



USAID FIRMS PROJECT

Tourism Policy for Khyber Pakhtunkhwa

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Abstract:

This report presents the draft tourism policy for KP, identifying key priorities of the provincial government for the next few years to develop the tourism sector as the priority sector and transform it into an engine of economic growth by making KP a preferred tourist destination.

Acronyms

ADB	Annual Development Plan
BOS	Board of Statistics
C&W	Communication & Works Department
DoT	Department of Sports, Tourism, Youth Affairs, Archaeology & Museums
DTS	Department of Tourist Services
EPA	Environmental Protection Agency
GDP	Gross Domestic Product
IMF	International Monetary Fund
KP	Khyber Pakhtunkhwa
M&E	Monitoring & Evaluation
MIS	Management Information System
NAVTEC	National Vocational and Technical Education Commission
P&D	Planning and Development
PAITHOM	Pak Austrian Institute of Tourism and Hotel Management
PHYDO	Pakhtunkhwa Hydrel Development Organization
PIA	Pakistan International Airlines
PKR	Pak Rupees
PPP	Public Private Partnership
PTDC	Pakistan Tourism Development Corporation
TA	Technical Assistance
TCKP	Tourism Corporation Khyber Pakhtunkhwa
TDC	Tourism Development Committee
TDCP	Tourism Development Corporation of Punjab
TDKP	Tourism Department Khyber Pakhtunkhwa
TICs	Tourist Information Centers

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Executive Summary

Pakistan, and Khyber Pakhtunkhwa (KP) in particular, blessed with immense tourism potential, has been endeavoring to fully capitalize on this potential despite the security challenges faced by the country. While the province of Khyber Pakhtunkhwa has three-fourth of the country's tourism assets, with sites representing archeological, cultural, historical and religious significance and attractive natural and scenic beauty, the province has also been facing severe conflict and security challenges. This calls for a renewed effort on the government's part to come up with innovative solutions to promote tourism in the province and facilitate investment in the sector.

The tourism sector in KP has been facing a host of challenges that has been impeding the growth of tourism in KP. Some of these challenges are cross-cutting, affecting the overall economy such as sluggish economic growth, unclear policy and an institutional regime in the wake of the 18th constitutional amendment, poor law and order situation and low public sector capacity to facilitate and regulate the private sector. On the other hand, there are also some serious sector-specific issues affecting the tourism sector, such as limited availability of information to monitor travel and tourism trends preventing planning; low quality of workforce; low level of private investments; absence of standards; poor infrastructure; limited and sub-optimal marketing activities, etc.

Improving the tourism sector has been a priority for the Government of Khyber Pakhtunkhwa to drive economic growth and make KP a preferred tourist destination. While the government is committed to create a robust facilitation and compliance tourism regime, built on quality and image, the government also realizes that this is a long-term goal and can only be achieved through a coherent well thought out strategy. This tourism policy presents government's strategy to realize this vision. This tourism policy envisions to develop an internationally competitive tourism sector to fully realize its diverse potential; making tourism a leading economic sector for the province through public-private partnership. This vision would be realized through driving an ambitious agenda for private-sector driven tourism development in the province to propel economic growth and to make KP a preferred tourist destination. The Government believes that through increased investments and by ensuring a business and tourist friendly environment, the tourism sector in the province can be strengthened, driving economic growth as well as restoring people's confidence in the region. A key in achieving all of this would be to partner with communities, drive business friendly policies, promote private investments and market the tourism assets cost effectively in selected domestic and foreign tourist markets. The tourism policy is built around six core strategic thrust areas including tourism and allied infrastructure development; quality assurance; institutional and regulatory reforms; marketing and image-building; workforce development; and resource mobilization.

Over the next five years, the policy is expected to achieve the policy's vision through strong public-private partnership, improved institutional capacity, adequate resources and a coherent set of interventions in short, medium and long terms. In particular, the policy will address institutional issues that have traditionally impeded tourism development in the province; capitalize on previous work done through various policies and strategies developed over the last few years; create an enabling environment; and bring about a paradigm shift in government's role by making it a facilitator and a regulator, rather than an implementer.

Why Invest in Tourism?

The Case for Khyber Pakhtunkhwa

The newly PTI-led government in Khyber Pakhtunkhwa would soon be devising its strategy to drive the economic growth of the province. With limited resource base, the new government would need to carefully prioritize its investments to focus on those sectors, which can play an instrumental role in giving a boost to provincial economy. Tourism is one of those sectors in the province, which should definitely rank high on the priority list for the new government, due to its wide ranging economic impact.

Tourism sector is considered a key source of inclusive poverty reduction in the developing world. The same holds all the more true for Khyber Pakhtunkhwa, where the sector is a significant source of employment generation, encompasses thousands of small and medium enterprises and includes geographical areas with widespread poverty. Moreover, there is a close relationship between tourism development and economic growth. Empirical studies in various countries including India, Taiwan and Turkey have shown a causal relationship between tourism development and economic growth. Similarly, IMF, in one of its cross-country studies, estimated that an increase of one standard deviation in the share of tourism in exports leads to about 0.5 percentage point in additional annual growth. Therefore there is substantial evidence to suggest that low-income economies, such as Khyber Pakhtunkhwa, should prioritize its investments in tourism sector to fuel growth over the long term and facilitate inclusivity.

Furthermore, the KP tourism sector has huge untapped potential, which if unlocked, can result in tremendous benefits for the province. Khyber Pakhtunkhwa is blessed with rich cultural heritage, centuries old civilizations, beautiful natural resources and scenic locations, sites for adventure and winter tourism; complemented with international price competitiveness. However, currently, the sector faces a host of challenges such as law and order crises, dilapidated infrastructure, low quality tourist services, absence of standardization, lack of trained workforce, etc. A targeted investment strategy, coupled with a coherent tourism policy can very well help in addressing these challenges and capitalizing on this untapped potential.

Another significant advantage of investing in tourism sector is accrued because of its direct impact on local communities, spread all across the province in case of KP, as the services rendered through the sector are mostly consumed right there in respective communities, thus bringing employment, income and investment to these far flung communities. Not only the tourism activities provide an opportunity for local people to participate in direct and indirect employment generated by tourist facilities and service providers as well as through their suppliers, but they also result in direct economic opportunities such as arts and crafts, excursions, food and beverage, etc.

Last but not the least, tourism development supports local enterprises and entrepreneurs in developing new products and exports through creating adequate market incentives and providing opportunities for pre-testing them for other national and international markets; facilitates in upgrading skills through demand for quality products and services; and provides support for preserving and developing historical, cultural, natural and other tourism assets.

Figure 1 Case for Khyber Pakhtunkhwa

1. Introduction

The tourism sector¹ has gained significant importance over the past few decades all over the world. According to World Tourism Organization, the year 2012 recorded one billion international tourists travelling to various countries around the world in a single year. Another five to six billion are estimated to travel in their own countries every year. Approximately, this brought about a direct revenue of USD \$1.2 trillion in the global economy and accounted for 9 percent of global GDP. The total employment created is worked out as 260 million, which form 8.8% of global employment.

Pakistan in general and KP in particular, blessed with immense tourism potential, have also been endeavoring to fully capitalize on this potential despite the security challenges faced by the country. While the province of Khyber Pakhtunkhwa has three fourth of the country's tourism assets, with sites representing archeological, cultural, historical and religious significance and attractive natural and scenic beauty, the province has also been facing severe conflict and security challenges. This calls for a renewed effort on government's part to come up with innovative solutions to promote tourism in the province and facilitate investment in the sector.

KP is a unique province of Pakistan where all the types of tourism attractions exist. These include tourism sites with natural, scenic beauty, sites with unique historical and/or religious significance, and sites for adventure tourism, ecotourism, winter tourism, shopping, cuisines, sports and festivals. No other province of Pakistan can claim to have such diversity of tourism assets. Some more popular tourist locations in KP include Swat Valley, Kaghan Valley, Chitral Valley, Dir Valley, Kalash Valley, Indus Kohisan, Abbottabad and Galliat, Peshawar and Khyber Pass and surroundings.

As per some estimates², the total number of domestic tourists visiting Khyber Pakhtunkhwa in a year is about 8.8 million; which account for about 19% share of the total national domestic tourist traffic. A higher share of Khyber Pakhtunkhwa in domestic tourism compared to its share in population is a clear indicator of the competitive edge the province possesses over other provinces/regions of the country. On the other hand, total number of foreign tourists arriving in Khyber Pakhtunkhwa represent about 5.6% share of the national foreign tourist traffic, which translated into total number of 47,900 foreign tourists. KP share of receipts from foreign tourism was PKR 974 million during 2008-09. Using careful assumptions, total annual economic impact of tourism for KP was calculated to be PKR 12.26 billion.

In KP, Tourism Corporation Khyber Pakhtunkhwa (TCKP) and the Department of Tourists Services (DTS) are two major entities responsible for tourism promotion and management. In addition, Pak Austrian Institute of Tourism and Hotel Management (PAITHOM) also exists in the province, which is responsible for producing skilled human resources in the hospitality sector. All these organizations are collectively working under the Department of Sports, Tourism, Youth Affairs, Archaeology & Museum (DoT). A delegated Secretary performs the responsibility of an official in-charge of the Department. After the devolution, it has been presumed that PTDC's properties in KP would be officially transferred to the same Secretariat. In order to compete in both the domestic and international markets and to efficiently perform the newly assigned

¹ The World Tourism Organization defines tourists as 'people who travel to and stay in places outside their usual environment for more than twenty-four (24) hours and not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited'.

² Figures for 2009; KP Tourism Vision Document

responsibilities, it is required that both TCKP and DTS should restructure their originations accordingly. In order to promote the tourism potentials of Khyber Pakhtunkhwa, the Tourism

Corporation Khyber Pakhtunkhwa (TCKP) was established as public limited company in 1991. TCKP is governed by Board of Directors, where the provincial tourism minister serves as its chairman while the relevant secretaries perform the responsibilities of the directors. It is headed by a Managing Director as its chief executive. Presently, Secretary Tourism Department also holds the charge of the Managing Director's position. The main responsibilities of the Corporation are:

- Promotion of tourism by exploiting the potential;
- Produce publicity and promotional material for distribution at home and abroad;
- Develop packages to attract domestic and international tourist by involving
- private sector;
- Organize tourism fairs at home and attend international tourism fairs to introduce
- the tourist product of KP;
- Build hotels and motels, where private sector is shy to invest;
- Monitor and manage the tourism activities;
- Protect the tourism assets by bringing the awareness in general public by holding
- awareness campaigns;
- Play the role of catalyst by providing level playing field for the private sector

2. Key Issues/Challenges for KP Tourism Sector

2.1 Cross Cutting Issues

The tourism sector in KP has been facing a host of challenges that have been impeding growth of the sector in KP. Some of these challenges are cross-cutting, affecting the overall economy such as the sluggish economic growth, unclear policy and institutional regime in the wake of 18th constitutional amendment, poor law and order situation and low public sector capacity to facilitate and regulate private sector. On the other hand, there are also some serious sector-specific issues affecting tourism sector such as limited availability of information to monitor travel and tourism trends preventing planning; low quality of workforce; low level of private investments; absence of standards; poor infrastructure; limited and sub-optimal marketing activities, etc. Some of these issues are discussed in more detail below:

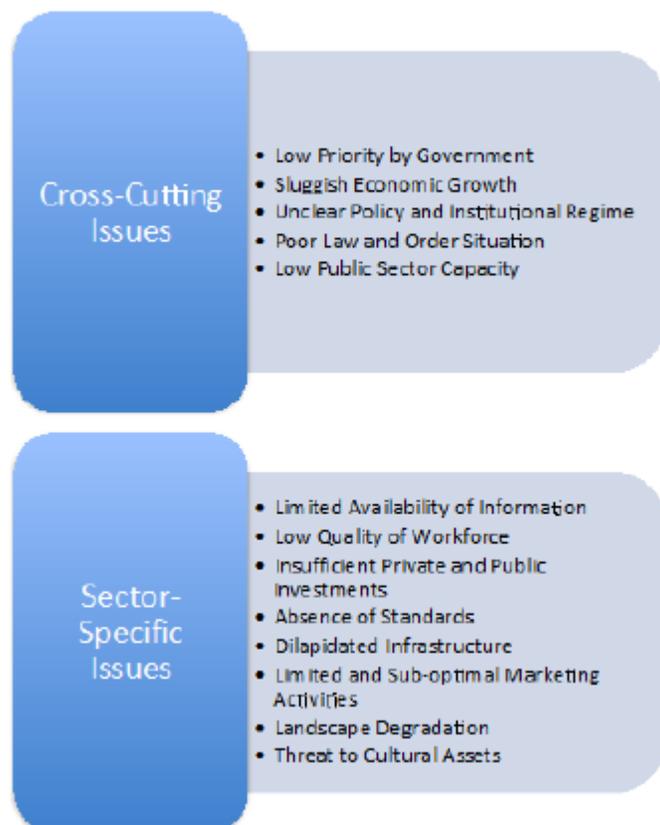


Figure 2 Challenges Impeding Growth of Tourism in KP

Sluggish Economic Growth – Over the last few years, Pakistan’s economy has faced high inflation and low growth, resulting in an economic slowdown. This economic slowdown has further been compounded by low tax-to-GDP ratio, high fiscal deficit, devaluing rupee, shaky law and order situation, huge energy shortfall and widespread natural disasters. According to Economic Survey 2011-12, Pakistan’s GDP growth has been projected to grow at 3.7% in FY 2011-12 against the target of 4.2%. As a result, Khyber Pakhtunkhwa continues to face its share

of sluggish economic growth, further exasperated by high load shedding of electricity in year 2011-12 creating operational problems for the existing businesses in the province, discouraging new private investments and impeding the process of new employment generation. Furthermore, the sluggish economic growth has affected incomes of people, reducing their expenditure of leisurely activities such as tourism.

Unclear Policy and Institutional Regime - Recently under the 18th constitutional amendment, a number of functions have been devolved from the federal level to provinces. While the devolution of power is aimed at enhancing provincial autonomy and transferring decision-making to lower governance tiers, this changed paradigm has also come with some new challenges. The provinces in most cases were not ready for this sudden transfer of increased responsibilities, moreover many functions, which were supposed to be performed by the national government are now subject to a lot of confusion with unclear responsibilities. This change also has a lot of implications for the tourism sector. With abolishing of the federal Ministry of Tourism, there is no entity in the federal government responsible for managing this function at the national level. While a lot of tourism activity happens at the provincial level, there is a need for national government involvement in a number of functions such as country's image building, smoothening visa regimes, civil aviation for airport management and operations, customs, etc. Moreover, the absence of a tourism policy in KP has also created a vacuum. While TCKP has been endeavoring tourism sector in the province, the sector also requires coordinated efforts by a number of other departments and agencies such as P&D Department, C&W Department, Excise and Taxation Department, Energy and Power, Environment Protection Agency, , Wildlife Department, Forest Department, Galliat Development Authority, Malakand Development Authority, Kaghan Development Authority, Small Industries Development Authority, Auqaf Department of Archaeology, Department of Culture, National Highway Authority, Pakistan Railway, Department of Transport, etc. This results in lack of synergy and coordination.

Poor Law and Order Situation – The armed conflict in KP has taken its toll on the tourism sector and the security crisis in Swat and other tourist areas in KP have created unprecedented damage. While the situation has significantly improved in the last year, there is still a lot of hesitation amongst tourists, especially the international visitors, to visit tourism sites in KP. Furthermore, the heightened security situation has also created procedural hassles in visa regimes, further discouraging international tourists.

Tourism Infrastructure Damages Due to Conflict and Natural Disasters

The military operation in KP launched in early 2009 in particular in Swat valley and some tribal areas has imposed an immense cost on the local economy as large number of people (an estimated 2 million individuals) has been forced to leave their homes and livelihood. In addition to the loss of lives and injuries the ensuing fighting between the military and militants also caused damage to health facilities, educational institutions, water supply, roads, electricity, gas supply, shops, hotels, restaurants and businesses.

The World Bank survey report (2009) in KP estimated the damages incurred to tourism industry was Rs. 180 million (US\$ 2 million). According to this survey about 500 hotels have been operating in the Malakand division, out of which some 60 units have been reported as damaged (12 % of total hotels).

Swat Tourism Sector Census (2010) explicitly explored the impact of conflict on the hotel industry of Swat in terms of capital, revenue, and employment losses. The largest category of capital losses was recorded for building amounting to Rs. 72 million.

Pakistan Austrian Institute of Tourism and Hotel Management (PAITHOM) in Swat was established in March 2001 at a cost of Rs140.50 million including foreign economic assistance of Rs. 64.262 Shillings. Regrettably, during the military operation in Swat this state of the art and purpose built building is not only looted but declared by Pak Army as a temporary detention cell.

Followed by 2009 conflict, the 2010 flash floods and heavy torrential rains have surpassed the physical destructions ever caused by all the disaster in Pakistan. The catastrophe has impacted a wide population in Indus river basin starting from North in Gilgit-Baltistan crossing KP, and Punjab and hitting down the Sindh province. The unprecedented natural disaster has severely hit the human lives, livestock, infrastructure, crops, and livelihoods in KP. The dynamics of this disaster was such that life losses were less but the damage to public and community infrastructure were beyond imagination.

According to the KP, Provincial Disaster Management Authority (PDMA) about 2000 km of major and link roads, 40 major bridges, 40 minor bridges, 150 health facilities beside 158 buildings (including hotels, motels and restaurants) damaged due to flood. The tourists' destination of Swat and Chitral were declared among worst and medium affected areas respectively. In Swat valley almost all the hotels along the bank of river Swat were either partly damaged or completely wiped out.

At present USAID and World Bank are providing financial support through various grants program for revival of tourism infrastructure in KP, in particular in Swat valley. However, in order to fully restore the tourism infrastructure both the government and private sector participation will be of immense value. Furthermore, serious interventions are required by KP government in order to reinstate PAITHOM with respect to its objectives.

Figure 3 Tourism Infrastructure Damages Due To Conflict and Disasters

Low Public Sector Capacity - Weak administrative capacity forms one of the core issues behind sub-optimal governance landscape in the province affecting a number of sectors. The weak administrative capacity is manifested in overstaffing and skill gaps, especially at the lower administrative tiers; high absenteeism; misdeployment and low productivity of key personnel; and dysfunctional oversight of service providers by middle and senior managers. There are no clear performance or appraisal standards and low compensation offered by the government prevents attraction of talent. This situation also takes its toll on the overall government functioning of the government.

2.2 Sector Specific Issues

Limited Availability of Information – The planning and management of any sector and its activities depend upon effective evidence-based decision-making, backed by flow of data and meaningful information. While the regular flow of information is a crosscutting problem, it becomes even a greater challenge for tourism sector, where the sector definition is porous and a number of private sector players such as hotels, restaurants, travel agencies, etc. are catering to both tourism and non-tourism sectors. This prevents collection and use of reliable data.

Low Quality of Workforce – Availability of quality human resource has been a significant challenge for the tourism sector. There are a few degree courses on tourism sector offered by large universities of the province. Furthermore, Pakistan Austrian Institute of Tourism and Hotel Management (PAITHOM) in Swat - the only notable training institute in the province for tourism and hospitality related training - has been non-operational since the conflict in Swat and is still in use by Pakistan Army. The workforce issue is further compounded by the fact that not many officials available in the public sector have thorough understanding of the sector. For private sector businesses, the reliance has mostly been on on-job informal trainings, making a dent in the quality of tourism services provided.

Insufficient Private and Public Investments – Development of tourism infrastructure requires influx of substantial funds; the provision of which is difficult for the government. In terms of travel and tourism government expenditure, Pakistan was ranked 101st in the World Travel and Tourism Competitiveness Report. Tourism Department's budget in 2011-12 stood around PKR 10 million³, whereas in 2012-13, it is expected to be around PKR 11 million. In 2011-12, an amount of PKR 1391.698 million was allocated for tourism (and sports) sector in Annual Development Program (ADP) for 38 projects, out of which 11 projects were completed. In 2012-13 ADP, an amount of PKR 685 million has been allocated for tourism, sports, culture and museums, covering 39 projects, out of which 27 are ongoing and 12 are new. The flow of private investments in the tourism sector of KP has also been limited. In order to promote private investments in the province, a regulatory framework is required to empower government officials and also to provide opportunities for secure investments to private sector investors. Presently, in KP, there is no such framework; which limits the execution of this option⁴

Absence of Standards – The enforcement of any standards is virtually absent in the sector. The responsibility of managing the laws and standards of hotels, tourist guides and travel agencies lies with Department of Tourist Services (DTS). Before 18th Amendment, DTS used to work under the federal Ministry of Tourism. As per the mandate decided for DTS, it is responsible to ensure the quality of tourist services through implementation of various enactments including The Pakistan Hotels and Restaurants Act 1976; The Pakistan Tourist Guides Act 1976; and The Travel Agencies Act 1976. This absence of a robust standards regime has implications for services offered by hotels and restaurants; licenses for tourist guides; fitness certification system vehicles used by tourists; transportation rates, etc.

Dilapidated Infrastructure – Due to a recent history of armed conflict and natural disasters, the tourism sector in KP has suffered major losses, including physical damages to buildings and equipment and lost businesses. This in turn has taken its toll on availability of tourist facilities in the province. Firstly, damage caused to access roads, unreliable supply of electricity, poor sanitation at tourists spots and closure of Saidu Sharif airport have further worsened the situation. The crisis damaged roads and bridges in Swat valley, Dir, Kohistan and Kaghan valley. In addition, new link roads should also be developed to reach scenic places in Swat, Dir,

³ Revised Estimates

⁴ The USAID Firms project is providing technical assistance to KP Govt. for developing PPP framework for the tourism sector.

Chitral and Kaghan valley and other areas. Secondly, electricity is one of the basic infrastructures for tourism promotion. The poor supply situation of electricity to the tourists' destination in KP is further devastated by the crisis. In order to encourage maximum tourists' flow, the government should ensure undisturbed supply of electricity to the tourists' destination in the province. Lastly, access to comfortable and reliable tourist transport facilities in Swat, Kaghan, Naran and Chitral needs immediate attention. These transport facilities need to be available from main cities of the country to major tourists' town of KP and from those towns to specific tourists' attraction points. Saidu Sharif airport in Swat used to have regular flights to and from Peshawar, Islamabad and Chitral but due to the conflict in the area this airport is closed.

Limited and Sub-optimal Marketing Activities –While the poor law and order situation has played its role in discouraging tourism in KP, some responsibility also has to be placed on lack of an effective and well-coordinated image building and marketing strategy to promote Pakistan and KP as preferred tourism destinations. KP has been bestowed with valuable tourism assets and unharnessed tourism potential in areas of natural, historic, archeological and cultural tourism, however, the tourism officials, especially at the federal level, have so far been unsuccessful in conveying this potential to the relevant audience across the globe. According to World Travel and Tourism Competitiveness Report, Pakistan has been ranked at 117th number in the world on effectiveness of marketing and branding activity. Similarly as per Travel and Tourism Competitive Index, Pakistan has been ranked at 125th, 127th and 62nd positions on affinity of the local communities for tourists and tourism openness; attitude of population towards foreign visitors; and participation in international fairs. So far the government's efforts to attract domestic tourists have been mostly centered around activities within the province, however, there is a need to extend these activities to tourist feeding areas in the country, including major cosmopolitan cities, to further promote domestic tourism.

Absence of a Robust Legal Regime– A key regulatory challenge faced by tourism sector in KP is that the existing tourism-related laws in the province are outdated and need revision to facilitate a robust regulatory role played by the public sector, facilitate investments by the private sector and to promote small businesses to compete. There is no Public Private Partnership (PPP) law in the province, under which the government can invite private investment

3. KP's Tourism Policy Rationale

As discussed earlier, currently the Govt. of KP does not have a clearly articulated formal tourism policy. However, considering that the tourism sector requires coordinated efforts by a number of departments and agencies as mentioned earlier, besides the Tourism Department and TCKP, the need for having such a policy is critical. Moreover, a well laid out tourism policy would demonstrate government's long-term commitment in the sector, would form the basis for shared understanding of, synergized actions, and coordinated planning by different stakeholders. Furthermore, such a policy framework would ensure sustainable development of tourism as most of the uncontrolled and haphazard development of tourism has negatively affected the social, cultural, natural and economic environment of tourist destinations in KP. In particular, this tourism policy attempts to address the following key issues:

Post-18th Amendment Scenario – After the passage of 18th Amendment, there has been lack of clarity on performing some of the broader functions related to tourism sector. For effective tourism development, the government considers it its foremost duty to develop a sound and comprehensive policy framework at the provincial level, clearly laying out our priorities vis-à-vis the federal government. This policy can then also form the basis for pursuing the federal government to maintain its role for effective coordination across the provinces. This would also result in optimal resource utilization and synergy of effort.

Role of the Government and Private Sector – This policy also provides guidance on the role of government vis-à-vis the private sector. The government would adopt the role of a regulator as well as that of the facilitator, whereas the private sector should come ahead for service provision. As a regulator, the government would act as the custodian for rights of tourists and ensure that they are getting quality services, whereas as a facilitator, it would provide well-targeted tax, policy and financial incentives to private sector players to promote investment in the sector. These incentives however, would be tied up with clearly laid out policy objectives, rather than being offered for everything and anything related to tourism sector. The government would also coordinate and synergize the tourism development efforts undertaken by various agencies, international donors and other stakeholders. If there is an established need to develop tourism infrastructure by the public sector, this responsibility would be entrusted to the provincial agencies. For management of these facilities as well as for undertaking other projects, various modalities will be considered including public private partnerships (PPPs).

Institutional Framework - The policy also includes a well laid out institutional structure to implement the policy. Currently much of the activities are performed by TCKP, however, there is a need for involvement of other agencies and departments. Moreover, there is a need to empower and strengthen TCKP to drive the implementation of policy.

Focus on Sustainable Tourism Development - This policy also emphasizes on development of sustainable tourism in the province, to ensure sustainable development through fostering understanding between people, to create employment opportunities and bring about socio-economic benefits to the local communities particularly in the remote areas. The policy also strives to preserve and promote KP's rich cultural and natural heritage while developing high-class facilities for the visitors.

4. Policy Objectives and Strategic Thrust

Improving the tourism sector has been a priority for the Government of Khyber Pakhtunkhwa to drive economic growth and make KP a preferred tourism destination. While the government is committed to create a robust facilitation and compliance tourism regime, built on quality and image, the government also realizes that this is a long-term goal and can only be achieved through a coherent well thought out strategy. This tourism policy presents government's strategy to realize this vision.



Figure 4 KP Tourism Vision Statement

The above vision statement is supported by the following mission statement.

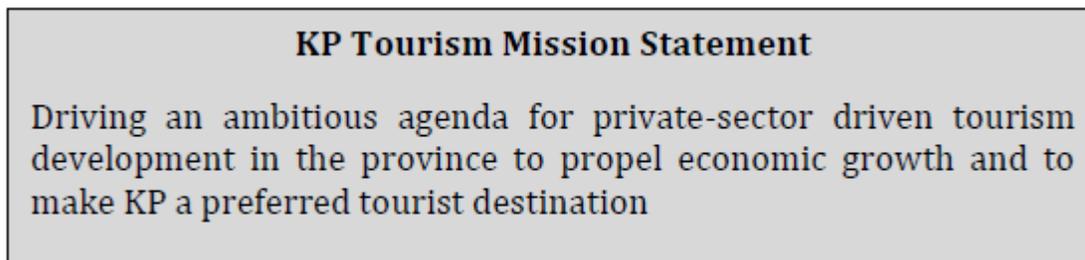


Figure 5 Mission Statement

4.1 Building Blocks of Tourism Development

The tourism policy has been carefully developed to bring about a sustainable change in overall tourism landscape of the province. Following are the key building blocks in formulating the policy.

Capitalizing on Existing Strengths- The policy does not aim at starting afresh and rather aims to knit various previous policy recommendations, coupled with a recent review, in a coherent plan, while laying out a clear future direction to keep the momentum going and consolidate and

extend the successes so far. The policy also endeavors to capitalize on the wide tourism asset base, existing within the province and making use of natural tourist destinations.

Clear Focus - This policy has a strong focus on achieving clear policy goals in the short to medium term, rather than diluting the efforts into many different directions and has come up with clear strategic priorities, which would drive the future tourism development agenda in the province.

Public-Private Partnership - The tourism policy is based on private-sector driven tourism development, whereby the government facilitates the investment by private sector and creates an enabling regime, whereas the management and establishment of tourism facilities is left for private sector to manage.

Resource Mobilization – Previously the government has been wrestling with generating enough resources to promote tourism development in the province. The policy therefore is expected to guide future public sector investments in the sector, by allocating a minimum spent in the annual development budgets, while also mobilizing other resources such as donor support and private investment

Strong Ownership - Since the policy is based on existing initiatives, its ownership is quite strong. Moreover, with the approval of the policy by the cabinet, the top-level political ownership of the policy is also ensured.

Robust Compliance and Improving Service Standards - The policy aims to create a strong and robust compliance regime to improve service standards for the tourist and improve their experience. This in turn would improve reliability of the tourism-related services offered in the province.

Institutional Development - The policy also takes into account weak institutional capacity of the government to implement a robust tourism policy and therefore also addresses this aspect.

Organic Planning By having a clear strategic thrust, rather than having prescriptive plans, the policy ensures that continuous feedback and monitoring would improve the tourism development plans and include the possibility of course correction.

Robust Implementation Plan – The government realizes that in order to drive the policy ahead in a meaningful way, a strong institutional push is needed. Therefore, the policy also includes a clear implementation plan, with TCKP taking the central driving role in implementing the program and providing necessary assistance.

KP Tourism Policy

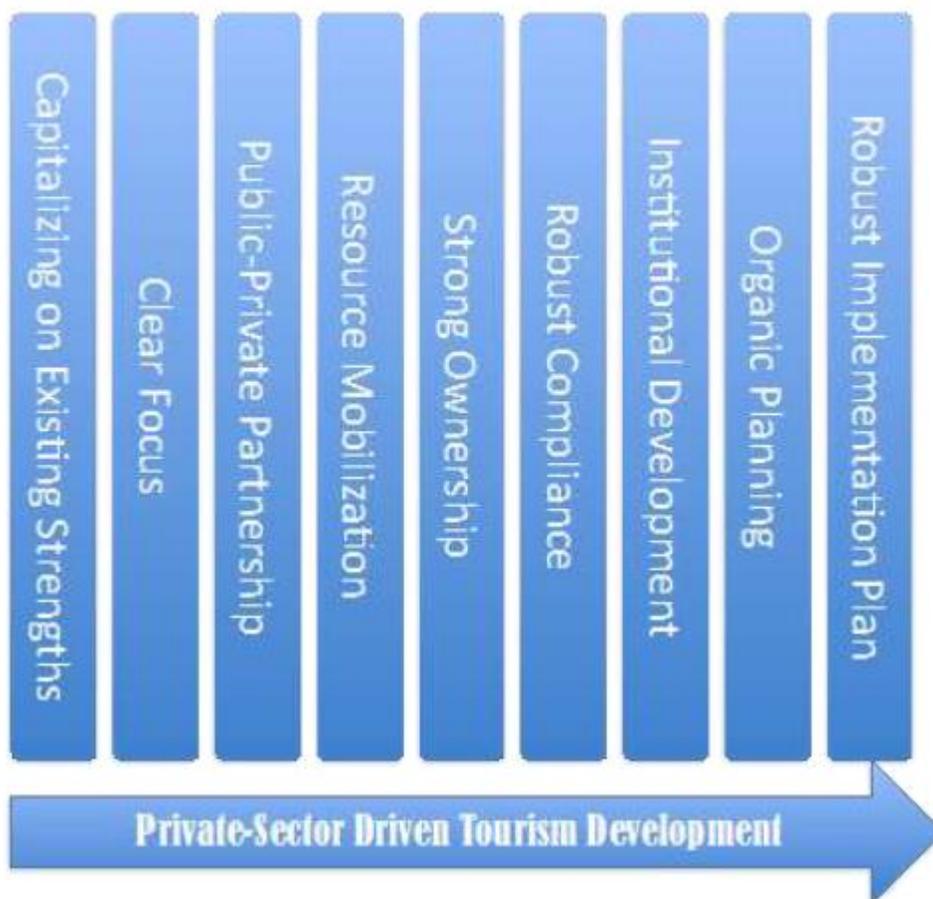


Figure 6 Building Blocks of KP Tourism Policy

4.2 Policy Objectives and Expected Impact

While the Government of Khyber Pakhtunkhwa is endeavoring to tackle the law and order challenges faced by the province, it is also propelling a robust agenda for economic growth to provide increased economic opportunities for people and drive growth and prosperity. In order to promote this mission, the province is relying on a few priority sectors, including tourism. The Government believes that through increased investments and by ensuring a business and tourist friendly environment, the tourism sector in the province can be strengthened driving economic growth as well restoring people’s confidence in the region. A key in achieving all of this would be to partner with communities, drive business friendly policies, promote private investments and market the tourism assets cost effectively in selected domestic and foreign tourist markets. The government’s role has to be two-pronged, including that of a facilitator to promote private-sector driven growth and of a regulator to ensure compliance with service standards.

Therefore the tourism policy addresses the wider issues related to the tourism sector, ranging from regulatory and legal regime, workforce development, infrastructure improvement, better

service standards, marketing and promotions, environmental and cultural conservation and last but not the least a clear strategic thrust.

Over the next five years, the policy is expected to achieve this task through strong public-private partnership, improved institutional capacity, adequate resources and a coherent set of interventions in short, medium and long terms. In particular, the policy will address institutional issues that have traditionally impeded tourism development in the province; capitalize on previous work done through various policies and strategies developed over the last few years; create an enabling environment; and bring about a paradigm shift in government’s role by making it a facilitator and a regulator, rather than an implementer.

The key objectives of the tourism policy include:

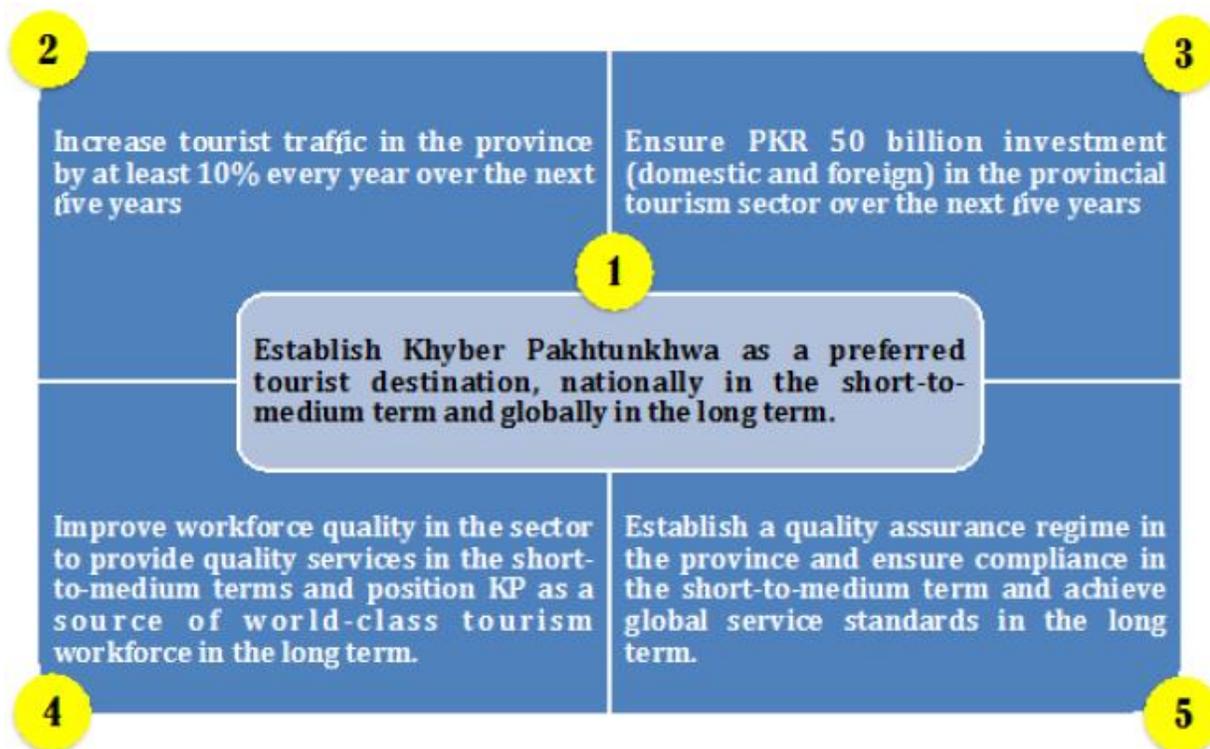


Figure 7 KP Tourism Policy 2013-2018

4.3 Key Strategic Thrust Areas

The tourism policy is built around six core strategic thrust areas including tourism and allied infrastructure development; quality assurance; institutional and regulatory reforms; marketing and image-building; workforce development; and resource mobilization.

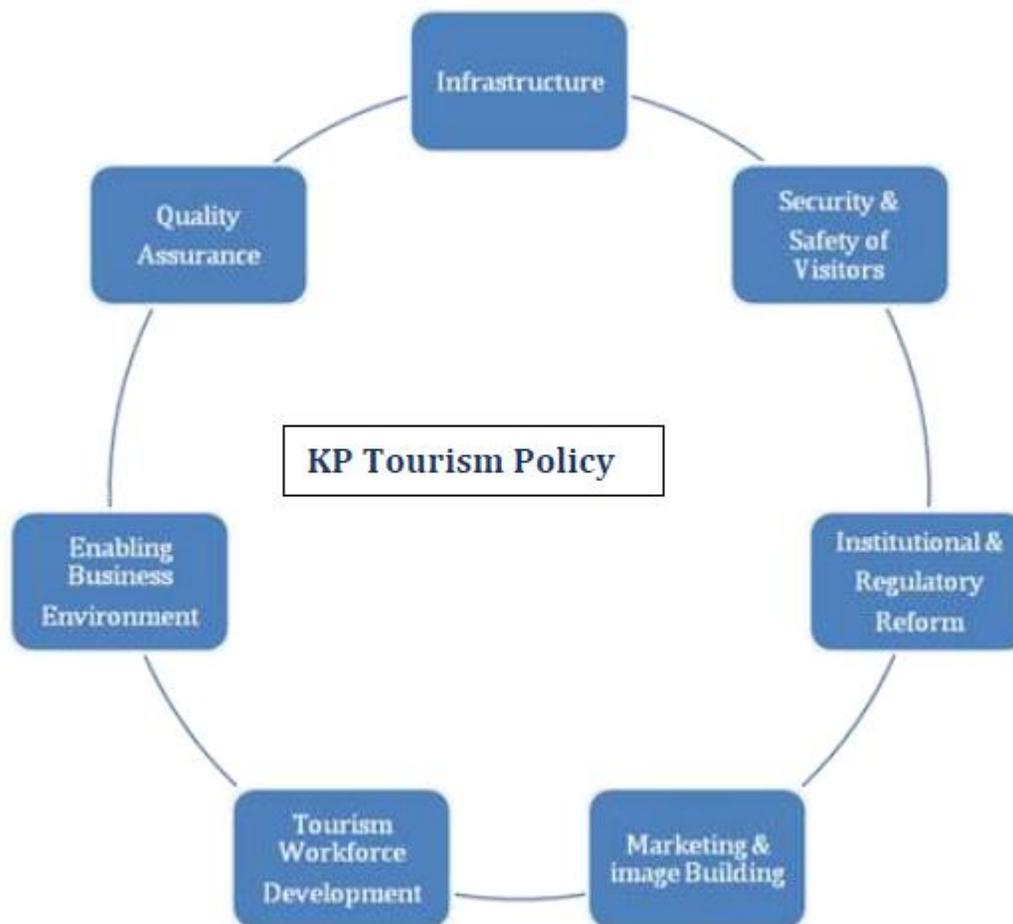


Figure 8 Key Thrust Areas-KP Tourism Policy

4.3.1 Allied Infrastructure and Development

Having quality tourism infrastructure is a prerequisite for attracting tourists. Important components of infrastructure include access roads, railway tracks, airports, flights, road transport facilities, accommodation facilities (hotels, motels, youth hostels, etc.), restaurants, tour operators, tourist attraction sites, tourist shops, etc. An important consideration in developing infrastructure is that the developed facilities should be indigenized and should not lose the local touch since the tourists come to experience the local specialties. Tourism and allied infrastructure development would be top priority of the government to provide quality services to tourists. The government would not only rehabilitate existing facilities and repair existing infrastructure but would also look for new opportunities for development. These would also include infrastructure services, such as transport facilities. New tourism products and relevant infrastructure would be developed in the province like establishment of culture tourism centers at potential sites; construction of children and amusement park and adventure tourism facilities (rafting, rock climbing, mountain biking, sport fishing and jeep safaris etc). Establishment of basic tourism infrastructure facilities like public toilets, stop over points, information centers, fuel stations, police posts, first aid facilities, children play areas, shelters with seating, telephone booths and parking areas along the roadsides of the tourist destination will boost tourists’ flow to the province. Moreover, the government would mobilize private investment to build tourism infrastructure in the province.

In particular, the government will improve/build access roads to tourist towns and tourist attraction places; improve electricity supply in tourist areas; improve transportation facilities to tourist places; improve the provincial airports; provide/improve support for rehabilitation of tourism infrastructure; develop new tourist sites and attractions overcoming seasonal limitations; and improve tourist facilitation services aiming at increasing average tourist stay at tourism destinations.

Integration of activities of line departments and local bodies is of prime importance to ensure quality of basic infrastructure at destinations. Tourism Department will prepare infrastructure plans for major destinations in association with the line departments. Stakeholders from private sector have to be continuously consulted on the infrastructure requirements at destinations.

4.3.2 Quality Assurance

The government realizes the need to improve and ensure quality of tourism services in the province to transform KP into a preferred tourism destination. Therefore, the government will introduce voluntary standards and quality regime for hotels, restaurants, tour operators, travel agencies and other tourism service providers. Once these standards are adopted at a relatively wider scale, the govt. would introduce certain mandatory standards for quality assurance, followed by a robust compliance regime. Over time, this standards and certification regime would also be linked with similar international regimes. In KP the international certification will be quite beneficial for businesses, consumers, government, local communities and not the least for the environment. For businesses, it would help to improve their quality, reduce operating cost and would provide a marketing advantage. It will also provide tourists with environmentally and socially responsible choices. In addition of providing opportunities of economic benefits to local communities, it will also ensure respect for local culture.

For government the certification will raises industry standards in health, safety, environment, social stability and will also lower the regulatory cost. The management of solid waste and pollution of water bodies due to tourism activities is a major concern not merely from tourism viewpoint but also as general public health issue. Tourism Department, in association with concerned government departments, will take necessary steps to promote best practices of solid waste and sewerage water management among the communities and service providers at the destinations.

Most of the tourist destinations in KP are located in remote mountain areas, which are presently not equipped to deal with any emergency. Lack of trained mountain rescue workers and first aiders at such places exposes tourists to security hazards. Department of Tourism will also coordinate with Provincial Disaster Management Authority to improve relief services in tourism areas.

4.3.3 Create Enabling Environment for Investment

The success of tourism in KP is based on the synergy between private and public sector. Government acts as a catalyst and facilitator to create enabling environment for private investment. Considering the peculiar geographical conditions of the province, government will give priority for small and medium level investment. Government will also offer land on long lease on subsidized rates for tourism projects in less developed areas.

In order to facilitate speedy approval of the tourism projects, the government will introduce a fast track clearance to tourism project for investment above Rs.100 million. Effort will also be made to attract foreign investors and donors for large scale projects such as chairlift/cable car resorts, four and five star hotels/adventure activity centers, recreational parks etc. Government will introduce special scheme to attract foreign investment for such project by introducing various

incentives are concessions. If required, the government will enact legislation that will accord tourism the full status of an industry.

4.3.4 Security and Safety of Visitors

The safety and security of tourists is of primer importance both from the points of view of tourism development and the national pride. It will be, therefore, given high priority in overall security policy of KP Province to provide safe and secure environment to the visitors during travel and at tourist destinations. Unnecessary restrictions on the movement of foreign tourists will be abolished and an institutional mechanism will be established in TCKP to ensure fast track issuance of trekking, mountaineering permits and travel related NoCs. Where necessary, invisible foolproof security will be provided to foreign tourists, so that they can enjoy their holidays without any fear and worry

4.3.5 Institutional and Regulatory Reforms

The government would develop a robust regulatory regime not only to ensure better quality tourism services provision but also to facilitate private investment in the sector. The new regulatory regime would be supported by institutional development efforts to build the capacity of the government to implement a host of initiatives under this policy and to ensure compliance of the regulatory regime.

On the regulatory regime side, the government will make necessary amendments in the existing laws and promulgate new laws, if needed, to realize the objectives of this tourism policy. On the investment side, the government would come up with a public private partnership law to facilitate the private sector to invest in tourism development in Khyber Pakhtunkhwa.

The new/improved regulatory regime would spell out the enforcement of licensing and registration requirements, considering that enforcement of existing statutes is uneven and generally ineffective. Natural beauty, environment, cleanliness, historic buildings/areas, artifacts and antiquities all attract tourists. Key laws, which regulate these Sectors, include the Environmental Protection Act, the Antiquities Act, 1976, the Local Government Act, and the Wildlife Act. A high standard of enforcement of these acts will lead to increased tourist activity in the country.

In particular:

- The Hotels and Restaurants Act would be revised to include detailed membership of the Advisory Committee for ensuring balanced representation of stakeholders; revised registration criteria and to make registration mandatory; define health and safety standards; and stipulate price fixation provisions.
- The Travel Agencies Act would be revised to include details of membership of Advisory Committee; bring focus on local tourists and introduce separate regulatory regime for travel agencies and tour operators.
- The Tourist Guides Act would be revised in line with the above statutes, besides introducing effective enforcement provisions.

On the institutional development side, the government would rationalize the existing institutional setup, by delineating a clear responsibility and accountability regime for DoT, TCKP, DTS and other government entities. This would be followed by provision of adequate resources to these entities to enable them to fulfill their responsibilities. A key need would be to strengthen government's regulatory and planning capacity, coupled with arrangements to manage private sector transactions. To the extent possible, project development and management for tourist infrastructure development and services provision would be left to the private sector. In addition,

government would also beef up its capacity to monitor the tourism sector, collect data, travel trends, and closely assess the policy implementation.

Existing laws already provide for the establishment of committees to advise the government in the administration of these statutes. However, at present these committees are not functional. The government would immediately operationalize these committees to provide necessary institutional support.

4.3.6 Marketing and Image Building

- a. TCKP will conduct surveys in key domestic tourism market and prepare a strategy to further strengthen existing domestic tourism markets by developing new tourism products focusing on family, youth, students and corporate segments.
- b. A detailed KP Tourism Web Portal will be developed to provide a one-stop solution to facilitate interested visitors for getting updated information and booking of hotels, transport and tours.
- c. Print and electronic media will be used in a cost effective manner to project the touristic attractions of KP in domestic market.
- d. TCKP will participate in various national and international tourism expos and fairs to highlight tourism potential of KP.
- e. Opportunities for Winter Tourism will be projected through press and electronic media to improve the room occupancy of the hotels of mountain areas during the low season.
- f. A task force on tourism marketing will be constituted to improve coordination between public and private sector to formulate a joint marketing strategy to promote KP as an all season tourist destination.
- g. Events like Shandur Polo Festival, Kalash Festival, Khanpur Water Sports Festival, Indus Food Festival etc. will be promoted more vigorously to attract domestic as well as foreign tourists.
- h. Special effort will be made to project potential of KP for Adventure Tourism, Youth Tourism, Gandhara Heritage Tourism, Rail Heritage Tourism, Cultural and Historical Heritage Tourism and Ecotourism in the selective foreign and domestic tourism markets.

In addition, the government will develop a multi-pronged branding strategy, through using multiple touch-points; developing interesting and multilingual tourism information and promotion material and ensuring its wide distribution and regular update; developing a robust KP Tourism portal; promoting and developing public private partnerships for tourism marketing and joint branding campaigns; involving PIA and Pakistan Railways for an integrated role in tourism promotion; organizing cultural and sports events for tourism promotion; focusing on countries like China and Korea that can potentially feed foreign tourist inflow in medium term.

4.3.7 Workforce Development

Availability of trained and qualified workforce has been a key constraint to tourism development in the province. The government recognizes this need and is aiming to address this challenges through strengthening and upgrading the curriculum and existing government and private training facilities including PAITHOM; review of curricula and programs at university level degree programs; regularly monitoring supply and demand of workforce in the sector; introducing new programs and incentivizing establishment of new institutions by the private sector; and developing international linkages for local institutions.

Sustainable Development of Tourism *A Cross-Cutting Theme*

The principle of sustainable development dictates that the level of development does not exceed the carrying capacity of the area. It will be government policy to ensure adherence to such limits through appropriate planning instruments, guidelines and enabling regulations and their enforcement. Efforts will be made to diversify the tourism products in such a way that it does not negatively impact on the natural and cultural environment of the destinations. Comprehensive perspective plans for developing sustainable tourism by assessing the existing tourism scenario in each tourist area with respect of availability of natural resources, heritage and other socio-cultural assets will be developed in consultation with concerned stakeholders.

Tourism development needs to be properly guided and regulated to avoid adverse impact on the natural environment and cultural heritage which constitute the tourism attractions. A conscious balance needs to be maintained between development and conservation. Government will ensure to maintain this balance through planning restrictions and by educating the people in appreciating their rich heritage and by gaining their cooperation in preserving and protecting it.

Figure 9 Sustainable Development

5. Resource Mobilization

The implementation of this tourism policy would be reliant on availability of adequate resources. The government realizes this need and therefore, the resource mobilization is one of the key strategic thrust areas of this policy. The resource mobilization plan includes the following:

- Setting a minimum threshold in annual development fund to ensure certain quantum of public funding available every year. This would also ensure setting tourism development as a priority sector for the government.
- Mobilizing private sector investment into tourism development through a robust public private partnership regime and leveraging limited government resources to generate more funding
- Introducing user fees in a number of infrastructure and tourism services to make these facilities viable in the long run. While the government continue to provide subsidies in well needed areas, tourism being a leisure activity would be promoted as a viable economic sector through returns on investment by revenues collected from tourists.
- Mobilizing donor funding would be a key to implement this policy, whereby the government would hold a donors conference to invite multiple bilateral and multilateral donors to indicate the areas, where they would be willing to support.
- Efficiency improvement in existing facilities and organizations would be carried out to result in cost savings and diverting inefficient spent wastages and leakages to well needed areas.



Figure 10 Resource Mobilization Plan

6. Implementation Plan

Tourism Development Committee – The Government of KP would formulate a high level Tourism Development Committee to spearhead the implementation of this policy. The high profile committee would generate enough momentum to provide strategic guidance on the policy. DOT would act as the secretariat of the Tourism Development Committee (TDC).

Role of DoT–DoT is mandated by the Government of KP to drive the tourism development agenda in the province and would support TDC for this purpose. At present the DoT has weak institutional capacity with limited resources. In order to implement this ambitious tourism policy, the government would revitalize DoT to drive the reform agenda and take a central role in building capacity of other organizations such as TCKP, PAITHM, etc. and galvanize support and resources from donors and other partners.

Capacity Development of DoT –DoT is in need of some serious capacity development support. For this purpose, the requirements will be assessed and will be consolidated into a PC I for seeking funding from the government. DoT will then be staffed and resourced as per these requirements.

Tourism Reform Leaders - In order to create a broad-based ownership of the tourism policy, DTC will also nominate a Tourism Reform Leader for each of the six strategic thrust areas. These leaders would be provincial legislators and would ensure removing any hurdles in reforms implementation and would advise DTC in devising appropriate strategies to address key challenges.

Detailed Resourcing Plan - Once DoT is fully staffed and resourced, it would also develop a detailed resource plan to fully implement the tourism policy, in line with the broader plan given above.

Implementation Plan Sign-off - Although this implementation plan sets up the broader framework for the tourism policy implementation and a more detailed strategic areawise implementation plan is also annexed at this document, there is a need to further refine this plan. DoT will therefore develop a detailed implementation plan for the Tourism Policy. Based on this implementation plan, the responsibilities of each organization/partner would be clearly delineated and signed off with DTC with clear timelines.

TA Mobilization Plan -DoT will also develop a Technical Assistance Mobilization Plan. Capacity gaps in each participating organization/partner would be addressed through TA support provided by DoT and international donors. International donor programs within the private sector development and tourism domain will also be managed/coordinated through DoT to ensure synergy.

Communication Plan - DoT will also develop a comprehensive communication plan addressing the communication needs of the KP's new Tourism Policy. This would include a comprehensive stakeholder mapping exercise, including both internal and external stakeholders; identifying communication needs for each stakeholder group (including whether its one-way or two-way communication); design of communication campaigns to address the communication needs; and communication campaigns rollout.

Monitoring and Evaluation - Effective monitoring and evaluation will form the core of this policy and DoT will be responsible for overall monitoring, supported by monitoring units/wings/officials at each participating organization/partner. A detailed monitoring plan will be

developed based on program results framework and monitoring capacity at each participating organization will be supplemented. DoT will also develop a monitoring MIS to keep track of results. The monitoring would be supplemented through a detailed evaluation plan, including timing/requirement for all 3rd party evaluations.

Following is the overall schematic of the implementation framework, followed by overall implementation plan. A detailed implementation plan, covering all strategic thrust areas is given at Appendix 1.

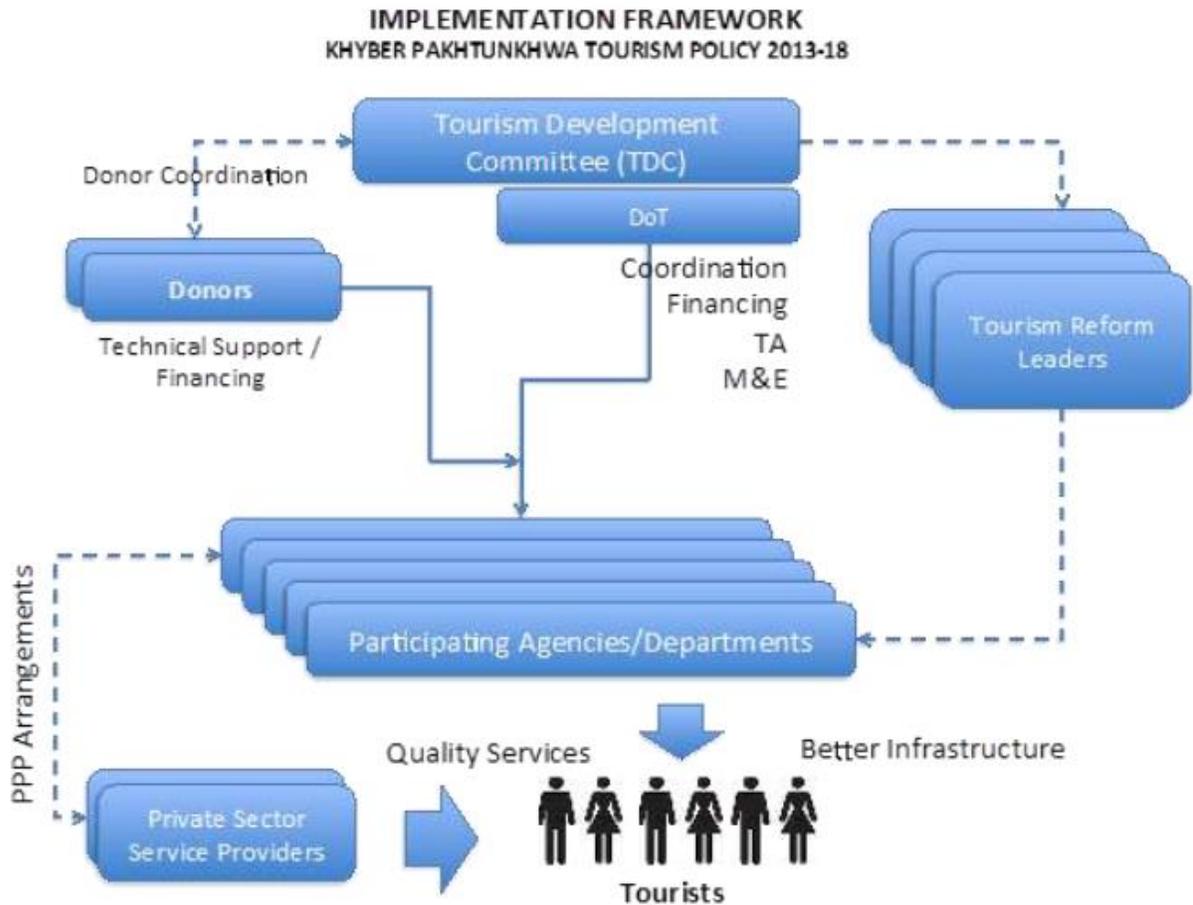


Figure 11 Implementation Plan

7. Monitoring and Evaluation

Developing baselines of key interventions and monitoring the progress of major activities and results are a key part of this tourism policy. While each implementing agency/department will be responsible for monitoring its own set of interventions, the DoT will drive the policy and will work with departments/agencies to improve the quality, timeliness and analysis and communicate analysis to the Tourism Minister, provincial cabinet and to the Chief Minister.

Capacity Development - DoT would be strengthened initially to become a center for driving the tourism policy and the reform agenda under this policy. Donor support would also be sought to provide necessary resources to the department. DoT will then work with TCKP, DTS and other agencies to develop their monitoring capacities, train their resources and help them develop tools for tracking various indicators.

M&E Unit at DoT - The overall M&E plan would be developed and steered by DoT, however all departments/agencies and donors (for their components) will monitor the projects within their own domains for timely delivery of results. DoT would be reporting on policy-level objectives (desired outcomes, as stipulated above) after aggregating results from various components. DoT will have a dedicated M&E Unit to drive the monitoring and evaluation of the policy.

Monitoring MIS - DoT/M&E Unit would develop a state-of-the-art MIS to keep track of various indicators, supporting the policy objectives. The MIS would be accessible to implementing agencies and partner organizations, where they can directly feed their information/data.

Monitoring Committees - DoT would form Monitoring Committees for each strategic thrust area, with members from government, private sector, academia, media and civil society. These committees would be responsible for providing guidance for delivering results within their strategic thrust area and would drive timely delivery of results. These committees will:

- Meet periodically with implementing agencies/departments/partners to assess progress towards policy objectives;
- Conduct field monitoring missions to gauge achievements and constraints;
- Identify any lessons or good practices;
- Reflect on how well policy implementation is improving the quality of tourism assets and services;
- Identify capacity development needs among partners, particularly related to data collection, analysis, monitoring and reporting; and
- Advise M&E Unit at DoT to provide capacity development support related to monitoring to implementing agencies/departments, as per identified needs.

M&E Component	Activity	Responsibility	Timeframe
Monitoring	Results Framework for Tourism Policy and Strategic Thrust Areas	DTC (Through DoT Support)	Q4 2013
	Monitoring Plan Templates	M&E Unit/DoT	Q1 2014
	Monitoring Committees for Each Strategic Thrust Area	DoT/TCKP	Q1 2014
	Establishment of MIS	M&E Unit / DoT	Q1 2014
	Monitoring Plans for Each Thematic Area	Monitoring Committees	Q1 2013
	Third Party Monitoring for Special Projects/Interventions	M&E Unit @ DoT/ TCKP	-
	Quarterly Monitoring Briefs	All Partners	All Qs
	Quarterly Monitoring Report	M&E Unit @ DoT	All Qs
	Annual Monitoring Report	M&E Unit @ DoT	Q4 2014 Q4 2015 Q4 2016 Q4 2017
	End Term Completion Report	M&E Unit @ DoT	Q4 2018
Evaluations	Baseline Evaluation	M&E Unit @ DoT	Q4 2013
	Mid-Term Evaluation	M&E Unit @ DoT	Q2 2016
	End-Term Evaluation	M&E Unit @ DoT	Q1 2019
	Reviews / Assessments	Review of Program/Projects/Systems, whenever required	M&E Unit @ DoT/ TCKP and Other Agencies/Partners
Impact Assessment		DoT	Q1 2021
Studies	As and when required to assess needs or assessments of conditions of a specified policy areas to tourism policy and/or define baseline indicators or milestones	M&E Unit @ DoT / Other Partners	-

Figure 12 Activities

Tourism Policy Implementation Plan	Start	End
I. Establish DoT as secretariat for Tourism Development Committee to implement KP Tourism Policy 2013-2018.		
A) Development and approval of PC-I for DoT capacity development	Q4 2013	Q4 2013
B) Staffing and resourcing of DoT, as per the new requirements	Q4 2013	Q1 2014
C) Nominate a Tourism Reform Leader for each of the six strategic thrust areas. These leaders would be senior provincial legislators.	Q1 2014	Q1 2014
D) Complete the Resource Plan that will detail the resource requirements for delivering the cross cutting policy reform measures, including government's resources, donor support, private investment, etc.	Q1 2014	Q1 2014
II. DoT to develop a detailed implementation plan for the KP Tourism Policy 2013-2018. Based on this implementation plan, the responsibilities of each partner would be clearly delineated and signed off with clear timelines.		
A) Development of detailed implementation plan.	Q4 2013	Q1 2014
B) Development of detailed responsibility matrix and sub-matrices for each participating partner.	Q4 2013	Q1 2014
C) Signing off on responsibility sub-matrices with each participating partner.	Q1 2014	Q1 2014
III. TA Mobilization Plan to be developed. Capacity gaps in each participating organization would be addressed through TA support provided by DoT and international donors.		
A) Capacity gaps identified through consultations with participating departments/organizations.	Q4 2013	Q4 2013
B) Detailed TA mobilization plan developed.	Q4 2013	Q1 2014
C) Donor support identified and built into the TA mobilization plan.	Q4 2013	Q1 2014
D) Mobilization of technical assistance as per agreed plan.	Q1 2014	Q4 2018
IV. Communication Plan – DoT will drive a comprehensive communication plan addressing the communication needs of the KP Tourism Policy 2013-2018		
A) Comprehensive stakeholder mapping exercise, including both internal and external stakeholders	Q4 2013	Q1 2014
B) Identifying communication needs for each stakeholder group (including whether its one-way or two-way communication)	Q4 2013	Q1 2014
C) Communication campaigns designing to address the communication needs	Q1 2014	Q1 2014
D) Communication campaigns roll-out	Q1 2014	Q4 2018
V. Monitoring and Evaluation – DoT will be responsible for overall monitoring, supported by monitoring units/wings/officials at each participating organization.		
A) Detailed monitoring plan to be developed based on policy results framework.	Q4 2013	Q4 2013
B) Monitoring capacity at each participating partner to be supplemented.	Q4 2013	Q1 2014
C) Monitoring MIS to be developed, maintained and updated by DoT	Q1 2014	Q2 2014
D) Detailed evaluation plan to be developed, including timing/requirement for all 3 rd party evaluations	Q1 2014	Q1 2014
E) Roll-out of evaluation plan	Q1 2014	Q4 2018

Figure 13 Implementation Plan

Detailed Implementation Plan for each strategic thrust area is given in Appendix 1.

8. Appendices

Appendix 1 Implementation Matrix

Implementation Plan – Khyber Pakhtunkhwa Tourism Policy					
Strategic Thrust Areas	Future Interventions	Responsibility	Timeframe	Expected Inputs/ Implementation Details	Expected Outcomes
I. Tourism and Allied Infrastructure Development	1) Tourist Asset Mapping	DoT TCKP	Short term	A) ToR Development for Comprehensive Asset Mapping Study B) TA mobilized through donors support C) Study Roll-Out D) Presentation of results to TDC	A) Better stock of existing facilities and prospective sites B) Improved planning
	2) Rehabilitation of Tourism Facilities	DoT TCKP PPP Unit & P&D	Short to Medium Term	A) Review of existing facilities B) Detailed engineering and cost estimates C) Opportunities for private investment and transaction roll-out D) PC-I preparation for publically funded projects E) Rehabilitation roll-out	A) Better tourist facilities B) Increased tourist traffic C) Investment in tourism sector
	3) New Tourist Facilities Development	DoT/TCKP PPP Unit	Medium to Long Term	A) Site Identification (From Tourist Asset Mapping) B) Concept Note Development for PPP Projects C) Project Preparation D) Transaction Execution to Hire Private Partners E) Project Construction and Operation	A) A) Better tourist facilities B) Increased tourist traffic C) Investment in tourism sector D) Development of new tourist localities E) Economic growth and income generation
	4) Allied Infrastructure Development/Improvement	Planning and Development C&W Department Support by DoT	Medium to Long Term	A) Priority List Development by DoT B) P&D Allocations in ADP and Prioritization C) PC-I Preparation D) Project Execution	A) Better access to tourist facilities B) Increased tourist traffic C) Greater interest to
Implementation Plan – Khyber Pakhtunkhwa Tourism Policy					
Strategic Thrust Areas	Future Interventions	Responsibility	Timeframe	Expected Inputs/ Implementation Details	Expected Outcomes
					invest in sector D) Higher investment
	5) Existing Leases/Public Tourist Resorts	DoT TCKP PPP Unit	Short to Medium Term	A) Review of Existing Leases B) On expiry, project preparation, with improvement plan with longer durations C) Transaction Execution D) Regulation of Contract	A) Better management of existing facilities B) Better returns C) Incentives for private sector to invest D) More competition and value for money
	6) Improve Electricity Supply	Energy and Power Department PHYDO	Medium to Long Term	A) Priority Areas with No/Low Load shedding B) Captive power plants C) Power generation through wheeling charges and micro hydel	A) Tourist satisfaction increased B) Greater investment C) Increased tourist traffic
	7) Better Tourist Facilitation Services	DoT DTS Communication & Works Department	Short to Medium Term	A) Services improvement plan development (Site-wise) B) Construction of public facilities C) PC-Is for Tourist Facilitation Centers at Railway Stations and airport D) Licensed tour operators E) General tourist guides and destination guides for tourists	A) Tourist satisfaction increased B) Greater investment C) Increased tourist traffic
II. Quality Assurance	1) Baseline Assessment of Quality and Standards	BOS	Short Term	A) ToRs development B) Mobilizing TA C) Execution of study D) Results presentation and decision making by TDC	A) Improved planning B) Better quality services and improved tourist satisfaction C) Increase in tourist traffic D) Greater investment
	2) Voluntary Service Quality Codes	DoT DTS	Short to Medium Term	A) Development of manual for service quality codes B) Awareness campaign and training for service providers C) Facilitation in voluntary compliance D) Service Standards improvement plan	
	3) Compliance Regime Implementation	DoT DTS	Short to Medium Term	A) Building capacity of DTS, along with SOPs development for ensuring compliance B) Supervision of compliance regime implementation	

Implementation Plan – Khyber Pakhtunkhwa Tourism Policy					
Strategic Thrust Areas	Future Interventions	Responsibility	Timeframe	Expected Inputs/ Implementation Details	Expected Outcomes
				C) Complaints redressal mechanism D) TA for adoption of service standards for service providers E) Wider availability of service providers ratings on web portal	
	4) Mandatory Standards Requirements	DoT DTS	Medium to Long Term	A) Regulatory notifications (sub-statutory) with reasonable and practical quality levels B) Progressive quality standards plan for the next 5 years – Awareness campaign C) Reporting and feedback mechanism for non-compliance	
	5) International Certifications	DoT DTS	Medium to Long Term	A) Fact finding missions B) MoU with international certification bodies C) Adoption facilitation TA D) Compliance mechanism	
III. Creating Enabling Environment for Investment	Investment promotion cell	TCKP	Short to Medium Term	A) Staff capacity building B) Prepare investment proposal profiles C) Prepare pre-feasibility studies D) Set fast track project approval process E)	Private sector friendly regime
	coordination with donor agencies	TCKp	Short to Medium Term	A) Establish coordination with donor and international development agencies	Improved infrastructure
	Attract Foreign Investment	TCKP	Mid to long Term	A) Introduce special package to attract foreign investment	Investment in large scale tourist resorts
IV. Security and Safety of Visitors	Tourist facilitation cell in TCKP	TCKP	Short to Medium Term	A) Staff capacity building B) Establish coordination mechanism with concerned law and orders agencies and with Interior Department	Tourist friendly regime
V. Institutional and Regulatory Reforms	1) Revisions on Existing Laws	DoT Law Department	Short to Medium Term	A) Revised draft laws B) Consultations with stakeholders C) Approval by legislature D) Sub-statutory notifications	A) Robust and private sector friendly regime B) More interest from investors
	2) Promulgation of New Laws (PPP Law)	P&D Finance Department	Short to Medium Term	A) Draft law development B) Approval by legislature C) Institutional arrangements	A) Private sector interest B) Investment in sector C) Risk reduction
Implementation Plan – Khyber Pakhtunkhwa Tourism Policy					
Strategic Thrust Areas	Future Interventions	Responsibility	Timeframe	Expected Inputs/ Implementation Details	Expected Outcomes
					through PPPs D) Improved services
	3) Capacity Development of DoT	DoT	Short Term	A) Capacity development plan B) Mobilizing TA C) Roll-out	A) Better resourced department B) Improved sector management
	4) Operationalizing Statutory Committees	DoT DTS	Short Term	A) Agreement on membership of committees B) Notifications C) Periodic meetings of the committees	A) Broader stakeholder decision-making B) Greater ownership
	5) Establishment of Tourism Development Committee	Cabinet DoT	Short Term	A) Agreement on membership of TDC B) Notification C) Periodic meetings of the committee D) DoT as Secretariat of TDC (Notification)	A) Momentum for reform B) Top level ownership
	6) Capacity Development of Board of Statistics	BoS P&D DoT	Short to Medium Term	A) Capacity development plan B) Mobilizing TA C) Roll-out	A) Better information collection B) Improved planning C) Impact assessment more objective
VI. Marketing and Image Building	1) Marketing and Image-Building Strategy Development	DoT TCKP	Short to Medium Term	A) ToRs development B) Mobilizing TA C) Execution of study D) Strategy presentation and decision making by TDC	Improved image KP, becoming preferred destination
	2) Social Media Strategy and Web Portal	DoT TCKP	Short to Medium Term	A) ToRs development B) Mobilizing TA C) Strategy development D) Results presentation and decision making by TDC E) Social media tools and platform development	
	3) International Fairs and Exhibitions	DoT TCKP	Short to Medium Term	A) Identifying prospective list of national international fairs B) TA support for participation C) Material development to make maximum use of these opportunities	
	4) Joint Marketing Campaigns with Private Sector	TCKP	Short to Medium Term	A) Joint marketing campaigns with airlines, bus operators, FMCG firms, etc.	

Implementation Plan – Khyber Pakhtunkhwa Tourism Policy					
Strategic Thrust Areas	Future Interventions	Responsibility	Timeframe	Expected Inputs/ Implementation Details	Expected Outcomes
	5) Collaboration with Railways and PIA and Pakistani embassies and other govt. organizations	TCKP Railways PIA Foreign Ministry	Short to Medium Term	A) Coordination with PIA, Railways and Foreign Ministry B) Dissemination of KP tourism marketing materials through these channels	
VII. Workforce Development	1) Capacity Development of PAITHM and Other Training Institutes	DoT TCKP	Short to Medium Term	A) Capacity development plan B) Mobilizing TA C) Roll-out	A) Better quality workforce B) Higher retention C) Lower turnover D) Greater tourist satisfaction E) Increase in investment
	2) Curriculum Needs Assessment and Improvement Plan	DoT	Short to Medium Term	A) ToRs development B) Mobilizing TA C) Study execution D) Results presentation and decision making by TDC	
	3) Tourism Sector Workforce Assessment Survey	DoT BOS	Short to Medium Term	A) ToRs development B) Mobilizing TA C) Study execution D) Results presentation and decision making by TDC	
	4) MoU and Collaboration with International Centers of Excellence	DoT TCKP	Medium to Long Term	A) Fact finding missions B) MoU with international certification bodies C) Work plans for implementation	
Resource Mobilization	1) Annual Development Fund Ceiling	TDC P&D DoT	Short to Medium Term	A) Initial consultation with Finance Department and P&D B) Sub-statutory notifications C) ADP formulation guidelines D) Medium term funding projections	A) Increase in resource availability B) Greater private investment C) Better tourist services
	2) PPP Project Pipeline	PPP Unit/P&D TCKP and DoT	Medium to Long Term	A) Identifying PPP opportunities B) Concept Note Development C) PDF Funding D) Project Preparation E) Transaction execution and private partner	
Implementation Plan – Khyber Pakhtunkhwa Tourism Policy					
Strategic Thrust Areas	Future Interventions	Responsibility	Timeframe	Expected Inputs/ Implementation Details	Expected Outcomes
				selection F) Project construction and management	
	3) User Fees and Sustainable Management	TCKP PPP Unit	Medium to Long Term	A) Management plan development for TCKP and other organizations B) Additional funding requirements and financing through ADP C) Introduction of user fees and charges	
	4) Donors Conference	DoT/TCKP/P&D	Short Term	A) Concept note development B) Donor assistance matrix development C) Financing arrangements from donors	
	5) Efficiency Improvement Plan	DoT/DTS/TCKP Finance Department	Short to Medium Term	A) Efficiency improvement plan development for DoT, DTS and TCKP B) Plan roll-out	

Appendix 2 List of Person Consulted

USAID Firms

1. Mr. Suleiman Ghani, Sr. Policy Advisor, USAID Firms
2. Mr. Taimur Khan, Business Enabling Environment Specialist, USAID Firms
3. Mr. Aftab-ur-Rehman Rana, Tourism Specialist, USAID Firms
4. Ms. Asma Malik, Business Enabling Environment Specialist, USAID Firms
5. Dr. Ihsan Qazi, Office Director (Islamabad), USAID Firms

Tourism Department & Tourism Corporation, KP

1. Mr. Mahmood Khan, Minister of Tourism, Khyber Pakhtunkhwa
2. Syed Aqil Shah, Former Minister for Tourism, Khyber Pakhtunkhwa
3. Mr. Tariq Jamil, Secretary, Tourism Department, KP
4. Mr. Taseer Alizai, Additional Secretary, Tourism Department, KP
5. Mr. Hayat Ali Shah, GM, Special Projects, TDKP & TCKP
6. Mr. Sajjad Hameed, GM, TCKP
7. Mr. Muhammad Ali Syed, GM Events & TICs, TCKP
8. Ms. Promila Isaacs, Consultant, TICs, TCKP
9. Mr. Iftikhar, Deputy Secretary, Tourism Promotion, Bahrain, Swat
10. Mr. Zarin Khan, Kalash Representative, TCKP
11. Mr. Nadeem Khan, Finance & Accounts, TCKP
12. Ms. Zahra Alam, Manager Media, Tourism Department, KP

Allied departments, KP

1. Mr. Azam Khan, Ex-Secretary, Department of Tourism, KP
2. Syed Jamaluddin Shah, Ex-Secretary, Tourism Department, KP
3. Dr. Muhammad Bashir Khan, Director General, EPA, KP
4. Syed Mubarak Shah, Chief Conservator, Wildlife Department, KP
5. Mr. Safdar Ali Shah, Conservator, Wildlife Department, KP
6. Shah Nazar Khan, Director, Department of Archeology, KP
7. Prof. Dr. Naseem Khan, Director, Archeology, KP
8. Qazi Ijaz, Deputy Director, Department of Archeology, KP
9. Mr. Muhammad Arabi, In-Charge, Department of Tourist Services (DTS), KP

10. Mr. Hurmat Khan, In-Charge, Pak Austrian Institute for Tourism & Hotel Management (PAITHOM), Golibagh, Swat
11. Mr. Javaid Iqbal, Regional Director, NAVTEC, KP
12. Mr. Sajad Ali Shah, Director, NAVTEC, KP
13. Mr. Bashir Khan, Additional Secretary Development, Finance Department, KP
14. Mr. Shahab Ali Shah, Chief Economist, P& D Department, KP
15. Mian Asim Ismail, Chief Economic Analysis Section, Public Policy and Social Reform Unit, Planning and Development Department, KP
16. Mr. Jaffer Kohistani, Manager, Patriata chairlift/cable car, TDCP, Murree
17. Mr. Ishfaq Afridi, Asst. Manager Projects, SMEDA, Peshawar
18. Mr. Rashid, Manager, SMEDA, Peshawar
19. Mr. Noor Muhammad, Asst. Chief Manager, State Bank of Pakistan, Peshawar
20. Mr. Muhammad Israr, Deputy Conservation, Wildlife Department, KP
21. Dr. Amjad Ali Khan, Deputy Director, Environmental Protection Agency, KP
22. Mr. Redi Gul, Deputy Secretary, SETD
23. Syed Noor Ehsan Shah, S.O. (A&M), KP Tourism Department
24. Mr. Ajmal Khan, S. Inspector, Tourism Services Wing, KP
25. Mr. Aijaz Ahmed, CDO, Forest Department of KP
26. Mr. Imtiaz Hussain, DFO, Wildlife, Chitral
27. Ms. Neelam Abbas, Tourist Guide, Peshawar Museum.
28. Dr. Muhammad Zahir, Lecturer, Dept. of Archeology, University of Hazara
29. Mr. Muhammad Ramzan, Dy. Chief, Gilgit-Baltistan Council, Islamabad
30. Mr. Noman Rasheed, Asst. Dir., EPA, KP
31. Mr. Asad Raza, Head, Tourism & Hospitality Dept., Hazara University
32. Mr. Irshad Ahmed Pirzada, Director, Tourism, Government of AJK
33. Mr. Salahuddin, Wildlife Department, KP
34. Mr. Shamsher Khan, Inspector, Tourism Dept., KP
35. Mr. Tayyab Mir, Acting Manager P&P, PTDC, Rawalpindi
36. Mr. Zafarullah Jan, Lecturer, Khyber Medical College, Peshawar
37. Mr. Attaullah, Tourism Officer, PTDC, Swat
38. Mr. Jahan Sher Khan, Dist. Director, Fisheries Department, Swat
39. Mr. Sajid Iqbal Badshah, Lecturer Tourism, AWK University Mardan
40. Mr. Sohail Khan, Abdul Wali Khan University Mardan
41. Mr. Aatif Iqbal, Lecturer, Tourism, University of Swat
42. Muhammad Hanif Khan, Head, Dept of Tourism & HM, University of Malakand

FGD Participants, Mainly From the Private Sector:

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44. Said Nawab, President Tourism Promotion Association, Madyan, Swat
45. Miraj Ud Din, President Hotel Association, Bahrain, Swat
46. Bakhat Buland Khan, Sr. Vice President Hotel Association, Bahrain, Swat
47. Mr. Rasool Khan, General Secretary, Islampura Khadi Association
48. Mr. Wali Rehman, Vice president, Islampura Khadi Association
49. Seth Matiullah, President, Tourism Promotion Association Kaghan
50. Mr. Nawazish Khan, Sr. Vice President, Tourism Promotion Association Kaghan
51. Mr. Asad Shah, Managing Partner, Nature Tourism Services, Abbottabad
52. Col. Khalid Mahmood, Principal, Tourism Training Institute, Abbottabad
53. Mr. Hukum Dad, Vice President, Hotel Association, Nathiagali
54. Mr. M. Waseem, Coordinator, WWF Pakistan, Nathiagalli
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60. Amjad Noshad, Owner Muslim Hotel, Madyan, Swat
61. Shad Muhammad, Owner Jawad Hotel, Madyan, Swat
62. Abdul Rasheed, Owner Rasheed Hotel, Madyan, Swat
63. Muhammad Hayat, Journalist, Swat Press Club, Mingora
64. Dil Nawaz Khan, Manager Hotel Swat Valley, Bahrain, Swat
65. Ahmed Zaib, Hotel Owner 2 Star, Bahrain, Swat
66. Mumtaz Khan, Hotel Owner, Bahrain, Swat
67. Sher Bahudar, Owner Punjab Restaurant, Bahrain, Swat
68. Nasir Khan, Owner Marina Hotel, Bahrain, Swat
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71. Mr. Anayatullah, Suvastu Gallery, Mingora, Swat
72. Mr. Abdullah, Handicrafts, Mingora, Swat
73. Bakht Hussain, Handicrafts, Mingora, Swat
74. Attaullah Khan, Arts & Crafts, Mingora, Swat
75. Mr. Abdul Qudoos, Owner, Gateway Hotel, Naran
76. Mr. Arif Swati, Managing Partner, Nature Tourism Services, Abbottabad

77. Mr. Asif Javed, CEO, Tourism Training Institute (NITHHMS), Abbottabad
78. Mr. Khurshid Ahmed, CEO, Hotel Demanchi, Naran
79. Engr. Mohsin Khan, Marketing Director, Hotel Demanchi, Naran
80. Mr. Qamarul Haq, Advocate, Abbottabad
81. Mr. Noor Hussain Shah, Hotel construction contractor, Nathiagali
82. Mr. Asif Ali, local entrepreneur, Nathiagali
83. Mr. Hassan Awan, Veterinarian, WWF Pakistan, Nathiagali
84. Mr. Barkat, Manager, Afaq Hotel, Nathiagalli
85. Mr. Yousaf Akhar, CEO, SAIYAH Travel
86. Mr. Ejaz Sohail, Manager, SAIYAH Travel
87. Mr. Maqsood ul Mulk, CEO, Hindukush Trails
88. Mr. Naiknam Karim, MD, ATP
89. Mr. Ashraf Aman, Chairman, Adventure Tour
90. Mr. Paarcha Shahid, CEO, City Express
91. Mr. Farhad Maqpoon, MD, Shikar Safari
92. Mr. Sultan Khan, Manager, Nazir Sabir Expeditions
93. Mr. Mubarak Hussain, CEO, Karakorum Explorers
94. Mr. IrfanUllah Baig, EM, Travel Waljis (Pvt) Ltd
95. Mr. Javed Awan, MD, Oriental Links
96. Mr. GN Raikoti, MD, FMT (Fairy Meadow Tours)
97. Mr. Liver Khan, MD, NPA (Nanga Parbat Adventure)
98. Mr. Hussain Ali Ghulam, Hunza Travel Services
99. Mr. Amir Ullah, MD, Hunza Guides Pakistan
100. Mr. Kristina Petrochenkova, NGO.
101. Mr. Shamsuddin, Manager, CAMAT, Chitral
102. Prof. Rehmat Karim Baig, Chitral
103. Mr. Fida Hussain, Tourist Guide, Chitral
104. Mr. Abdur Razzaq, Tour Operator, Chitral
105. Mr. Siraj-ul-Mulk, CEO, Hotel Hindukush Heights, Chitral
106. Mr. Shafiqullah, F.B, WWF-P.
107. Mr. Sajjad Hussain, Manager, AKRSP
108. Mr. Shahzad Alam, Coordinator, TCKP
109. Mr. Sikandar-ul-Mulk, CEO, Pamir Trotters
110. Mr. Israruddin, CEO, Subhinak
111. Mr. Azhar Ali Shah

112. Mr. Mehbub Alam, Tour Operator
113. Mr. Amir Muhammad Khan
114. Mr. Arif Tufail, Dir. Operations, Sustainable Tourism Foundation Pakistan
115. Mr. Zahoor Awan, General, Secretary, T-PAK.
116. Mr. Abdul Qadoos, Joint Secretary, T-PAK
117. Mr. Saad Tariq Siddiqui, Alpine Club of Pakistan
118. Mr. Tajammul Hussain, Consultant, Daewoo, Islamabad
119. Mr. Siraj-ul-Haq, Save the Globe NGO
120. Mr. Khalid Khalil, Adventure Foundation, Pakistan
121. Mr. Amir Siyab, GM, Alpine Hotel, Abbottabad
122. Mr. Asif Javed, NITHAMS
123. Mr. Sajjad Ahmed, Royal Hotel, Naran
124. Mr. Omar Javed, Regional Coordinator, Sungi
125. Mr. Gulfam, Manager NRM, Sungi Foundation
126. Mr. Tanweer Qureshi, Eco-Tourism, CRM
127. Syed Moeen-ul-Haq Shah, Lalazar Hotel, Kaghan, Naran
128. Mr. Ali Shahzad, Asst. Commissioner, Mansehra
129. Dr. Adnan, Comsats University, Abbottabad
130. S.A. Asghar, Elites Hotel, Abbottabad
131. Mr. Muhammad Waseem, Coordinator, WWF, Abbottabad
132. Mr. Meherban Karim, MD, Explore Pakistan/ Members of PATO
133. Mr. Amirullah Khan, MD, Hunza Guides/Member of PATO
134. Mr. Amir Saeed, Manager Conservation, WWF Pakistan
135. Mr. Zaman Khattak, Sales Manager, Pearl Continental Hotel, Peshawar
136. Mr. Raheel, Training Coordinator, Pearl Continental Hotel, Peshawar
137. Dr. Abdul Hadi, Swat Trekking Club
138. Mr. Zahir Shah, CE, Shah Corporation
139. Mr. Imranullah, MD, Swat Air Services
140. Mr. Haq Nawaz, PAITHOM
141. Mr. Masroor Ahmed, Manager, Environmental Protection Society, Swat
142. Mr. Javed Ali Shah, GM, Pameer Hotel, Swat
143. Mr. Said Amir Khan, Hotel Hills City, Fizagat
144. Mr. Muhammad Saeed, Serena Hotel, Swat
145. Mr. Zubair Torwali, Exec. Director, IBT, Swat
146. Mr. Mujahid, IBT, Swat

147. Mr. Iftikhar Ahmed, Hotelier

148. Syed Ajmal Shah, Swat Tourism Association

149. Mr. Luca Maria Olivieri, ACT-Field School Project, Swat

150. Mr. Saeed Akbar, Consultant, ACT-Field School Project, Swat

151. Mr. Fazal Khaliq Khan, News Editor, Daily Chand, Swat

Appendix 3 Documents Reviewed

1. Pakistan National Tourism Policy 2010 (Draft)
2. Pakistan in the 21st Century, Vision 2030 (PC)
3. Pakistan National Conservation Strategy
4. Khyber Pakhtunkhwa Provincial Conservation Strategy
5. The Pakistan Hotel and Restaurants Act 1976
6. The Travel Agencies Act 1976 and rules 1977
7. The Pakistan Tourism Guides Act and rules 1977
8. Khyber Pakhtunkhwa Tourism Vision Document
9. Tourism census report for Malakand, Swat
10. Tourism related laws of India, Nepal, Sri Lanka, Iran & Turkey
11. Sector recovery and development strategy for Swat tourism
12. Master Plan for Promotion & Development of Tourism in KP
13. Pakistan National Tourism Policy 1990 (Ch 5: Conclusions)
14. Best Practice Case Studies in Tourism
15. Tourism Management in Pakistan (Ch 5: Analysis)
16. Pakistan Tourism National Plan 2000
17. Final Report
 - Technical Vol.1: Medium Term Marketing Strategy
 - Technical Vol.2: Physical Planning & Environmental Considerations
 - Technical Vol.3: Economic & Investment Analysis
 - Technical Vol.4: Human Resource Development

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