries and the private sector in the Greater Mekong Subregion.

The festival is meant to attract amateur and professional movie makers and create a large amount of content for the region with promotions and screenings internationally.

The Mekong Minis reached over 22 million people in 2018 and won the HSMAI Adrian Gold Award as the best digital tourism campaign in 2018.

In terms of monitoring and reporting results, a framework for GMS cooperation exists, including performance targets. MTCO is in charge of tracking result indicators and compiling progress reports. The main reporting platforms are GMS TWC meetings, the Mekong Tourism Forum (MTF), GMS tourism minister meetings, and GMS ministerial meetings.[300] In terms of data collection, all GMS NTOs collect tourism statistics and publish annual tourism statistics by country.

To measure progress toward achievement of this vision, the GMS TWG monitors (i) the percentage of international tourists taking multi-country holidays in the GMS, (ii) travel and tourism's direct contribution to gross domestic product in each GMS country, and (iii) the distribution of international tourism receipts among the GMS countries.[301]

The Mekong Tourism Coordinating Office is relying on the GMS countries to provide the information to measure success. A standard reporting structure is not in place at this point in time. However, data harmonization workshops are being conducted to have access to more transparent information in the future.

[300] Ibid.

[301] Mekong Tourism Coordinating Office, *Experience Mekong: Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020*.

Facilitation of visa procedures

All GMS members of ASEAN have enacted the ASEAN Framework Agreement on Visa Exemption, which exempts citizens of ASEAN member states holding valid national passports from visa requirements (to visit other ASEAN countries party to the agreement) for a period of stay of up to 14 days. Most GMS countries also offer various forms of visa exemption for priority markets based on the ASEAN+3 cooperation framework or bilateral agreements.

Regarding the availability of visa-on-arrival, international visitors from up to 180 countries can easily obtain a tourist visa on arrival at 46 land checkpoints, and about 20 airports and tourist e-visas are available for travel to Cambodia, Myanmar, and Vietnam. While improving, tour operators and independent travelers often mention the lack of reliable information about visa requirements and procedures as an impediment to multi-country travel[302]. Furthermore, passport and visa controls at border crossings of river-based cruises and boat trips in the countries bordering the Mekong River remain a barrier to growth. Although there is increasing liberalization (i.e., Vietnam's recent visa-free offer to five European countries), the process is still seen as cumbersome and costly.[303] The need was expressed in working collaboratively in GMS on a joint-visa-policy.[304]

Responsible engagement

Much of the economic growth and related social achievements generated by these corridors is fueled and sustained by the corridor's natural capital. However, since the corridors are also in regions where other economic development takes place, many developments along these corridor roads are exceeding the regeneration and coping capacity of the natural capital (resilience), leading to natural resource depletion, land degradation, loss of biodiversity and genetic diversity, and extensive water, soil, and air pollution. In turn, the loss in natural capital has direct implications on the performance of GMS program investments along the corridors, particularly sector investments that rely heavily on intact ecosystem services - beside hydropower, especially tourism.[305] At this point in time, solutions to the development/tourism dilemma have not been found. It is suggested that more initiatives should work on this topic in the future.[306]

Conflict management among stakeholders

Neither the literature nor the interviews cited previous instances of major conflicts among the stakeholders, which will need to be managed by internal or external entities. However, the ADB was appointed as an advisor; in case there would be an ongoing, unsolved conflict, probably the ADB would take over the role as mediator.[307]

[302] Ibid.
[303] World Tourism Organization, *Mekong River-Based Tourism Product Development*.
[304] Interviews with Chairwoman of Myanmar Tourism Marketing and Teamleader, GIZ, Laos
[305] Asian Development Bank, *Economic Corridor Development for Inclusive Asian Regional Integration. Modeling Approach to Economic Corridors*.
[306] Interview with Head of Project and Administration, ADB
[307] Interview with Executive Director of MTCO

E. Management of tourism corridor including communication tools

Strategic Management of the corridor including visitor satisfaction

In terms of management, the MTCO serves as the secretariat of the GMS TWC. The office is located at the Ministry of Tourism and Sport in Bangkok/Thailand (Department of Tourism) and managed by an Executive Director, and an Operations Manager sometimes supported by one or two interns and advisors. MTCO coordinates sub-regional tourism development projects and sub-regional tourism knowledge management, assists the GMS countries to jointly promote the Mekong as a single tourism destination,[308] and supports the Program and Project Implementation Agencies, which can be private or public organizations or frameworks, such as Destination Mekong, which is a public-private partnership framework under which some Mekong Tourism initiatives are executed.

These frameworks are specific to each initiative and manage the financing and operations of programs. An example is the Mekong Moments initiative, which the Mekong Tourism Coordinating Office launched in collaboration with companies from the private sector, NGOs, as well as government agencies. The private sector took over the creation of the portal and the management, whereas financing was arranged through a "Founding Partner" fee, for which partners received online exposure in exchange. The governments support the Mekong Moments initiative through joint marketing as well as the promotion of campaigns related to it.

All stakeholders, including the MTCO, mainly follow two strategies:

1. The *GMS Tourism Sector Strategy 2016–2025* reflects the subregion's commitment to promoting inclusive and sustainable tourism development. Led by the GMS TWC, the strategy aims to strengthen human resources, improve infrastructure and service quality, creatively market the GMS as a single destination, and ease travel formalities.[309] The GMS Tourism Cooperation Strategic Framework is built on five pillars, as shown in Figure 31.
2. The *GMS Tourism Marketing Strategy and Action Plan 2015-2020* deliberately aligns with GMS member countries' shared objectives to develop thematic multi-country tour programs and promote secondary destinations to help spread benefits more widely. The focus on joint marketing of multi-country tours is also consistent with the ASEAN Tourism Strategic Plan and ASEAN Tourism Marketing.[310] Another supportive document is the Mekong River-based Tourism Product Development Report,[311] published by UNWTO.

[308]"Overview of the Greater Mekong Subregion (GMS)," Mekong Tourism, accessed August 14, 2019, https://www.mekongtourism.org/about/what-is-the-gms/. And interview with Executive Director of MTCO
[309] Asian Development Bank, *Greater Mekong Subregion. Twenty-Five Years of Partnership*.
[310] Mekong Tourism Coordinating Office, *Experience Mekong: Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020*.
[311] World Tourism Organization, *Mekong River-Based Tourism Product Development*.

Figure 33: GMS Tourism Cooperation Strategic Framework312

Source: Mekong Tourism (2019)

3. Most of the strategies in the framework are guidelines for the partner governments in their development of the tourism sector. The main strategies, the MTCO supports actively are as follows:

Human Resource Development: The MTCO conducts capacity building activities in the form of industry training and presentations.

Improve tourism infrastructure: The MTCO has a startup program called Mekong Innovative Startups in Tourism (MIST) to support entrepreneurship in the region and also enhance social and environmental impact.

Enhance Visitor Experiences & Services: The Experience Mekong Collection has been created to build a network of socially responsible companies in the region and provide them with services and knowledge exchange. This program, which already has over 350 members, is currently being enhanced.

Creative Marketing and Promotion: The MTCO launched the Mekong Moments portal to allow for collaborative marketing and entice any business in the region to run social media contests through the porta. The MTCO is running their own campaigns, such as the Mekong Mini Movie Festival on this portal. In addition, the MTCO manages multiple social media channels to promote the region and its initiatives.

Facilitate Regional Travel: Through the creation of regional travel routes, the MTCO is supporting the governments to jointly promote cross-border travel. Route-specific workshops are held to coordinate the efforts.

Communication Tools

The GMS TWC normally meets twice a year. One meeting is typically held alongside the MTF when it takes place in one of the GMS countries. The venue of GMS TWC meetings rotates among the six participating countries. In principle, there are two meetings per year. The Meeting summary of proceedings can be downloaded from the Mekong Tourism website.[313] In

[312] "Tourism Sector Strategy," Mekong Tourism, accessed August 14, 2019, https://www.mekongtourism.org/about/tourism-sector-strategy/.
[313] Ibid.

addition, a WhatsApp group has been established between TWC members and MTCO staff as a way to share urgent matters; however, it usually is not applied.

F. Marketing

The common interests of each GMS tourism marketing objectives include (i) product development to boost arrivals in secondary destinations and achieve a more balanced spread of visitors throughout the year, (ii) improvement of market linkages with neighboring countries, (iii) expansion of product distribution channels and dissemination of promotional information, and (iv) strengthening market intelligence and public-private collaboration.[314]

Especially to support (ii) a joint tourism marketing strategy was formulated in the GMS Tourism Sector Strategy and the GMS Strategic Framework 2012– 2022[315]. The Experience Mekong Tourism Marketing Strategy and Action Plan 2015-2020[316] aligns with GMS member countries' shared objectives to develop thematic multi-country tour programs and promote secondary destinations to help distribute tourism benefits more widely. A strategic objective of the plan is to encourage secondary destinations and encourage multi-country itineraries, especially those with themes such as ecotourism, local cuisine, and cultural appreciation, consistent with the ASEAN Tourism Strategic Plan and ASEAN Tourism Marketing Strategy.[317]

Figure 34: Joint Tourism Marketing and Product Development Objectives of the GMS

Greater Mekong Subregion	ASEAN
- Position the GMS as a single tourism destination - Promote multicountry tourism in the GMS economic corridors - Target high-yield markets - Improve the business-enabling environment for product development by the private sector - Emphasize development of pro-poor tourism - Improve quality standards for accommodation, food, and tourist site management - Promote intra-GMS travel	- Increase the number of tourists traveling to Southeast Asia - Increase multi-country visits in Southeast Asia - Develop experiential regional tourism product - Position ASEAN as a preferred destination by focusing on marketing and promotion efforts of the national tourism organization - Harness the benefits of marketing to help meet social, economic, and cultural goals - Promote intra-ASEAN travel

Source: Mekong Tourism (2019)

Despite the new strategy document being developed in collaboration with the tourism industry, the GMS tourism stakeholders have not taken full advantage of opportunities to develop and

[314] Mekong Tourism Coordinating Office, *Experience Mekong: Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020*.
[315] Asian Development Bank, *The Greater Mekong Subregion Economic Cooperation Program Strategic Framework 2012–2022*.
[316] Mekong Tourism Coordinating Office, *Experience Mekong: Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020*.
[317] Ibid.

jointly promote the multi-country experience[318]. Constraints include coordination difficulties, inconsistent Mekong brand messaging, insufficient funding, and an uneven capacity to conduct joint marketing and promotion campaigns - especially using online tools and social media. Less effective marketing undermines the GMS objectives to attract higher-spending visitors, promote new destinations, and counter seasonality. In order to change this situation, the MTCO and the GMS TWC, with the financial support of the ADB, have started to address these issues in 2015 by relaunching successfully its travel trade website MekongTourism.org, which was recognized with various awards for its innovative approach. The site houses an e-library with documents available for free download, its Mekong Tourism Contributor Program categorized into experts, storytellers, and groups, the Experience Mekong Collection, event calendar, destination information, tourism performance statistics, and a news feed with curated articles from various relevant sources. The site is completed with a newsletter and active social media accounts (www.mekongtourism.org) [320]. The flagships are contributor programs such as Mekong Moments[321] and Mekong Trends (www.mekongtrends.com), the Mekong Mini Movie Festival (Mekong Minis) and the Experience Mekong Collection: The flagship Mekong Moments, an innovative social commerce platform enables any organization related to the visitor economy in the GMS regardless of size and type to inspire domestic and international travelers with practical digital marketing tools (www.mekongmoments.org).[323] It encourages travelers to share visual content and experiences in GMS by way of specific hash-tagged social media posts. These posts are collected, curated, and then filtered on the Mekong Moments platform along with any corresponding websites. The ongoing result of this process is a searchable interactive map with currently over 10,000 experiences packaged with corresponding social media content and/or campaigns. [324] The Mekong Moments platform success helped to facilitate the 2018 'Mekong Mini Movie Festival,' a unique competition that celebrates the many faces and experiences of the GMS, promoting the region as a single tourism destination. The 2018 Mekong Minis campaign has attracted over 500 video submissions, which earned a collective viewership of over one million and reached over 22 million people globally.[325] The Mekong Mini Movie Festival was recognized with the HSMAI Adrian Gold Award as best digital tourism campaign in 2018.

The 'Experience Mekong Collection' showcases responsible and sustainable travel experiences in the Greater Mekong Subregion (GMS). The Mekong Tourism Advisory Group (MeTAG) is made up of tourism professionals active in responsible tourism, and the GMS endorse all nominations. As a capacity-building initiative in the GMS, these best practices are to motivate other operators to learn and get inspired (www. experiencemekong.org). Curating small travel businesses categorized in Stay, Taste, Do, Shop, and Cruise/tour, the Experience Mekong Collection showcases responsible travel experiences across the six member countries of the GMS in partnership with Mahidol University. One business per country is featured as a Mekong Collection Showcase every year for its innovation via a case study to allow other businesses to learn and get inspired[326].

[318] Interview with GM of Myanmar based tour operator.
[319] Ibid.
[320] Ibid.
[321] Mekong Tourism Coordinating Office, *Greater Mekong Subregion Tourism Sector Strategy 2016-2025*.
[322] Ibid.
[323] Ibid.
[324] Ibid.
[325] Ibid.
[326] Ibid.

The MekongMoments.com platform has been recognized with PATA Gold Awards 2018, and with the prestigious Golden City Gate Award at ITB Berlin for its innovative approach to regional tourism marketing through visual content. Furthermore, the MTCO has been featured as a driving force for tourism growth in the Asia-Pacific region by a number of industry publications (e.g., UNWTO, PATA).

However, the integrated effort to promote Mekong River-based tourism is still lacking. Marketing the river-based products calls for a common Mekong River product with special interest brochures, posters and other visuals (films, DVDs, CDs) to be promoted through a particular MTCO webpage linked to www.MekongTourism.org. While the individual members have excellent promotional material and sites, sufficient attention has not been made to river-based tourism as a whole. A new brand is vital for the success of Mekong River-based tourism.[327] Regarding market segments, it was proposed that GMS/MTCO has been focusing in the past especially on long-haul Europeans, nowadays aiming as well more on the ASEAN and Chinese markets.[328]

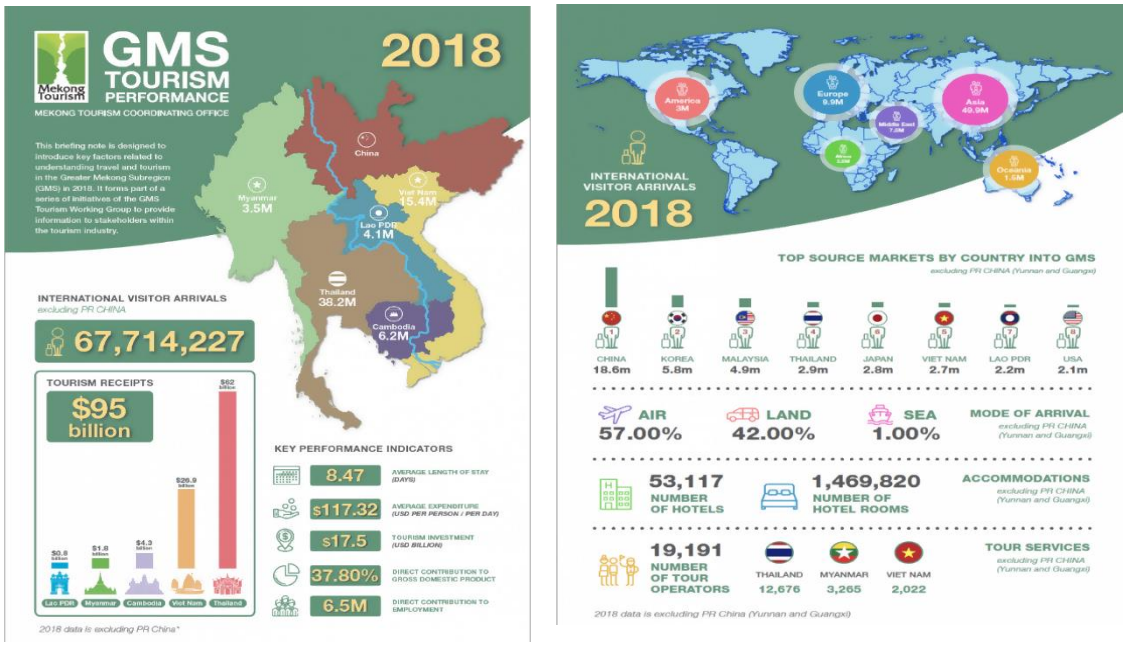
In terms of measuring the success, the MTCO tracks 20 tourism performance indicators in the Greater Mekong Subregion:[329]

1. International Visitor Arrivals
2. Average Length of Stay
3. Top 10 Source Markets by Region and Country
4. Percentage of Tourist Arrivals by Air
5. Percentage of Tourist Arrivals by Land
6. Percentage of Tourist Arrivals by Sea
7. Scheduled International Inbound Flights
8. Inbound Air Seat Capacity
9. Number of Countries Permitted to obtain Tourist Visa on Arrival
10. Number of International Border Checkpoints (land, sea, air) Offering Tourist Visa on Arrival
11. Number of Hotels
12. Number of Hotel Rooms
13. Average Occupancy Rates of Hotels
14. Number of Tour Operators
15. Number of Registered Tour Guides
16. Tourism Receipts
17. Tourist Expenditures
18. Tourism Investment
19. Tourism's Direct Contribution to Employment
20. Tourism's Direct Contribution to Gross Domestic Product

Results are presented on the website on an annual basis (see example below)[330]:

[327] World Tourism Organization, *Mekong River-Based Tourism Product Development*.
[328] Team Leader; GIZ, Laos
[329] "GMS Tourism Performance," Mekong Tourism, accessed August 14, 2019, https://www.mekongtourism.org/about/tourism-performance/.
[330] Ibid.

Figure 35: Top Sources by Country into GMS Tourism Performance Indicators



Source: Mekong Tourism Website (2019)

The collection of reliable and consistent data are a challenge for the MTCO due to different reporting systems and timeframes for each country. Steps have been taken to improve this by having a data harmonization working group. At the current point in time, the past annual scorecards were based on different reporting systems and cannot be compared with each other.

G. Future Development of the Corridor

During the last decade, dramatic changes were witnessed in the GMS. Myanmar, for example, saw a boom in international tourist arrivals. Air and overland access are now able to connect some of the most remote locations. More streamlined visa issuance has made exciting multi-country journeys possible for more people. More luxury hotels throughout the GMS and luxury vessels on the Mekong River and other waterways are attracting affluent consumers who are looking for high-end experiences.

The GMS is very close to being the largest and fastest-growing source markets of the 21st century, China and India. The rising wealth and the growth of a middle class with disposable income in the rest of Asia, especially Southeast Asia, provides tremendous opportunities for future growth. This is all in addition to the existing long-haul markets of Europe and North America. While regional travel is more sustainable, in that it is less susceptible to external shocks, it does require different products, services, and experiences.

Information and communications technology (ICT), including the Internet, social media, and mobile devices, has transformed how consumers are researching and purchasing products, including travel & tourism. Travelers now have access to information in real-time and can also share their experiences "in the moment." Low-cost local SIM cards and Wi-Fi access are readily available, and peer-to-peer platforms allow travelers and local micro-entrepreneurs to connect

and transact on local tours, dining, transportation, accommodation, and many other services in what is dubbed the "sharing economy." These trends have fueled the desire of travelers to engage in authentic local experiences. This is positive for inclusive tourism. The economic value that tourism brings spreads out to secondary destinations and into communities where micro, small, and medium businesses have the opportunity to benefit. While that prospect is exciting and aligned to the mandate of the regional tourism cooperation framework, it also brings challenges that have to be managed.

One of the biggest challenges is that with growth comes increased responsibility. Especially the MTCO is aware of existing problems, including infrastructure, sanitation, security, human resource development, and child safety concerns. The next 10-year GMS Tourism Sector Strategy has to consider how to protect and preserve the unique cultural heritage of the region, for example, by focusing on yield rather than arrival numbers. Responsible and sustainable tourism practices must remain the primary concern when developing programs and influencing travelers and the tourism industry in the GMS Tourism corridor.

Furthermore, it needs to be stressed that despite the recent establishment of multi-stakeholder tourism, marketing, and promotion boards in some GMS countries, public-private collaboration for joint marketing remains weak. Greater effort is needed to bring public and private actors together to increase the effectiveness and efficiency of destination marketing and improve competitiveness. Strengthening partnerships is also essential for maximizing economies of scale, creating demand in secondary destinations, delivering on the brand promise, and stimulating innovation[331]. In terms of branding, it is recommended to undertake a new strategy to avoid dual branding.

A new aspect is mentioned here, recommending to focus the work of the GMS Tourism corridor more on aspects of "Business in peace" by using tourism as a tool for interregional peace-building or rather, as in the case of the corridor, to continue the stable peace situation in that region by offering more cross-border products which implicates more cross-border private sector cooperation[332] and within more cross-regional communication and knowledge sharing.

Overall it is seen as necessary to keep this program alive and make it sustainable. It needs to be evaluated if the GMS Tourism Corridor should be more involved in activities of ASEAN but at the same time integrate especially the marketing activities on the country and even destination level.[333]

[331] Mekong Tourism Coordinating Office, *Experience Mekong: Greater Mekong Subregion Tourism Marketing Strategy and Action Plan 2015–2020*.

[332] Interview with Head of Project and Administration, ADB

[333] Interview with Executive Director of MTCO

H. Evaluation of the Corridor

Infrastructure and SMEs: Especially the promotion and support of infrastructure at secondary destinations and SMEs in tourism through recent development projects were highlighted.[334]

Standards: No common service standards are applied in the six regions to build up consumer confidence (lack of willingness or interest to implement Mutual Recognition Agreements for several tourism and hospitality services)[335].

Institutional level: In terms of positive aspects on the institutional level. it is important to realize that six countries support such a program for about 15 years with a limited budget but with high commitment and strong ownership (e.g., joining on a regular basis the biannual meetings)[336]. Furthermore, with the focus on public-private partnerships, especially with the current marketing activities, added value has been created for the stakeholders: The countries provide support to the MTCO, and the MTCO creates at the same time credibility. It was mentioned that despite the commitment to attend meetings on a regular basis, engagement of a high level is quite often missing[337]. However, the MTCO is still able to attract cooperation with donor agencies/development partners, which is an additional value for current and future development of responsible tourism in the GMS Tourism Corridor.[338]

All interview partners acknowledged the valuable work accomplished by the MTCO, especially that carried out by the current Executive Director through his excellent cooperation with the private sector over the years. Since he will be leaving this post by the middle of 2020 at the latest, the participants expressed worry about the professional stature of his successor and whether the management of the GMS Tourism Corridor can be improved. The one potentially weak aspect of the management structure is its institutional framework, which is based not only on the dedication of two staff members but especially on the quality and commitment of the Executive Director.

Product Development: Although the interview partners spoke highly of the MTCO's current work (especially in terms of its marketing activities), the lack of concrete product development along the Mekong or of cross-border products was seen as a problem. In terms of border regulations, more efforts are needed; for example, there are still too many barriers to promoting the whole region as one product (e.g., crossing borders by car is possible only if one obtains a special permit, which can take up to six months to be issued.[339]

Funding: It was acknowledged that the MTCO had achieved a lot despite the limited financial resources available. Although all the interview partners expressed the need for more funding sources, they were unable to offer any concrete suggestions to remedy this problem. However,

[334] Interview with Head of Project and Administration, ADB
[335] Ibid.
[336] Interview with Unit Head of Project and Administration, ADB
[337] Interview with Executive Director of MTCO
[338] Ibid.
[339] Interview with chairwoman of Myanmar Tourism Marketing

some remarked that the MTCO and the GMS Tourism Corridor should work toward becoming less dependent on the ADB, which of course, has its own agenda.[340]

Public-Private Cooperation: On occasion, the interview partners positively assessed the joint cooperation of the six countries, which were represented mainly by the Ministries of Tourism. However, they criticized the fact that the public sector alone makes the principal decisions regarding responsible tourism development in the GMS, and that representatives from the private sector or even local NGOs/CSO who work in this field are not given the opportunity to be involved in the decision-making process, such as "Myanmar Tourism Marketing is not a semi-government body and could not attend such a meeting easily"[341] and "it is driven by the government with limited capacities or rather unequal capacities,…the buy-in of the private sector is limited."[342] Furthermore, direct communication between the six countries is possible only at the ministry level. For example, if bordering/neighboring destinations such as Pakse (in Laos) and Siam Reap (in Cambodia) want to cooperate jointly, they cannot communicate with each other directly at the secondary level.

Marketing and Branding: The interview partners repeatedly lauded MTCO's marketing efforts, such as the Mekong Moments, Mekong Mini Movie Festival, Mekong Tourism Forum, and Experience Mekong Collection, especially in recent years. However, they questioned whether it makes sense to promote the brand of the Mekong or Mekong countries whilst at the same time promoting competing brands (such as ASEAN). It was recommended that research by an independent entity be undertaken. Furthermore, they voiced concern that the area of the Greater Mekong Subregion is too broad; instead, the focus should be on river-based tourism alone to reach the market, because there is value in promoting the Mekong as a destination rather than all six countries. On a different site, it was mentioned about opening up for further cooperation with ASEAN. However, taking all the current strengths and limitations into account, this corridor might only survive in the long-term if public-private sector cooperation is enforced.[343]

[340] Interview with former Director of Swiss Contact Cambodia, Laos and Myanmar
[341] Interview with chairwoman of Myanmar Tourism Federation
[342] Interview with former Swisscontact Director of Cambodia, Laos and Myanmar
[343] Interview with Executive Director of MTCO

Area	Lessons Learned
Corridor Development	• To support concrete product development, based on the knowledge and skills of the private sector • To advocate for open borders in terms of visas, border crossing, etc. • To support the infrastructure for secondary destinations and to drive domestic and regional tourism • To encourage further efforts towards infrastructure development in secondary destinations by simultaneously supporting decentralized planning
Funding Sources	• To seek more than one financial resource • To encourage governments to support such multi-country promotional initiatives, such as by collecting more (indirect/invisible) taxes from tourists, which when earmarked could also be a source of income for the coordination office of such a tourism corridor • To create an institutional structure for the secretariat to obtain its own funding sources
Governance	• To create more opportunities for representatives of the tourism industry, private sector, and local NGOs/CSOs both in an advisory capacity and in decision-making procedures • To create opportunities for direct communication among public stakeholders at the secondary level to achieve faster and more concrete results
Management	• To create an institutional structure that does not depend solely on the drive and determination of the Director of MTCO

Marketing	• To develop a clear branding strategy by trying to avoid overlaps with other branding efforts • To clearly define the borders of the corridors by not competing with other brands • To send one clear message and repeat it as many times as possible within the correct mediums of course • To support more capacity-building initiatives through digital marketing for various stakeholders • To ensure effective and efficient cooperation among regional, national, and provincial public and private stakeholders to successfully implement marketing strategies • To be consistent in branding activities • In organizational development, to support not only the planning but also the implementation of joint marketing initiatives, along with the support and integration of the private tourism sector
Future Development	• Evaluate competition for branding efforts in the region and devise a clearer strategy in this regard • Focus on concrete product development • Promote greater involvement by the private sector and local NGOs/CSOs, not only as advisors but as voting members • Seek greater independence from the ADB in the future • Improve the institutional setting of the MTCO, so it does not depend on the effectiveness of the Executive Director • Support even more responsible tourism activities (e.g., cross-border initiatives of national parks/green corridors, etc.) • Support the implementation of "Mutual Recognition Agreements" regarding hospitality standards to achieve comparable service levels in all six regions

3.1.2. The Danube Tourism Corridor

Background

Figure 36: The Danube Tourism Corridor Map

Source: Danube Competence Center

Although the Danube River, the second largest in Europe, has connected people, countries, and traditions for thousands of years, during the Cold War, the Danube separated Slovakia (Czechoslovakia) and Hungary from Austria, and communist Romania and Bulgaria from the more open, independent-minded Yugoslavia. With the end of the Cold War, the Eastern European countries of the Danube region started to emerge as tourism destinations, and it was in 2010 that the idea of closer cooperation started to materialize. Similarly, Western European destinations such as Germany and Austria saw the potential for cross-border tourism in areas such as cycling.[344]

The Danube connects ten countries: Germany, Austria, Slovakia, Hungary, Croatia, Serbia, Bulgaria, Romania, Ukraine, and Moldova. One activity in particular that connects all countries in a seamless way is river cruising, although even today, many cruises end in Budapest or Belgrade, and only few reach the Danube Delta, apart from the fact that the associated economic

[344] "The Danube Cycle Path from Donaueschingen to Budapest," Komoot, accessed October 12, 2019, https://www.komoot.com/collection/359/the-danube-cycle-path-from-donaueschingen-to-budapest.

benefits for countries are limited and focused on a few port cities. Furthermore, as the EU is interested in fostering the integration of macroeconomic regions and consolidating its influence in Eastern Europe, one of the key areas being the Danube region, a political and strategic framework emerged - the EU Danube Strategy, in short EUSDR - that created a facilitating framework for the realization of joint projects and activities across Danube countries.

The Danube is one of Europe's longest rivers with a length of 2888 kilometers, with the German section of the Danube winding its way through Baden-Württemberg and Bavaria, covering 199 kilometers through Baden-Württemberg and 448 kilometers through Bavaria. In Austria, the Danube flows for 350 km. Its 172 km in Slovakia and the Hungarian part of the Danube is 417 km long. 188 km are in Croatia, and Serbia has Serbia 588 km. The longest portion of the Danube runs through Romania, for more than a thousand kilometers. It borders the country from the East, and after that, it broadens and forms most of the state border to Bulgaria for 480 km. At Galati, the river divides into an expansive delta before entering the Black Sea. The Northern branch of the delta runs along the border between Romania, Moldova, and Ukraine. With 160 km at the Romania/Ukraine border and less than a kilometer at the border with Moldova.

Because of their different history and evolution, vast differences between the countries remain, with the German-speaking countries figuring among the most competitive tourist destinations in the world, and Moldova, on the other side of the continuum, being the least competitive tourism destination in all of Europe. These substantial differences are reflected in aspects such as visitor arrivals, competitiveness rankings, infrastructure development, marketing budgets, and institutionalization of destination management structures representing a fundamental challenge when working with the Danube region.

While the Rhine River has been called "Europe's river highway," the Danube is sometimes referred to as the "country road among European rivers." Apart from the capitals Vienna, Bratislava, Budapest, and Belgrade located right on the river, much of the Danube region retains a rural character, uniting areas that are not always tourism hot spots in their respective countries.

Despite all the differences, the two common themes that attract tourism to the Danube region are both culture and nature, two aspects that are covered in the DCC Marketing Plan. The cultural aspect encompasses city breaks, rural traditions, festivals, art, creative industries, gastronomy, languages, and dialects. The strong link between food and culture is evident in the wine regions, agricultural or harvest festivals, as well as many traditions that relate to rural and agrarian life.

The nature part encompasses the river itself and all the water sports possibilities that come with it; as well as nearby natural areas, even national parks, that are the base for activities such as hiking, biking, nature observation, horseback riding, relaxing, spa tourism, and health and wellness tourism in general. Cycling, in particular, is indicative fof the Danube Region, with the Danube Cycling Path (part of the Eurovelo cycling 6 route[345]) figuring among Europe's most popular cycling routes. This is one of the key elements of the Danube corridor.

Another major segment is river cruising, with cruising packages with a duration of one week or two weeks dominating the landscape, most of which originate in Southern Germany near

[345] "EuroVelo 6: Atlantic – Black Sea," EuroVelo, accessed October 12, 2019, https://en.eurovelo.com/ev6.

Passau. Given the worldwide boom in the cruising/river cruising segment, Danube itineraries have seen a strong surge in popularity but also stiff price competition and are less upscale than they once used to be.

Corridor Planning and Establishing

In terms of demand analysis, the DCC incorporates market intelligence into the focus of its project and activities, and in this framework, aspects of demand and seasonality are addressed. One example is drawing tourists to a particular place by promoting one of the local festivals, many of which do not take place in the peak season. As an overarching effort, it is worth pointing out Danube Day[346], a day with activities in multiple Danube countries that also involves the local population to a high degree.

In terms of infrastructure, it varies substantially along the Danube, with the upper Danube presenting a much more advanced infrastructure than the middle and lower Danube. In general, the density and quality of roads decrease as one moves from the Upper Danube towards the Lower Danube. In general, there are more bridges in the Upper Danube, with cities like Budapest offering lots of possibilities to cross the river; but the situation is much more challenging in countries like Bulgaria and Romania. In Bulgaria, there are only two bridges in Vidin and Russe, and the ferry boats that used to be more common in Soviet times are now only sporadically in operation. This implies long driving times to get from one place to another, often on country roads that are not well maintained.

The strongest airport in the Danube region is Vienna, with many connections to Eastern European cities, but within Eastern Europe, seamless connectivity is not always a given. Some tour operators within their packages offer flights to one destination, for example, Belgrade, Serbia, and return from another like Sofia, Bulgaria, with the land portion in between covered by ground transportation. These triangular arrangements tend to be pricey and drive up the cost of tourism packages

With regard to the Danube cycle pathway, Austria[347] is the most advanced country with excellent infrastructure in terms of cycling paths, information, orientation signs, support material like apps or maps, support services like places to stay, or bike repair services, followed by Germany. In contrast, in countries like Bulgaria, the pathway may appear on a map but is not recognizable because it leads along heavily transited roads used by trucks that can make it dangerous to travel along these roads by bike. Facilities to take along a bike by train are also better in countries like Germany, Austria or Hungary and more difficult in the countries of the Lower Danube. In addition, bike rental can vary substantially in terms of quality of bikes and is usually less common and sophisticated along countries of the Lower Danube.

Corridor Governance and Management

As an overarching platform for the Danube Region, the Danube Competence Center was established in 2010 to respond to the demands of the wider European and global tourism market. The Danube Competence Center is a public-private partnership association. It consists of eighty-five members from public and private entities as well as NGOs from the Danube

[346] "Welcome to Danube Day 2019," Danube Day, accessed October 12, 2019, http://www.danubeday.org/.
[347] "Danube Cycle Path," Donau Oesterreich, accessed October 12, 2019, https://www.donau-oesterreich.at/en/danube-cycle-path/.

countries. The Danube Competence Center cooperates with national tourism boards as well as private and non-governmental entities of member countries.[348]

The key drivers of this process were first and foremost national tourism organizations, although regional tourism organizations also played a role. On the one side, there are continuous activities assumed by all members, and on the other, there are project-related activities under different perspectives. Typically, closer cooperation mechanisms tend to involve just a few countries that often have geographic proximity. In general, because of their weight as the main institution on the national level, NTOs have been a driving force with regard to participation in marketing activities or EU projects. In addition, they also have a certain lobbying power that regional destination management organizations typically do not have.

Apart from the national DMO's and NTOs, the importance of regional DMO's depends a lot on their location. Germany[349] and Austria,[350] for example, have fully institutionalized Danube-focused associations that assume a strong role as do those regional DMOs that represent cities on the Danube like the Bratislava Region,[351] or at least a certain proximity to the Danube like Odesa,[352] the Ukrainian gateway to the Danube Delta which is located approximately 200 km from the Delta.

Not all Danube countries have properly established ministries of tourism, one such case being Ukraine, that has a Department of Tourism within the Ministry of Economic Development[353]. The role of ministries depends on the importance of the Danube in each country's context. Much of Serbia is influenced by the Danube. Therefore, the Serbian National Tourism Organization NTOS plays a substantial role within the Danube context. In contrast, the Danube region in Bulgaria and Romania is at the margins of national tourism development; therefore, the ministries do not focus as much on the Danube and don't have the same weight in the context.

In the case of Austria, because of the strength of the regional destination management organization, there is not much involvement from the national level. In the case of Croatia, again, the Danube regions are not of high importance within the national context. Therefore, the involvement from the ministry is not strong. In the case of Germany, apart from an already established Danube Association, Petra Hedorfer, the head of the German tourism board, is a member of the Board of Directors of the Danube Competence Center, which highlights the fact that the role and influence can also be driven by institutional or political considerations. All in all, the panorama is heterogeneous and influenced by an intricate of factors in each case, reflecting the complexities and disparities of the Danube region, and reflecting as well constant change in emphasis of involvement from either the national or regional level.

Apart from national and regional destination management organizations, other stakeholders include the private sector, both in the form of associations as well as individual members and

[348] Interreg Central Europe. 2016. Good Practice Catalogue of Existing Certified Cultural Routes.
[349] "Deutsche Donau," Deutsche Donau, accessed October 13, 2019, https://www.deutsche-donau.com.
[350] "About Us," Donau Oesterreich, accessed October 12, 2019, https://www.donau-oesterreich.at/en/services/about-us/.
[351] "Mountains, Wine Cellars, Castles and Great Food," Capital City of Slovakia - Bratislava, accessed October 12, 2019, https://www.visitbratislava.com/about/bratislava-region/./
[352] "Helpful Info," Odessa City Counsil Department of Culture and Tourism, accessed October 12, 2019, http://www.odessatourism.org/en/hinfo.
[353] "The Structure of the Central Administrative Office of the Ministry of Economic Development and Trade of Ukraine," Ministry of Economic Development, Trade and Agriculture of Ukraine, accessed October 12, 2019, http://me.gov.ua/Documents/Detail?lang=en-GB&id=4c40b681-8688-4741-8c36-35839afc3810&title=ClassifiedRecordsDirectorate.

NGOs.[354] Stakeholders were initially engaged either because of their importance on the national level (NTOs) or because they are geographically or thematically linked with a Danube region in some way.

In terms of capacity building, it is mostly done in alignment with project activities and focuses on both individual capacities as well as collective capacities by supporting the formation of cooperative networks, for example, product clubs in the context of the Transdanube Pearls project. Since these product clubs enable local stakeholder constellations to work more effectively on product development and marketing, capacity and innovation are increased on a subnational destination level.

In terms of stakeholder collaboration, the Danube Competence Center is a facilitator of different initiatives that can involve different partners focused on fostering cooperation between stakeholders, for example, through so-called Floating Conferences on the Danube that bring together different stakeholder groups and that contribute to better coordination.[355] General Assembly meetings organized by the Danube Competence Center take place at least once a year. Meetings for specific project-related activities are organized for partners typically every few months. Meetings between corridor partners are also held in parallel to international fairs, especially ITB. These meetings often take place as part of the side program or within politically driven forums.

In terms of travel facilitation, the Danube unites 10 countries, each with its own legal framework. For countries belonging to the European Union, EU legislation applies in addition to country legislation, but even in this context, there are some relevant differences. For example, Croatia, Bulgaria, and Romania are not Schengen countries yet.[356] However, there are some specific regulations that facilitate travel within the Danube region. Among these, Chinese tourists that have a Schengen visa are allowed to enter a Non-Schengen country like Bulgaria, without any additional requirement from the Bulgarian side. According to Wikipedia, Bulgaria, Romania, and Croatia all accept Schengen visas, although they are not part of Schengen.[357]

In terms of monitoring performance, there is no centralized data collection, data harmonization, or measurement of visitor flows within the Danube region. Statistics, such as visitor metrics and satisfaction, are only available individually at the country level and are not broken down for the Danube region within national statistical frameworks. This issue has been acknowledged as a fundamental pending challenge, and the Danube Competence Center is considering setting up a project that would help to institutionalize a Danube tourism observatory, to make progress on this issue. This would include different measurement points of tourism flows along the river in strategic locations with tourism activity.

In terms of funding, in the case of the Danube Competence Center (DCC), which on average implements 3 to 5 projects (like the EU Interreg - Transdanube Pearls and the EU COSME project), 80% of funding corresponds to donor organizations and 20% of funding corresponds to membership fees. With regard to the membership fees, 80% of funding corresponds to the

[354] http://www.danubecc.org/
[355] "Floating Conference 2015," Romanian Government - Ministry of Regional Development and Public Administration, accessed October 12, 2019, https://www.mdrap.ro/userfiles/Floating%20conf_PA3_15-18_06.pdf.
[356] Benjamin Elisha Sawe, "Which European Countries Are Not in the Schengen Zone?," WorldAtlas, last modified December 21, 2018, https://www.worldatlas.com/articles/which-european-countries-are-not-in-the-schengen-zone.html.
[357] "Visa Policy of the Schengen Area," Wikipedia, last modified October 13, 2019, https://en.wikipedia.org/wiki/Visa_policy_of_the_Schengen_Area.

public sector (mostly National Tourism Administrations), and 20% of funding corresponds to the private sector (mostly SMEs). In the past, German development cooperation (GIZ) has substantially co-funded the DCC.[358] Cooperation concluded in 2018 and was instrumental in the initial phase of the DCC.

Corridor Marketing

In terms of branding, there were efforts to institutionalize a Danube brand. However, these have not yet materialized.[359] The Danube Wine Route and the Roman Emperors Route[360] have their own logos that appear in different publications, thus providing an example of route branding. In terms of promotion, the Danube Competence Center, in cooperation with other partners, such as PR companies or individual PR representatives that are active in different markets, undertake promotion for the Danube TC. Member countries may provide support, for example, tourism ministries, in the context of sending out press releases, invitations, organizing fam trips, etc.[361] In addition to the Danube website, which is promoted on social media[362], there are print materials[363] covering all Danube countries that are distributed in some key fairs like ITB without any additional cost for members. In addition, there are project-based fairs that require additional payment by interested members.

The ITB presence[364] involves a number of elements such as stand, active participation in the side program, Danube passport game for the final consumer, among others. In cooperation with the EU and within the framework of the EU-China year, specific promotional activities were launched with regard to China as a promising long-distance market interested in cross-border tourism to Europe; among these, a virtual fair[365] between European providers and Chinese buyers.

Public relations efforts have been focusing on media and German-speaking countries and the Netherlands. In addition, there have been blogger trips involving representatives from middle Danube countries to stimulate tourism between these. In addition, a series of YouTube videos have been elaborated, especially in the context of the Transdanube Pearls project. Furthermore, Danube-specific media [366] played a role. Strong focus is placed on online presence, and currently, Danube travel is experiencing a relaunch. This mix is fine-tuned yearly in coordination with national partners.

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[358] "Trans-Border Tourism in the Central and Lower Danube Region," Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ), accessed October 13, 2019, https://sustainabledevelopment.un.org/content/documents/4508GIZ_Fact%20Sheet_Danube%20Competence%20Center.pdf.

[359] "Danube Region," UNWTO, accessed October 13, 2019, http://www2.unwto.org/content/danube-region.

[360] "Roman Emperors Route," Danube Competence Center, accessed October 12, 2019, http://romanemperorsroute.org/.

[361] "Serbia Is Partner Country of the International Tourism Fair in Brussels," National Tourism Organisation of Serbia, last modified February 1, 2011, http://www.serbia.travel/news/Serbia-is-partner-country-of-the-International-Tourism-Fair-in-Brussels.n-1619.580.html.

[362] "My Danube Travel," Facebook, accessed October 12, 2019, https://www.facebook.com/mydanubetravel/.

[363] "A Day on the Danube," Danube Competence Center, last modified April, 2016, http://danubecc.org/wp-content/uploads/2016/04/A-day-on-the-Danube.pdf.

[364] "Discovering Destinations Along the Danube at ITB Berlin," ITB Berlin, last modified February 10, 2017, https://www.itb-berlin.com/Press/PressReleases/News_38529.html.

[365] "1st EU-China Virtual Travel Fair on Cultural Tourism," European Travel Commission, last modified 2018, https://ecty2018.org/events/270/1st-eu-china-virtual-travel-fair-on-cultural-tourism.

[366] Thomas Zehender, "Getting from One Pearl to the Other in a Sustainable Way," Danube Connects, last modified November 9, 2018, https://danube-connects.eu/?p=1841&lang=en.

Future Development of the Danube TC

Rather than creating new products, the challenge is to enhance the existing ones in terms of quality, service, connectivity, and variations of the same basic product. In some instances, countries and regions have been involved in project activities that are not immediately bordering the river but that are part of the wider Danube region.

Railways services within and among countries should be improved over the next few years, as well as opportunities to take bikes along to facilitate cycling along the Danube cycling path. The same applies to coach services and equipping them with bike carriages. The most needed immediate improvement concerns establishing or improving cycle paths, their proper paving, and signage, as well as establishing services around them. More fundamentally, infrastructure requirements are necessary mostly for the middle, and lower Danube in terms of roads, port facilities, air connectivity as well as railroad/coach connectivity, but much of that is outside the scope of intervention of the Danube Competence Center.

Another aspiration is to involve more stakeholders in the nascent product clubs that constitute the "Danube Pearls" that emerged out of the Transdanube Pearls project. This refers to adding new members to each Pearl as well as incrementing their economic contribution. Furthermore, the goal is to involve new Pearls in countries like Moldova. Fundamentally, destination management structures on the subnational level still require much more institutional strengthening and market orientation. In the same line, cultural routes like the Roman Emperors Route and the Danube Wine Route will gradually extend and include new stakeholders while improving the level of quality and service.

Evaluation of the Danube TC

Continued investment in infrastructure (roads, bridges, cycle paths, signage, port/mooring facilities, ferries, tourism services in general), in quality, in the differentiation and improvement of existing products as well as capacity development will be required. Value is not only provided by bringing an increased visitor flow to certain regions of the Danube but also by creating greater cohesion in Danube regions and among the regions, as evidenced by project activities, emerging product clubs, exchanges of best practices, etc. But is also a greater understanding of roles, for example, as demonstrated in the river cruising master class, an event which helped both the river cruise industry and small and medium-sized enterprises along the river to have a better grasp of what the other side requires for successful product development. The perception of a common Danube destination nurtured through activities such as Danube@ITB, also translates into economic benefits for the Danube region although these are hard to measure at this stage.

Tourism can be improved by focusing on enhancing market readiness of products, improving the linkages between those products, and by improving the quality of services and tourism establishments in around attractions, to positively influence visitor satisfaction and therefore, arrival numbers, average length of stay and average daily spending. Higher quality products attract target groups with higher spending power so quality and infrastructure developments will, over time, contribute to positioning the Danube as a high-quality destination.

Area	Lessons Learned
Corridor Planning and Establishment	Infrastructure development is a key factor in corridor development; too long transit times or too complicated connections from A to B hinder the arrival of tourists. Despite its importance, it is not part of the fundamental mission of the Danube Competence Center, nor at the center of most EU projects; but rather depends on the investments of the different countries themselves. Corridor development requires cross-border coordination on different levels, such as product development, unification of standards, complementarity of products, operations - which can imply cooperation between hotels, tour operators or coach companies; national tourism organizations, in areas such as marketing, creation of a facilitating framework and transportation companies, buses and trains, airlines in addition it requires synchronization between these different players, as for example in the Danube Travel Trade Master Class. In the countries of the Middle and Lower Danube, often, the basics are in place, but tourist services, support infrastructure, and human resources lack the level of quality and consistency required for international source markets. Details like missing public bathrooms, lack of signage along roads, or tourist sites, although comparatively trivial, do hinder tourism development. The importance of the Danube in each country is very different, correspondingly the resources available for tourism development along the Danube vary substantially. This leads to the phenomenon of tourism hubs, or tourism hotspots, along the Danube, which represent a certain clustering of attractions and services and come in different flavors and dimensions - this is the driving dynamics rather than one consistent corridor.
Governance	In terms of governance, different legal frameworks are not easily unified and require flexible, case-by-case strategies to facilitate cross-border tourism in practice. Overarching efforts such as data harmonization require the development of structures and institutionalization in to work and to be effective. This alignment does not just happen - the desired outcomes need to be facilitated and brokered in a proactive and continuous manner to eventually materialize. On a local level, stakeholders organize themselves in the contexts of projects through working communities, task groups, and product clubs, addressing the issues at hand in a flexible way. These can be attached to or embedded within existing structures on the subnational level (like the Business Support Centre for Small and Medium Enterprises in Ruse, Bulgaria, or the Lake Neusiedl DMO in

	the Burgenland region in Austria), or function as informal networks. It is precisely the combination of working on the subnational level, with locally rooted organizations (like regional management organizations thus ensuring involvement of stakeholders grounded in local realities) and working on the national level that operates on a more strategic level and is relevant to creating a framework for market access that contributes to the success of projects. In terms of stakeholder collaboration, coordination needs to be brokered within a broader context, often driven by development cooperation while people understand the necessity of the corridor logic, implementing steps still requires a lot of brokering, facilitation, coordination, and accompaniment - or will not function effectively. In terms of capacity building, similarly, given the overall complexity of the Danube tourism corridor, capacity development does not aim at providing similar capacity building activities throughout the corridor but rather revolves around specific requirements in the context of specific activities or projects, involving carefully selected stakeholders in each case. In terms of funding, given the complexity of the corridor, especially in the early stages of corridor development, funding is driven very much by and fundamentally dependent upon international donor support. In the Danube context, donor funding (mostly EU, but also German and Austrian Development Cooperation) is available because donors have an interest in financing cooperation between countries, either in tourism and itself or in areas that overlap with tourism such as culture, environment or mobility. Therefore, it is important to understand donors' agendas and align fundraising efforts accordingly. Financing from both public tourism entities and private sector companies is modest and still emerging, both on the DCC level as well as with regard to co-financing on the project level, and will require a gradual increase over time to secure financial sustainability and buy-in, resting increasingly on membership fees, and multiple income streams, to mitigate dependence on donor funds. This can only work based on increasing market returns and the ability to prove the commercial success of activities and interventions, through monitoring mechanisms that are not yet fully established.
Marketing	In terms of marketing, it already starts with product development, and this phase should be in close consultation with players from the private sector that are in daily contact with clients and buyers and

	that have a notion of what products are ready for the market and what products are not. Because there are substantial differences between countries in terms of funds available for marketing, in practice there is a combination of basic marketing activities (like a webpage) covering all countries to the same degree; and more specialized activities that are financed on a case-by-case basis in accordance with the interests of particular countries or players (like participation in specialized fairs). Long-distance markets have a stronger interest in cross-border tourism than close-by source markets, because of longer average length of stay and a stronger interest among long-haul tourists to obtain a variety of impressions within a world region like the Danube region. That is why focusing on the Chinese market is of interest and the understanding that it is a long-term effort. For close-by source markets (usually Western European countries), manageable country combinations between two or three countries tend to be the most feasible product found in commercial publications. Despite all integration efforts, marketing is not always coherent across countries and needs to be supported by overarching branding and storytelling, both of which have proved to be difficult and require additional effort.

3.2. OIC Tourism Corridors

3.2.1. The Turkic Silk Road Tourism Corridor

Background

The Turkic Silk Road Tourism Corridor is comprised of five countries: Turkey, Azerbaijan, Kazakhstan, Kyrgyzstan, and Uzbekistan, all of which share a common history, language, identity, and culture.[367] The people of the present Turkic-speaking countries are historically connected with the Tujue. "Tujue" is the name the medieval Chinese ascribed to a group of nomadic people who lived in the fifth century CE in an empire stretching from the territory of present Mongolia and the northern border of China to the Black Sea.[368] Many powerful kingdoms and rulers referred to themselves as Turks, including the Huns, the Timurids, the Ottomans, and the Great Mughal Empire. Tamerlane and Babur are among the significant historical figures born within the territory of these empires.[369]

The shared history of the Soviet invasion strengthened the existing bonds between these countries, and they already shared a common geographical and historical identity created around the term "Central Asia," which in the mid-1920s replaced the geographic terms of "Turan" and "Turkestan" (meaning "the Land of Turks").[370] A shared language group also serves as a uniting factor. However, the languages of the countries within our study belong to three different branches of the Turkic group: The Southwestern (Oghuz branch: Turkey, Azerbaijan), the Southeastern (Uighur-Chagatai branch: Uzbekistan) and Northwestern (Kipchak branch: Kazakhstan, Kyrgyzstan).[371]

Islam is another mutual factor between these countries. The Turks spread Islam westward, and prominent theologians from their part of the world contributed greatly to Islamic philosophy: Imam al Bukhari, Baha-ud-Din Naqshbandi, Rumi, Hakim atTermizi, and Abu-Nasr al-Farabi, among others.[372] Their common legacy contributed to many discoveries in the worlds of science, algebra, mathematics, astronomy, and medicine. The names Al-Khwarizmi, Biruni, Ulughbek, Avicenna, are now known throughout the world.[373] Religious tolerance and ethnic diversity are significant features of the area, as non-Muslims and non-Turks have always been comfortable with preserving their religious identity, whether that be in the Golden Horde, the Timurid Kingdoms, the Ottoman Empire, or the Great Moghul Empire.[374]

The Great Silk Road was far more than just trade routes. It represented a multitude of benefits emerging from cultural exchange, and as a result, numerous historical and cultural sites still remain along its routes.[375] Upon the creation of the Silk Road and Spice Routes map, UNESCO

[367] "About Turkic Council," Turkkon, accessed October 13, 2019, turkkon.org/en/turk-konseyi-hakkinda.
[368] The Editors of Encyclopaedia Britannica, "Turkic Peoples," Encyclopaedia Britannica, last modified August 28, 2019, britannica.com/topic/Turkic-peoples.
[369] Odil Ruzaliev, "In Search of Turkic Identity," *Turkish Policy Quarterly* 5, no. 4 (2006): 47.
[370] Ibid.
[371] Lars Johanson, "Turkic Languages," Encyclopaedia Britannica, last modified April 16, 2014, https://www.britannica.com/topic/Turkic-languages.
[372] Ruzaliev, "In Search of Turkic Identity," 47.
[373] Ibid.
[374] Ibid.
[375] "Developing a Sustainable Tourism Strategy for the Silk Roads Heritage Corridors," UNESCO, accessed October 13, 2019, https://whc.unesco.org/en/activities/826/.

uncovered 100.000 km of these complex chain routes. Today, it is called the Silk Road. These discoveries provide endless opportunities and fresh experiences for history seekers.[376]

One example of a historic finding is Golden Man, which was discovered in the early 90s in the mountains outside of Almaty, near Issiq Lake. The Golden Man was buried in a stocked armory in a warrior's armor, made of pure gold. The Golden Man came to be a symbol of present Kazakhstan. Two years ago, a similar Golden Man was discovered in the eastern part of Kazakhstan.[377]

Another significant discovery was announced this year was the discovery of Alexandria on the Oxus in Uzbekistan, which was founded by Alexander the Great.

The History of Tourism Development in the Region

Modern tourism development in Central Asia can be divided into two periods - Soviet and post-Soviet, also called the *Independence* era. International tourism in the Soviet Union as a specialized sphere of activity started in 1929 when an entity called *Intourist* ("International tourist" in Russian) was set up. Tourism had been similarly centralized, as in the case of the whole economy. The head office of *Intourist* in Moscow distributed the flow of foreign tourists to all its republics.[378]

When the *Perestroika* political movement emerged in 1985, new opportunities for international tourism in the USSR opened up, including several previously closed off areas becoming accessible to tourists. Official figures provided by the Soviet government confirm a rise in foreign arrivals from less than 500,000 in 1956 to more than six million in 1988.[379] After the collapse of the USSR in 1991, the conveniently-located tourist sites of the former Soviet Central Asian Republics were able to become popular tourism destinations. These tourist sites varied in type from the unique cultural, historical and archeological, to natural attractions. The policy and model of tourism development in the independent countries of the region are primarily created around improving tourism infrastructure.[380]

[376] "ETC-UNWTO Seminar on Transnational Tourism Themes and Routes - the Silk Road," Travel 4 thoughts, last modified October 13, 2019, https://travel4thoughts.com/.
[377] Interview with Deputy Chairman of the Board of Kazakh Tourism
[378] Elena Yurievna Pashkova, "Organization of International Tourism in the USSR in Terms of Altai Krai (1960-1980-Ies)," *Service and Tourism: Current Challenges* 10, no. 4 (2016): 129.
[379] V. Arefyev and Z. Mieczkowski, "International Tourism in the Soviet Union in the Era of Glasnost and Perestroyka," *Journal of Travel Research* 29, no. 4 (1991).
[380] Bobur Sobirov Baxtishodovich, Tukhliev Iskandar Suyunovich, and Anvar Kholiqulov, "The Start-up of Tourism in Central Asia Case of Uzbekistan," *World Scientific News* 67, no. 2 (2017): 220.

Figure 37: Silk Road Vision[381]

Source: UNWTO

Establishment of the Silk Road Initiative

The countries of the Turkic-speaking tourism corridor later joined the United Nations World Tourism Organization (UNWTO). Turkey joined in 1975; Kazakhstan, Kyrgyzstan, and Uzbekistan in 1993, and Azerbaijan in 2001.[382] All of them are currently part of the UNWTO Silk Road Initiative.[383] UNWTO's role in facilitating tourism along the Silk Road dates back to 1994, when some 19 countries, early-adopters, were called for the "peaceful and fruitful re-birth of these legendary routes as one of the world's richest cultural tourism destinations."[384] In 1994, a UNWTO meeting was held in Samarkand, and *The Samarkand Declaration on Silk Road Tourism* was adopted in 1999. The subsequent *Khiva Declaration* called upon the nations of Central Asia to preserve their cultural and natural heritage. Ongoing initiatives stress the advantages of sustainable tourism and outline specific steps to stimulate cultural and ecological tourism in the emerging destinations of the Silk Road. The opening of a Silk Road Support Office

[381] The diagram from the "Silk Road Action Plan 2016/2017," UNWTO, last modified 2016, http://cf.cdn.unwto.org/sites/all/files/docpdf/sr2016web.pdf.
[382] List of 158 Member States of the UNWTO and the year of admission in the Organization. Retrieved from "Member States," UNWTO, last modified October 13, 2019, https://www2.unwto.org/members/states.
[383] Ibid.
[384] Silk Road Action Plan 2014/2015. "Silk Road Action Plan 2014/2015," UNWTO, last modified 2014, http://cf.cdn.unwto.org/sites/all/files/docpdf/silkroadactionplaningles.pdf.

in Samarkand in 2004 also aimed to promote tourism within the countries of the Silk Road.[385] Since then, numerous local and international workshops and conferences have been held on the Silk Road in Azerbaijan, Uzbekistan, Kazakhstan, and other countries, supported by UNWTO, UNESCO, and other entities.[386]

The first step towards a Silk Road tourism corridor was taken in 2007 when China, Kazakhstan, Kyrgyzstan, Tajikistan, Uzbekistan, and Turkmenistan all signed a concept paper addressing the World Heritage application. Since then, 50 potential Silk Road heritage corridors have been identified.[387]

Figure 38: Silk Road Member Countries[388]

In 2010, UNWTO launched the Silk Road Programme, dedicated to boosting tourism in the region. The first Silk Road Action Plan 2010/2011 was unveiled at the 5th International Meeting on the Silk Road in Samarkand, and the following three key focus areas were revealed:

a) Marketing and promotion
b) Capacity building and destination management
c) Travel facilitation[389]

According to UNESCO/UNWTO, cultural tourism is growing at an unprecedented rate and now accounts for around 40% of global tourism.[390] Local DMOs play a significant role in promoting the Silk Road, and exhibit stands at major international fairs such as ITB, WTO, Fitur, and RESA.[391] Some are creating a "one-stop-shop" that allows travelers to find out about all the tour opportunities available to them when planning a trip.[392] In addition, the Uzbek and Turkic

[385] Baxtishodovich, Suyunovich, and Kholiqulov, "The Start-up of Tourism in Central Asia Case of Uzbekistan," 222.
[386] "Past Events List," UNWTO, accessed October 13, 2019, https://silkroad.unwto.org/event/archive.
[387] Michelle Witte, "China, Kazakhstan, Kyrgyzstan Propose Silk Road Corridor for World Heritage Status," Kazakhstan Tourism, last modified September 23, 2013, https://astanatimes.com/2013/09/china-kazakhstan-kyrgyzstan-propose-silk-road-corridor-for-world-heritage-status/.
[388] The diagram from the Silk Road Action Plan 2016/2017. "Silk Road Action Plan 2016/2017".
[389] "Silk Road Action Plan 2014/2015".
[390] "Developing a Sustainable Tourism Strategy for the Silk Roads Heritage Corridors."
[391] Interview with Deputy Director of Sun House Team DMO
[392] "The Goal of Silk Road Explore," Silk Road Explore, accessed October 13, 2019, https://silkroadexplore.com/about-us/.

nations possess the same historical roots, culture, and traditions, and so, a collaboration between these states and service providers generate some tourism potential.[393]

Developing the current Silk Road initiative in Uzbekistan includes a significant list of stakeholders:

1. All the 15 institutes or universities of Uzbekistan offering bachelor's and master's degrees in the subject of tourism and hospitality.
2. GosComTourism, which now holds a ministerial role (former Uzbektourism held a different status which was ranked lower than the ministerial one). This shift also means they now have appropriate financing.
3. The Academy of Science of Uzbekistan plays a critical role, as they provide continuous historical research, and now they have reached a point in which they are cooperating with GosComTourism on Silk Road issues. The Institute of History is also operating under The Academy of Science.
4. The Ministry of Culture, as all historical objects are in their sphere.
5. The UNWTO Silk Road Programme Office, which is located in the office of the national PR center (a substructure of GosComTourism). They work on a number of initiatives and collaborate with the head office of UNWTO in Madrid.
6. Private businesses, such as tour-operating companies, DMCs. They deliver the Silk Road as a product to foreign tourists. It is also well known that Uzbekistan plays the role of a tourist hub for the neighboring countries of Central Asia. And Uzbek tour operators, within their combined tour packages, provide a significant flow of tourists to neighboring Turkmenistan, Kazakhstan, Tajikistan, and Kyrgyzstan.[394]

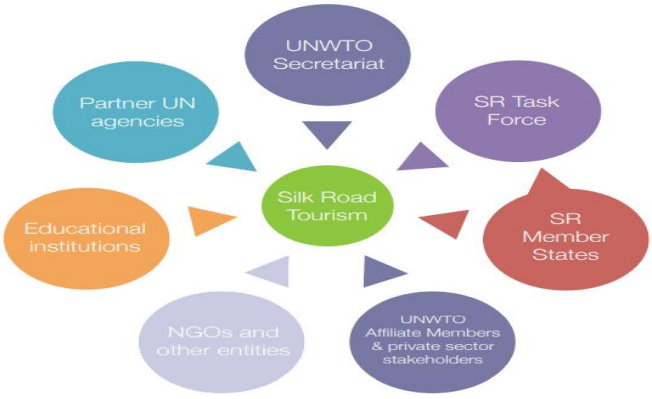
In 2013, two heritage corridors were nominated for establishment. The China-Kazakhstan-Kyrgyzstan Silk Road Corridor was one submitted to the World Heritage Centre. This corridor follows the southern part of Kazakhstan and connects China with Iran, and it also covers 7-8 monuments and sites (in the territory of Kazakhstan).[395] The Silk Road Corridor crossing Uzbekistan and Tajikistan was the other nomination.[396]

Governance and Management

The following two figures illustrate the types of stakeholders involved in the Silk Road as well as its governance structure. As the figure below demonstrates, the stakeholders involved in the Silk Road include international development organizations, non-governmental organizations, public and private sector entities, and educational institutions.[397]

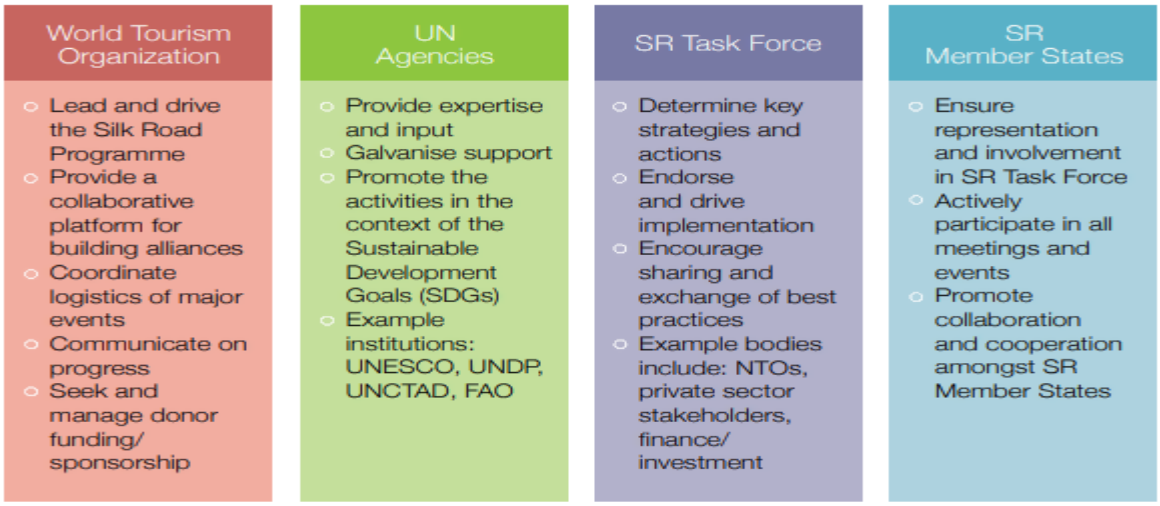
[393] Baxtishodovich, Suyunovich, and Kholiqulov, "The Start-up of Tourism in Central Asia Case of Uzbekistan," 225.
[394] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[395] Interview with Deputy Chairman of the Board of Kazakh Tourism
[396] "World Heritage and Sustainable Tourism," UNWTO, accessed October 13, 2019, http://cf.cdn.unwto.org/sites/all/files/pdf/itb_silk_road_edited.pdf.
[397] UNWTO. 2014. Silk Road Action Plan 2014/2015.

Figure 39: Silk Road Stakeholders[398]



As the following figure shows, UNWTO is leading efforts to provide a platform for coordination and alliance building, as well as fundraising for the corridor along with other UN agencies, such as UNESCO and UNDP, and providing support for the various Silk Road initiatives. The Silk Road Task Force, which includes representatives from National Tourism Organizations and tourism businesses based in the Silk Road countries, formulates strategies and prescribes actions, while bodies within the Silk Road collaborate on Silk Road activities as well as implement local action plans and strategies. [399]

Figure 40: Silk Road Governance Structure



Source: UNWTO

The role of NTOs: Conducting holistic planning with well-integrated stakeholder participation for long-term sustainability is a key priority for the Silk Road Heritage Corridors strategy. It aims to optimize the opportunities that tourism presents while safeguarding the outstanding heritage along the Silk Road.[400] During the economic transition of the post-Soviet Central Asian

[398] "Silk Road Action Plan 2016/2017".
[399] UNWTO. 2014. Silk Road Action Plan 2014/2015.
[400] "Developing a Sustainable Tourism Strategy for the Silk Roads Heritage Corridors."

republics, the governmental bodies responsible for tourism development and participation in the Silk Road project were transformed over a period of 25 years. In Kazakhstan, the tourism body was a department of tourism, which was a part of the Ministry of Infrastructure and Development until 2016. At the end of 2016, the tourism body was transferred to the Ministry of Culture and Sports. The present Kazakh Tourism National Company JSC was established in 2017. Both entities are primarily responsible for policy development and legislation initiatives. Kazakh Tourism promotes Kazakhstan as a tourist destination and co-invests in large investment projects while helping with product development.[401]

The former Uzbektourism played a vital role in the establishment of the Silk Road Programme. In 1995, a special decree from the President of Uzbekistan, Islam Karimov, set in motion the Silk Road initiative in Uzbekistan. The President's message declared Uzbekistan as a Silk Road country and positioned its tourism product accordingly. In a UNWTO assembly on the Silk Road in the mid-1990s, Uzbektourism also played an important role on behalf of the Uzbeki government.[402] In that initial stage, it was the most active authority among all five of the Central Asian countries in promoting the Silk Road brand to travelers. It also played a leadership role for other countries like Turkmenistan, Kyrgyzstan, Tajikistan, and Kazakhstan to join this initiative.[403] The current entity of GosComTourism was established in late 2016, on the foundation of Uzbektourism, and with the same functions of supporting and developing the Silk Road Programme in the country.

Before 2019, the state-owned enterprise, Kyrgyz Tourism, was a department under the Ministry of Culture, established in Kyrgyzstan, and aimed to support an old-fashioned Soviet recreation infrastructure (mainly on Issyk-Kul lake) and restore and organize further protection for historical sites like Burana Tower and three UNESCO World Heritage Sites.

The role of local DMOs in promoting the Silk Road brand and concept should not be underestimated. According to interview partners, the professional DMOs of Uzbekistan, Kyrgyzstan, and Kazakhstan were early adopters and pioneers for promoting the Silk Road Corridor, and it is due to their efforts that the Silk Road tourism brand became popular among travelers in the Western world. The tourism authorities in Central Asian countries then joined [at different times] the DMOs' efforts. It is noticeable that in the early stages, it was Uzbeko DMOs that started this business and spread it to neighboring countries.[404] Now, DMOs widely use the Silk Road concept as a marketing tool, pushing their countries as part of the Silk Road and also use the notion in content development. The website, Silk Road Explore, a provider of tours around Silk Road countries, is one such initiative.[405]

Three firms interviewed for this case study indicated that the mid-sized and larger-sized DMOs (such as Silk Road Destinations, Caravanistan) in each country are the ones ordinarily promoting the Silk Road through international travel fairs, web-content creation, online and offline sales and the organization of Silk Road tours. Some participate in different working groups and projects, as well. For instance, there is a working group in Silk Road Tourism Development run by the Turkic Council, which some of the tour operators are part of.[406]

[401] Interview with Deputy Chairman of the Board of Kazakh Tourism
[402] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[403] Interview with Director of Silk Road Destinations DMO
[404] Ibid.
[405] Interview with Deputy Director of Sun House Team DMO
[406] Interview with Deputy Chairman of the Board of Kazakh Tourism

The role of other stakeholders. Hotels, from small and mid-sized ones (such as the Silk Road Lodge and Bishkek) to international chains (formerly Dedeman Silk Road Hotel, Tashkent), are participating in Silk Road brand development, contributing to its increased visibility.[407]

In Kyrgyzstan, where mountaineering is an essential tourism product, a rescue helicopter for climbers and tourists exploring mountainous areas was unavailable this year. It was *Aksay Travel* DMO, which purchased a rescue helicopter on credit last year. This is a public-private partnership achievement for the destination, as previously it was Kazakhstan as well as the Ministry of Emergencies of Kyrgyzstan, who assisted in such cases. The acquisition of a rescue helicopter is a significant step in the growth of tourism in the mountain destination.[408]

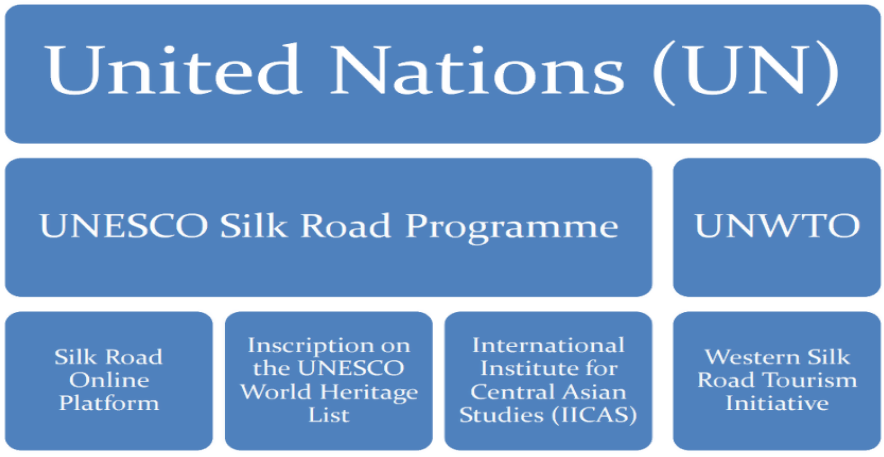
*A*ll the Central Asian governments try to use the Silk Road brand for their tourism development initiatives. This is because these countries are linked to the history of the Silk Road, and the Silk Road is an *organic* brand that fosters recognition and awareness for these new tourist destinations.[409]

In Kyrgyzstan, the following governmental agencies are directly engaged in tourism:

- Ministry of Foreign Affairs
- State Agency for Environmental Protection and Forestry
- Ministry of the Interior (which is in charge of the tourist police)
- State Committee for National Security
- State Registration Service
- Border and Customs Services
- Local governments
- National Statistical Committee[410]

[407] Interview with Director of Silk Road Destinations DMO
[408] Interview with Deputy Director of the Department of Tourism, the Ministry of Culture, Information and Tourism of Kyrgyzstan
[409] Interview with Director of Silk Road Destinations DMO
[410] Interview with Deputy Director of the Department of Tourism, the Ministry of Culture, Information and Tourism of Kyrgyzstan

Figure 41: The Silk Road and International Institutions[411]



Source: UNWTO

Infrastructure: One of the critical priorities for complex infrastructure development is to identify the routes, and the segments within these routes, connecting tourism spots along the Silk Road, as its tour product tends to attract travelers along integrated routes and corridors rather than to individual sites or destinations.[412] There is a definitive lack of information regarding complex Silk Road travel and the logistics of traveling these routes and corridors. This prevents potential visitors from choosing the Silk Road as a travel destination.[413]

In modern Kazakhstan, which long served as a main line of the Silk Road, great attention is paid to road infrastructure. Around 3000-4000 km of roads are built and/or renovated every year. There is a state program called "Nurlijol," which funds roads that will connect Nur-Sultan, the capital in all four directions – East, West, North, and South. The southern destinations will be connected to the eastern ones and so on. The most prominent connection is a corridor between Horgos, which is on the border of Kazakhstan and China, with Samara in Russia. It is a part of a larger project called the Western Europe - Western China International Transit Corridor, connecting Lianyungang with Saint Petersburg. The distance is close to 10,000 km, with Kazakhstan's share being 2,700 km. This connection supplies an excellent road network to major tourist destinations such as Charyn Canyon, Turkestan city, and Baikonur Cosmodrome. Many attractions and sights are currently connected through the group of highways within the New Silk Road economic corridor. The road from China already attracts visitors who can travel by car. The next step will be tourist buses, taking tourists from China to Horgos or Turkestan, and then to Tashkent or Bishkek. The roads are still missing services such as gas stations and

[411] "Turkey and the Silk Road on the 8th UNWTO Silk Road Task Force Meeting," Ministry of Culture and Tourism, last modified April 26, 2018, http://cf.cdn.unwto.org/sites/all/files/pdf/turkey_and_the_silk_road_umut_ozdemir.pdf.
[412] "Developing a Sustainable Tourism Strategy for the Silk Roads Heritage Corridors."
[413] "Building a Stronger Silk Road: Strategic Recommendations for Enhancing Tourism with a Special Focus on Central Asia Compiled by UNWTO in Collaboration with a Team of International Experts," UNWTO, accessed October 13, 2019, http://cf.cdn.unwto.org/sites/all/files/pdf/recommendations_tour_operators_forum_2012_electronic_0.pdf.

motels, but most of these projects are now underway, such as the Almaty-Bishkek Corridor, whose master plan was just completed with the help of the ADB.[414]

There are negotiations taking place between the governments of Uzbekistan and Kazakhstan concerning the launch of a direct train and bus service from Tashkent to Turkestan. This connection will streamline how a tourist visits both countries and historical towns in just one trip while increasing the number of tourists visiting both Uzbekistan and Kazakhstan, with at least one or two days spent in the latter. For example, Turkish visitors who are mostly visiting Uzbekistan for religious purposes. There is a pilgrimage site in the country: Ahmad Yassaviy Mouselem in Turkestan city in Kazakhstan. However, due to transport and border issues, it is a complicated journey, and Turkish visitors only travel around Uzbekistan. This is an excellent opportunity for Kazakhstan to use Uzbekistan's tourist traffic for its own benefit (and profit).[415]

High-speed trains in Uzbekistan are also a perfect example of current tourism-oriented projects. Uzbekistan Railways' speed rail consists of 600 km of track and services, and utilizes Spanish Talgo 250 trains, branded *Afrosiyob*.[416]

Kazakhstan maintains a leading role in attracting international hotel chains. Since 2013, 140 new hotels were built for *Expo2017* in Astana alone. In Almaty and Astana, chain hotels are widely represented: Novotel, Holiday Inn, Best Western, Park Inn, Windham, Hampton Court, Hilton Garden, Marriott, Hilton, Ritz-Carlton, Rixos, and Radisson Blu.[417] In Tashkent, only the Hyatt Regency, Radisson Blu, Ramada, and Windham represent international brands. In Bishkek, it is the Hyatt Regency, Sheraton, and Ramada.

There is a necessity for medical and rescue facilities to cater to growing tourism demands and to deal with the difficulties that may naturally occur concerning the health and well-being of visitors. The provision of adequate medical facilities is imperative. There are some international clinics within the capital cities, but for those traveling to other areas, especially in the countryside and mountainous regions, there is a higher level of risk, and efficient rescue and medical facilities in the event of accidents or illness are lacking. Crime is another important aspect of tourist safety. Tourists require an emergency call center, police patrols, and a rapid response facility to tackle crime in the main centers where tourists congregate. Some actions have already been incorporated into the tourism plans of certain countries (the government of Kyrgyzstan plans to create a police pilot project for resorts and in the historical cities of Uzbekistan, special English-speaking police patrol sites).[418]

The Internet and the new opportunities it provides are becoming more accessible and diverse, and its penetration increases every year in Central Asia countries. Kazakhstan is 61st in the world in terms of internet speed (31.86 megabits per second), Kyrgyzstan is currently 92nd (20.52 Mbps), and Uzbekistan is 131st (11.31 Mbps).[419]

[414] Interview with Deputy Chairman of the Board of Kazakh Tourism
[415] Interview with Director of Silk Road Destinations DMO
[416] Ibid.
[417] Interview with Deputy Chairman of the Board of Kazakh Tourism
[418] "Promoting Regional Tourism Cooperation under CAREC 2030, a Scoping Study," Asian Development Bank, last modified March, 2019, https://www.adb.org/sites/default/files/publication/490681/carec-2030-regional-tourism-cooperation-study.pdf.
[419] Maria Levina, "Internet Becoming More Accessible in Central Asia Countries," Times Of Central Asia, last modified March 10, 2019, https://www.timesca.com/index.php/news/26-opinion-head/20924-internet-becoming-more-accessible-in-central-asia-countries.

Integration of capacity-building, start-ups, and local communities. Central Asia's exceptional cultural and living heritage creates incredible opportunities for tourism.[420] One of the expected outcomes of tourism corridors is enhanced regional and international cooperation, as well as stakeholder engagement across all levels. Today, heritage corridors can potentially offer economic benefits to local communities and cross-cultural exchanges through tourism development. Taking the Almaty-Bishkek economic corridor initiative as an example, it can be said that tourism is one of the most significant components, as it includes other sectors such as agriculture, capacity building for human resources, etc. As for tourism, those overseeing the corridor are developing a variety of transborder tours with varying means of transportation (walking, biking, driving tours). Each type of traveler is presented with a different set of routes and attractions. The next step is then to coordinate with both governments to implement transborder tours.[421]

Taking into consideration that tourism along the Silk Road is mainly historical and cultural, tourist guides are also critical. UNWTO's Silk Road Programme, which aims to improve the standard of heritage interpretation and improve visitor experience, announced the Quality Guide Training Initiative in 2015. The successful pilot course for participants from five countries (China, Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan) took place in Khiva, resulting in an international pool of Silk Road heritage guides and Silk Road heritage guide trainers. Additionally, a specific Silk Road Guide Handbook was developed and distributed to all participants.[422]

Over the last two years, GosComTourism has launched many projects and released funds to sponsor tourism projects and start-ups. There is a special department that takes care of and supports all new projects, and start-ups focused on tourism in Uzbekistan, as well as in Central Asia. It is now a government institution that provides money for tourism development in Uzbekistan. Previously, *Uzbektourism* was an institution solely controlling tourism politics, and the growth of tourism depended on the private sector, mainly DMCs and small stakeholders, such as private hotels.[423]

Funding sources: Countries must be proactive when it comes to funding initiatives. Funding is a complicated issue in UNWTO, and there are budgetary constraints. Concerning the funding to support the Silk Road initiative, only a very minimal budget is provided for staff and operations. The Silk Road Programme (which is now a department that falls under Technical Cooperation) is understaffed and has been struggling to increase its budget by earning money through participation in EU-funded projects (like VeroTour), individual project sponsorship (as in the case of the Maritime Silk Road study, which was undertaken by a Chinese company), or substantial support from countries hosting events and airline sponsorships, for example, for its Annual Silk Road Task Force meetings.[424]

The national company, *Kazakh Tourism*, is fully funded and owned by the government. It participates yearly in international travel fairs, such as ITB in Berlin, WTM in London, KOTFA in Seoul, ITE in Hong Kong, COTTM in Beijing, and CITM in Shanghai. It is fully government-

[420] "Developing a Sustainable Tourism Strategy for the Silk Roads Heritage Corridors."
[421] Interview with Deputy Chairman of the Board of Kazakh Tourism
[422] "Enhancing Silk Road Interpretation and Quality Guide Training," UNWTO, last modified September, 2016, http://www2.unwto.org/project/enhancing-silk-road-interpretation-and-quality-guide-training.
[423] Interview with Director of Silk Road Destinations DMO
[424] Email correspondence with former head of UNWTO Silk Road Programme, Silk Road specialist on sustainable tourism development

funded; tour operators and associations cover only travel expenses and receive a free stand inside the Kazakhstan pavilion.[425]

GosComTourism finances promotional activities through a) a special fund for tourism development. This fund is financed through a special tourist tax, which is paid by tourists for every night spent in a private apartment or room (in the case of apartments, the tourist tax together with visitor registration is to be applied from the fourth day after arrival). And b) from the state budget. The National PR Center is funded by GosComTourism. The UNWTO Silk Road Programme Office in Tashkent is located in an office in the National PR Center. All the PR, advertising, marketing campaigns, and strategies for promoting Uzbekistan as a tourist destination, including participation in international tourism fairs, are made or coordinated by the National PR Center. GosComTourism is responsible for financing the UNWTO Silk Road Programme Office.

According to a recent presidential decree, GosComTourism can cover 100% of the costs of DMOs for their participation and their stands at international travel fairs, but the detailed process has yet to be defined. In the digital media era, an effective way to attract attention to a new destination is inviting bloggers on FAM trips, which Uzbekistan successfully did in 2018 and 2019. GosComTourism covers bloggers' expenses from their tourism funds too.[426]

The Kyrgyzstan government considers the tourism sector as one of the most critical for the country's economy and has therefore launched tourism development programs and action plans for annual implementation. This year, the action plan included the Silk Road concept development, together with neighboring countries. Funds were allocated from the budget for a five-year period, totaling approximately $120,000. Despite the decision of the Joǵorku Keńesh (Supreme Council) to allocate an amount of about $700,000 annually to the tourism sector, this has not been fully implemented. Most likely, this is due to the state budget being quite limited. However, there is a significant contribution from donors and tourism businesses.[427]

Much has been done since the beginning of 2018 to strengthen ties between the governments and NTOs of Kazakhstan and Uzbekistan in particular. In 2018, Kazakhstan hosted Uzbekistan Tourism Year, and within its framework, the State Committee of the Republic of Uzbekistan for Tourism Development, together with its Kazakh partners, carried out several activities. Within its framework, over one hundred events were held, covering the fields of culture, arts, literature, science, and tourism. Theater trips and folk groups, as well as pop artists, were organized. The Days of Uzbek Literature took place in Almaty, and the Days of Uzbek Cinema were held in Taraz, Shymkent, Kyzylorda, and Turkestan. The first Uzbekistan–Kazakhstan Tourism Forum was held in March 2018 in Astana, in which over 200 tour operators from the two countries attended. Similarly, the Year of Kazakhstan was launched in Uzbekistan in 2019, and as Mr. Shavkat Mirziyoyev, the President of Uzbekistan, stated, this testified to the dynamically developing strategic partnership, growing confidence, mutual support, and inseparability of the bonds between the two countries.[428]

[425] Interview with Deputy Chairman of the Board of Kazakh Tourism

[426] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism

[427] Interview with Deputy Director of the Department of Tourism, the Ministry of Culture, Information and Tourism of Kyrgyzstan

[428] "Uzbekistan Creates Great Amenities for Kazakhstan Tourists," UZ Daily, last modified April 15, 2019, https://www.uzdaily.uz/en/post/49190; ibid.

The Turkic Council's Modern Silk Road, joint tour package project, aims to a) raise awareness of the historical and cultural heritage of the Silk Road in the Turkic Council member states and across the region, b) prepare the cities of the member states in line with new trends in tourism and empower them to become appealing touristic stops, c) contribute to the training of tourism employees from the Turkic Council member states in the needed sectors, d) support the generation of projects to turn the Silk Road into a well-structured and famous tourist destination, and e) facilitate experience sharing among the member states for the development of Silk Road Tourism.[429]

Corridor Governance and Management

Legislation and legal framework. There is no special tourism legislation between the neighboring countries. The general legislation regarding the borders and citizenship is currently being used. The Central Asian territory is easy to cross, but visas and borders create problems. If governments and NTOs worked together to simplify these challenges, unique joint projects could be generated in Central Asian countries. Silk Visa may become the first such example. Its process is now in incubation, but it could take a long time to create border control legislation in the relevant countries.[430]

Sustainability monitoring and auditing. In 2013, UNWTO launched its first Silk Road Action Plan Survey, with the goal of enabling the NTOs in member states to give their feedback and proposals on future activities and priorities. The results of previous surveys were collected in the next action plan editions.[431]

However, sustainability as a concept and approach has not yet been implemented in any of the Central Asian countries at the government level. Both government tourism officials and the private sector need serious training on sustainability criteria application to start using it in their work.[432]

Facilitation of visas and border procedures. According to TripAdvisor Travel Trends for the Silk Road 2017, 47% of travelers would be more likely to travel to the Central Asian region if they only needed a single visa for a trip to Kazakhstan, Kyrgyzstan, and Uzbekistan.[433]

GosComTourism is actively cooperating with Kazakh Tourism and the Department of Tourism (Kyrgyzstan) on the Silk Road concept. It aims to stimulate a synergistic effect by including neighbor's proposals concerning each other's routes, itineraries, and promotional materials, especially for long-haul trans-continental tourist markets.[434]

Opening two more cross-border points between Uzbekistan and Tajikistan makes combined tours much easier and more comfortable, as two years ago, there was only one border-crossing, and today, there are three open cross-border points. Additionally, a visa-free policy (up to 30 days) opens up travel possibilities for the citizens of Tajikistan and Uzbekistan. Positive

[429] "Modern Silk Road Joint Tour Package: An Innovative Project to Empower Silk Road Tourism by Turkic Council," UNWTO, accessed October 13, 2019, http://cf.cdn.unwto.org/sites/all/files/pdf/turkiccouncil.pdf.
[430] Interview with Director of Silk Road Destinations DMO
[431] "Silk Road Action Plan 2014/2015".
[432] Email correspondence with former head of UNWTO Silk Road Programme, Silk Road specialist on sustainable tourism development
[433] "Tripadvisor Travel Trends for the Silk Road 2017," UNWTO, last modified 2017, http://cf.cdn.unwto.org/sites/all/files/pdf/unwto_silk_road_2017_for_print_pf.pdf.
[434] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism

political changes between the Uzbekistan and Turkmenistan governments have also allowed for the previously far stricter visa policy of Turkmenistan towards its neighbors to be softened. Turkmenistan is following Uzbekistan's lead in easing up its visa restrictions.[435]

The governments of Kazakhstan and Uzbekistan are also working on legislation for the Silk Visa. After a pilot launch, the next countries that will be involved are Azerbaijan and Kyrgyzstan. However, one issue of contention is that Uzbekistan is lobbying for the Silk Visa to just be an entry stamp, not a sticker, which it believes is the easiest way for tourists to travel in this part of the world. There are also some logistical issues to be settled within the next year or two.

A recent presidential decree in Uzbekistan increased the visa-free-entry country list by 20 countries. In total, Uzbekistan has increased this list to 85 and now holds the second position after Georgia in CIS on visa-free entry metrics.[436]

However, an expanding visa-free list in both countries does not discount the efforts being made to launch a Silk Visa because it a) is a useful marketing instrument for old markets (now visa-free), as under a Silk Road visa a positive mass content can be created and will give these countries more visibility in the international media and b) will become a door to the new, Asian markets, for instance, China, which is on the visa list for both countries.[437]

The Department of Tourism of the Ministry of Culture, Information, and Tourism of Kyrgyzstan, developed a legislative proposal for a visa-free regime for some countries, including citizens of China and India with valid Schengen, Japanese, USA, and UK visa.[438]

Data transparency. The number of arrivals to Uzbekistan in 2018 was 5.4 million. Before 2015, UNWTO didn't recognize Uzbekistan's statistics. Starting from 2016, the country has been working on implementing a new methodology, and its statistics since 2017 are fully available and are published and accepted on a global level.[439]

GosComTourism collects feedback from travelers and analyzes it; however, accessing this information is troublesome for DMCs. This, unfortunately, means potentially missing out on precious data that could help develop business.[440]

Responsible engagement. The development of responsible and sustainable tourism practices has been one of the key issues for all high-level UNWTO Silk Road gatherings – Silk Road Ministers meetings and the biannual International Silk Road meetings.[441] The thesis from the last Silk Road Ministers Meeting says: "All of sustainable nature, the proposed initiatives will allow us to further advance and work towards our main vision: to make the historic Silk Road routes the most important transnational tourism route of the 21st century."[442]

[435] Interview with Director of Silk Road Destinations DMO
[436] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[437] Interview with Director of Silk Road Destinations DMO
[438] Interview with Deputy Director of the Department of Tourism, the Ministry of Culture, Information and Tourism of Kyrgyzstan
[439] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[440] Interview with Director of Silk Road Destinations DMO
[441] Email correspondence with former head of UNWTO Silk Road Programme, Silk Road specialist on sustainable tourism development
[442] "Silk Road Ministers Meeting at ITB Berlin 2019," UNWTO, last modified March 6, 2019, http://silkroad.unwto.org/event/silk-road-ministers-meeting-itb-berlin-2019-0.

The mandates of entities involved. In management terms, NTOs are responsible for the management of inbound tourism. The scope of Kazakh Tourism goes beyond just promotion, as it's the main body for implementation of the state tourism program, and Kazakh Tourism is also coordinating the efforts of different entities involved in tourism development, such as the Ministry of Transport, the Ministry of Foreign Affairs, National Parks, etc.[443]

Reopened in 2013, the UNWTO Silk Road Tourism Office in Samarkand, which provides support services and member engagement, is now working independently under the supervision of the National PR Centre of Uzbekistan, which is part of the foremost institution responsible for tourism development - the Committee of Tourism Development of Uzbekistan. The Ministry of Culture, which plays a vital role in tourism development, closely collaborates with GosComTourism, and they share several common projects. The purpose of the Ministry of Culture is not to bring tourists but to protect the monuments, which are the main attraction for tourists visiting Uzbekistan. They also provide some cultural festivals, and their star project is a big international music festival called "Sharq Taronalari," which takes place every two years in Samarkand.[444]

The role of GosComTourism is to be a coordinator between tourism businesses, hotels, associations, ministries, and communities. Every ministry and big state company, such as Uzbekistan Airways or Uzbekistan Railways, contains a tourism department, and GosComTourism is working with all of them. For instance, when the Ministry of Foreign Affairs receives some tourism-related tasks and encounters challenges, they work with GosComTourism through their tourism department, to settle the issue.[445]

Destination sustainability. Several of the world's most impressive heritage sites are located along the ancient Silk Road, and the UNWTO Silk Road Ministers' Meeting 2013 was dedicated to the key issue of effective heritage management, which is necessary for sustainable tourism development. It focused on how Silk Road countries can work together to enhance their tourism profile while preserving the historical heritage and living culture to ensure future generations can enjoy them. To ensure sustainable development, the collaboration between member states needs to be conducted within the framework of the UNWTO Silk Road Programme, focusing on marketing and promotion, destination management and capacity building, and travel facilitation.

Resource preservation. Growing numbers of tourists visiting World Heritage Sites require more effective tourism development and visitor management, as well as a cooperative commitment between all stakeholders in the heritage and tourism sectors.[446]

More than 7400 historical monuments are located in Uzbekistan, a destination where the main tourism product is history and culture. Most of these are linked to the Silk Road. The historical towns of Bukhara, Samarkand, and Khiva are located directly on the main Silk Road route. Over the years, these monuments have deteriorated as a result of time, weather, and human activity. The Ministry of Culture is responsible for the protection of all these items of heritage. But reconstruction has to be done according to the particular requirements of UNESCO, which are, in many cases, much different from local authority understanding of reconstruction standards and approaches. It is the sphere of the Ministry of Culture to make UNESCO requirements a

[443] Interview with Deputy Chairman of the Board of Kazakh Tourism
[444] Interview with Director of Silk Road Destinations DMO
[445] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[446] "World Heritage and Sustainable Tourism."

guideline for all reconstruction and conservation procedures. A recent presidential decree (УП-5781 of 13 August 2019) in Uzbekistan also covers a very sensitive point: no new construction or commercial activity (except selling of souvenirs) is allowed in the territory of UNESCO heritage sites, except a UNESCO special commission permit is obtained. In the UNESCO cultural heritage list, "plov" (an Uzbek national dish accepted by UNESCO in December 2016) is listed. The UNESCO has also accepted the Khorezmian national dance as a cultural heritage object, as well as the traditional procedure of producing khan-atlas (also called Uzbek print) from silk.[447]

The opinion of an interview partner from Samarkand is that the Ministry of Culture has very little experience in preserving attractions. The problem is that no-one has relevant experience at this point in time in Uzbekistan. DMCs only have experience in utilizing heritage for business. The Ministry of Culture should become a core organization, working to preserve heritage, and which constantly upgrades the expertise of its specialists according to modern technologies and trends in historical monument preservation.[448] External help to establish such capacity building is the quickest way to save unique historical heritage.

In Kazakhstan, there is a new state program in place for intangible objects called "*Rukhani Zhangyru,"* meaning "*The Revival of the Past."* According to this program, Kazakh Tourism is filming documentaries, publishing books and identifying sacred places and putting them on the map or digital solutions such as online maps, or a 3D map of sacred sites, so that people become aware of their existence and are driven to visit them. They want Kazakhstan citizens to learn more about their culture and history, too, and using technology is a sustainable way of reviving it.[449]

Visitor satisfaction. The number-one expected outcome from UNWTO activity on the Silk Road is a high-quality visitor experience of the world's most outstanding cultural and natural heritage in the Silk Road Corridors.[450]

The search for new experiences and destinations, so-called *experiential travel,* is a growing global phenomenon. Silk Road countries offering unique and untapped travel opportunities can benefit from this in the years to come. Rich and authentic experiences are already available here, and UNWTO sees its role not so much in reinventing available routes, but in boosting best-practices as examples already taking place in Central Asian destinations.[451]

The preconditions for maximizing experiences are based on safety and accessibility. In 2019, Kazakh Tourism launched a Tourist Police initiative in Nur-Sultan, Almaty, Turkestan, and Burabay. They are still in the process of evaluating Tourist Police work, in which the main issue is mutual coordination. Being police, they are a part of the Ministry of Internal Affairs, not the Ministry of Tourism or Culture, but need to possess the unique qualities or traits a tourist police officer should have and follow.

The Kazakhstan government-initiated information services in airports and different attractions in Nur-Sultan and Almaty. They have a bigger stand in Almaty, which is more involved now, and

[447] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[448] Interview with Director of Silk Road Destinations DMO
[449] Interview with Deputy Chairman of the Board of Kazakh Tourism
[450] "Roadmap for Development, Heritage Conservation & Tourism: Promoting Sustainable Growth Along the Silk Roads Heritage Corridors," UNWTO, last modified 2014, https://silkroad.unwto.org/publication/roadmap-development-heritage-conservation-tourism-promoting-sustainable-growth-along-sil.
[451] "Technical Cooperation and Silk Road. Key Focus Areas," UNWTO, accessed October 13, 2019, http://silkroad.unwto.org/en/content/key-focus-areas.

they have a special building for tourists to come and collect the information, as well as smaller kiosks at Almaty airport and at major attractions. In Nur-Sultan, there is no special information building in the city center as there is in Almaty, but they have several kiosks providing tourist information. The goal of the central government is to impose local administrations in the regions of Kazakhstan to create information centers for tourists and also to provide internet connectivity. The government identifies this initiative as a potential plan to fund internet satellite connections in major remote destinations, as the country is huge, and coverage is not excellent yet.

In Kazakhstan, there is no customer satisfaction monitoring system at this point in time, but the country is just starting to launch a survey either in airports or at major attractions and sightseeing spots. Next year, a special feedback area on Kazakhstan's travel website will be introduced, where those who are traveling by car can register and leave feedback or complaints if they are illegally stopped by the police or feel somehow mistreated.[452]

At GosComTourism, there is a new Department of Statistics. In June 2019, they conducted vast research on tourist satisfaction, particularly on spending. The survey was undertaken directly in railway stations and at main historical sites. Students from the tourism faculties of Uzbekistan's universities volunteered for this process, and they interviewed more than 10,000 tourists. The Department of Statistics analyzes this data, and GosComTourism uses it for planning.[453]

DMOs have their own way of collecting feedback. According to an interview with a Silk Road Destination DMO, around 90% of travelers leave feedback, but the issue is how to properly analyze this information. There is a need to structure the methodology of feedback analysis.[454]

Community involvement. The role of local communities in preserving the historical heritage of the Silk Road is critically important. Without the strict protection of these monuments, there is no future in tourism which has sustainability based on the role of local communities.[455] Community-based tourism, which is mainly developed in Kyrgyzstan, is yet to reach its full potential in other destinations.[456]

In Kazakhstan, local communities are not heavily involved. The Kazakhstan Tourism Association and some other stakeholders are engaged in CBT (community-based tourism) projects, and they are developing new guest houses and educating locals on converting their homes into guesthouses to earn a stable income. There is still no particular legislation for guesthouses, but there are ongoing discussions on tax waivers or grants to help communities convert their homes into comfortable guest accommodations. They are currently either funded by international organizations in the form of grants or are purely business driven. For instance, there is Saty village in Kolsai lake, which has many guesthouses on offer, but none of which were sponsored or funded by the government or any organizations – people instead took this as a business opportunity.[457]

Silk Road Destination DMO supports a responsible tourism project in the village of Metan near Samarkand, where they are trying to preserve the land, culture, and traditions of the local

[452] Interview with Deputy Chairman of the Board of Kazakh Tourism
[453] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[454] Interview with Director of Silk Road Destinations DMO
[455] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[456] "Silk Road Action Plan 2016/2017".
[457] Interview with Deputy Chairman of the Board of Kazakh Tourism

people. As was mentioned by an interview partner, they face several difficulties in managing this project, and only with contributions from foreign organizations and institutions can they continue because, as an agency, they have no experience related to how such projects must be managed.[458]

Managing the profitability of entrepreneurs. Uzbekistan has recently enacted some supportive policies for businesses – particularly for the hospitality industry. There is reimbursement for 4-star hotel construction costs of up to $4,210 per room constructed, and up to $6,850 USD per room constructed in 5-star hotels. This will be paid out of the tourism fund of GosComTourism[459] and will stimulate a boom in hotel construction in the tourist cities of Uzbekistan.

Another example is the benefits and preferences for entrepreneurs who create free Wi-Fi zones. According to this, the taxable base of business entities that have established free Wi-Fi access zones in their premises is reduced by the amount of expenses spent on the purchase of equipment (necessary for connecting to the Internet, in particular, routers, communication cables, etc.) and the acquisition of Internet traffic to deploy a wireless access zone of sufficient quality.

The taxable base of business entities is reduced by up to $10,500 USD, for the reconstruction, overhaul, and construction of modern sanitary facilities (public toilets) in tourism sites and on roads. [460]

Supply and demand and seasonality management. The tourism seasons in Central Asian countries, depending on tourist specifics, vary from very short (2-3 months per year in the mountain areas of Kyrgyzstan and Kazakhstan) to quite short (4-5 months per year for so-called *city tours*). Seasonality is thus a big problem for all stakeholders. In Uzbekistan, tourism activities are mainly conducted over just five months – in winter and summer, they almost stop. GosComTourism understands the problem of seasonality, and they have begun to support tourism actors by regulating/coordinating with other ministries to move big governmental events to the off-season period.[461]

Due to the climatic conditions in Kazakhstan, seasons are very rigid, especially in the northern and central regions. Kazakh Tourism is attempting to diversify tourism products, and there have been both successful and unsuccessful initiatives. One way of diversifying the product was hosting festivals in autumn and even in winter, such as ice-skiing, but these have not affected tourist numbers yet. Some ski resorts are trying to use the colder temperatures to attract winter clothing manufacturers to test their products in Kazakhstan, or they are working to attract producers of winter tires for campaign purposes. These are more creative options and can convert existing shortcomings into success. Like turning imperfect roads into off-road driving adventures.[462]

From this year, to reduce the seasonality problems in Uzbekistan, GosComTourism comprehensively encourages MICE tourism and festival development to attract more tourists

[458] Interview with Director of Silk Road Destinations DMO
[459] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[460] "Санитарно-Гигиенические Узлы," Государственный Комитет Республики Узбекистан по развитию туризма, accessed October 12, 2019, https://uzbektourism.uz/ru/toilet.
[461] Interview with Director of Silk Road Destinations DMO
[462] Interview with Deputy Chairman of the Board of Kazakh Tourism

in the low season and to areas that are less popular and more sparsely populated. A full catalog of what Uzbekistan and its tourist centers offer for MICE tourism is currently being developed. According to the last presidential decree (13th August 2019), all governmental event dates/periods will be preliminary coordinated with GosComTourism, and it is GosComTourism that will suggest the low season dates for their events. The intention of this is to contribute to tourism business development, as this new type of planning will help DMOs to settle the problem of a lack of hotel rooms in the short tourism season and for hotels to increase their yearly average occupancy rate.[463]

Mediums of communication. GosComTourism communicates with businesses, local governments, and local communities around all the regions of Uzbekistan through 40 regional departments. Each department communicates with the public through their own Instagram and Facebook accounts and websites.[464]

Nevertheless, the head of DMO from Samarkand doesn't find communication between the different tourism stakeholders, coordinated by GosComTourism (especially by its regional offices), effective enough. Moreover, GosComTourism tries to push/coordinate the associations of travel agencies and hoteliers, but there is no communication or relationship between these associations. If GosComTourism can create a place where all tourism stakeholders can easily communicate, this will contribute to the development of tourism much more than unsynchronized activities.[465]

In Kazakhstan, an internal information system is used between state bodies as well as email exchanges or video conferences when speaking to remote regions. WhatsApp is used even at the government level, and many WhatsApp groups are used for instant communication. Kazakh Tourism is also utilizing the infrastructure of the National Chamber of Entrepreneurs – the biggest business union, called *Atameken,* to communicate with the private sector. This non-governmental body represents the interests of businesses, who are paid members. Atameken has branches in different regions and industries, and they have regional reporters. Atameken spreads relevant information efficiently through their regional offices, which can contact businesses directly on the ground. The communication between Kazakh Tourism and Atameken is close and conducted through video conference calls. Kazakh Tourism will also open regional sub-offices in Almaty and in all of the top ten prospective destinations the government decided on.[466]

In Kyrgyzstan, there is an Interdepartmental Commission for Tourism Development, in which different stakeholders and governmental structures address topical issues at least once a quarter, as well as those that require prompt solutions. Meetings are held under the chairmanship of the Vice Prime Minister who oversees tourism.[467]

Capacity building, education, and training. Education, training, and research are defined by UNWTO as key factors in ensuring the sustainability and competitiveness of tourism

[463] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[464] Ibid.
[465] Interview with Director of Silk Road Destinations DMO
[466] Interview with Deputy Chairman of the Board of Kazakh Tourism
[467] Interview with Deputy Director of the Department of Tourism, the Ministry of Culture, Information and Tourism of Kyrgyzstan

destinations.[468] The Silk Road Training and Capacity Building Programme aims to deliver executive training to NTO officials from the Silk Road member countries, university graduates wanting to build a career in the tourism industry, and those stakeholders interested in sustainable and transnational tourism development through the Silk Road.[469] Founded in 1998 and based in the Principality of Andorra, the UNWTO Academy leverages education and training, supporting member countries through effective and competitive capacity building.[470]

In 2016, the UNWTO Silk Road Programme, in collaboration with the Great Southern Touring Route Australia and Chinese Friendly company (affiliate member of UNWTO aiming to ease tourism and cultural understanding and create pleasant experiences for Chinese travelers to international destinations), ran two capacity-building training workshops for inbound tour operators.[471]

A *bottom-up* approach aims to contribute destination management to sustainable development. Domestic tourism authorities should enhance the potential of local communities and stakeholders by delivering relevant training and capacity building covering all aspects of destination management. The improved skills and services will lead to repeat visits, strong business relationships, and direct foreign investment. Recommendations for training programs include IT and communications technology, English language skills, hospitality management, good governance and transparency in international business, customer service, tourist information services, and sustainable management of natural and heritage resources.[472]

As one tourism practitioner mentioned in an interview, the biggest problem related to tourism in Central Asia is capacity. Therefore, any training or educational projects contribute significantly because there is usually a large gap between job applicants' profiles and DMOs' requirements. Preparing a salesperson or tour operations specialist in a travel company takes up to 6 months, or sometimes almost a year.[473]

GosComTourism considers travel companies, students, local governments, guides, certain individuals, and policymakers as stakeholders. And in a newly established Tourism Development Institute, they will provide courses for all these stakeholder categories. They have modernized the curriculums and program structures too. Moreover, they are going to provide training for several other ministries, and the goal is to explain to them how to make tourism-related activities in the right way (because sometimes they don't know how to contribute tourism, and sometimes they make things worse).[474]

The launch of tourism courses at the Silk Road International Tourism University in Samarkand for the 2018–2019 academic year is a particularly encouraging development. About 125

[468] "Partnerships in Education with UNWTO," UNWTO, accessed October 13, 2019, http://academy.unwto.org/content/partnerships-education-unwto.
[469] "UNWTO Silk Road Training and Capacity Building Programme," UNWTO, last modified November, 2017, http://silkroad.unwto.org/project/unwto-silk-road-training-and-capacity-building-programme.
[470] "About UNWTO Academy," UNWTO, accessed October 13, 2019, https://academy.unwto.org/content/about-us-1.
[471] "UNWTO Workshop for Inbound Tour Operators," UNWTO, last modified October 1, 2016, http://silkroad.unwto.org/project/unwto-workshop-inbound-tour-operators.
[472] "Building a Stronger Silk Road: Strategic Recommendations for Enhancing Tourism with a Special Focus on Central Asia Compiled by UNWTO in Collaboration with a Team of International Experts."
[473] Interview with Director of Silk Road Destinations DMO
[474] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism

undergraduates are studying tourism through design, marketing, services technology, logistics, professional education, hotel business, catering business, and event management. [475]

In Kazakhstan, tourism education and capacity building are currently undertaken through tourism associations (KTA and KAGIR), which receive some funding to conduct such training either from the government directly or from international organizations. Kazakh Tourism is planning to offer training on capacity building. The National Chamber of Entrepreneurs sometimes organizes forums or masterclasses on tourism. About 30 universities in Kazakhstan currently offer a degree in tourism, and another 15 colleges also offer vocational training for hospitality jobs. On top of that, the Kazakhstan government is in the process of launching an international tourism university. The school has just been registered, and they are now building a campus in Astana.[476]

Corridor Marketing

In Uzbekistan, there is a special government marketing agency, the National PR Center, operating under, and sponsored by, GosComTourism. The National PR Center is responsible for promoting Uzbekistan through marketing activities and bringing tourists to the country.

For tourists from long-haul destinations such as the USA, Canada, Australia, and Western Europe, there is a lot of interest in visiting at least two of (or even all) the 5 *"stans,"* and tour operators are now developing this type of combined tour. They are increasingly interested in combined tours for travelers because the Silk Road has great marketing leverage as well as a narrow niche, which is still not easy to organize for new, young tourism companies.[477]

Target segment identification. In general, segmentation is answering two questions: *what are we going to offer and to whom?* Without knowing its potential, a destination can't make a valid offer. Kazakh Tourism works on both these questions – tour products and promoting them to segments of travelers. First, they looked at historical statistics, at a list of countries from which they received tourists and identified the major groups of potential target markets, which is Russia and China; in Europe – Germany, the UK, and Poland; in Asia – Korea, India, Hong Kong, and Malaysia; and in the Middle East it is the United Arab Emirates. Inside each target market, they identified segments by answering the question: "Who do we target?" They did this via different age, income, and gender demographics, and so they got to know who a tourist or traveler to Kazakhstan is. After this, they started market initiatives.[478]

Another approach utilized by Kazakh Tourism was generally identifying tourism positioning as 4Es, with each E standing for a certain type of tourism: Eco, Ethnic, Entertainment, or Events. With Eco and Ethnic tourism being the core offer, and Entertainment and Events being complementary products. Based on this positioning, they promoted their tourism products based on these 4Es and also tailored them to specific markets. For instance, in Europe, they mostly promoted Eco and Ethnic tourism to Kazakhstan. For China, this was both Eco and Entertainment, and for Russia, it was mostly Events and Entertainment.[479]

[475] "Promoting Regional Tourism Cooperation under CAREC 2030, a Scoping Study".
[476] Interview with Deputy Chairman of the Board of Kazakh Tourism
[477] Interview with Co-founder of Caravanistan.com DMO
[478] Interview with Deputy Chairman of the Board of Kazakh Tourism
[479] Ibid.

Within the last two years, GosComTourism has focused on the 3-4-hour flight segment (visitors from Russia, Kazakhstan, the Middle East, Turkey), plus European countries. In the near future, they are going to start working on attracting tourists from long-haul countries.[480]

Silk Road branding. "The Silk Road is one of the world's most powerful brands, perhaps even bigger than Disney or Coca-Cola," Ben Simpfendorfer wrote in his Forbes article. He continued by saying, "In my conversations across the region, whether speaking with a Chinese policy official or Egyptian taxi driver, simple mention of the Silk Road brings immediate recognition."[481]

UNWTO, together with UNESCO, launched a study in which 300.000 local social networks were surveyed. Online data showed that the "silk road" keyword combination came up in almost 30% of all searches and discussions linked to route travel. However, not much is known about the type of tourism there.[482]

Several destinations are currently using the Silk Road for promotion; however, without a universal communications strategy, including a professional and attractive brand toolkit supported by guidelines for use, efforts are not reaching their full potential.[483]

This has been one of the objectives of the UNWTO Silk Road Action Plan, and the UNWTO Silk Road Programme has been working to make its member states aware that increasing Silk Road brand recognition will generate higher interest and more frequent visits to the destinations. The initial Silk Road logo, in the shape of an arched double gate (which is now mostly out of use but is still used by a few tour operators in Central Asia), was commissioned by UNESCO and jointly launched by the World Tourism Organization (WTO – not part of the UN yet) and UNESCO at the first Silk Road Meeting in Samarkand in 1994 (along with the Samarkand Declaration). The logo was circulated among participants. At that time, the logo was distributed in hard copy, not digitally, and there were no restrictions on how the Silk Road logo could be used. The logo was used in association with all UNWTO activities along the Silk Road and only used by UNESCO on the Silk Road activities carried out with UNWTO, as UNESCO has its own Silk Road logo for its Culture section projects.[484]

When the UNWTO Silk Road Programme was created in 2010, there were some fresh issues regarding the use of the existing logo by third parties due to the existing UN rules and restrictions related to the use of UN system logos. The need to create shared promotional tools and collective Silk Road brand identity has been an ongoing topic at all annual meetings with the Silk Road Task Force, the programme's working body. UNWTO thus developed a new logo and toolkit, which was presented to the Task Force, offering the countries the opportunity to take ownership and register it. So far, the process has been frozen due to the complexity of the issue and the lack of dynamic parties ready to work on it.[485]

[480] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[481] Ben Simpfendorfer, "What Does China's Silk Road Policy Mean in Practice?," Forbes, last modified June 15, 2015, https://www.forbes.com/sites/bensimpfendorfer/2015/06/15/chinas-silk-road-policy-implications/#67b65e39140f.
[482] "ETC-UNWTO Seminar on Transnational Tourism Themes and Routes - the Silk Road".
[483] "Silk Road Action Plan 2012/2013," UNWTO, last modified 2012, http://cf.cdn.unwto.org/sites/all/files/docpdf/jdunwtosilkroadactionplanaugust2013final1.pdf.
[484] Email correspondence with former head of UNWTO Silk Road Programme, Silk Road specialist on sustainable tourism development
[485] Ibid.

Strategic recommendation number one for enhancing tourism along the Silk Road is developing and integrating the Silk Road brand (which has massive growth potential as a destination brand) into national marketing strategies. Social media research for the Silk Road Project highlights that the Silk Road is number-one in online discussions concerning travel routes (approximately 30% of all discussions globally). However, very few Silk Road countries are accelerating their marketing and promotional potential by linking their brand with the Silk Road.[486]

Kazakh Tourism does not use the Silk Road brand in promotional materials, but they do mention the Silk Road as one of the strongest of Kazakhstan's touristic offerings.[487]

Previously, Uzbektourism (before being restructured as GosComTourism) used UNWTO's Silk Road logo in some promotional materials and banners (those which advertised events on the Silk Road).[488] Nowadays, awareness of the Silk Road as a travel brand has increased, and on the front page of the 135zbekistan.travel governmental portal, "Welcome to Uzbekistan, the Heart of the Great Silk Road," is written.[489] Silk Road heritage and culture play a significant role in attracting tourists to Uzbekistan. 81% of international tourists surveyed in 2014 mentioned that they were interested in this destination due to its historical connection to the Silk Road. Respondents in the same survey said that among the countries associated with the Silk Road, Kyrgyzstan, Kazakhstan, and China represented the top three destinations identified.[490]

The DMOs of Uzbekistan, Kazakhstan, and Kyrgyzstan use Silk Road tours and the Silk Road brand as a unique selling point in their promotional materials. It should also be noted that, in the early 2000s, it was the owners of small family hotels in Samarkand and Bukhara who actively used the Silk Road name in their promotion and everyday visibility. Now, everyone in the tourism business in the area understands that the Silk Road brand brings business. Small stakeholders such as small-sized hotels or big institutions like GosComTourism or international hotel chains all understand the benefits the Silk Road brand brings and that it is valuable for their businesses.[491]

However, private businesses are using Silk Road as an umbrella for their products while still not using the Silk Road concept in their promotional materials. This can be explained by the fact that they are interested in developing their individual company names (brands). The owner of a big DMO from Samarkand said in an interview that in his branding, they use the Silk Road name organically, as it is a part of the company brand name, Silk Road Destination. This DMO is interested in gathering tour operators from different Central Asian countries under its brand, and they have worked this way over the last two years. For example, in France last year, they were using one stand for several companies from varying countries under the Silk Road Destinations brand.[492]

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[486] "Building a Stronger Silk Road: Strategic Recommendations for Enhancing Tourism with a Special Focus on Central Asia Compiled by UNWTO in Collaboration with a Team of International Experts."
[487] Interview with Deputy Chairman of the Board of Kazakh Tourism
[488] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[489] "Welcome to Uzbekistan," Uzbekistan.travel, accessed October 13, 2019, https://uzbekistan.travel.
[490] "Uzbekistan Tourism Insight – Findings from the Uzbekistan International Visitor Economy Survey 2014 and National Tourism Satellite Accounts," UNWTO, last modified 2015,
http://cf.cdn.unwto.org/sites/all/files/pdf/150910_uzbekistan_visitor_economy_survey_jc_final.pdf.
[491] Interview with Director of Silk Road Destinations DMO
[492] Ibid.

At the same time, the same DMO proposes that NTOs unite and organize (with the support of the UNWTO Silk Road Programme) a Silk Road stand in the main international travel fairs. The design of the stand must express the nature of the Silk Road, and the client should find every country along the Silk Road inside the stand.[493]

Distribution channels used. GosComTourism considers tourism companies participating in travel fairs and bloggers as the main distribution channels. They also work closely with the Uzbekistan embassies abroad and Uzbek diasporas in different countries. The relationship with diasporas in terms of tourism is a new strategy of the Uzbek NTO, and they have a special department that is responsible for connection with NGOs and diasporas.[494]

For DMOs still, the number-one distribution channel is travel fairs, and these bring them business. Many have online channels, but primary business volume still depends on travel fairs, except for the select number of full-online DOMs like Advantour.com and Caravanistan.com.[495]

The content created by brands is perceived as less authentic than content generated by users.[496] Nevertheless, social media is mostly used for destination awareness and image, but it is not a distribution or direct sales channel yet.

Pricing determination. Within the last two years, there have been many changes in Uzbekistan's legislation, especially in the tax policy. Stakeholders may feel the resultant positive influence within 1-2 years. However, pricing culture in Uzbekistan is still at a low level, and this negatively impacts tourism. Suppliers always want to wait until the last moment and earn the biggest profit from their sales instead of providing the correct price and experiencing a comfortable sales period after they announce the price. It is rooted in the unstable exchange rate that has always been a big problem for suppliers (and this represented a *business reality* in Uzbekistan from the end of the 90s until September 2017). During the last two years, financial liberalization was carried out, and now the country has a fairly stable exchange rate, but pricing culture is still a weak point for Uzbekistan hoteliers, restaurateurs, or transportation suppliers. Many of them still don't understand that the DMO should provide the price to the client, maybe even one year before the tour's starting date, and in this case, the DMO takes all financial risks if prices go up.[497]

Findings from the Uzbekistan International Visitor Economy Survey indicated that the majority of respondents preferred to stay in locally owned accommodation and use local restaurants, as they provided a more authentic experience and ensured that the money they spent supported the local community.[498]

More budget airlines are coming to Kazakhstan, with some flying from Budapest and Paris. China Southern mid-level airline flies to many popular destinations in Kazakhstan. The midscale Polish Airline and Indian IndiJet are also about to enter the market. This increases connectivity because the national air carrier AirAstana is positioned as a higher-end airline and does not offer low-cost options. For domestic flights, there are local airlines like Kazak Air, Bek Air, Scat Airlines, FlyArystan, which are considered to be affordable options. One of the

[493] Ibid.
[494] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[495] Interview with Director of Silk Road Destinations DMO
[496] "Inspiring Silk Road - Using the Power of Social Commerce to Promote Travel Along the Silk Road, Jens Thraenhart," UNWTO, accessed October 13, 2019, http://cf.cdn.unwto.org/sites/all/files/pdf/cs_unwto-silkroadministermeeting_01.pdf.
[497] Interview with Director of Silk Road Destinations DMO
[498] Ibid.

initiatives Kazakhstan is testing now is an international flight from Tokyo – Astana, operated by Scat Airlines and subsidized by the government. Hotels are also becoming more affordable in Kazakhstan due to competition. Moreover, since 2013, 140 new hotels were built for *Expo2017* in Astana. 3-4-star hotels in Almaty and Astana now offer fairly competitive prices for tourists, including branded hotels, like Novotel, Holiday Inn, Best Western, Park Inn, Windham, Hampton Court, and Hilton Garden. In general, due to exchange rates, traveling to Kazakhstan is considered affordable by most people. Tourists can get accommodation, an excursion, and meals for just 100 euros per day.[499] The latest findings show that numerous Kazakhstan airports have offered to switch to open sky mode, which will stimulate healthy competition between airlines and ultimately affect carriers' pricing policies.[500]

Marketing strategies for the tourism corridor. Uzbekistan is still lacking a marketing strategy for tourism development. An interview partner from GosComTourism mentioned that the country needs a comprehensive marketing strategy to 2040 that answers the big question – what the destination will do with its marketing until then and how Uzbekistan will position itself on the world tourism map. The first step has been done, and since 2017, Mr. Sadik Barak, a foreign advisor from Turkey (the former Deputy of the National Assembly of Turkey), is working as a permanent advisor to GosComTourism and has already produced the document *Strategy 2030*.[501]

Until recently, the NTO of Kazakhstan has mostly been focusing on B2B using roadshows and exhibitions for its promotional strategy, but there is still no real marketing strategy in use. Push & Pull strategies can be mentioned in terms of: for *pus*h; it is to stimulate tour operators to participate in roadshows and exhibitions, for *pull,* it is targeting the traveler with advertising or through approaching tour operators in the visitor's origin country.[502]

For DMOs, the marketing strategy is to use proven instruments such as participation in travel fairs, different workshops, or roadshows in targeted countries. Familiarization trips are seen to be among the best instruments for promoting certain DMO's products and destinations. As an example, the Silk Road Destinations DMO from Samarkand has been providing familiarization trips consistently for six years, and every year they have four guaranteed departures. Almost 50 travel professionals use this opportunity to visit Uzbekistan yearly and learn how to sell the country's travel products. For this purpose, within the familiarization trip program, the DMO delivers a 3-hour workshop in Samarkand, and company experts all participate. Over three hours, they answer as many questions as possible from their potential partners on how to better sell Uzbekistan to the end-consumers. On the last familiarization trip in August 2019, twelve people and three companies from Germany, one company from Italy, and two companies from France participated. These countries served as the main markets for this DMO. The famtrip strategy works well (15% yearly growth) for this particular DMO, and they continually learn how to develop online marketing channels as well.[503]

Public Relations & Communications. The forthcoming Silk Visa alone may have an impact on public relations. It's a practical marketing instrument that can cause a huge news wave, and a

[499] Interview with Deputy Chairman of the Board of Kazakh Tourism
[500] "Kazakhstan Airports Offered to Switch to Open Sky Mode," Newsline.kz, last modified September 27, 2019, https://newsline.kz/article/789018/.
[501] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[502] Interview with Deputy Chairman of the Board of Kazakh Tourism
[503] Interview with Director of Silk Road Destinations DMO

lot of positive content can be created on that topic. This will give the region more visibility in international media.[504]

Kazakh Tourism is using both traditional and digital channels – TV advertising on Euronews, CNBC, EuroSport, and RBK in Russia and a website with search engine optimization and social media marketing. They will continue along this path until the country's name becomes well-known as a tourist destination (currently, Kazakhstan is mostly known for oil and gas).

Since early 2018, GosComTourism began to invite foreign travel bloggers, and as a result, on August 22-27, 2019 Tashkent hosted the *World Influencers Congress* – a unique platform designed to bring more than 100 world-class digital influencers from 40 countries together to facilitate the exchange of ideas, techniques, and best practices. The main goals of the congress were to create a Global Influencers Network, which would unite influencers and leading thinkers from around the world, and which will meet regularly in the world's most unique destinations. This event is an excellent example of "*going viral*" – a common internet term. The number of influencers and subscribers covers more than 150 million people on world social networks such as Instagram, Facebook, and YouTube.[505]

The Measurement of Success. The UNWTO Silk Road Programme measures engagement level by a) number of countries formally joining the Programme (recently reached 34), b) number of ministers attending the Annual UNWTO Silk Road Ministers meeting at ITB, c) number of country representatives participating in the training, d) number of countries participating in the collaborative initiatives, i.e., marketing and promotional campaigns created by the Silk Road Programme.[506]

For GosComTourism, the most important indicator of success is visitor satisfaction. As a representative of the government of Uzbekistan in the tourism sphere, they are responsible for monitoring how governmental decisions are implemented and finally *work* for tourist satisfaction. There are three levels of problem analysis, the local community level, business level, and governmental level, and they provide conditions that will be comfortable for every level. There are also three departments in GosComTourism that are responsible for data analysis – The Department of Statistics and Analysis, The Department of Tourist Navigation, and The Department of Marketing Research.[507]

Starting this year, Kyrgyzstan will organize the annual national Kyrgyz Tourism Awards. As part of this, the rating will be compiled to show at what level the different representatives within the tourism industry conduct their business. Now, they are collecting applications from companies, and on September 27, International Tourism Day, they will summarize the 17 nominations, including a nomination for the "Person of the Year," which will be awarded for the greatest contribution to tourism development.[508]

[504] Ibid.
[505] "World Influencers Congress Launched in Tashkent," UZ Daily, last modified August 23, 2019, https://www.uzdaily.uz/en/post/51448.
[506] Email correspondence with former head of UNWTO Silk Road Programme, Silk Road specialist on sustainable tourism development
[507] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[508] Interview with Deputy Director of the Department of Tourism, the Ministry of Culture, Information and Tourism of Kyrgyzstan

Future Development of the Silk Road TC

An existing or future tourism corridor cannot continuously create activities in a vacuum. It can only channel and maximize deep-rooted tourism and economic potential.[509] The Silk Road can grow as a tourism destination, can be a valuable brand, and tour operators can easily sell their destinations under its umbrella. It is generally much more useful for emerging destinations to sell themselves when they position themselves as a part of the Silk Road.[510]

Basic Infra-Structural and Super-Structural Requirements. The inter-country speed train connection between Almaty and Bishkek, Bishkek and Tashkent, and budget airports in small tourism spots could play roles as tourism drivers, being a good air connection between Bishkek and Tashkent. Frequent and comfortable air-connectivity between the capitals of neighboring countries is also crucial for tourism development.

The hospitality industry in Kyrgyzstan still hasn't developed enough to generate demand, but is improving every year. A wealth of small hotels and guesthouses should be complemented with branded hotel chains. Not just in Bishkek (which has Hyatt, Sheraton, Novotel, Ramada) but in smaller cities as well.[511]

Policy-wise, a single tour guide accreditation system would allow guides to work across borders. Today's licensing restricts tour guides from Kyrgyzstan to just working in Kazakhstan (as in Uzbekistan where guide certification is obligatory), but still, many guides come from Kyrgyzstan. This restriction is inefficient and difficult to manage for tour operators in Kazakhstan, and it has led to complaints. To move away from this situation, it is better to open up borders for professionals so both tour operators and tour guides can work across borders. This would also foster competition and increase the need for build capacity to stay competitive. In terms of infrastructure, Central Asian countries should first solve this perennial issue and make transborder passage easier. Infrastructure projects, such as the development of a stable wireless network, rest stops on the major roads and bus routes, should also be part of an infrastructural development plan.[512]

Evaluation of the Silk Road Corridor

What was done well. The key success is creating a collaborative platform and spirit for so many and for such diverse destinations along the Silk Road (35 member states), as well as working with both the governments and private sector together. So far, Technical Cooperation and Silk Road (formerly the UNWTO Silk Road Programme) is the only existing platform of this kind for the Silk Road. In each of the three key areas of activities, there have been concrete achievements:

1. Expanding the work on the Silk Road from Classic (traditionally including China and Central Asia) to Western and Maritime Silk Road is groundbreaking.

2. Raising awareness of Silk Road tourism globally through building partnerships with international travel fairs (i.e., the UNWTO Silk Road Programme at ITB) and working with high profile media channels like the Discovery Channel and with the British comedian, novelist and

[509] "Operationalizing Economic Corridors in Central Asia. A Case Study of the Almaty–Bishkek Corridor," Asian Development Bank, last modified 2014, https://www.carecprogram.org/uploads/2015-CAREC-ECD-study.pdf.
[510] Interview with Deputy Director of Sun House Team DMO
[511] Ibid.
[512] Interview with Deputy Chairman of the Board of Kazakh Tourism

television presenter, David Baddiel. The aim was to uncover the most extraordinary sites and the most intriguing stories from the Silk Road and reveal how ancient exchanges had a critical impact on the future development of the world.[513] The project was an international success and aired globally, with an outreach of over 2.5 billion audience members. Another example is a collaboration with the BBC for a two-episode documentary on the Silk Road hosted by renowned historian, Dr. Sam Willis (focused on the arts, heritage and culture of the Silk Road, the series featured the Silk Road countries of Tajikistan, Uzbekistan, Iran, Turkey, Italy, and China[514]), which was seen by 152 million subscribers in 120 territories on BBC World.

3. Creating a unique Silk Road Guides training scheme with WFTGA and UNESCO.[515]

4. In the area of knowledge transfer and capacity building training, numerous workshops were delivered with UNWTO Affiliate Members and UNESCO as well as skills training and service excellence for tour operators, tourism, and heritage guides on international marketing strategies, etc.[516]

What Can be Improved. The historical absence of market-based economic development is a challenge for Central Asia, which has other unique challenges such as low service quality, vast distances, landlocked economies, and challenging terrain. However, Central Asia also has advantages, such as well-educated populations that, in many cases, share languages, culture, and history, and all of which can help the concept of economic and cultural tourism corridors to succeed.[517]

Post-Soviet states are still cash-based economies, and travelers are often wary of doing business with local companies via wire transfer or other means of payment that do not protect against fraudulent activity.[518]

Informational support is necessary to create a high level of awareness of the Silk Road before further steps can be done. On NTO and partner websites, a dedicated section for the Silk Road with synchronized information including each country's own Silk Road unique selling points have to be established. Through the utilization of social media, it will help to engage consumers in Silk Road marketing campaigns.[519]

First of all, the five *"stans"* of Central Asia have to clearly position themselves as Silk Road destinations and as a single product, in addition to their national tourism strategy (however, the important point is that they should not conduct individual Silk Road activities without coordination with other Silk Road countries). Kazakh Tourism has recently launched a new campaign called *TravelStan*. This will be launched on the *CNBC, RBK,* and *EuroSport* TV channels. The idea is to show Kazakhstan first but then extending this concept to other

513 "'David Baddiel on the Silk Road' to Air on Sunday 21 February at 9pm on the Discovery Channel UK," UNWTO, last modified February, 2016, http://silkroad.unwto.org/project/david-baddiel-silk-road-air-sunday-21-february-9pm-discovery-channel-uk.

514 "BBC Documentary on the Silk Road Hosted by Renowned Historian Dr. Sam Willis," UNWTO, last modified May, 2016, http://silkroad.unwto.org/project/bbc-documentary-silk-road-hosted-renowned-historian-dr-sam-willis.

515 Email correspondence with former head of UNWTO Silk Road Programme, Silk Road specialist on sustainable tourism development

516 Patrick Fritz, "Technical Cooperation Opportunities Along the Silk Road," UNWTO, accessed October 12, 2019, http://cf.cdn.unwto.org/sites/all/files/pdf/sr_pf_itb2019_with_ng_slides.pdf.

517 "Operationalizing Economic Corridors in Central Asia. A Case Study of the Almaty–Bishkek Corridor".

518 "The Goal of Silk Road Explore."

519 "Building a Stronger Silk Road: Strategic Recommendations for Enhancing Tourism with a Special Focus on Central Asia Compiled by UNWTO in Collaboration with a Team of International Experts."

countries as well in the future. By launching a *TravelStan* campaign, the nations are planning to counteract the possible negative connotations that potential visitors associate with the "*stan"* suffix (usually associated in potential visitors' mind with the war and terrorism issues of Afghanistan or Pakistan), and transform them into common branding through new forms of campaigning. It will be much simpler when there is a single Silk Visa and also easy transportation options passing through border control. There shouldn't be any competition between each of the five *"stans"* when it comes to the cultural and historical heritage of the Silk Road. Moreover, cultural corridors can help to distinguish particular regions from the bigger Silk Road perception where there are big players like Italy, Spain, or Greece, whose strengths can contribute to emerging Central Asian destinations just by adding "another product by the Silk Road."[520]

An interview partner from GosComTourism proposed a Silk Road Tourism Skills project – a new concept aiming to unify service standards within Silk Road locations. These countries have to have common standards, and they have to promote each other. They don't have to compete; they have to complement and contribute to each other. The general idea of the project is that all participating destinations will speak one professional *language,* and linkage on educational and research levels between these countries will be created. This will ensure the further sustainable development of the Silk Road Corridor, and the higher quality of education and facilities will increase the profit and income of the destination's tourism industries. Better competence and skills among individuals and governmental support (at the initial stage) will make the tourism sphere less vulnerable.

Inter-governmental cross-border management programs will help to improve border crossing procedures and services for tourists, including English speaking staff at border control, standardized working hours (6 am – 12 pm daily), tourist information points, guided service through buffer zones, signage, food and beverage services, transit accommodation, shopping, money exchange, restrooms and first aid facilities. An innovative approach to cross border management can include some cultural activities and local craft markets, cross border job/internship exchange, standard tourism development plans, and cross border e-tourism frameworks.[521]

A dedicated department (or person) in each NTO/tourism ministry will be responsible for communication, PR and joint programs on the Silk Road initiative, and will help to unite the efforts of all Central Asian countries. This will definitely increase visibility and results in the marketing of Silk Road products. Otherwise, all Central Asian countries promote their own countries separately using different criteria, visuals, and approaches. Joint participation in travel fairs (such as *ITB Berlin*) under the Silk Road Corridors umbrella will help visitors to understand that these destinations are very close to each other geographically and that they offer complementing tourist products. The best way is to have a big central Asian stand in travel fairs that will give visitors the possibility to see all 5 "*stans"* in one place.[522]

More collaboration between businesses from Silk Road countries would improve tourist satisfaction and increase the total number of days spent in the region.[523] To strengthen existing

[520] Interview with Deputy Chairman of the Board of Kazakh Tourism
[521] "Building a Stronger Silk Road: Strategic Recommendations for Enhancing Tourism with a Special Focus on Central Asia Compiled by UNWTO in Collaboration with a Team of International Experts."
[522] Interview with Director of Silk Road Destinations DMO
[523] Interview with Co-founder of Caravanistan.com DMO

tourism product professional associations, joint stands are to be established.[524] There is also a necessity to continue a global promo campaign and PR campaign and attract more big hotels together with airport infrastructure improvement, not only in capital cities but in tourism spots as well.[525]

Small and medium-sized locally owned responsible tourism businesses can develop without governmental investment, with the support of local investors and the business community. This part of infrastructure doesn't require significant investment. Hotel businesses require hefty investment, and local business communities usually don't have enough resources for this. There are many small hotels in various cities throughout Uzbekistan, but for real tourism development, this is not enough, and at this point, they should have government support. Furthermore, the government should co-invest in hotel business development.[526]

Governments have to know and be able to access the required funding for individual communities. This can reach from large infrastructural investments and big developments to small-scale support to preserve communities and enable sustainable growth. In general, communities benefit more from small to medium-sized responsible developments that keep money within the communities. The development of a network of local social enterprises that have a direct impact on communities, coupled with strategic larger investments, would be the best approach for the countries.

NTOs should leverage the shared legacy of the Silk Road: architecture, gastronomy, religion, culture, and technology, by establishing partnerships between Silk Road destinations and businesses for global marketing campaigns, and implementing them by working together to attract resources.[527] Together – all five Turkic-speaking countries of the corridor could apply for the joint nomination *Silk Road cultures and traditions* to save what they have and transfer it to the next generations.[528]

Cooperative development of new trans-border thematic itineraries and experiences positioned as the Silk Road will boost their joint product offering and allow more word-of-mouth advancement to contribute to a stronger and better recognized Silk Road brand globally. Joint social media activities can have a massive impact. Cross-marketing initiatives and product development, partnerships for joint Silk Road marketing campaigns, combining of resources and gathering of market intelligence and standardization of data and partnering with tour operators, airlines, and other private sector stakeholders are among the recommended actions.[529]

Although the UNWTO Silk Road Programme has been successful in bringing the Silk Road member states and the private sector under one umbrella and driving joint initiatives, the Silk Road

[524] Interview with Deputy Director of Sun House Team DMO
[525] Interview with Co-founder of Caravanistan.com DMO
[526] Interview with Director of Silk Road Destinations DMO
[527] "Building a Stronger Silk Road: Strategic Recommendations for Enhancing Tourism with a Special Focus on Central Asia Compiled by UNWTO in Collaboration with a Team of International Experts."
[528] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[529] "Building a Stronger Silk Road: Strategic Recommendations for Enhancing Tourism with a Special Focus on Central Asia Compiled by UNWTO in Collaboration with a Team of International Experts."

destinations are still lacking a single high-tech consumer-friendly online platform. A joint DMO would also be a breakthrough for the Central Asian countries.[530]

The Challenges Faced. Accepting and using a Silk Road Corridor concept requires more inclusivity in its interpretation. As an example, an interview with a Tourism Ministry official from Kyrgyzstan can be considered. The interviewee mentioned the Silk Road as a component that "must be included in our tourist routes and events" to make it known throughout the world. Inclusive thinking concerning the Silk Road involves considering certain destinations within the Silk Road for its effective promotion.[531]

According to another interview partner, the Silk Road concept is at least known among the local people and communities (except some in the inbound tourism sphere). Corridors, in particular, are an intellectual product. They can be developed through proper education. It's those educated who will support the Silk Road initiative and its cultural and historical heritage in the most sustainable ways, and they will transfer and their spread skills further.[532]

The UK, alongside Germany, is the leading outbound travel market in Europe, and it is extremely important that the Silk Road promotes its tourism offerings there, as the Silk Road has the potential to be one of the next globally prominent tour routes. 70% of outbound tour packages in the UK are now booked via travel agents, and it is fundamental that much of the promotion is targeted towards travel agents so that they understand what the Silk Road route offers and can communicate this to their customers. However, at present, the main European travel agents have a very limited understanding of the Silk Road route for tourism.[533]

Among the challenges of scientific research regarding Silk Road tourism are employability and development. The UNWTO World Tourism Day 2019 theme, "Tourism and Jobs: A Better Future for All" emphasized the significance the sector of tourism plays in creating more and better jobs for millions of people worldwide, presently and in the future, with numerous opportunities and challenges.[534]

Travelers don't just travel for historical, artistic, or educational reasons anymore. Travel destinations have become social hubs for visitors to spend time, dine, shop, work, and even sleep. Visitors say that culture is key when they make their decision to visit a new destination.[535]

Tourism Spending Improvement. Higher quality of education and educational facilities is a factor that will indirectly contribute to the increase in profit and income in Central Asian countries. Better individual competence and skills at all levels will increase service quality and the awareness of these emerging destinations worldwide. And governmental support of capacity building (at least at the initial stage) can reduce the sensitivity of business to seasonal

[530] Email correspondence with former head of UNWTO Silk Road Programme, Silk Road specialist on sustainable tourism development
[531] Interview with Deputy Director of the Department of Tourism, the Ministry of Culture, Information and Tourism of Kyrgyzstan
[532] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[533] Daniela Wagner, "Silk Road Route Sales Mission 2018 Proposal," UNWTO, accessed October 13, 2019, http://cf.cdn.unwto.org/sites/all/files/pdf/danielawagner_.pdf.
[534] "World Tourism Day 2019 - Tourism and Jobs: A Better Future for All," UNWTO, accessed October 13, 2019, http://wtd.unwto.org/content/programme-19.
[535] "Silk Road Route Sales Mission 2018 Proposal."

vulnerability (as well as a vulnerability of inbound tourism caused by some regional political and social issues).[536]

Any development has to be in collaboration with local communities and focus on sustainability and inclusive growth. With the nature of the Inner Tyan-Shan Mountains, Kyrgyzstan could stake a claim to be the place for extreme world championships. However, Kyrgyzstan and Uzbekistan need modern hotel infrastructure. The Issyk-Kul region, modern Tashkent, and historical Samarkand and Bukhara can become MICE centers for conferences, summits, and inter-government meetings too. Countries have to identify their particular niches and positionings. For example, Uzbekistan is famous for its historical monuments and food, and Kyrgyzstan has to strengthen its infrastructure for mountaineers and position itself as a conveniently located adventure destination. Good roads with modern infrastructure and speed trains between capitals and tourist spots in Central Asian states will radically contribute to tourist flows in combined tours across several countries.[537]

Several countries, like Turkey and Thailand, which are still young but have already developed touristically, have created an entire industry of small services for tours, and Central Asian countries can imitate some of their best practices. For instance, Turkey is a very close example [in terms of historical and cultural tourism], and they have similar tourism products. Cultural, gastronomy, and city tours from the above-mentioned destinations can also be case studies on how not to develop destinations. Thailand and Turkey have a lot of problems with large-scale developments. Therefore, Central Asian countries can also learn from Egypt or neighbors like Georgia and Iran. And based on benchmarked practices, they can create something new and unique for extra spending.[538]

Destinations are struggling to make visitors stay longer. To achieve this, they have to diversify their offerings and perform not as a single country, but as a part of the Silk Road. No-one should claim the Silk Road brand on their own, but as a joint decision, and NTOs should speak very openly and bring tour operators together and tell them how to make their products and visitor experiences more exciting. For instance, Uzbekistan does not offer a range of adventure travel proposals. However, adventure is growing huge annually and globally. So, it may be a matter of offering a cultural and heritage trip from Uzbekistan to Turkestan (Kazakhstan), then delivering adventure travel in Kazakhstan for just 1-2 days (this could be something extreme like heliskiing, paragliding or rafting). Just to make it more interesting and diverse. Between Kazakhstan and Kyrgyzstan, there could be Issyk-Kul – Almaty hiking was offered during the USSR period but is no longer available. Kazakh Tourism is pushing Kyrgyz to open the border to go straight from Almaty to Issyk-Kul within a day by bike or horse. Issyk-Kul offers beach holidays, but Almaty could offer casino gambling, sophisticated nightlife with night clubs, and restaurants. So, this kind of initiative should be undertaken, as Kyrgyzstan is standing on their own in ITB with a yurt, and Kazakhs are standing with the yurt as well. What's the point in bringing one yurt and spending that money on something else? There should be a single catalog between all participating destinations.[539]

[536] Interview with Head of the Department of Scientific Research and Work with Educational Institutions of GosComTourism
[537] Interview with Deputy Director of Sun House Team DMO
[538] Interview with Director of Silk Road Destinations DMO
[539] Interview with Deputy Chairman of the Board of Kazakh Tourism

Area	Lessons Learned
Corridor Development	• More intergovernmental collaboration to develop tourism in the region is needed. • Corridor product development based on the challenges the private sector faces and skills they possess. • Encouraging improvement of connectivity along the Silk Road by addressing infrastructure gaps.
Funding Sources	• To create better conditions for stimulating direct private investments, thus ensuring sustainability. • Countries have to be proactive when it comes to funding initiatives.
Governance	• There is a need to negotiate and implement special tourism legislation between neighboring countries. • NTOs need to work together to generate unique joint projects in Central Asian countries. Silk Visa may become the first. • Statistics based on traveler satisfaction surveys, collected by NTOs, need to be easily accessible to private businesses. • Both government tourism officials and the private sector need to increase training on sustainability criteria application to start using them in their work. • There is a need to deliver holistic planning with well-integrated stakeholder participation for long-term sustainability to optimize opportunities for tourism while safeguarding heritage.
Management	• NTOs need to work more closely with tour operators by conducting audits and identifying problem areas that currently hinder the connectivity of Silk Road routes. • International and national private sector players should be engaged in the long-term vision of destination competitiveness and sustainability aspects. • Private sector and NTOs must cooperate with young professionals/startups to work together as part of the capacity building program and use existing online modules and onsite training to create transnational projects.
Marketing	• There's a need to provide more market research and better understanding of travel motivations to empower destinations to be more innovative and competitive in their national marketing strategies.

	• There's a need to foster greater provision of practical travel information to address the information gaps that make it difficult for travelers to plan a Silk Road trip. • Establish a dedicated section for the Silk Road on official websites from each destination, to position themselves as Silk Road countries in addition to their individual national tourism strategy. • Conduct individual Silk Road activities without coordination with other Silk Road countries, utilizing the country's own Silk Road unique selling points. • For each destination to partner with other Silk Road destinations as well as the private sector in global marketing campaigns and engage travelers through social media. Joint social media activities can have a high impact. • Develop a strong and recognizable brand in each heritage corridor with a positive reputation that inspires trust and is consistent in branding terms. • Support and monitor the effectiveness and efficiency of the implementation of joint marketing initiatives, along with the involvement and integration of private tourism businesses.
Future Development	• Along with the benchmarking of best practices of other corridor developments, learn from their negative experiences on how not to develop destinations. • Support more capacity-building initiatives for various stakeholders utilizing e-courses, webinars, and other digital tools. • Stimulate joint participation in international travel fairs (such as *ITB Berlin*) under the Silk Road name to help visitors understand that these destinations are very close to each other geographically as well as offer complementing tourist products. • Foster the implementation of mutual recognition agreements concerning hospitality standards to achieve comparable service levels in each country. • NTOs should leverage the collective legacy of Silk Road architecture, gastronomy, religion, culture, and technology by establishing partnerships among destinations and businesses for global marketing campaigns • All five Turkic-speaking countries in the corridor could apply for common nomination Silk Road cultures and traditions.

3.2.2. The Holy Family Tourism Corridor

Background

"Religious tourism is a key agent of peace. It is a transformative force that breaks down cultural barriers and builds bridges between people, communities, and nations. Leveraging the growing interest in religious tourism is crucial in building cultural dialogue, mutual understanding, and peace."[540]

The Holy Family TC spans three countries: Egypt, Jordan, and Palestine. Egypt started focusing on the holy corridor in the early 1990s. The Holy Family TC received more extensive attention after 2016, with the Pope's recognition of the Holy Family sites in Egypt for Catholic pilgrimage. According to the Ministry of Tourism in Egypt, the Holy Family went through 25 sites, listed as follows: Rafah, Al-Arish, Al-Farama, Tal Basta, Mostorod, Bilbeis, Samanoud, Sakha, Burullus, Wadi al-Natrun, Al-Matarah, Ain Shams, Ancient Egypt, Maadi, Deir al-Jarnous (Al-Badrasheen), Al-Bahnasa, Ben-Mazar, Samalut, Jabal Al-Tair, Ashmunin, Dairut, Al-Qoussah, Qarya Mir, Jabal Qesqam (Deir Al Muharraq), and Dernka Mountain.[541]

Figure 42: Holy Family Sites in Egypt

Source: Egyptian Ministry of Tourism

In Palestine, from Jerusalem to Bethlehem, and Nazareth to the Sea of Galilee and Capernaum, there are many important Christian sites, including the occupied territories. However, due to the political situation in the region, there were severe limitations on travelers visiting various sites, depending on their nationalities and the site locations. Egyptian Christians were also restricted from visiting the occupied territories. However, this restriction has been lifted in recent years, with Egyptian authorities permitting elderly people to go on pilgrimage.

[540] Rifai, T. (2007). UNWTO Secretary-General. Paper presented at the Accessible Tourism for All", taking into consideration the UN Convention on the Rights **of** Persons with Disabilities.
[541] Egyptian Ministry of Tourism Website.

Corridor Planning and Establishment

In terms of theme formulation and asset identification, in Egypt, the Ministry of Tourism, in cooperation with the Coptic Church, researched the Holy Family sites to decide which should be included in the TC. The Coptic Church formed a committee of bishops to draft a map of the sites visited by the Holy Family during their journey through Egypt. Currently, the Ministry of Tourism is preparing to apply to UNESCO to designate some of the TC sites as World Heritage Sites.[542]

In terms of infrastructure assessment and development, in Egypt, the government has worked on improving the road network connecting the Holy Family sites. It has set a three-phase plan to improve accessibility to the corridor and has allocated $3.5 million to improve the infrastructure in the first phase. [543] In Jordan, the government has worked on facilitating convenient transportation and providing the necessary services to receive all Christian denominations, visitors, and pilgrims from all over the world.[544] Marked paths and trails link accommodation facilities to the core archeological area. Shuttle buses are also provided for tourists going to and from the sites.

Corridor Governance and Management

In terms of governance structure, in Egypt, the Tourism Development Authority is responsible for the coordination between the various government bodies that work together to manage and promote the corridor, including the Ministry of Antiquities, the Ministry of Tourism, and the Ministry of Local Development. The archaeological sites fall under the supervision of the Ministry of Antiquities. In Jordan, the Ministry of Tourism and Antiquities and the Jordan Tourism Board (JTB) collaborate in the management and promotion of the MDTC sites. Although several agreements were signed in late 2016 between Egypt and Jordan for the development of the trail, there is currently no joint formal organization overseeing the MDTC.

In terms of collaboration with stakeholders, in Egypt, several government bodies, such as the Ministry of Antiquities, the Ministry of Tourism, and the Tourism Development Authority, cooperate with non-governmental organizations such as the “Revival of the Egyptian Heritage Society” as well as the Coptic Church. In Jordan, development agencies and donors have played a crucial role in supporting the Holy Family sites.[545]

In terms of travel facilitation, there is currently no cooperation in the area between corridor countries. Many tourism agencies organize tours over three countries, with tourists applying for visas for each country separately. Due to the political and security situations in the corridor countries, it is difficult to envision a unified visa for the corridor.

In terms of capacity building, in Egypt, the government is planning hospitality and language training for local communities in Upper Egypt, to enable them to provide tourism services for tourists visiting the Holy Family sites. The fact that the Holy Family sites are located in areas that are economically disadvantaged will help create better employment opportunities for local

[542] Marc Espanol, "Egypt to Boost Spiritual Tourism through the Holy Family Trail," Al-Monitor, last modified May 31, 2019, https://www.al-monitor.com/pulse/originals/2019/05/holy-trail-in-egypt-boosted.html.
[543] Ibid.
[544] "Search," Amon News, accessed October 13, 2019, https://www.ammonnews.net/search.
[545] "Ministry of Tourism & Antiquities.," MOTA, last modified October 13, 2019, https://www.mota.gov.jo/Default.aspx.

communities.[546] In Jordan, plans are underway for onsite training in the area of archaeological site conservation, addressing remaining issues such as pulverization, exfoliation, salt deposits, atmospheric pollution, and plant deposits. Tour guides have received technical training and capacity building on the significance of the sites, as well as the historical and Biblical context, to ensure that they can help pilgrims immerse themselves in the experience.

In terms of sustainability, in Jordan, the five main sites for Christian pilgrims are: Al-Maghtas (Baptism Site), Machaerus, Mount Nebo, Mount our Lady Church, and Tell Mar Elias. Al-Maghtas is well protected through heritage legislation, and a construction moratorium was issued for the property, preventing any new construction, except that exclusively dedicated to the protection of archaeological remains. It is designated as an antique site according to Antiquities Law 21/1988, art. 3, par 8. This law prohibits destruction, damage, or alteration of the antiquity itself and regulates development works around it, to avoid any major impact. The property and its buffer zone are likewise protected by the Jordan Valley Authority Laws and on the site level by the by-laws of the Baptism Site Commission. The objective of these laws is to protect the property from potential future threats, focusing mainly on development and tourism projects that might jeopardize the nature and character of the site and its immediate surroundings.

In terms of funding, in Egypt, financing for the Holy Family sites is provided by the government. In Jordan, governmental funding, as well as service charges, are used to fund the sites. The Baptism Site Commission charges fees for the various services provided at the baptism site, from guide services to shuttle buses.[547]

Corridor Marketing

In the case of the Holy Family TC, as Egypt and Jordan are still in the process of formalizing cooperation on the corridor, there are no dedicated sites or joint marketing efforts. Both countries currently use traditional tools to promote the Holy Family sites within their territories. In Egypt, with the help of the Coptic Church, the Tourism Ministry has organized familiarization trips for tour guides to Holy Family sites, which was followed by a visit from an Italian religious delegation hosted by the Coptic Church in 2018.[548] The tourism development authority includes the Holy Family TC sites in the tourism programs for Egypt. There are also plans to launch a website to promote the corridor.

In Jordan, the Jordan Tourism Board (JTB) is promoting the Holy Family sites to both Muslim and Christian visitors through various activities in areas that have significant religious aspects. For example, this year, visitors in Madaba and Fuheis will be able to enjoy Christmas-related activities, such as the Christmas Parade, like the one held in Bethlehem.

Future Development of the Corridor

Due to the political situation in the region, any corridor development is limited to activities by individual states. There is a three-stage project in Egypt for developing and rehabilitating the holy corridor. The first and most urgent stage concerns five archaeological sites: the three monasteries of Wadi Natroun, the monastery of Abu Sergeh in Masr Alqdemaa, and the Alazraa

[546] Espanol, "Egypt to Boost Spiritual Tourism through the Holy Family Trail".
[547] "Baptism Site 'Bethany Beyond the Jordan' (Al-Maghtas)," UNESCO, accessed October 13, 2019, https://whc.unesco.org/en/list/1446/documents/.
[548] Al-Masry Al-Youm, "Italian Tourism in Egypt to Witness Boost after Holy Family Journey: Ambassador.," Egypt Independent, last modified June 28, 2018, https://egyptindependent.com/italian-tourism-in-egypt-to-witness-boost-after-holy-family-journey-ambassador/.

monastery in Maadi. These five archaeological sites are maintained under the supervision of the Ministry of Archaeology. The Tourism Development Authority and governorate also increased the efficiency of roads and other services. Up to now, the holy corridor is still being developed. After finishing the three stages of the project, authorities will then work on plans for sustainability.

In Jordan, the only new construction in Bethany Beyond the Jordan will be new churches for the various Christian denominations, which are allowed only in certain areas away from the core archaeological area. Another possibility for new construction that is currently being examined is the establishment of a tourist village at the far eastern end of the site, near the entrance and away from the main archaeological area. This tourist village may include low-rise housing that is compatible with international conventions and charters, the Jordan Valley Authority law, and the law of antiquities in addition to other facilities to accommodate pilgrims and other visitors who may wish to stay overnight while participating in events at the modern churches or visiting other nearby sites, such as Mount Nebo, Mukawar and Madaba. This proposed village is one of the main components of the future visitation strategy.

For Jordan, suggested strategies to enhance the governance of corridor sites include adding a Conservation, Interpretation, and Management Unit that employs conservation specialists and an archaeological team to provide research on archaeology and the history of the sites, as well as conservationists of mosaics and mosaic flooring, site interpretation and presentation experts, who would work on developing strategies for the future interpretation of the site. It is also recommended to add a Heritage and Education Tourism Unit to promote heritage as well as a museum curator to address issues of artifact acquisition, renovation, interpretation, and display.

Evaluation of the Corridor

Although the Holy Family TC has a tremendous potential to attract religious travelers and also has a wide range of sites, it is not fully utilized by the countries in question. This is mainly due to political challenges, which cannot be overcome by private sector engagement at the moment. There is private sector engagement, connected particularly with other tourist attractions in the region. However, even though the corridor is marketed in Egypt, development is mainly focused on individual sites and not on the corridor as a whole. There is still room to grow, even with the sustainable development of individual sites. In Jordan, collaboration is needed between the Ministry of Tourism and other stakeholders to coordinate plans for the archaeological site and environmental protection, adopting the required conservation measures for the site while neutralizing the potential effects of pollution on the area.[549]

[549] Mohammad Waheeb, Raed AlGhazawi, and AbdAziz Mahmoud, "Bethany Beyond the Jordan Site of Jesus Baptism: A Threatened Site," *Journal of Human Ecology* 43, no. 2 (2013).

Area	Lessons Learned
Corridor Marketing	In terms of branding, there is a need to correctly brand and position the corridor with the creative use of tools such as storytelling. In terms of promotion, Egypt didn't capitalize on the Pope's visit to the sites and his recognition of their importance.
Funding Sources	In terms of funding sources, the fund-raising process requires more than local funding sources. Authorities can take a fund or aids from international organizations.
Governance and Management	In terms of governance structure: Due to the large number of organizations involved in the management of the corridor and sites on the corridor, it is challenging to craft an efficient and targeted strategy. It is recommended to use a single organization to manage the promotion of the corridor and coordinate between stakeholders. In terms of funding, there is a need to diversify funding beyond internal funding sources, with the possibility of approaching international development organizations to develop sites on the corridor or for capacity building.
Marketing	In terms of marketing, there is a need for joint marketing efforts and planning between Egypt and Jordan.
Future Development	Adding a Heritage and Education Tourism Unit to promote heritage on the sites is recommended. Also, future development could be divided into stages, starting with the urgent stage, which includes the most important sites.

4. Comparing Global Best Practices and OIC Tourism Corridors

In this chapter, a comparison of global best practices and existing OIC corridors in terms of MDTC development, management, and marketing is undertaken. In the first section, best practices in the development of MDTCs are compared with the OIC MDTCs. In the second section, management best practices are compared with the existing OIC MDTCs in terms of organizational structure, development of enabling legislation, use of performance indicators, collaboration with stakeholders, capacity building, and funding. The last section of this chapter compares marketing best practices to marketing strategies used by the OIC MDTCs in the areas of branding and promotion.

4.1. Best Practices versus OIC Tourism Corridor Planning and Establishment

Demand Analysis

Best practices from global MDTCs show persuasive examples for researching demand as well as the use of research in targeting potential visitor segments, as illustrated by the research for the Iron Curtain Trail and European MDTCs. However, in the case of the OIC MDTCs, analysis of demand seems to be quite limited. For the Silk Road, TripAdvisor has carried out research on travel trends. However, in the case of the Holy Family, no research was undertaken to estimate demand.

Table 20: Demand Analysis - Best Practices versus OIC Examples

Best Practices	-	**The Iron Curtain Trail TC demand estimate was based on a model using bed density and day trips based on population density and the national share of cycling as** the **main transport mode.**
	-	**The Council of Europe study of inbound tourism trends and subsequent targeting of China through in the "Chinese Virtual Tourism Fair."**
OIC	-	**Limited research efforts of Silk Road travel trends researched by TripAdvisor in support of the UNWTO Initiative.**

Infrastructure Assessment and Development

The presence of robust infrastructure is one of the essential success factors in establishing corridors. In Europe, solid infrastructure and transport networks connect European countries and facilitate mobility for tourists along European MDTCs. In the case of the GMS TC, the existing infrastructure networks were assessed with plans made to improve ports.

Infrastructure development represents a challenging area for the OIC MDTCs, especially for countries facing financial constraints. In 2016, OIC countries' rail network density per million people was 68.8 km of the total rail lines, which is markedly lower than the world average (160.2 km). It is important to note that efforts to improve connectivity are underway in some OIC regions, which can enhance mobility for tourists along MDTCs in these regions.

Table 21: Infrastructure Assessment - Best Practices versus OIC Examples

Best Practices	**- The Greater Mekong Subregion TC study reviewed the infrastructure, along with the nodes of the corridor and transportation networks, to identify ports and landings along the river that needed improvement.** **- The Eurail pass provided by European railways connects the railway networks of 27 countries and facilitates travel between European countries using a single pass, which supports the development of TCs in the region.**
OIC	**- Efforts being made to improve connectivity in Africa with the Standard Gauge Railway project and the Dakar-Port Sudan railway.** **- In Kazakhstan, the state highway program "Nurlijol" planned to improve accessibility to the different nodes along the Silk Road TC as well as a railway connection between Tashkent and Turkestan.**

Social Value Assessment

Engaging local stakeholders and ensuring their support of the corridor, as shown in the ATRIUM and Wadden Sea TCs, is also essential for the success of MDTCs. The examples from the OIC MDTCs are shown in the following table, as examples of the Abraham Path and the Umayyad Route. Efforts have also been made to engage stakeholders in establishing the corridors, especially in terms of providing local communities with added value. Both the Abraham Path and the Umayyad Route have supported the development of community-based tourism initiatives.

Table 22: Social Value Assessment - Best Practices versus OIC Examples

Best Practices	**- The Wadden Sea TC research to explore potential local community opposition to new conservation regulations associated with the corridor.** **- ATRIUM route consultation with local communities in the development of TC. In Italy, the Municipality of Forlì conducted research to ensure that residents accepted the promotion of this controversial tourism product.**
OIC	**- Abraham Path supporting local communities in the development of guesthouses using a "shared cost approach."** **- Umayyad Route support for community-based tourism initiatives and local handicrafts.**

Theme Formulation and Assets Identification

Examples from global MDTCs, summarized in the following table, suggest that the successful planning and establishment of MDTCs involves extensive research with the aid of experts from historical, cultural and practical perspectives to formulate the theme of the corridor and assess its potential tourism assets, as in the case of the Prehistoric Rock Art Trails. The OIC MDTCs also seem to be performing well in theme formulation and asset identification, as well as stakeholder engagement in the planning and establishment of corridors.

The existing OIC MDTCs, as shown in the following table with the examples of the Silk Road and the Umayyad Route, have equally succeeded in no small extent due to the support from international and regional organizations in formulating the themes and identifying the tourism

resources to be included in the corridors. In the case of the Holy Family TC, the Coptic Church in Egypt played an important role in identifying the sites to be included in the corridor.

Table 23: Theme Formulation - Best Practices versus OIC Examples

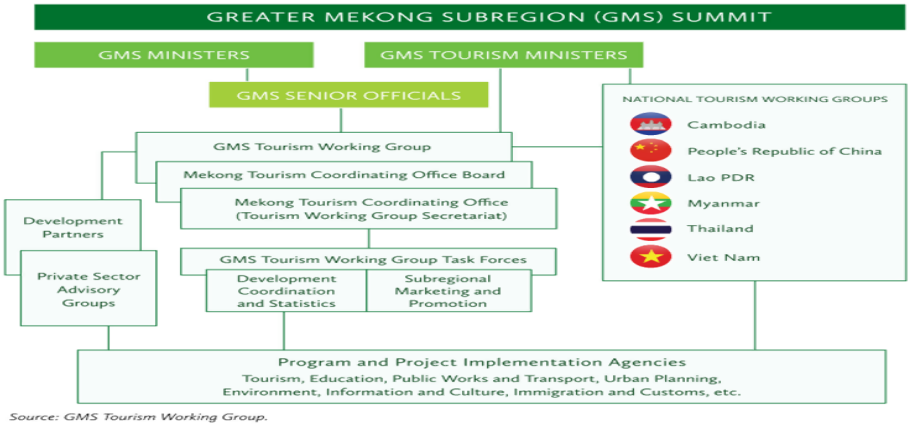
Best Practices	**- The HANSA Culinary Route creates a culinary theme with elements such as visits to local producers and markets, special menus in restaurants, and culinary festivals.** **- The Prehistoric Rock Art Trails uses the criteria for the evaluation of the quality of rock art sites to be included in the route.**
OIC	**- ICOMOS analysis of sites along the Silk Roads in terms of uniqueness and distribution. Identifying major nodes or large cities along the Silk Road and route segments between those nodes.** **- The Jordanian NGO Cultural Technologies for Heritage and Conservation researches the historical value of the sites to be included in the Umayyad corridor and assesses their condition.** **- The Egyptian Ministry of Tourism, in cooperation with the Coptic Church, researched the Holy Family sites to decide on the sites to be included in the TC.**

4.2. Best Practices versus OIC Tourism Corridor Governance and Management

Governance Structure

In terms of governance structure, the GMS TC offers a great example of best practices, with bodies representing the various stakeholders and having well-defined functions. With GMS tourism, ministers appoint NTO officials to represent GMS countries in the GMS Tourism Working Group, which meets to set GMS tourism strategies and initiatives, approve resources for their implementation, and monitor implementation. The GMS Tourism Working Group cooperates with development partners and private advisory groups, and also acts as an advisory body to the Mekong Tourism Coordination Office. The Mekong Tourism Coordination Office promotes cooperation among GMS governments and assists in coordinating and implementing programs. The GMS Tourism Working Group Task Force sets priorities for national implementation for GMS TC countries. Programs and initiatives are implemented by the various national agencies of the GMS TC countries.

Figure 43: Greater Mekong Subregion TC Governance Structure



Source: GMS Tourism Working Group.

The Silk Road shows a less hierarchical structure in comparison with the GMS TC. As the following figure illustrates, UNWTO leads the efforts in providing a platform for coordination and alliance building as well as fundraising for the corridor with other UN agencies, such as UNESCO and UNDP, delivering support for the various Silk Road initiatives. The Silk Road Task Force, which includes representatives from the National Tourism Organizations and the tourism businesses of the Silk Road countries, formulates strategies and prescribes actions, while Silk Road member bodies collaborate on Silk Road activities as well as implement local action plans and strategies.

Figure 44: Silk Road Governance Structure

Source: UNWTO (2014)

Enabling Legislation

Best practices from global MDTCs show efforts towards travel facilitation, whether through the provision of unified visas, as in the case of the Schengen visa, or by facilitating entry requirements and entry procedures, as in the case of the Global Entry and Nexus Programs. While there are initiatives for cooperation in travel facilitation in the case of some of the existing OIC MDTCs, there is still a long way to go in easing restrictions within existing travel corridors. There have been many talks regarding unified visas for a number of tourism corridors. However, only the three countries of the East Africa Northern Corridor currently have this.

Table 24: Enabling Legislation - Best Practices versus OIC Examples

Best Practices	- **Europe's Schengen visa facilitating travel between member countries of European TCs and revised Schengen visa regulations facilitating procedures for a short-stay tourist visa.** - **Facilitation of entry procedures using Trusted Traveler Programs, such as the United States' Global Entry and Nexus Programs.**
OIC	- **With the notable exception of the three East Africa Northern Corridor countries, no OIC TC has a unified visa.** - **88% of the global population needs a visa to travel to Silk Road countries. Kazakhstan and Uzbekistan are working on developing a unified Silk Road visa for Central Asian countries.**

Monitoring Performance

Best practices from global corridors show efforts towards a comprehensive performance evaluation with European cultural routes using the European Tourism Indicators System,

which practically covers all aspects of performance from governance and communications to MDTC impacts and sustainability. The GMS TC also uses visitor metrics and organizational effectiveness, as well as sustainability metrics.

Monitoring performance for the OIC MDTCs seems to be lagging behind the best practices from global MDTCs. While visitor metrics are typically collected by OIC MDTCs' countries, an assessment of impact whether economic, social, or environmental, as well as organizational and marketing communications, is not common practice among the OIC MDTCs. The Abraham Path TC provides a good example of incorporating economic impact metrics. However, there is a range of other metrics that still need to be covered for proper governance to be ensured.

Table 25: Performance Indicators - Best Practices versus OIC Examples

Best Practices	- **Currently, 7 of the Council of Europe routes monitor their performance with the use of the European Tourism Indicators System (ETIS), measuring governance, communication both internal and external, sustainable management, the impact of cultural activities, and the economic and environmental impacts of the route itineraries.** - **The Greater Mekong Subregion TC using visitor metrics and organizational effectiveness, as well as sustainability metrics.**
OIC	- **The Silk Road uses visitor metrics.** - **The Abraham Path uses visitor metrics, organizational effectiveness, and marketing communications metrics.**

Collaboration with Stakeholders

Best practices from global MDTCs also show that collaboration with stakeholders is done using formal platforms, as in the case of the Mekong Tourism Advisory Group and the Destination Napoleon local steering committees, which include representatives from various stakeholder groups. Some of the existing OIC MDTCs seem to be performing well in creating public-private partnerships that allow for cooperation between the various stakeholders.

In the case of the Silk Road, collaboration with stakeholders was facilitated by the creation of the Silk Road Task Force and the establishment of its office in Uzbekistan. In the case of the Umayyad Route, the layered organizational structure with local support groups is composed of public and private sector entities, allowing for interaction and collaboration among the various stakeholders.

Table 26: Collaboration with Stakeholders - Best Practices versus OIC Examples

Best Practices	- **The Mekong Tourism Advisory Group, including representatives from the private sector and industry associations.** - **Destination Napoleon local steering committees, including public and private sector entities, universities, think tanks, and professional associations.**
OIC	- **The Silk Road Task Force, including representatives from the National Tourism Organizations and tourism businesses of Silk Road countries that are responsible for formulating strategies.** - **The Umayyad Route advisory committee and the local action groups include various groups of stakeholders, from public to private and NGOs.** - **The Holy Family TC, collaboration between government bodies, NGOs, and the Coptic Church, however, have no formal platform.**

Capacity Building

Training and capacity building efforts are also evident in the best practices of global MDTCs. In the case of European routes, the Council of Europe and the French Federation of European Cultural Routes, training, and knowledge-sharing initiatives have been launched targeting the European MDTCs. In the case of the GMS TC, capacity building for entrepreneurial initiatives is provided through boot camps or incubators.

Most of the existing OIC MDTCs have also launched initiatives aimed at capacity building for tourism stakeholders along the corridor. In the case of the Silk Road, a handbook was developed, and training was provided for tour guides, in addition to training for tourism officials on sustainable and transnational tourism development. For the Umayyad Route, training was provided to tourism officials covering the areas of marketing and management, while tour guides were provided training and certification as Umayyad Route guides.

Table 27: Capacity Building - Best Practices versus OIC Examples

Best Practices	- **The Heritage and Cultural Tourism Open Resource project for innovative training associated with the Cultural Routes of the Council of Europe supported by several European universities.** - **The French Federation of European Cultural Routes sessions for exchange of best practices in physical and digital accessibility, local community involvement and social inclusion for tourism stakeholders from more than 15 cultural routes.** - **The GMS TC Mekong Innovative Start-ups in Tourism Program, training through intensive boot camps with the help of mentors and access to incubators and investors.**
OIC	- **The Silk Road Quality Guide Training Initiative and Handbook, official tourism training on sustainable and transnational tourism development and use of digital media tools.** - **The Umayyad route in Jordan, training for the tourism industry in the areas of management and marketing in addition to cultural itineraries. Training also provided in Tunisia and Lebanon.**

Sustainability

Sustainability is an area that could stand for some improvement, both globally and for the OIC MDTCs, especially in terms of monitoring tourism impact, as shown in the monitoring performance section. Examples from global corridors show cooperation in the preservation of shared assets, as illustrated by the "Joint Declaration on the Protection of the Wadden Sea" between the Wadden Sea TC countries. Examples also show the use of demand management to preserve corridor assets and ensure benefit to local communities.

In the case of the Silk Road, UNWTO has led the efforts for the preservation and conservation of cultural heritage in Silk Road countries, as illustrated by the 1999 Khiva Declaration, calling on Central Asian countries to preserve their cultural and natural heritage and to promote sustainable tourism. In the case of the Holy Family, in Jordan, the TC sites are protected through heritage legislation with a construction moratorium issued preventing any new construction projects, except those exclusively dedicated to the protection of archaeological remains.

Table 28: Sustainability - Best Practices versus OIC Examples

Best Practices	**- The Netherlands, Germany, and Denmark signed a "Joint Declaration on the Protection of the Wadden Sea" in 1982.** **- In the case of the Danube TC, well-known destinations are combined with less-known tourist destinations in tour packages offered by travel agents to improve traffic to these sites and lower pressure on the highly-frequented sites.**
OIC	**- The Silk Road 1999 Khiva Declaration calling on Central Asian countries to preserve their cultural and natural heritage and to promote sustainable tourism.** **- In the case of the Holy Family, in Jordan, the TC sites are protected through heritage legislation with a construction moratorium issued preventing any new construction projects except those exclusively dedicated to the protection of archaeological remains.**

Funding

Funding is a major challenge for MDTCs in general, with global MDTCs trying to diversify funding sources, both externally and internally, to ensure the sustainability of MDTCs, as shown in the example of European routes in general and Destination Napoleon in particular. Most of the OIC MDTCs seem to be dependent on financial and/or technical support from international and regional organizations, while the other OIC MDTCs are primarily financed through government allocations of corridor countries. In the case of the Silk Road, which has a more diversified funding strategy, its funding levels are still reportedly low. Diversifying funding needs to be a top priority to ensure the sustainability of the existing OIC MDTCs. Encouraging private sector investments and contributions can play an important role in diversifying and increasing OIC MDTCs funding.

Table 29: Funding - Best Practices versus OIC Examples

Best Practices	**- The routes of the Council of Europe diversifying funding from internal and external sources, including country corridor public and private contributions as well as EU funding.** **- Smaller towns part of Destination Napoleon raising funds from tourism professionals and local communities.**
OIC	**- Silk Road diversified funding from external sources such as international organizations and internal sources in the form of TC countries' public and private sector contributions.** **- Holy Family TC in Egypt dependent on government funding.** **- Abraham Path dependent on external funding through the World Bank and bilateral donors.** **- Umayyad Route 80% funded by EU instruments.**

4.3. Best Practices versus OIC Tourism Corridor Marketing

Branding

Best practices from global MDTCs demonstrate the use of various branding strategies, from designing logos to creating a narrative highlighting the MDTCs story and characteristics as well as capitalizing on storytelling and user-generated material to reinforce branding as illustrated by the GMS TC example. Consistency of branding is another essential element, with the Wadden Sea TC providing an example of best practices with its development of a brand manual for stakeholders.

In comparison with best practices, OIC corridors seem to be performing equally well in terms of creating narratives for the corridors and disseminating them through documentaries. However, no data support their use of storytelling or user-generated material to reinforce their branding. With regards to logo design, on the one hand, the current logo for the Silk Road, created by UNWTO as a logo for its program, is not used consistently across the various TC countries. On the other hand, the Umayyad Route more consistently uses a logo in all its communication materials.

Table 30: Branding - Best Practices versus OIC Examples

Best Practices	-	**The "Mekong Moments" platform using storytelling to complement the GMS branding strategy by aggregating, curating, and filtering social media posts by tourists visiting the TC and sharing them on the platform in the form of a searchable interactive map.**
	-	**The Vennbahn Cycle Route, creating a story using the railway history of the road and its transformation into cycling routes and linking it to generations passing on stewardship of things of value to each other.**
	-	**The Wadden Sea, ensuring consistency in branding messages by developing the "Stakeholder Toolkit for Communication and Marketing" comprising of a brand manual, fact sheets, and brochures.**
OIC	-	**Silk Road Programme logo not uniformly used. Silk Road documentaries to increase awareness of the history of the road and put forward the narrative associated with the TC on the global stage.**
	-	**The Umayyad Route uses its distinct logo in all communications. The route has also created its own narrative and produced a documentary for the TC to facilitate storytelling.**

Promotion

Best practices from global corridors show the use of both traditional and digital promotional tools. While familiarization trips and participation in travel fairs remain critical promotional tools, the introduction of digital tools has become an integral part of promoting MDTCs. Utilizing user-generated content on MDTC digital platforms has become an essential promotional tool with the increased importance of storytelling. In comparison to best practices, the OIC MDTCs seem to be mainly using traditional methods for promotion. The OIC MDTCs have not incorporated digital media platforms including social media in an integrated marketing communications strategy to promote the corridors.

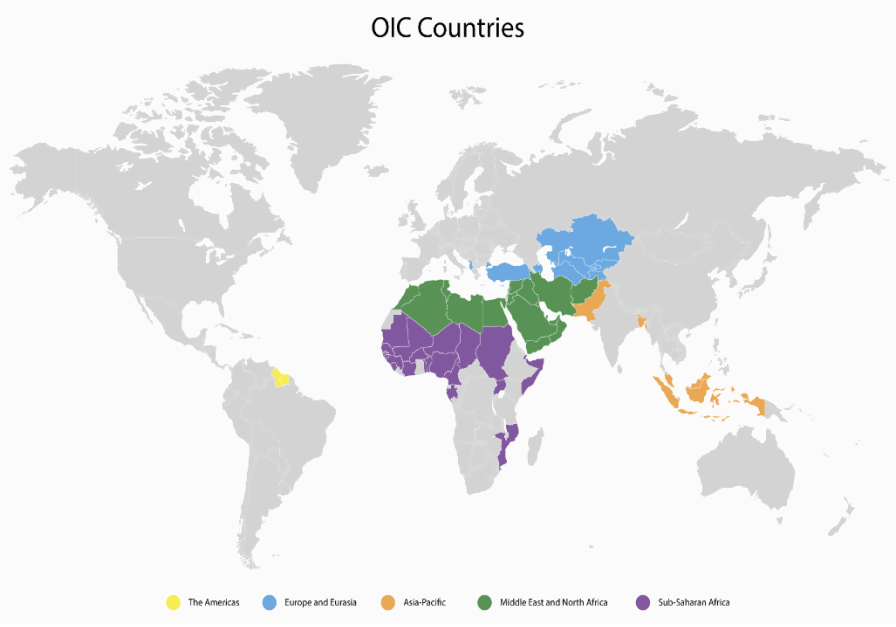
Table 31: Promotion - Best Practices versus OIC Examples

Best Practices	**- St .Olav Ways invited British journalists to experience the route leading to the publishing of blog entries and articles in various outlets.** **- The Council of Europe's cultural routes participation in the "Chinese Virtual Tourism Fair" to promote Chinese tourism in Europe.** **- Council of Europe website, "Crossing Routes – Blogging Europe" highlighting the experiences of travel bloggers in certified cultural routes countries, including user-generated multimedia content.** **- The GMS TC website "MekongTourism.org" combining traditional promotional materials from newsletters and destination information with interactive tools such as "Mekong Moments" which share user-generated content from social media platforms on an interactive map.**
OIC	**- Silk Road documentaries, participation of corridor member countries in travel fairs, and blogger competitions.** **- Umayyad Route website featuring documentary videos and guidebooks for corridor member countries, participation in travel fairs, and familiarization trips.** **- Holy Family familiarization trips for tour guides to Holy Family sites in Egypt.**

5. Policy Recommendations

This chapter presents a policy framework for the OIC countries to establish and manage tourism corridors. The first section gives an overview of the countries and the assessment required to establish policies and an overview of policy areas necessary for tourism corridors. The second section provides corridor-specific recommendations based on the tourism resources available to a destination in addition to its stage in the destination life cycle and with consideration as to where the countries are located in the Tourism Readiness Index in relation to each other.

Figure 45: Map of OIC Countries



Source: OIC website

5.1. Policy Framework

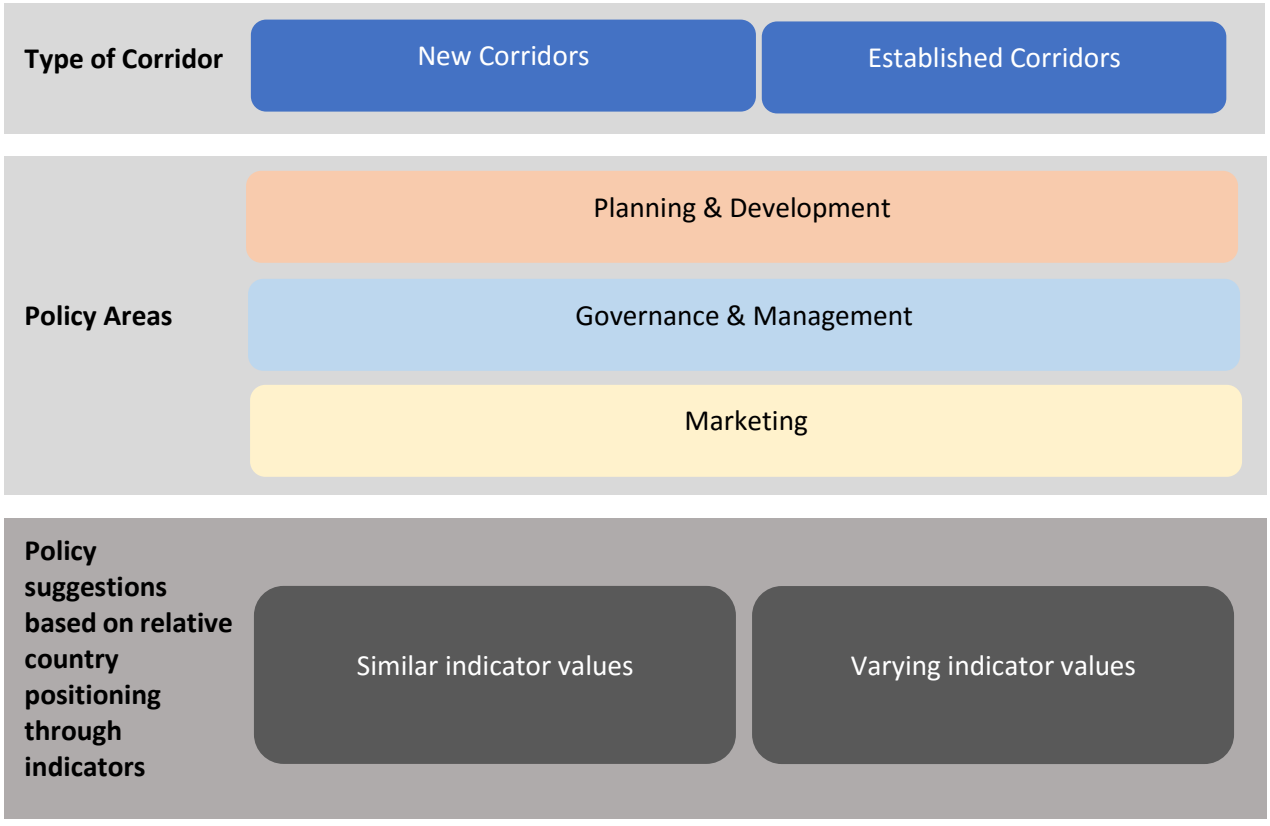
The Organization of Islamic Countries has members from various regions with different cultural, political, social, and historical backgrounds. The OIC member countries greatly vary in terms of income, tourism readiness, visa openness, and the importance of tourism to their economies. These factors will naturally have an impact on how the countries collaborate on tourism corridors and the policies required for multi-lateral tourism projects.

To set the baseline for a policy framework, one has to look to the tourism corridor itself and where it is currently positioned in its lifecycle, as well as how formal it is. Also, country-specific factors must be taken into consideration, such as described below, from infrastructure and human resource capabilities to existing tourist sites, as well as local stakeholders. These factors are coupled with external factors, including political considerations and the mindset of consumers.

As such, before establishing any policies, a set of indicators must be analyzed to assess the viability of any tourism corridor for a country or region vis-à-vis national tourism activities. The following policy framework is recommended, which includes the lifecycle of the corridor and also takes into account the tourism readiness of countries within the corridor. This framework can be applied to various circumstances and can overlap with other frameworks, such as the Travel and Tourism Competitiveness Framework or the 10 A's of successful destinations by Dr. Alastair M. Morrison.

The overall goal of this chapter is to provide a framework that can be applied to any tourism corridor, followed by providing specific examples of suggested tourism corridors for the OIC countries.

Figure 46: Policy Framework for Multi-Destination Tourism Corridors



Source: DinarStandard Analysis

The basic observation for any corridor is what type of tourism corridor it is: new or established. This step is followed by applying policies from various policy areas, as described in Chapter One of the report: planning and development, governance, and management, as well as marketing. In the end, we look into sample indicators and the variations between countries in one corridor, to factor in the different national development statuses of the OIC countries concerning specific indicators relevant to tourism development.

Policies will vary based on whether countries within a corridor possess similar indicator values (for example, are similar in terms of openness) or widely vary in their indicator values. Finding and applying indicators to assess who can lead policy development in a multi-lateral partnership should always precede the formation of any formal tourism corridor and the creation of related policies.

5.2. The Importance of Indicators

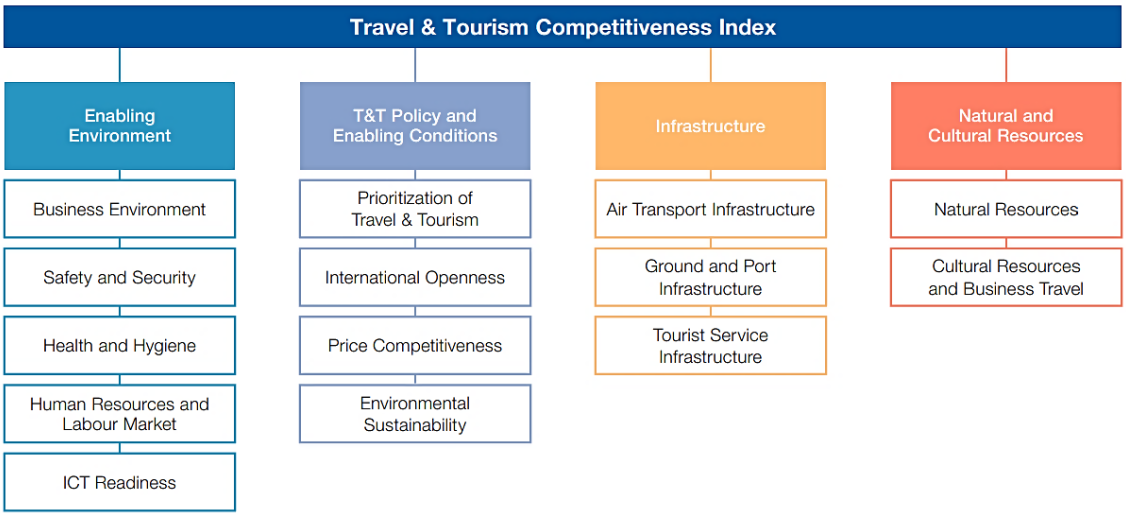
Finding common indicators to compare countries and assess their readiness for tourism in general and thus being part of a corridor is of the utmost importance. Data collection and standardization must be part of any multi-lateral tourism project, such as cross-border corridors. Without standardized data, the results of initiatives and the impact on communities cannot be measured and efficiently steered. The *World Economic Forum Travel & Tourism Competitiveness Index*, which is referred to in this report as a data source, provides a very detailed overview of where most countries stand. However, several of the OIC countries are not represented due to missing data.

This index provides a strategic benchmarking tool for businesses and governments to develop the travel and tourism sector. By allowing a cross-country comparison and benchmarking countries' progress on the drivers of travel and tourism competitiveness, the index informs policies and investment decisions related to the travel and tourism business and industry development. The report provides a unique insight into the strengths and areas for development of each country to enhance its industry competitiveness, and a platform for multi-stakeholder dialogue at the country level to formulate appropriate policies and actions.

The WEF Index is comprised of four sub-indexes, 14 pillars, and 90 individual indicators, distributed among the different pillars, as depicted below.

For corridor development, countries with low indicators can benefit from collaborating with those with high indicators and adjusting their policies to reflect those of their neighbors. Through opening borders, as well as dispersing tourism flows, knowledge exchange, common marketing, etc. a corridor can benefit a highly diverse set of countries.

Figure 47: The Travel & Tourism Competitive Index 2019 Framework



Source: World Economic Forum Travel & Tourism Competitiveness Report 2019

5.3. Assessing the Indicators

By combining indicators and comparing countries within a tourism corridor, differences in their positioning and required policies become apparent. The below graph shows the differences. The scatter graph shows differences particularly in the regions between the OIC countries. The radar graph shows the differences between specific indicators within one corridor.

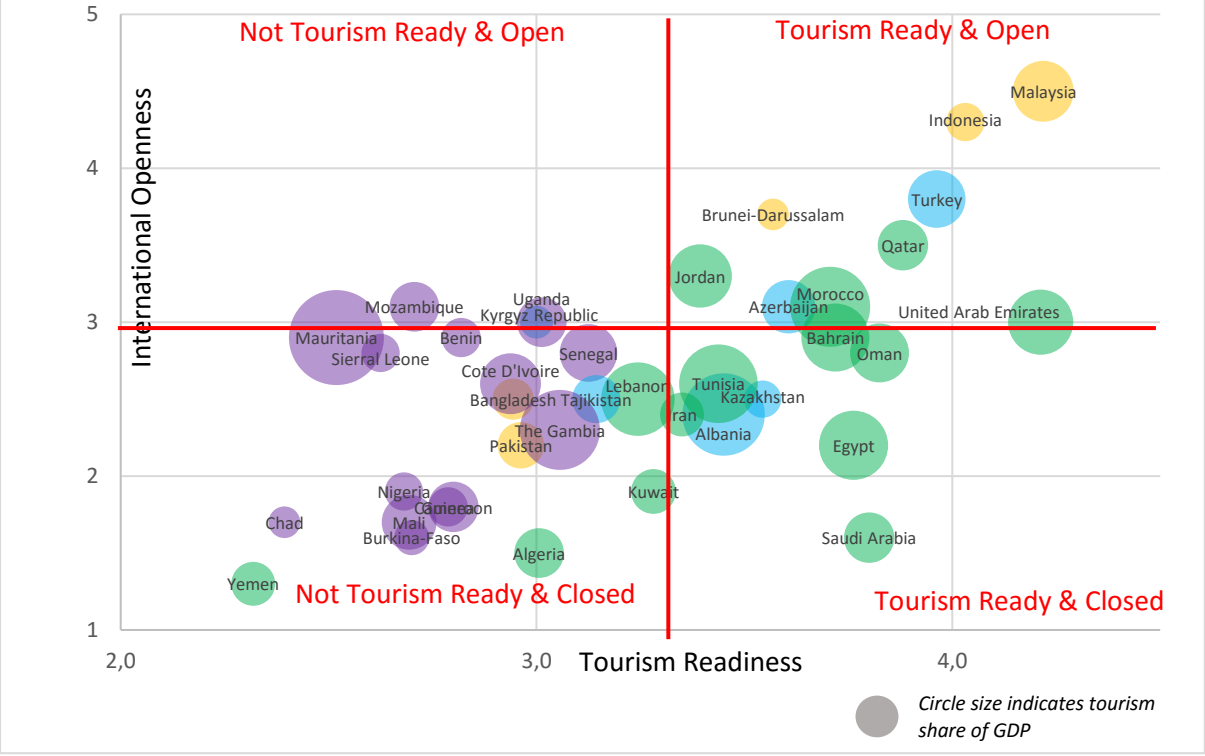
With the scatter graph, in this case, we can determine countries that are tourism ready and open, tourism ready and closed, not tourism ready and open, and not tourism ready and closed. In this case, it can generally be observed that Sub-Saharan members of the OIC are less tourism ready and tend to be less open whereas Middle Eastern and North African countries tend to be more tourism ready but still relatively closed.

As an example, we can assess the Holy Family Corridor with Egypt and Jordan. Jordan is lower on the Tourism Readiness Index than Egypt. This shows that policies to improve Jordan's tourism readiness overall are required, and Egypt could help with the knowledge transfer. It also shows that Jordan would overall benefit from a joint corridor through gaining more tourism from Egypt.

Egypt is lower on the Openness Index, which means that a corridor involving both countries would overall be measured through Egypt's openness. Some policies might be required to facilitate cross-border travel to enhance the corridor.

The radar graph shows that Turkey is higher on the infrastructure index and can assist other countries with knowledge exchange, whereas Azerbaijan leads in the safety and security index, which should make it the perfect example in the corridor within this sphere.

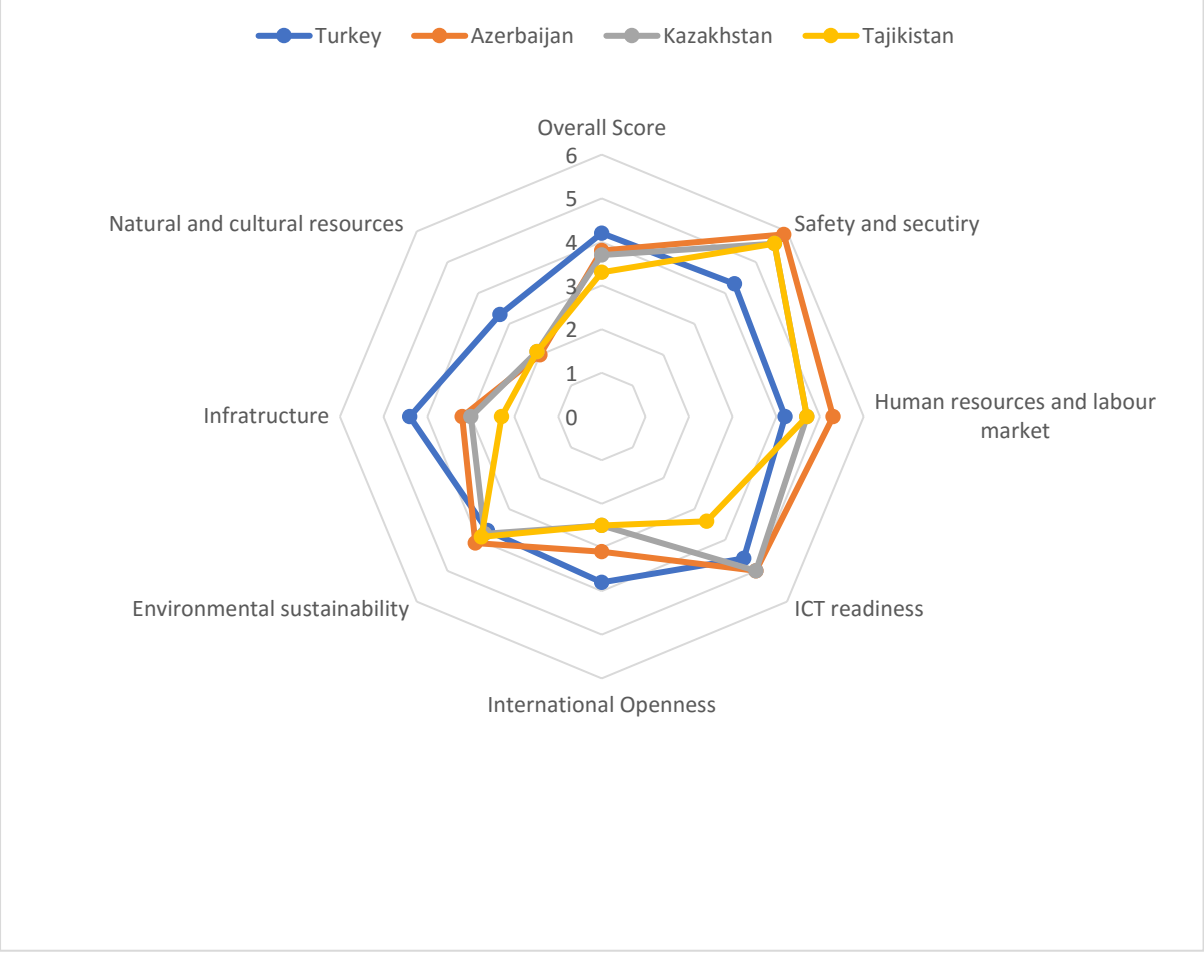
Figure 48: Segmentation Using the Indicators Tourism Readiness and International Openness



Source: DinarStandard Analysis

The above scatter graph can be applied to various indicators depending on requirements for specific corridors and purposes.

Figure 49: A Sample Segmentation Using Eight Indicators and Comparing the Turkic Silk Road Countries



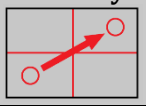
Source: World Economic Forum Travel and Tourism Competitiveness Report 2019; DinarStandard Analysis

The above radar graph shows an example set of indicators within the Turkic Silk Road Corridor. It shows which country is more developed in which indicators, which helps to address collaboration in finding suitable policies for this corridor.

5.4. Policy Framework for Cross-Border Tourism Corridors

Table 32: Policy Framework for Cross-Border Tourism Corridors

	New corridors	Established corridors
Planning & Establishment	Demand Analysis	
	Infrastructure Assessment	
	Social Value Assessment	
	Formulating Theme	
Governance & Management	Governance Structure	Governance Structure
	Monitoring Performance	Monitoring Performance
	Stakeholder management	Stakeholder Management
	Capacity Building	Capacity Building
	Funding	Funding
	Monitoring	Monitoring
Marketing & Promotion	Branding	Branding
	Promotions	Promotions
	Product Development	Product Development

Countries on a corridor with similar indicators	Joint development of a new corridor with equal shares	Joint enhancement of established corridor with equal shares
Countries on a corridor with varying indicators 	Knowledge transfer from developed countries to less-developed countries	Knowledge transfer from developed countries to less-developed countries

Source: DinarStandard Analysis

Tourism Corridor Planning and Establishment – Policy Framework

Demand Analysis

For new corridors, before deciding that a tourism corridor should be established to increase tourism collaboratively, an exploratory working group should be set up with participants from all involved. That is, governments, NGOs, development organizations, and the private sector (refer to chapter 1.2.4.). This working group should focus on jointly assessing the viability of a tourism corridor. This includes the assessment of tourism assets (chapter 1.2.1), demand analysis (chapter 1.2.2), and infrastructure assessment (chapter 1.23.). Using specific indicators as described in the sample above, the working group should look at existing policies, highlight gaps in the policy framework, and set realistic goals for collaboration.

This working group may also be a preliminary structure for a more permanent one, once viability has been assessed, and the corridor established. This approach was used for the Baltic Sea Route, although this never became a sustainable structure due to the difficulty of establishing a sustainable funding model at the time.

Assessing the Tourism Infrastructure

When looking at the infrastructure that could be part of a cross-border tourism corridor, it is advised to take a strategic look at the current landscape and keep in mind potential but realistic future developments. Depending on the tourism corridor, it might start as a point-to-point experience for travelers via a regional airline and can be developed into an overland experience with many smaller experiences in the future. Keeping in mind the development and inclusion of small sustainable businesses, these will benefit the tourism corridor in the future. The Danube Competence Center, for example, is extending its cycling route network to include new experiences over time.

Social Value Assessment

The measurement of the impact of tourism corridors is often a challenge for multilateral corridors. Distinct data are often not available on a country level. Nevertheless, it is important to assess the impact any initiative can make on stakeholders. Consulting with local stakeholders on the potential impact the tourism corridor could have on them is highly recommended. This can be done through direct interviews or small group meetings. Through technology, a larger sample group can be assessed for quantitative research.

It is wise to set strategic goals for any corridor that the collaborative framework aims to achieve through the resources that have been jointly invested. The goals and strategies should be published in a joint strategy document (e.g. The Greater Mekong Subregion Tourism Sector Strategy[550]), which is renewed every two to five years rolling and also includes a promotion plan and action steps. It is also recommended that strategies should be based on UN Strategic Development Goals. This would also connect the strategy directly with any benefits stakeholders, especially local communities.

[550] Mekong Tourism Coordinating Office, *Greater Mekong Subregion Tourism Sector Strategy 2016-2025*.

Formulating the Corridor Theme

A set theme needs to be determined for the formalized corridor. This helps stakeholders to collaboratively promote a tourism corridor in an efficient manner. The theme can be simple, such as the HANSA Culinary Route, or broad, with sub-corridors, such as Mekong Tourism. The final theme should be clearly defined by the working group and agreed upon by all parties. Brand consultancy is recommended at this stage to find the best solution for the destinations.

The Danube Competence Center, for example, benefits from a strong existing brand, "The Danube River," and has created products around this brand. They didn't need to create a new brand. In contrast, the Mekong Tourism Coordinating Office (MTCO) created Mekong Tourism as a new brand, which had to be promoted as a single destination. The Mekong river was not well known internationally and was not associated with the six countries it crosses. This allowed the MTCO to have a "clean start," which benefits any online activity because of limited online competition for a similar theme or brand.

Once a theme has been established, more detailed branding activities should be conducted — more on this under Marketing and Promotions.

Once a tourism corridor has been established, and depending on its type, it can also be extended. Policies to extend a corridor usually involve the member countries, which need to decide if another country or region should be added to the corridor.

Governance and Management

Setting Up a Governance Structure

To set up and create successful tourism corridors, countries must develop policies for cooperation in this field. A long-term approach might be a separate secretariat, such as the Mekong Tourism Coordinating Office, which administers a joint working group comprised of the participating countries. Another option would be to create a public-private partnership that promotes products in the corridor, such as the Danube Competence Center. Then depending on the importance of the region and the prospective benefits for stakeholders, it is advisable to create official policies and define responsibilities for each corridor (or a group of corridors). Also, the scope of the corridor has to be defined - does it only concern tourism or also other economic factors related to tourism, such as infrastructure, education, ICT.

The general recommendation is to follow the best practice examples (Chapter One) of a public-private partnership model. Using a tourism advisory group similar to the Mekong Tourism Advisory Group helps to gain valuable insights from industry experts from the public and private sectors.

Every structure should also incorporate operational considerations. Even though partners in a corridor might decide not to endorse a corridor formally, it will create administrative and operational work. It is thus recommended for multi-lateral partners to decide how to address any work raised through a formal or informal corridor. Administrative work might be passed through a working group, one of the partners, or a management structure for the corridor.

There is a wide range of structures to manage cross-border corridor initiatives. The governance can be hands-off with little cooperative involvement from a regional organization. Hands-on,

where a regional tourism organization manages all aspects of the corridor or a mixture of both with a high focus on individual regional projects.

An example of a hands-off approach would be the Holy Family Corridor, where Egypt and Jordan conduct very little joint management, and private stakeholders have taken over the promotion and management of the corridor to the public.

An example of a more controlled approach is the Danube Competence Center, which does direct product development and marketing of the region centrally in collaboration with the public and private sectors.

The Mekong Tourism Coordinating office uses a mixed approach, where different initiatives are managed with varying direct involvements. For example:

1. The Mekong Tourism Forum is managed directly through the MTCO in collaboration with the host tourism ministry every year.
2. The Mekong Moments initiative is managed by a public-private framework, called Destination Mekong.
3. The Mekong Innovative Startups in Tourism initiative was managed by the Mekong Business Initiative.

It is best to assess which governance structure is more suitable for each corridor. The more countries a corridor includes and the more initiatives it is tasked to manage, the more complex the governance will become. On the other hand, budgetary considerations have a large impact on governance structures. The lower the budget is, the more support will be required from other organizations, and the private sector will be required to execute initiatives.

Enabling Legislation

Tourism corridors are often dependent on multi-lateral government relations, long-term development, and changes in legislation. These factors are often not directly influenced by the respective tourism ministries but rather by other government bodies. These development areas, however, have an enormous impact on the success of cross-border tourism and thus should be taken into consideration when formulating policies for cross-border tourism corridors.

It is essential to include the following goals, depending on the format of the TC.

a) Air connectivity approvals, especially for regional carriers, are required to enable easy connectivity for travelers once they are in the region and also for domestic travelers.
b) Visa facilitation to enable easy border-crossing. It is recommended that countries partner for visa facilitation regionally. The planned “Silk Visa” for the Turkic Silk Road is a good example. Another example of this would be the development of the ASEAN visa, which allows citizens of ASEAN countries to travel in the region (Chapter 1.3.2) freely. Even though it did not address border crossings of non-ASEAN travelers, the Mekong region benefited from easier traveling facilitation.
c) Strategic transportation (cross-border roads, bridges, railways) and other tourism infrastructure are important.

d) ICT connectivity infrastructure is very often one of the most important factors for travelers, and governments should consider the importance of mobile connectivity to enable open travel and inclusive growth.
e) Developing new air, land, and sea route connections.
f) Creation and implementing of common tourism and competency standards.
g) Undertaking programs to build supply chains in the region and allowing local businesses to have access to local sources for sustainable products.

Sustainability

A strong focus should be put on the sustainability of the tourism corridor as well as the governance, as both are necessary to support any objectives set for a multi-country corridor. Some policies should be developed jointly to preserve the corridor. The predominant experiences the corridor offers are the reason tourists are visiting. Sustainably preserving these supporting communities is the reason the corridor exists. This can be achieved through policies to protect and preserve the environment, cultural sights, communities, or historical structures. It is recommended for multi-national policies to align with each other to prevent confusion and to reach equally high standards to preserve livelihoods and community histories in collaboration with stakeholders, with the goal of building sustainable and inclusive growth for communities on the corridor.

Monitoring Performance

Once a tourism-corridor is formalized, multi-lateral policies to define data harmonization should be created. Only with a common data format and in-depth collection of data will it be possible for the partners to measure the success of a tourism corridor and be able to decide together on strategies and action plans.

The Greater Mekong Subregion has a data harmonization working group, which meets regularly to develop a common framework for all countries to use. Countries might also assess the use of technology for data collection and evaluation. Tourism cooperation can be an excellent vehicle for negotiating with technology providers and simultaneously establish common standards. The recommended metrics are as follows:

Table 33: Key Performance Indicators[551]

Measurement Approach/Model	Key Performance Indicators	Measurement
Visitor Metrics[552]	Visit Statistics	Number of Visitors, Average Length of Stay, Tourist Spending
	ROI	Ratio of Visitor Spending to Corridor Management Spending
Marketing Communications[553]	Activity	Number of Programs/Campaigns, Total Reach and Total Frequency
	Performance	Advertising Awareness, Brand Image Changes
	Productivity	Conversion Rates, Cost-per-Conversion Rate
Consumer-Based Brand Equity (CBBE)[554]	Brand Salience	Mindset, Decision Set
	Brand Associations	Cognitive Attributes, Affective Perceptions
	Brand Resonance	Previous Visits, Intent to Visit
	Brand Loyalty	Repeat Visits, Word-of-Mouth Referrals
Organizational Effectiveness	Appropriateness of Objectives	Clarity of Objectives, Feasibility of Objectives
	Achievement of Objectives	Progress towards Objectives
	Implementation Efficiency	Efficient Resource Allocation, Cost-Effectiveness
Stakeholder	Tourist Evaluation[555]	Satisfaction with Access to Services, Accommodation, and Transport
	Local Industry Evaluation[556]	Satisfaction with Destination Promotion, Satisfaction with Industry Support
	Local Community Evaluation[557]	Satisfaction with Quality of Life
Sustainability Metrics[558]	Social Impact	Residents' Satisfaction with Tourism Impacts on Destination Identity
	Economic Impact	Percentage/Value of Local Products Sold to Tourism
	Environmental Impact	Water, Energy Consumption & Waste Production per Tourist Night Compared to General Population per Person

Source: DinarStandard Analysis

[551] Adapted from previous COMCEC studies: Destination Development and Institutionalization Strategies in the OIC Member Countries (Ankara: COMCEC, 2018); Sustainable Destination Management Strategies in the OIC Member Countries (Ankara: COMCEC, 2019).
[552] Steven Pike, *Destination Marketing: An Integrated Marketing Communication Approach* (London: Routledge, 2008).
[553] "Standard DMO Performance Reporting - a Handbook for Destination Marketing Organizations (DMOs)," Destination Marketing Association International, last modified May, 2011.
[554] Steven Pike, *Destination Marketing: An Integrated Marketing Communication Approach* (London: Routledge, 2008).
[555] Aimee Epp, *Assessing the Impact of Stakeholder Engagement on Perceptions of DMO Performance* (ICRT occasional paper n. 28, 2013).
[556] *A Manual for Evaluating the Quality Performance of Tourist Destinations and Services* Office for Official Publications of the European Communities (Luxembourg2003).
[557] Geoffrey I. Crouch and J. R. Brent Ritchie, "Destination Competitiveness and Its Implications for Host-Community QOL," in *Handbook of Tourism and Quality-of-Life Research: Enhancing the Lives of Tourists and Residents of Host Communities*, ed. Muzaffer Uysal, Richard Perdue, and M. Joseph Sirgy (Dordrecht: Springer Netherlands, 2012).
[558] Indicators sourced from the European Tourism Indicator System and Indicators of Sustainable Development.

Stakeholder Management

It is highly encouraged to create a framework for stakeholder engagement and management (see chapter 1.3.4). It is important for any framework to be able to create passion and to identify champions amongst stakeholders, who will be ambassadors for the project. Such a program could be informal or formal, such as the Tourism Advisor Group of the MTCO.

In addition, small and medium-sized, and especially sustainable businesses, on a corridor must be aware of activities they can use to enhance their offerings and create pride in being part of the tourism corridor and subsequently invite and engage visitors. Collaborative branding is a robust tool in creating sustainable marketing for a tourism corridor through engaged stakeholders. Policies that define how stakeholders on the ground can be involved in activities, collaboratively promote them, and directly benefit from them, are highly recommended. One such structure is the Experience Mekong Collection of the Mekong Tourism Coordinating Office, which provides social enterprises in the Mekong Region with a framework to directly benefit and simultaneously align with all other activities.

Focusing on local communities and associations first is recommended while working with international organizations on a more strategic and supporting level. Local universities have been seen as competent partners in tourism activities for cross-border corridors. The Mekong Tourism Coordinating Office works with various universities on their activities. They publish showcase studies of best practice social enterprises in collaboration with Mahidol University to allow other businesses to learn.

Capacity Building

Capacity building is an essential component of corridor development in terms of building tourism standards and ensuring inclusive growth (chapter 1.3.5). It is crucial for the effective management of MDTCs to ensure unified standards and ensure a seamless tourist experience. For this, educational institutions, such as universities and training centers, need to be involved. Policies to ensure common standards and joint capacity building initiatives are recommended in any tourism corridor.

Often, capacity building can be conducted in partnership with international development or training agencies. The Abraham Path, for example, provided training through the private sector and partner organizations with funding from the World Bank.

UNWTO works with several educational partners. Countries may consider using domestic training centers, asking international providers to provide training, or arranging for knowledge transfer from international providers to the country. This is dependent on the tourism sector development in the country. Corridors with a high variance in HR development benefit from inviting the leader in this area to provide a knowledge exchange to the other countries.

Budgetary Responsibilities, Financing

It is recommended that a financial framework for collaboration is created. The financing should be created with sustainability in mind and may come from various sources, public or private (chapter 1.3.6). Membership fees, whether from public or private entities, are an important source of funding, especially as they promote a sense of ownership. Assistance from external

sources, whether international or regional, can be sought out to complement internal funding. However, it must be ensured that a tourism corridor is not over-reliant on external funding as this might influence its sustainability in the long term. It may also be decided to change the financing framework over time. For example, a corridor could be launched with shared public financing to build a critical mass of participating stakeholders, and this can then be transferred to private-sector stakeholders to manage.

An example of a mixed financing framework would be the Mekong Tourism Coordinating Office (MTCO). MTCO operations as a secretarial of the six governments involved are financed through fixed annual governmental contributions. However, for any initiative the MTCO conducts, a separate public-private partnership framework is created. For their Mekong Moments initiative, for example, private and public partners become "founding partners." This financed the launch of the program. It is made sustainable by charging affiliation fees to participating businesses in the future.

Financial sustainability should be kept in mind at the initiation of a corridor and throughout ongoing operations. Many international projects face challenges when financing is based on a single source. An example of this is Baltic Tourism, which even though initially successful, faced challenges when public financing was stopped. A well-balanced business plan is required to ensure the long-term sustainability of the corridor. A mixed model is recommended with development funds and government contributions as well as private-sector funding of initiatives or commissions for direct sales generated.

Tourism Corridors Marketing and Promotions

Branding of Corridor

It is recommended that strong branding is created for the tourism corridor. This should be conducted by a professional agency and involve the governance and operations committees, as well as industry stakeholders. A brand is a promise, and it should tell a story (see chapter 1.4.1). A brand toolkit should be developed to enable all stakeholders to understand the brand and use it effectively. Collaborative branding, which is the practice of using a large number of stakeholders to build and promote a brand collaboratively, might be applied. An example of this is the Mekong Moments campaign of the Mekong Tourism Coordinating Office (MTCO).

It should be decided, as part of the branding exercise, how the brand fits into a larger structure. For example, how the Turkic Silk Road fits into the overall Silk Road Programme as well as into the country tourism programs, and how sub-level branding will be handled. The MTCO has multiple sub-brands, such as the Experience Mekong Collection, Mekong Trends, and Mekong Moments, which all have their specific designs but follow a standard language and structure.

Promotion of Corridor

A joint marketing plan to promote the corridor as a single brand and to define initiatives, responsibilities, and channels is recommended. This marketing plan should include action plans as well as financing for marketing activities. The financing can be provided centrally through the collaborative framework, by creating financial frameworks for each initiative, or a mix of both, such as the Mekong Tourism Coordinating Office.

It is recommended that promotional activities are created that benefit participating stakeholders directly and which can be executed collaboratively. This has the advantage of engaging stakeholders and driving direct business towards them. The MTCO conducted the Mekong Mini Movie Festival as a collaborative campaign, allowing any business in the region to create their own social media campaign within the framework of the overall campaign. Overall, the campaign reached 22 million people with a limited budget. It won the Adrian Gold award for the best digital campaign in tourism in 2018.

Digital storytelling is encouraged as an efficient tool for corridor promotion. Involving storytellers, such as bloggers or photographers, in crafting engaging content helps to increase online exposure of a TC. Promotional channels are dependent on the budget recommended to have a large online share. It is recommended that digital tools are combined with traditional tools, as shown from the best practice examples, such as participation in travel fairs and familiarization trips. The use of documentaries to raise awareness of the tourism corridor theme and disseminate its associated narrative can enhance the tourism corridor brand.

Product Development

A collaborative framework can also create products for stakeholders in selling directly. The Danube Competence Center has done this successfully. Creating products enhances marketing a region as a single destination and allows the framework a higher control factor. However, this is only recommended with a very hands-on approach by the framework.

A corridor can also be enlarged by adding experiences in existing regions that enhance the corridor experience for travelers and also make the corridor more sustainable in the long run. Also, policies to enhance the sustainability, inclusiveness, and competitiveness of the region and the corridor as a destination are recommended.

An example of corridor enhancement is the addition of Bagan in Myanmar as a World Heritage Site in the Greater Mekong Subregion. Being added to the list of UNESCO World Heritage Sites enhanced the Mekong brand overall and helps the Mekong Tourism Coordinating Office to enhance their historical sub-corridor.

Another example of corridor improvement would be the addition of thematic wine routes by the Danube Competence Center. This is another theme for travelers and attracts new target groups of them.

Variances in Indicators

Using indicator modeling, such as scatter or radar graphs, shows which country in a specific corridor is more advanced than the others. It can be assumed that the country that is more advanced in an indicator is able to transfer knowledge to the other countries. If we take the sample scatter graph with international openness, for example, countries that are less internationally open, could adapt their visa standards to those that have successfully implemented further policy.

Even though there are limits to this approach, due to, for example, differences in natural tourism attractions, it can generally be said that within a corridor, all countries should strive to enhance their tourism industry to move closer together on the graph.

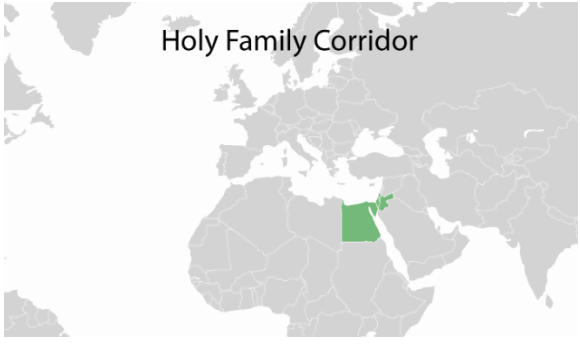
5.5. Recommendations for Existing OIC Corridors

This chapter takes into account the findings of the study and applies the policy framework on existing OIC country corridors. Due to the complexity of each corridor and the multi-lateral co-relations required to set-up each MDTC, it is not possible at this point to provide detailed policy recommendations. They would have to be created in a working group with the governments in collaboration with the private sector. Each corridor should have a clear action plan on which policies and initiatives are required to achieve the agreed-upon goal for the particular MDTC.

Both of these corridors would be assessed as new corridors. Even though the Holy Family Route is already known to travelers, it has not been formally established and not jointly managed by the countries. This means that all initial assessments are still required before formalizing the corridor.

The Holy Family Corridor

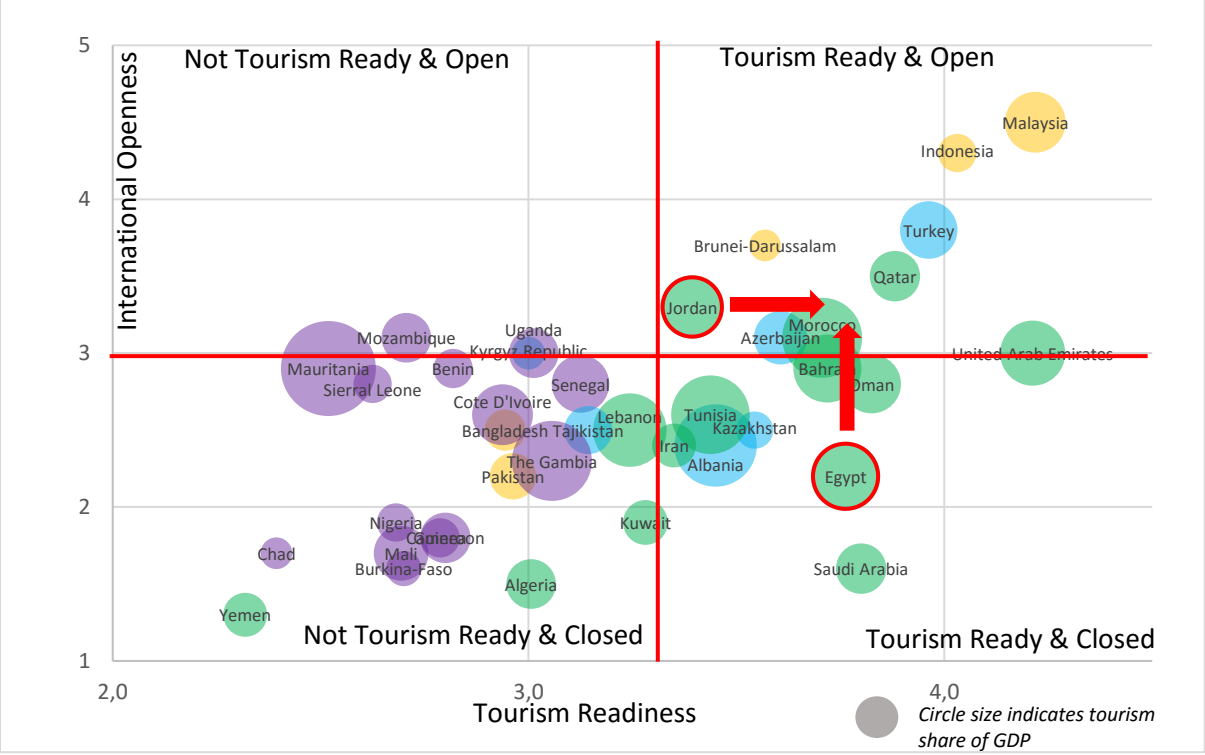
Figure 50: Map of Countries of the Holy Family Corridor



Source: DinarStandard

When looking at the development of a corridor, one has to first assess the current situation. The scatter graph below shows that among all the OIC countries, Jordan and Egypt are positioned in different quadrants based on Tourism Readiness and International Openness. Jordan is overall less tourism ready than Egypt, while at the same time being more internationally open. Both countries have a similar economic dependence on tourism, which is indicated through the circle size. To achieve benefits for both countries and provide a seamless tourism experience, both countries could use the Holy Family Corridor to move further to the top right to attract more tourism.

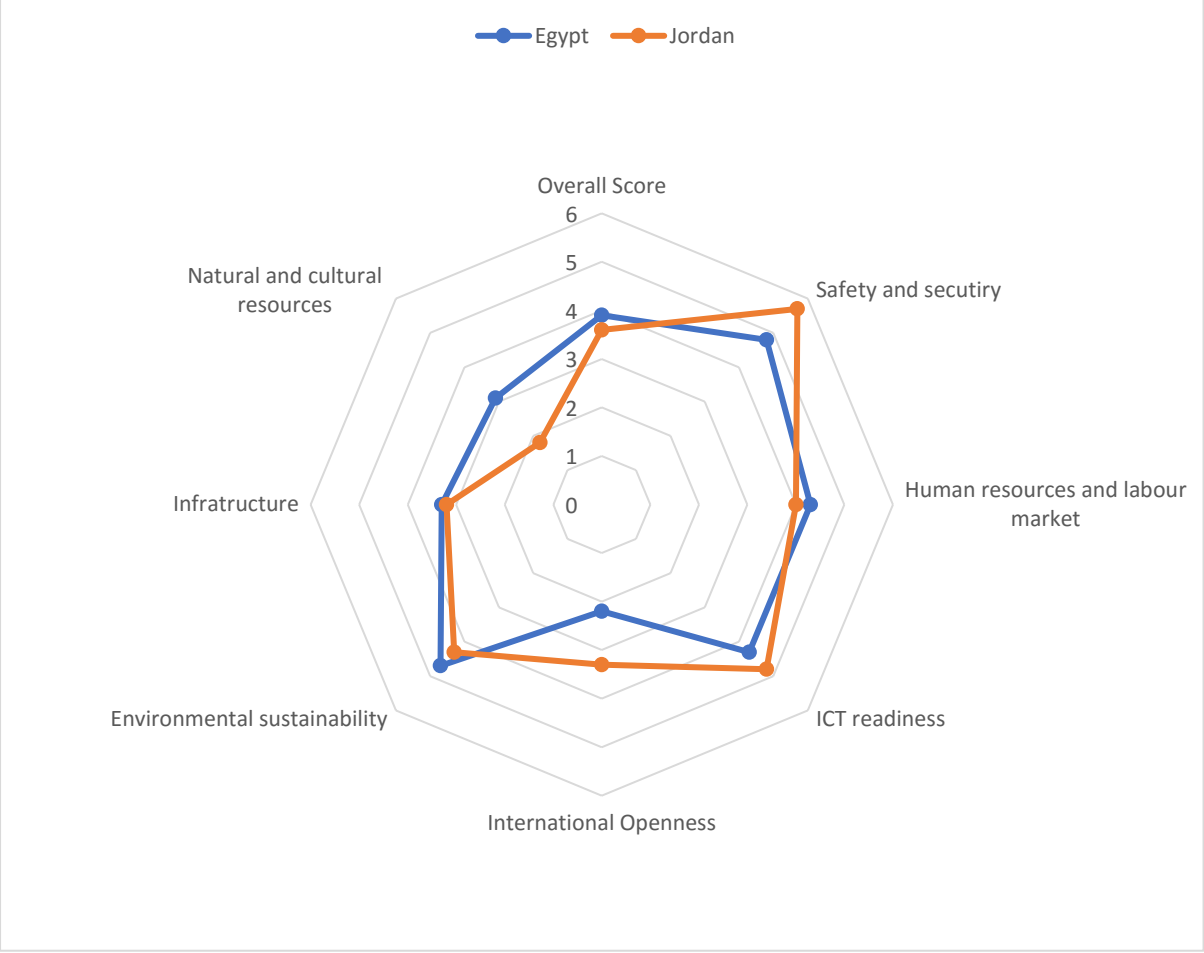
Figure 51: Scatter Chart Showing Some of the Holy Family Corridor Countries (no data available for other countries)



Source: DinarStandard Analysis

A similar conclusion can be found in the radar chart below, which shows numerous indicators for only two countries. Here, it can be observed which country could learn from the other and in which areas. Jordan is ranked highly in safety and security, whereas Egypt is more highly ranked in environmental sustainability. A knowledge transfer in these sectors would benefit both countries and enhance a joint tourism corridor.

Figure 52: Radar Chart Showing Eight Indicators of Egypt and Jordan (no data available for other countries)



Source: DinarStandard

The Holy Family Corridor has tremendous potential for religious and cultural tourism. It tells a compelling story as a whole but can be categorized as an 'informal' corridor. The countries involved in the corridor are Egypt, Jordan, and Palestine (which is not part of the graphs due to missing data). Based on the learnings from the case study, we recommend the following policies for this corridor.

Setting Up a Governance Structure

We recommend formalizing the formation of the Holy Family Corridor through a collaboration agreement between the parties involved (Egypt, Jerusalem, Jordan, Palestine). A public-private partnership structure with governments and DMOs, advised by religious organizations, development organizations, as well as private sector partners. This would ensure that government interests are protected as well as the interests of varying organizations.

The managerial structure of the organization has to be assessed. A single organization to manage the corridor is recommended. However, this should be carefully structured to prevent

it from risking limitations caused by too many involved parties. This can be done by giving parties observer status and asking them for input without giving them a vote in proceedings. One option might be a Tourism Advisory Group, similar to the structure the Greater Mekong Subregion has.

Sustainability

Common international standards in the preservation and application of sustainability are recommended for the protection of cultural and environmental heritage. Egypt and Jordan have similar indicators on the Environmental Sustainability Index and would benefit from jointly developing standards and policies in this area. Due to Egypt's higher position in the Natural and Cultural Resources Index, it might have more experience in this area and could assist Jordan in finding common standards.

Monitoring of Performance

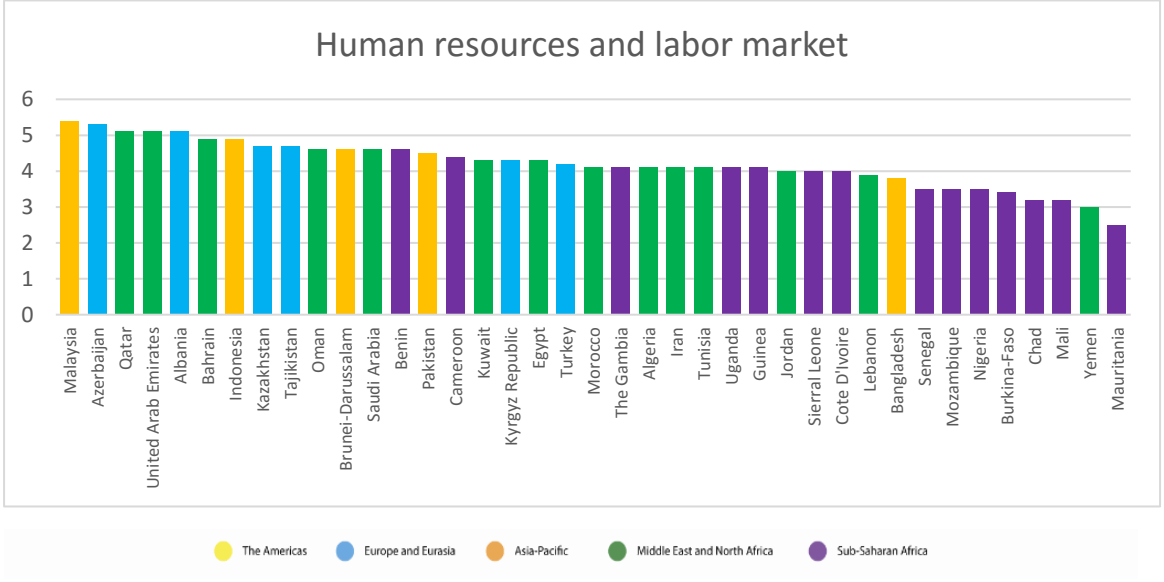
It is highly recommended that a joint working group on data harmonization is established. The performance of the corridor should be monitored in detail. A common data format is recommended to facilitate data evaluation.

Stakeholder Management

The private sector can be engaged to promote a more formalized Holy Family sector. Policies to engage the private sector through collaboration should be established too. This could be to have a membership status for stakeholders or create a membership organization, similar to the Experience Mekong Collection, created by the Mekong Tourism Coordinating Office. An annual forum for members should be established to find out about initiatives on the corridor, industry trends, and networking.

Capacity Building

Figure 53: An Overview of Human Resources and Labor Market Indicator for Some OIC Countries



Source: World Economic Forum, Travel and Tourism Competitiveness Report 2019

Looking at an overview of human resources and the labor market indicates that Egypt is more developed than Jordan (the graph does not include figures for Palestine and Jerusalem). This indicates that Jordan would benefit from knowledge transfer from Egypt in this case.

Several factors have an impact on the human resources and labor market indicators. These include primary education enrolment rate, secondary education enrolment rate, staff training, treatment of customers, hiring and firing practices, ease of finding skilled employees, ease of hiring foreign labor, pay and productivity, and female labor force participation. It has to be assessed in detail, including which areas need improvement to achieve the best results.

It is recommended that a detailed capacity building plan is created both for local businesses to increase their capacity in social media marketing, corridor products, and sustainable practices. The activities can be conducted in collaboration with international development agencies, such as the GIZ (Gesellschaft für Internationale Zusammenarbeit) from Germany, UNWTO, or the World Bank.

Training to ensure that corridor branding will be followed, and businesses collaborate in joint initiatives, will enhance the brand, build more engagement, and increase the exposure of the corridor internationally. The training can be conducted by local universities, training centers, or with international support.

Budgetary Responsibilities, Financing

The managing organization can handle budget and financing. Funding from development organizations could be requested (these could include economic development organizations from certain countries, such as Germany's GIZ, Swisscontact, USAID, or international organizations, such as the World Bank, the European Commission, or a Development Bank).

It is recommended that a multi-source funding plan is built to diversify funding to make it sustainable in the long run. A similar structure to the Mekong Tourism Coordinating Office with base funding from member organizations and separate funding on a project basis can be applied. With technology, funding can be diversified and connected with the revenue generated for businesses.

We would recommend creating a Holy Family business plan to publicize the budget and make the private sector aware of any support they can gain through the corridor initiative. Such business plans have been successfully launched, for example, for Banff-Lake Louise tourism in Canada.

Tourism Corridors Marketing and Promotion
Branding of Corridor

It is recommended that the Holy Family Corridor branding is created and applied to all activities and experiences related to the corridor. In line with this, a brand kit should be distributed to stakeholders, and businesses should be enticed to apply the branding instead of using their own branding creations. Promoting the corridor as a single brand can benefit all stakeholders involved through increased exposure and a common messaging,

Promotion of Corridor

A joint marketing plan for the Holy Corridor, in collaboration with the private sector, would help to promote the corridor as a single brand and benefit from economies of scale. Marketing activities can be created in a format to make it possible for the private sector to build their promotional campaigns around them. Suggested marketing activities should include:

1. A Holy Family online portal
2. Print materials to be distributed at experiences on the corridor as well as at international trade shows
3. Media connections to inform local and international audiences about activities and initiatives and to tell engaging stories about people and experiences on the corridor
4. Storytelling activities (influencer and social media marketing)
5. Participation in international trade shows
6. Organization of familiarization trips

Joint initiatives should be established to promote the Holy Family Corridor. These can be conducted by the central office or by working groups with stakeholders. The initiatives are financed through a central budget or individually through public-private partnership frameworks.

Product Development

It is recommended that products are created in collaboration with the private sector. This could include thematic journeys for Christians that have an approved quality standard. Depending on the existing infrastructure, this could, for example, be a driving program that allows FIT to travel to the Holy Family attractions with a rental car or by motorbike or bicycle.

Thematic journeys could be developed, such as family-based, culinary, nature, or wellness, to provide different target groups of travelers with a Holy Family Corridor experience.

In addition, new experiences that are adjacent to current sites can be developed, such as botanical gardens, museums, cultural experiences, or leisure attractions.

Some additional sites might be able to achieve UNESCO World Heritage status through successful management of the corridor and joint efforts from the countries involved.

The Turkic Silk Road

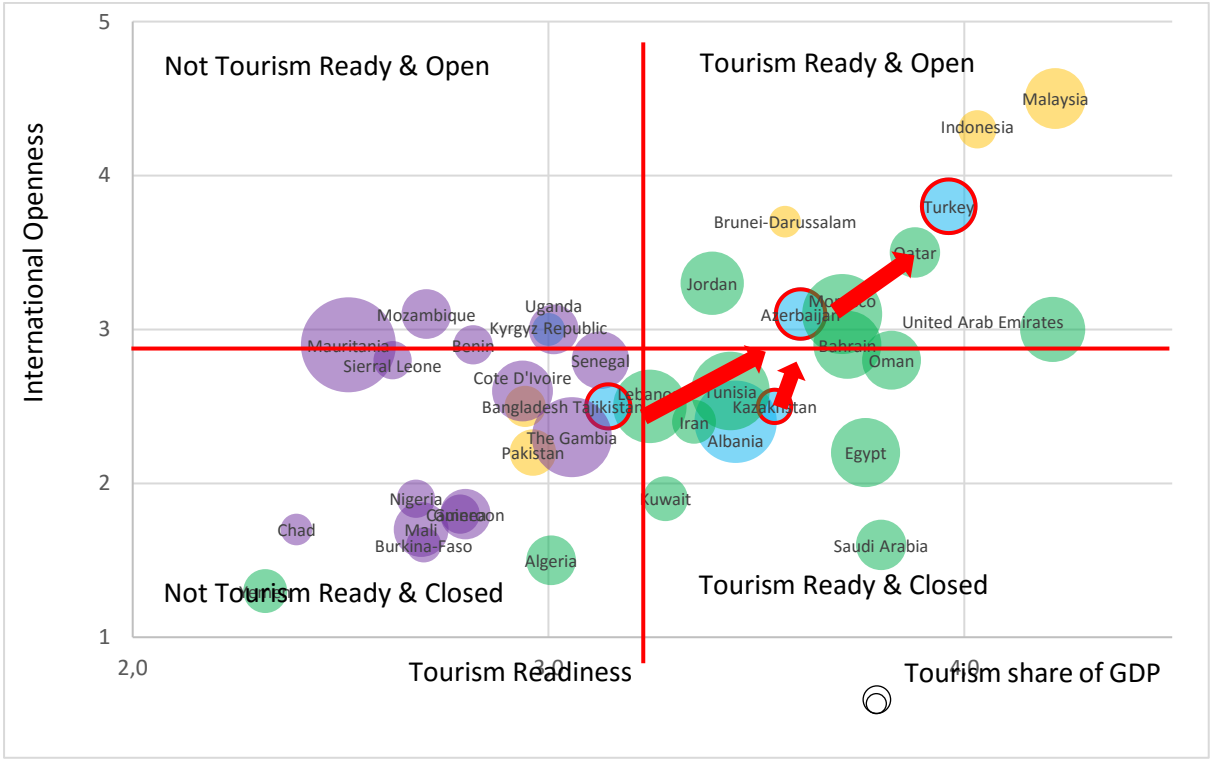
The Turkic Silk Road can be seen as a high-potential corridor, taking into account the emerging tourism countries of Azerbaijan and Turkey, as well as the established tourism hub in Turkey. In addition, the Silk Road has high brand recognition and is being developed by UNWTO. The Turkic Silk Road would be a sub-corridor benefiting from the overall marketing while at the same time building a very distinct brand through identifying with Turkic culture.

Figure 54: Map Showing the Turkic Silk Road Countries

Source: DinarStandard

The scatter graph below shows that Turkey is far ahead of the other countries in both tourism openness and readiness. Having a more developed tourism industry gives Turkey a potentially leading role in a Turkic Corridor. The other countries could gain the opportunity to learn from Turkey and jointly set standards for the region. Turkey also has a higher dependence on tourism on its GDP, as indicated through the circle size below.

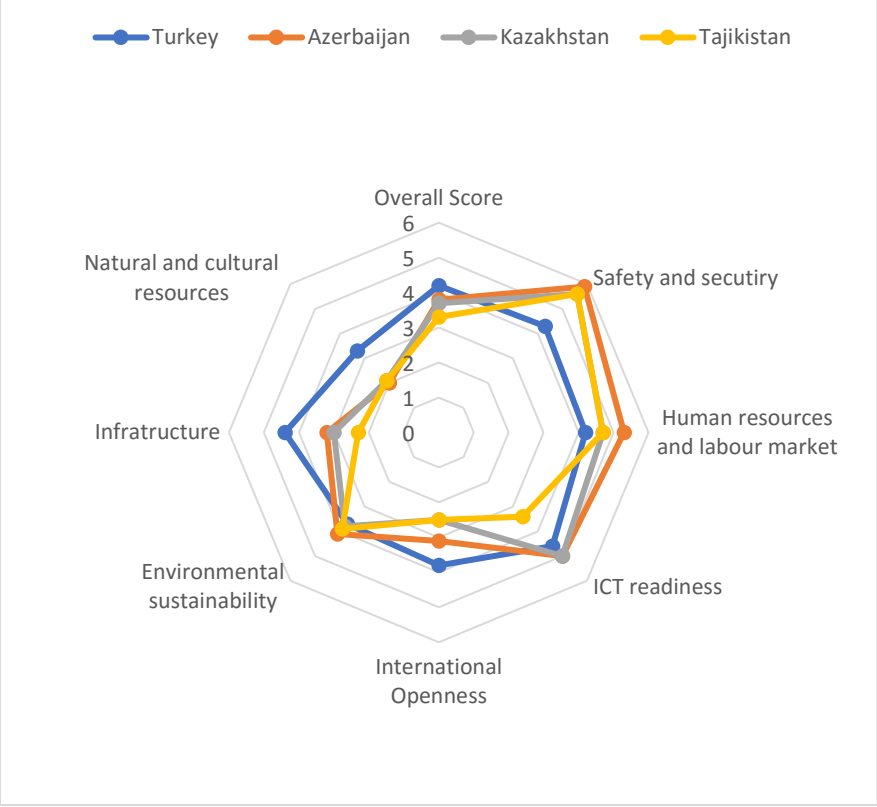
Figure 55: Scatter Chart Showing the Turkic Silk Road Countries



Source: DinarStandard analysis

A look at the below radar chart shows, however, that Turkey would also benefit from joint policies that help to implement similar safety and security standards, and HR regulations like Azerbaijan and Tajikistan have. The Turkic Corridor overall can be seen as an example of collaboration used to learn from each other with joint high-level policies and targets.

Figure 56: Radar Chart Showing Eight Indicators of the Turkic Silk Road Countries



Source: DinarStandard

The OIC Silk Road Corridor is an established cross-border corridor under the framework of the UNWTO Silk Road Initiative. Countries in the OIC Silk Road Corridor are Azerbaijan, Kazakhstan, Uzbekistan (which is not part of the graphs due to a lack of data), Tajikistan, and Turkey. The countries greatly vary in their tourism readiness and international openness. Turkey, as the most tourism-ready country, will be able to lead in the development of policies and transfer knowledge to the less developed countries.

The countries also have substantial differences in other indicators, such as safety and security, ICT readiness, infrastructure, and natural and cultural resources.

Setting Up a Governance Structure

It is recommended that a formal structure is set up for the Turkic Silk Road within the UNWTO Silk Road Programme. The framework could be a formal agreement between the Turkic

countries on the Silk Road. A joint working group with meetings twice a year to foster intergovernmental collaboration is recommended. The advantages of formalizing a sub-corridor on the Silk Road are to promote specific aspects of Turkic heritage and culture as part of the overall Silk Road.

Creating a secretariat to help coordinate activities on the corridor is recommended. Working groups can support the secretarial on specific topics involving stakeholders. It has to be assessed, though, if the Turkic Silk Road requires an operations office for product development, marketing, and capacity building activities. This would strengthen the corridor vis-à-vis the national tourism bodies but would overall benefit tourism arrivals in the region.

Enabling Legislation

Tourism corridors are often dependent on multi-lateral government relations, long-term development, and changes in legislation. These factors are often not directly influenced by the respective tourism ministries but by other government bodies. These development areas, however, have a significant impact on the success of cross-border tourism and thus should be taken into consideration when formulating policies for cross-border tourism corridors.

It is essential to include the following goals, depending on the format of the TC.

1. Facilitation air connectivity approvals, especially for regional carriers, are required to enable easy connectivity for travelers once they are in the region and for domestic travelers.
2. Visa facilitation to enable easy border-crossing. It is recommended that countries partner on visa facilitation regionally. The planned "Silk Visa" of the Turkic Silk Road is a good example. Another example of this would be the development of the ASEAN, which allows citizens of ASEAN countries to travel within the region freely (Chapter 1.3.2). Even though it did not address border crossings of non-ASEAN travelers, the Mekong region benefited from easier traveling facilitation.
3. Strategic transportation (cross-border roads, bridges, railways) and other tourism infrastructure is important
4. ICT connectivity infrastructure is very often one of the most important factors for travelers, and governments should consider the importance of mobile connectivity to enable open travel and inclusive growth.
5. Developing new air, land and sea routes connections
6. Creation and implementing common tourism and competency standards
7. Undertaking programs to build supply chains in the region and allowing local businesses to have access to local sources to sustainable products.

Sustainability

It is recommended that standards are jointly created to preserve the cultural heritage of the Turkic-speaking countries on the corridor. This includes architecture, gastronomy, religion, and culture. This should be done with sustainable and inclusive growth in mind and following

the Sustainable Development Goals of the United Nations. Turkey, with a higher index than the other Turkish countries, can be a leader in this regard.

Monitoring of Performance

It is highly recommended that a joint working group on data harmonization is established. The performance of the corridor should be monitored in detail. A common data format is recommended to facilitate data evaluation.

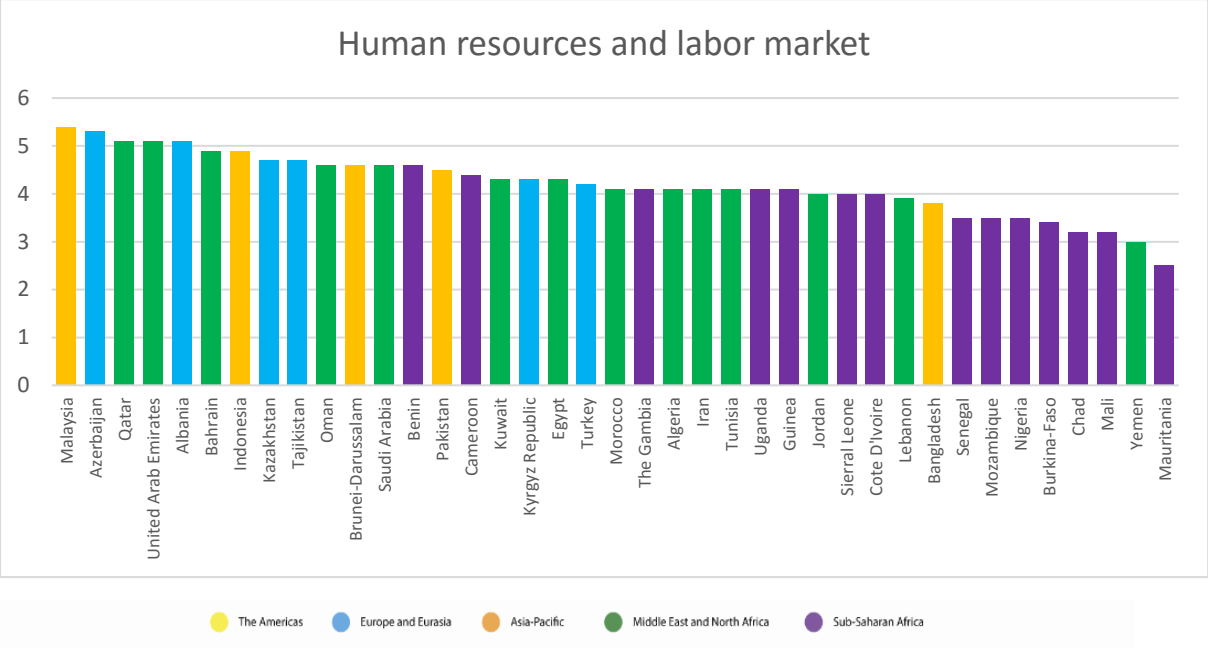
Stakeholder Management

The private sector should be engaged in creating an environment that promotes Turkic culture and traditions through the Turkic Silk Road. Policies to engage the private sector through collaboration should be established. This could be to have a membership status for stakeholders or create membership organizations, similar to the Experience Mekong Collection, created by the Mekong Tourism Coordinating Office. An annual forum for members should be established to find out about initiatives on the corridor, industry trends, and networking.

Capacity Building

Capacity building is an important component of corridor development, the building of tourism standards, and ensuring inclusive growth (chapter 1.3.5). Here, Azerbaijan and Tajikistan might be able to benefit the other corridor countries. By jointly assessing why they are rated higher in HR and labor market indicators, this would enable the building of joint standards in HR policies. Policies to ensure common standards and joint capacity building initiatives are recommended in any tourism corridor.

Figure 57: An Overview of Human Resources and Labor Market Indicator for Some OIC Countries



Source: World Economic Forum, Travel and Tourism Competitiveness Report 2019

Several factors have an impact on the human resources and labor market indicators. These include primary education enrolment rate, secondary education enrolment rate, staff training, treatment of customers, hiring and firing practices, ease of finding skilled employees, ease of hiring foreign labor, pay and productivity, and female labor force participation.

Budgetary Responsibilities, Financing

The countries can provide the base funding of the corridor. Additional funding can be requested from development organizations (such as the European Commission, or the Asian Development Bank) and through the private sector. It is recommended that funding is diversified to make it sustainable in the long run. A similar structure to the Mekong Tourism Coordinating Office with base funding from member organizations and separate funding on a project basis can be applied. With technology, funding can be diversified and connected with revenue generated for businesses.

Tourism Corridors Marketing and Promotions

Branding of Corridor

It is recommended that a specific sub-corridor under the Silk Road brand is created. A Turkic Silk Road Corridor would promote the distinct heritage and culture of the region. In connection with Islamic tradition and its position as a connection between East and West, the region has powerful stories to tell, which sets it apart from other Silk Road destinations and corridors.

An example for this is the Mekong Moments inspirational tourism portal by the Mekong Tourism Coordinating Office, which promoted the Mekong Region as a single brand, while at the same time allowing each country sub-portals, as well as promoting sub-corridors within the region.

Promotion of Corridor

A joint marketing plan for the Turkic Silk Road, in collaboration with the private sector, would help to promote the corridor as a single brand and benefit from economies of scale. Marketing activities can be created in a format to make it possible for the private sector to build their promotional campaigns around them. Suggested marketing activities should include:

1. A Turkic Silk Road online portal integrated into a Silk Road Portal and the country portals
2. Print materials to be distributed at experiences on the corridor as well as at international trade shows
3. Storytelling initiatives (Influencer Marketing, Social Media Marketing)
4. Media relations to inform local and international audiences about activities and initiatives and to tell engaging stories about people and experiences on the corridor
5. Participation in international trade shows
6. Organization of familiarization trips

Joint initiatives should be established to promote the Turkic Silk Road. These can be conducted by the central office or by working groups with stakeholders. The initiatives are financed through a central budget or individually through public-private partnership frameworks.

Product Development

Increasing the number of UNESCO-inscribed cultural and historical heritage sites is recommended. Joint efforts with an Islamic Silk Road might be possible in the future.

A Turkic Silk Road working group, consisting of stakeholders, can help to develop products to jointly promote as well as for the private sector to sell. It has to be assessed if this activity should be conducted by the administration office of the Turkic Silk Road, similarly to the Danube Competence Center, or through public-private partnerships, similarly to the Greater Mekong Subregion.

5.6. Recommendations for New or Extended OIC Corridors

After looking into existing tourism corridors between the OIC countries, this chapter suggests other possible MDTCs to promote specific themes or regions of the OIC countries collaboratively.

Islamic Silk Road

The Islamic Silk Road is at the center of where East and West meet. Representing robust Islamic tradition and a melting pot of cultures, it represents what most people associate with the historic Silk Road: A connection between Asia and Europe. As a sub-corridor of the UNWTO Silk Road Programme, this corridor can be a very powerful brand, showcasing Islamic history and its role in the Silk Road in contrast to Chinese and European influence.

Figure 58: Map Showing the Islamic Silk Road Countries

Source: DinarStandard

Alexander the Great

One of the best known ancient Greek emperors, Alexander the Great has high name recognition internationally. Most countries ruled by the Macedonian king are the OIC countries. Taking over the leadership in an Alexander the Great Corridor in collaboration with Greece would position the OIC countries as connectors between East and West.

Figure 59: Map Showing the Alexander the Great Tourism Corridor Countries

Source: DinarStandard

The Travels of Imam Bukhari

Imam Mohammed Al-Bukhari is considered one of the most distinguished scholars of Hadith in Islamic history. His book, Sahih al-Bukhari, in which the Prophet's words, actions, and habits were collected, is one of the greatest sources of prophetic influence in history. Even though this is not an "official" tourism corridor, it can be seen as the biggest influence on Muslim travel in the region.

Figure 60: Map Showing the Travels of Imam Bukhari Tourism Corridor Countries

Source: DinarStandard

Cross-Border Parks and Protected Areas in West Africa

In 2006, the OIC had the first meeting of the Committee on the Regional Project of "Sustainable Tourism Development in a Network of Cross-Border Parks and Protected Areas in West Africa." At this point, numerous interventions were coordinated by member countries to discuss potential corridor development.

Figure 61: Map Showing Countries of the Cross-Border Parks and Protected Areas in West Africa.

Source: DinarStandard

Masar Ibrahim

Masar Ibrahim, a community-based walking trail, was mainly developed in Palestine, but with an ambition to include the whole of Abraham's Path, through Egypt, occupied Palestine, Turkey Syria, and Iraq. Created in 2007 by the international non-governmental organization, Masar Ibrahim Initiative, in collaboration with Harvard University, Masar Ibrahim is a cultural walking route that retraces the journeys of Abraham, an important figure in all the three major monotheistic religions; Judaism, Christianity, and Islam.[559]

Figure 62: Map Showing Countries on the Masar Ibrahim Trail

Source: DinarStandard

Bedouin Trails

A corridor promoting the distinct Arabic heritage and tradition of the nomadic Bedouin people would open up the region to international travelers. With a focus on making the culture accessible, it would bring the magnificent natural and cultural heritage of the area closer to a larger number of visitors.

Figure 63: Map Showing the Bedouin Trails Countries

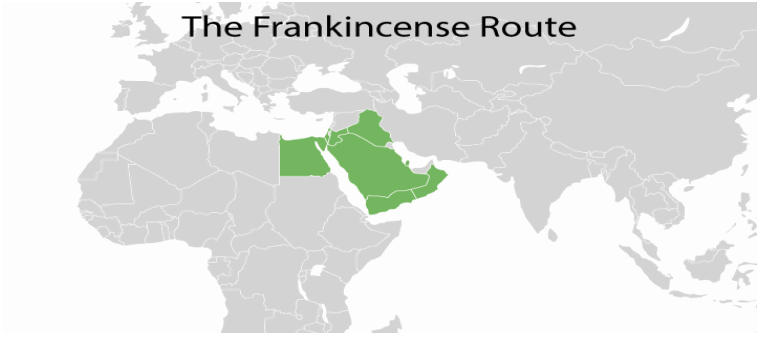
Source: DinarStandard

[559] see: http://masaribrahim.ps/en/

The Frankincense Route

A network of trade routes established between the historical OIC countries, carrying goods such as salt, wheat, wine, weapons, dates, and animal skins from one fortified settlement to another. These paths were the basis of the frankincense trade routes between the kingdoms of southern Arabia, which formed the starting point of the route towards the north. For centuries, incense trade routes from Arabia Felix to the Mediterranean were specifically made with camel caravans, although, this was not just a single and permanent route. This distinct branding would promote the historical role of the region.

Figure 64: Map Showing Countries of the Frankincense Route

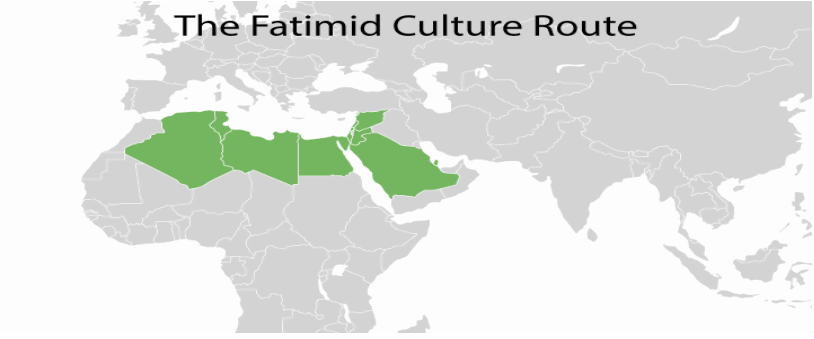


Source: DinarStandard

Fatimid Culture Route

The Fatimid Culture Route would place a focus on early Islamic history and its influence on the culture and architecture of the Middle East and Northern Africa.

Figure 65: Map Showing Countries of the Fatimid Culture Route



Source: DinarStandard

The Red Sea Tourism Corridor

The Red Sea is a divider and also a connection between a number of the OIC countries. Since the opening of the Suez Canal, it has become even more critical than it was in ancient times as a trading route. With many natural signs on land and in the sea, this corridor would be well placed to connect the Arabic peninsular with Africa.

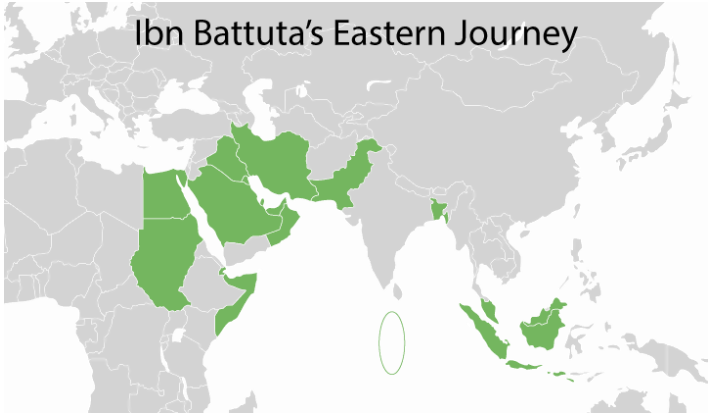
Figure 66: Map Showing Countries of the Red Sea Tourism Corridor

Source: DinarStandard

Ibn Battuta's Eastern Journey

Ibn Battuta was one of the most distinguished Muslim explorers and travelers. Born in Morocco in the 13th century, he visited most of the Islamic world, including Central Asia, Southeast Asia, South Asia, and China. This corridor could have a strong branding once formalized and part of the UNWTO Maritime Silk Road. It could be recommended to include China in this corridor to benefit from its healthy economic muscle and travel market.

Figure 67: Map Showing Countries of Ibn Battuta's Eastern Journey



Source: DinarStandard

The Trans-Saharan Trail

Based on the old Trans-Saharan trade routes, this tourism corridor connects northern African countries with the Sub-Saharan OIC countries. With a strong association with caravans and deserts, this corridor could offer a strong message and branding.

Figure 68: Map Showing Countries of the Trans-Saharan Trail

Source: DinarStandard