

Government of Punjab

Punjab Tourism Policy

**Messages by Chief Minister/Chief Secretary
And Secretary YASAT**

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CCI	Council for Common Interests
COTHM	College of Tourism and Hotel Management
DTS	Directorate for Tourism Services
EPA	Environment Protection Agency
EIA	Environmental Impact Assessment
ETPB	Evacuee Trust Property Board
GDP	Gross Domestic Product
ICT	Information & Communications Technology
IPC	Interprovincial Coordination
IT	Information Technology
ITDC	Indian Tourism Development Corporation
ITHM	Institute of Tourism and Hotel Management
LDA	Lahore Development Authority
MOTC	Ministry of Tourism & Culture
MoTS	Ministry of Tourism & Sports
MOU	Memorandum of Understanding
P & D	Planning & Development
PATO	Pakistan Association of Tour Operators
PGS	Punjab Strategy Growth
PHA	Pakistan Hotels Association
PITHM	Pakistan Institute of Tourism and Hotel Management
PPP	Public Private Partnership
PSGPC	Pakistan Sikh Gurdwara Parbandhak Committee
PTDC	Pakistan Tourism Development Corporation
SGPC	Shiromani Gurdwara Parbandhak Committee
TDCP	Tourism Development Corporation of Punjab
UNESCO	United Nations Educational, Scientific and Cultural Organization
WCLA	Walled City Lahore Authority
WTO	World Tourism Organization
WTTC	World Travel and Tourism Council
YASA&T	Youth Affairs, Sports, Archaeology & Tourism

1 Introduction

In many countries of the world tourism is the mainstay of their economy and has been playing a vital role in the development of those countries. The volume of tourism growth has been witnessed by UNWTO (World Tourism Barometer)¹ that in the first half of 2017 the tourism figures reached up to 98 million which were only 100 million globally in 1964. On the same footing, the volume of money involved in the tourism can be seen from the fact that tourism generated US\$ 7.6 trillion which counts equal to 10.2 % of the global GDP as reported by the World Travel and Tourism Council.² The growth of tourism in South Asia witnessed 12% rise during 2017.³ However, this growth is neither witnessed in Pakistan nor has this growth trajectory been followed here. Thus, this sector has not been able to contribute fully in the development of Pakistan.

The Punjab province, despite having enormous potential for tourism and given the role this sector could play in the economic uplift of the marginalized strata of society through an inclusive development approach, has not performed to its optimal level. Government of Punjab, however, is now fully cognizant of the untapped economic potential of this sector. It is fully aware of the unique geographical location of Punjab and the ways it can benefit from it. It believes that Punjab's landscape, wetlands, ecology, history, heritage, festivals, cuisine, and its religious heritage and archaeological assets can play a vital role in the growth of this sector. But, with a haphazard growth of this sector without involvement of the private sector and inclusion of society, it appears difficult to tap this potential. Hence, it is critical to move toward an inclusive and organized development of this sector by providing state-of-the-art tourist services which match the international standards across Punjab. The effort shall be made to place a special focus on heritage tourism and other high-opportunity segments. The Government will lead this sector through the existing organizational support in the shape of Youth Affairs, Sports, Archaeology and Tourism Department (YASAT) and Tourism Development Corporation of Punjab (TDCP) and allied institutions. However, the engine of growth for this sector would be the private sector. Private investment in the tourism sector will be mobilized to make it a state of the art sector and thereafter the vibrant growth of this sector would turn it into an effective factor for social development and poverty reduction as well as a significant contributor to the economic uplift of the province.

The tourism policy of Punjab, therefore, aims at articulating Government of Punjab's commitment in this regard and setting the future direction of tourism sector in the province to make it an effective link for social betterment of the marginalized communities. The Government believes that by putting this policy in place, complemented by social mobilization, an investor-friendly business environment, and an enhanced institutional capacity, the unexploited potential

¹ Media.untwo.org dated 6th September, 2018.

² Travel & Tourism Economic Impact 2017 on www.wttc.org dated 6th September, 2018

³ Media.untwo.org dated 6th September, 2018.

of the tourism sector can be unlocked and tapped to contribute to economic growth.

The Government of Punjab is completely aware that any policy that seeks to promote cultural, religious, and historical heritage by increasing the access of people, both nationally and internationally, to the tourist sites, will, in addition to the economic gains it harvests, pay huge social dividends as well. It will help make Punjab a truly pluralistic, tolerant, culturally confident, and vibrant society.

2 Status of Tourism in Pakistan:

Though after the 18th Amendment, tourism has been devolved to provinces, yet we need to look at the national spectrum first to have a glance of this sector and its contribution to the economic growth of this country. It will help us to appreciate the existing status of this specific sector. According to the World Travel and Tourism Council (WTTC)'s Economic Impact 2018 report for Pakistan,⁴ in 2017 the travel and tourism sector made a direct contribution of PKR 930+ billion (2.9% of total GDP) to the national economy⁵ and with indirect and induced effects, it exceeded 7.4% of GDP with a contribution of almost PKR 2.35 trillion. The sector not only directly created nearly 1.5 million jobs, claiming 2.5% of total employment, but also generated an investment of PKR 410+ billion (9.1% of total investment) in 2017. Punjab, being the largest recipient of international tourists who came to see their relatives, claims significant share in these contributions⁶. Different figures indicated above shows that economic contribution by the tourism sector has almost doubled between 2006 and 2015. Moreover, the sector is likely to contribute PKR 4,200 Billion to the national economy by 2028⁷ at the present growth projections indicated by the WTTC.

WTTC statistics showed that domestic travel spending in Pakistan generated 89.4% of direct Travel & Tourism GDP in 2017 compared with 10.6% for visitor exports (i.e. foreign visitor spending or international tourism receipts). Domestic travel spending is expected to grow by 6.0% in 2018 to PKR 1,445.9 Billion. It is low as compared to the growth of this sector in the South Asian region which steadied itself at 7.1% in 2018.

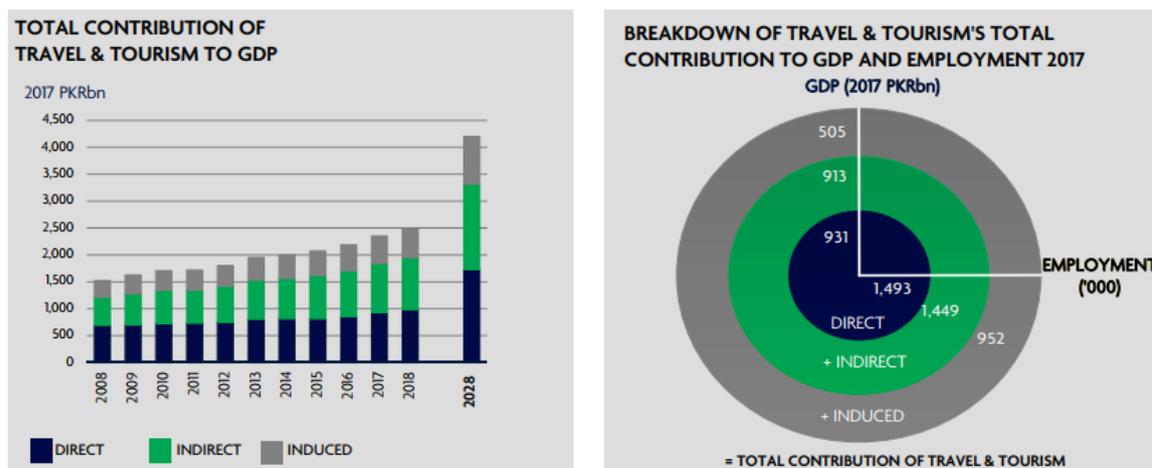
⁴ Available at <http://www.wttc.org/-/media/files/reports/economic-impact-research/countries-2018/pakistan2018.pdf>

⁵ All values are in constant 2015 prices & exchange rates

⁶ All values are in constant 2015 prices & exchange rates

⁷ WTTC's methodology covers government spending as well as all expenditure on hotels, airlines, airports, travel agents and leisure & recreation services utilized by individuals for business and holiday. This may slightly overstate the contribution by the sector as a large portion of expenditure in Pakistan on hotels and travel is for personal/family visits and for private and public sector business purposes. The total number of domestic tourists in Pakistan during the year 2009 equaled 46.07 million. About half of these tourists travelled to meet their social obligations (friends, relatives, etc.) and around 14% travelled for recreational purposes. Other important categories were of the people who travelled for business, health, or religious reasons (PILDAT, 2015).

Figure 1: Tourism and Travel Contribution to GDP and Employment in Pakistan



Source: WTTC 2018

According to World Tourism Organization's Report, in 2014 on a global level, there were 1,081 million foreign tourists. Total number of foreign tourists coming to Pakistan in 2014 was 0.965 million compared to a figure of 0.557 million in the year 2000. Pakistan's share in the global tourism market in 2014 was only 0.09% which is far below its potential. In South Asia, Pakistan's share in a total number of 17.5 million foreign tourists was a paltry 5.5% compared to India's 44%, Iran's 28.4%, and Maldives' 7%.⁸

In terms of receipts in 2015 from foreign tourists, Pakistan scraped a share of merely 1% out of the total spending of US\$ 31.4 Billion in South Asia. India was the biggest beneficiary with foreign tourist spending of US\$ 21 Billion during 2015.⁹

In terms of geographical distribution, 44% of the total foreign tourist arrivals into Pakistan were from Europe, a major share of which was of overseas Pakistanis coming from United Kingdom. South Asia was the second largest origin for international tourists coming to Pakistan, accounting for 21% of the total. Of these tourists, a major share consists of Sikhs coming from India for religious festivals and for visit of holy sites. Moreover, almost 50% of the foreign tourists come to Pakistan to visit their friends and relatives (VFR). These travelers usually do not engage in the typical tourism activities. In fact, only 14.7% of the total visitors to Pakistan come for recreational purposes. This low share of tourists in the total arrivals is a clear indicator of the untapped potential of the tourism sector¹⁰ by the international tourists. This less utilization of international tourists by the tourism market reflects the non-development of the sector to involve them in tourism but it also depicts the target areas of tourists

⁸ UNWTO Tourism Highlights 2016

⁹ Ibid.

¹⁰ PILDAT 2015

coming to Pakistan and development of packages for them accordingly. These travel trends of tourists will facilitate to craft policy and strategies accordingly.

Pakistan's landscape is dotted with numerous heritage and religious sites spread across the entire country with six UNESCO-recognized World Heritage sites, three of them falling in Punjab. They include Rohtas Fort in Jhelum, Lahore Fort and Shalimar Gardens in Lahore and Buddhist Civilization remains at Taxila near Rawalpindi. But why this vast and rich potential has not been tapped appropriately still remains a myth.

Usually, most of the domestic visitors to the numerous Sufi festivals, tombs and shrines across the province belong to the lower income class, thus limiting the overall economic benefit of domestic tourism. Provision of better tourist infrastructure and extensive marketing and projection of many heritage sites and festivals could potentially attract higher income groups, thus increasing the economic benefits of domestic tourism manifold. Middle and upper income domestic tourism is crucial for generating the volumes required for the private sector to invest in this sphere thereby leading it to the development of quality facilities.

As indicated above, the international tourism has not been tapped appropriately due to security situation which has now improved considerably. In view of the changed safety scenario, it is expected that in the next few years, international tourism's contribution to Pakistan's tourism sector, in particular, can increase five-fold from its current level as international tourists generate a greater amount of revenue per visitor. The infrastructure for tourism is not fully developed and the improvements in infrastructure and visitor facilities can boost domestic tourism, enabling Pakistanis across the country to connect with their culture and heritage.

3 Present Status of Tourism in Punjab

After looking at the national spectrum, the picture in Punjab is almost the same despite the fact that Punjab is an ancient land which housed 5000-year old civilization along the banks of its rivers. Its soil gave birth to Indo-Aryan legends and epics. Alexander marched through it, the weight of his army leaving marks on the culture of the land. Great Buddhist kingdoms rose and fell, visible now in the remains of the high seats of learning they created. A young conqueror brought the early light of Islam to be followed by Muslim Turkic rulers from the North. The greatest of Mughals ruled India from the ramparts of Lahore, while the most just of them lies buried here. It has seen the creation and disintegration of a Sikh kingdom and it has seen modernity come in the guise of colonialism, opening up its hinterlands through a network of canals and rail-tracks. It has been in the forefront of the struggle to overthrow this yoke and it has eventually tasted the fruits of freedom and democracy. Thus this land is an amalgamation of various cultures and creeds in the annals of history.

This relentless ebb and flow of history has woven an immensely rich cultural tapestry, which defines the people of Punjab. It is best reflected in its legends and songs. This arras was further coloured by the message of Guru Nanak, the founder of Sikhism. Punjab is also land of Sufis and the great Muslim Sufis such as Ali Hajveri, Baba Farid Ganj Shakar, Mian Mir and many others' shrines dot the land. These saints, through their message of peace, tolerance and love further enriched the culture of Punjab especially and Sub-continent in general. This land has rich legacy of Sikhs, Hindus, Buddhists and Christians. Thus Punjab heritage includes oldest civilization at Harappa, Buddhist heritage remnants at Taxila, Sikh's religious birthplace, land of Sufis, second most sacred site of Hindus at Katas Raj, forts like Lahore Fort, Rohtas Fort, Derawar Fort, and Mughal architecture and gardens. Despite such a rich heritage, the opportunities offered by this land have not been realized fully according to its potential.

Given this diversity and richness of religious heritage, the economic potential, which could be generated from religious and heritage tourism, is immense. Preservation of these sites and development of necessary tourism and related infrastructure in these areas would attract not only higher income domestic tourists but also millions of international tourists including Sikh, Buddhist and Hindu pilgrims. This could lead to a substantial economic uplift of different regions of the province including the economically backward but historically and religiously rich southern districts of Punjab.

In the above backdrop, the tourism sector has not played a very vibrant role in the economic growth of Punjab. The Punjab Growth Strategy now specifically aims at enhancing both income and employment in the province through increased private sector investment across different segments of the economy. In this regard, the tourism sector can become one of the main contributing sectors to the provincial economy. As per government estimates¹¹, Sikh and Buddhist tourism from international tourists alone has the potential to generate almost PKR 20 billion and an estimated 40,000 jobs every year¹². It only requires channelling of Buddhists and Sikhs tourism potential through better coordination of different segments of government of Pakistan on the one hand and preservation of these religious sites on the other. It also requires aggressive marketing and better packaging with easy access.

By attracting high-income Sikh and Buddhist tourists to Punjab, opportunities shall be generated for investments by the private sector in hotels and restaurants, along with overall hospitality sector, across the province. Availability of good quality tourist facilities and services would in turn attract more visitors hence starting a virtuous cycle of growth and income generation. Finally, a large and buoyant tourism industry would also help enhance employment opportunities and social uplift of the marginalized sections of the society.

¹¹ Initial estimates – economic impact of religious tourism in Punjab; IGC

¹² These are very preliminary estimates that indicate the potential of this sector to contribute to the economy.

The present status of tourism in Punjab is neither sufficient nor up to the mark. Similarly, it is neither organized nor well planned. It is neither inclusive nor development-oriented. The mushroom growth of hotels, eatery points etc. at the tourist sites is further aggravating the problem. It is neither diversified nor geared up to bring social parity in the province. The diversity and richness of religious heritage in Punjab and the economic potential, which could be generated from this religious and heritage tourism, is immense. The protection, preservation and development of these sites especially the infrastructure would attract not only higher income domestic tourists but also scores of international tourists including Sikhs, Buddhists and Hindu pilgrims. This could help to attain a substantial economic uplift of marginalized segment of society along these sites. Tourism can help to alleviate the economic disparities with the development of new sites and variety of allied cultural, traditional and economic activities.

3.1 Vision for Tourism Development

To make Punjab an attractive tourist destination through inclusive planning, diversification, development and management of tourist destinations in an organized manner without disturbing socio-ecological balance in close collaboration with private sector; thus helping in upward social mobility of the local marginalized communities and making tourism an engine of economic growth and poverty alleviation in the province.

3.2 Mission Statement

To make Punjab a preferred destination for domestic and international tourists by introducing diversification and socially inclusive sustainable development of new destinations through state of the art infrastructure driven by the government and led by the private sector; with best services through vibrant regulation, trained human resource and aggressive marketing and branding of Punjab assuring sustenance of ecology of the sites.

3.3 SWOT Analysis

Before delving into the challenges faced by tourism in the Punjab, it seems appropriate to carry out SWOT analysis of the province in respect of tourism sector to see an overall picture in a precise way as under:

3.3.1 Strengths:

1. Rich cultural traditions and variety of heritage.
2. Home to a number of important pilgrimage sites for Sikhs, Hindus and Buddhists.
3. Rich range of Cuisine.

4. Good core infrastructure and better environment in comparison to other provinces.
5. Diversity of landscape and culture.

3.3.2 Weaknesses:

1. No tourism policy.
2. Inadequate awareness about tourist spots in the Punjab.
3. Less effective marketing through promotion and publicity.
4. Inadequate tourism infrastructure.
5. Lack of coordination among tourism stake holders.

3.3.3 Opportunities:

1. Huge potential of development in tourism sector.
2. Promotion of religious tourism.
3. Identification and development of new sites.
4. Promotion of adventure tourism, eco-tourism and motor sports.
5. Promotion of culture and cuisines.
6. According industry status to tourism related industries.
7. Promotion of Sports Tourism.

3.3.4 Threats:

1. Law & Order situation.
2. Lack of political will to implement the tourism policy.
3. Likely resource constraints.

3.4 Key Issues/Challenges

Punjab has the immense potential for tourism due to availability of variety of natural systems like ecological, wetlands, architectural treasures, five thousand years old civilization, historical treasure of Forts and palaces, variety of fruits, lush green fields and treacherous deserts. It starts from foothills of Himalayas, then travels to green fields and ends in desert with variety of temperature variation. Last but not the least; it has immense religious tourism treasures with variety of cuisines to offer to the tourists, both domestic and international. But this potential could not be tapped due to various challenges. Some of these issues are of core nature and others are of secondary nature.

3.4.1 Core Challenges

1. Non-formulation of tourism policy which speaks volumes about low priority accorded to tourism and lack of interest on the part of the Government of the Punjab.

2. Poor security situation in the wake of war on terror going on in Pakistan. This situation has improved substantially but the tourists are required to be convinced about this improved situation.
3. Lack of trained human resource to handle the tourism industry due to availability of few training institutions with limited capacity on the one hand and use of raw human resource by tour and travel handlers to save a little money on the other hand. No effort has been made by the operators to use trained human resource which could have been a pull factor to train more HR in the tourism on the one hand and could build tourist confidence on the other. Tourism Development Corporation of Punjab through its Institutes of Tourism and Hotel Management (ITHMs) and COTHM produced less human resource because pull factor is lacking due to non-standardization.
4. Poor infrastructure and low interest in its development. Being a low priority area on the economic development chessboard, the government has not allocated sufficient funds to upgrade the infrastructure nor has the private sector been provided with incentives to lead to investment in the area.
5. There is either less coordination or it is totally non-existent among various departments for the development of tourism. The site maintenance and management requires frequent coordination which is not there. Same is the case with other organizations involved in tourism and no coordination exists there to manage and improve this area.
6. Non-existence of standards for travel tour and Hotel/Restaurant facilities. Neither any effort has been made by the government in a serious and sustained manner to standardize services in this sector nor has the private sector made any effort to do it voluntarily for in its own benefit.
7. The existing institutional infrastructure is not enough to steer the tourism sector out of the crisis. The tourism Wing kept shifting from one department to another.
8. The regulation regime is not vibrant enough to upgrade the standards in tourism. Then staff position in regulatory institutions is not better enough to implement regulation. The department of tourist services is abysmally understaffed to regulate the whole Punjab and no miracles can be expected from this thin organization
9. Lack of aggressive marketing strategy and branding of the destinations for being tourist friendly, standardized, environment friendly and community inclusive. Such branding and marketing acts as a pull factor and thus needs to be evolved.
10. No effort has been made to diversify tourist destinations in Punjab which thing has made it only a seasonal activity. Therefore, tourism is mostly confined to north of Punjab and south is apparently either ignored or not explored.

3.4.2 Secondary issues

1. Ecological degradation of tourist destinations has taken place due to tourist burden and non-availability of solid waste management system. Even the visitors leave their litter behind without realizing the damage they cause to tourist treasure which is a common property of all of them. This also has made these sites un-attractive. We need to preserve these sites' ecology by planting indigenous trees, keeping the wetlands intact, and ensuring cleaning of surroundings through innovative means by involving the tourist or at least by contributing to the maintenance and upkeep efforts.
2. The tourism sector has not used the information technology to provide easy and extensive information to the intending tourists in general and the Government sector in particular to get personal benefits. ICT can be applied in all processes but its application is lacking. Its best example is that TDCP resorts are still not using online booking and payment system which could have increased the flow of tourist, augmented revenue generation, and assured true potential of the resorts.
3. Poor maintenance, up-gradation and preservation of historical / archaeological sites due to non-availability of sufficient financial resources and trained Human Resource.
4. Insufficient packages have been developed by the existing institutions and those are not even aggressively marketed. The Tourism Department in general and Tourism Development Corporation of Punjab in particular have never tried to market other destinations through innovative and aggressive manners. Thus, the tourism sector has remained confined to limited packages and specific destinations.
5. There is no system about the current availability if data of tourist whether domestic or international which could help to plan and organize this sector to take full advantage. Besides this, there is no research facility or coordination among the departments to plan inclusive development for this sector.
6. Shyness of the tourism sector to market new and innovative products on the one hand and government institutions' lethargy to support it on the other hand. Ministry of Foreign affairs has not marketed the destinations and heritage to the international community in an effective and aggressive manner. Even various institutions have not come to support the Tourism Development by taking tourists to new destinations.
7. Lack of robust legal and institutional framework enabling the private sector to play lead role for development of this sector.

3.5 Objectives of the Tourism Policy

The main objective of the policy is to make Punjab a preferred tourist destination and to make tourism an effective part of economic growth in Punjab. Government has shown its resolve to provide necessary and robust institutional and regulatory framework to support growth in this sector by providing opportunities to the private sector to play the lead role in its future development. However the main objectives of the tourism policy are as under:

3.5.1 To develop Tourism as a Provincial Priority Area

Unlike the previous regimes, the present government will accord high priority to this sector by investing in the infrastructure development along with the private sector.

3.5.2 To make tourism an engine of economic growth

In view of tourism share in the global GDP, government of Punjab is convinced that tourism is an engine of economic growth which can provide jobs to the youth and can thus help in poverty alleviation.

3.5.3 To upgrade and develop state of the art infrastructure

The government of Punjab is committed to upgrading the existing infrastructure and also to develop the new one to bring the tourism sector at par with international standards which will make it one the most productive sectors.

3.5.4 To standardize various sectors of tourism industry

The government is committed to standardizing various segments of the tourism industry to build tourists' confidence and provide them with facilities of international standard. It shall be ensured through voluntary or associations' cooperation and through regulation

3.5.5 To build up institutional capacity and improve the regulation regime

In view of the insufficient capacity and weak regulation regime, the government of Punjab will ensure to fill the institutional gaps through reforms by bringing in the vibrant regulatory regime to meet the modern-day needs.

3.5.6 To diversify the tourism destinations for social equity and development

The government will identify and develop new destinations with a view to providing more opportunities to the tourists and making tourism a whole year activity. Besides this, through tourism development, opportunities shall be provided to the local communities which will help build social equity in the province.

3.5.7 To ensure effective branding and marketing of new sites:

The Government will apply modern techniques of branding and marketing of the new sites through effective use of various Media Tools.

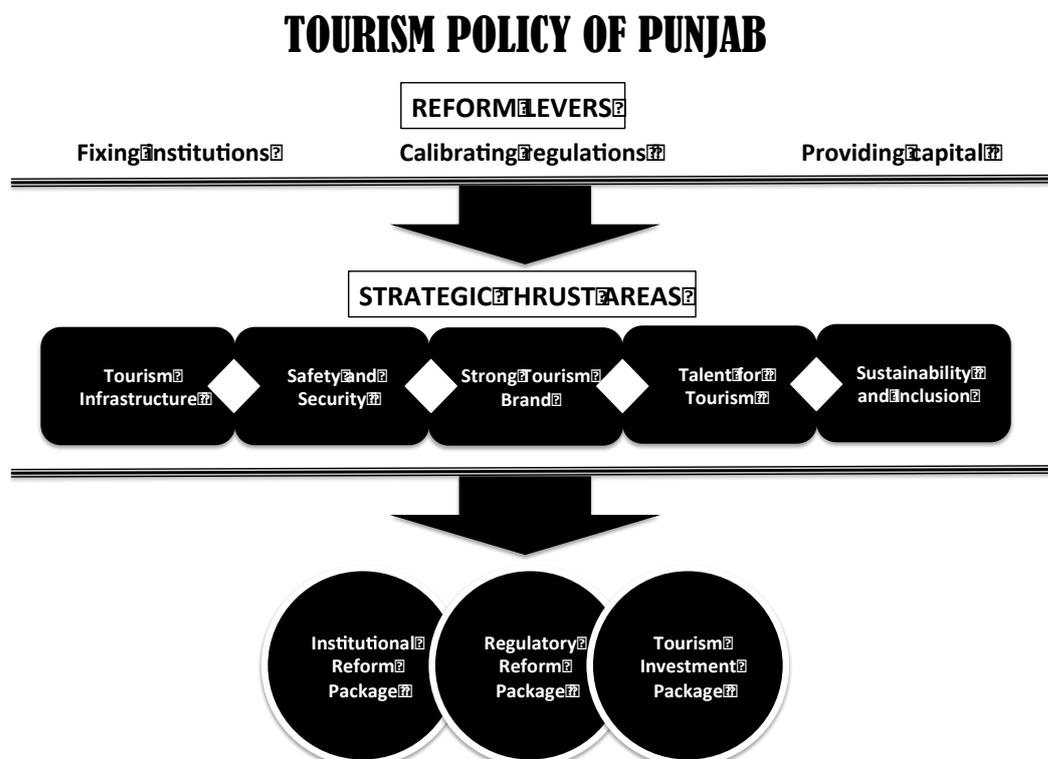
3.5.8 To develop new tour packages

Various Government institutions and private tour operators shall be encouraged to develop new and useful packages both for the domestic and foreign tours.

4 Approach towards Tourism Development

Government of Punjab believes that tourism development can happen through appropriate use of three key reform levers – fixing the institutions, calibrating the regulations and providing requisite financing. Therefore, this tourism policy presents an institutional reform package, a regulatory reform package and a tourism investment package to activate these three levers.

Figure 2: Punjab’s Tourism Policy Framework



4.1 Three Reform Levers

A) Fixing the institutions – Institutional Reform Package

Any vision for tourism development, no matter how ambitious it may be, will only be as good as the government's capacity to realize it. Therefore developing the capacity to deliver forms the first and foremost reform lever of Government of Punjab. Government recognizes that the tourism institutions in the province, in their present form, cannot deliver the requisite change and there is an immediate need to fix this. Therefore, the tourism policy includes a comprehensive tourism institutional reform package, which will be implemented right away. The underlying theme for this package is to bring institutional structure in line with what's needed for private sector-driven growth in the tourism sector. Moreover, government will now adopt a sector-approach with a cross-departmental oversight mechanism to ensure that there are synergies across various agencies and will create a stakeholder-led management structure to ensure that any public sector-led initiative is aligned with market needs. The details of the institutional reform package are provided in this policy in the subsequent section.

B) Calibrating the Regulations – Regulatory Reform Package

Government of Punjab recognizes that the tourism regulatory regime in its present form is not appropriate for private sector-led growth. Even the proposed institutional reform package will need supporting laws and regulations to enable it. Consultations with stakeholders also indicated market expectations from government to create an enabling environment and facilitate the private investors. These expectations are also in line with what's happening in other countries. Therefore, this policy also includes a detailed regulatory reform package for the tourism sector. Government believes that targeted regulatory reforms will help a) increase confidence of tourists in the ability of Punjab to better cater to their needs and b) enhance competitiveness in the travel and tourism industry by addressing some of the factors identified in the international Travel and Tourism Competitiveness Index pertaining to business environment, safety and security, health and hygiene, human resources and labour market and ICT readiness that are hindering the sector's growth. The details of the regulatory reform package are provided in this policy in the subsequent section.

C) Providing Requisite Financing – Tourism Investment Package

Government of Punjab realizes that any future growth in tourism sector will ultimately hinge on investment flows to the sector. The limited public spending will only complement the private sector-led interventions through smart investments in public infrastructure or to address any market failures. While the government will increase public spending immediately to implement this tourism policy, the real growth is expected to stem from private capital. Therefore this tourism policy also includes a tourism investment package. The package not only includes policy levers to attract private investors but also a

focus on public private partnerships to create a pipeline of potential investment opportunities. The details of the tourism investment package are provided in this policy in the subsequent section.

4.2 Five Strategic Thrust Areas

I) Building State-of-the-Art Tourism Infrastructure

Government will adopt with utmost transparency a coherent and well-conceived approach towards the development of infrastructure related to the tourism sector. The focus of the government will be on developing high quality tourism and support infrastructure that will include local transportation as well as tourist service infrastructure possibly through PPP models, enabling better management of facilities, creating sustainable models and enhancing involvement of the private sector through specialized contractors and improved supervision.

Government of Punjab recognizes the importance of meticulous planning and involvement of local communities in infrastructure development and will duly address any concerns regarding environmental degradation, heritage preservation, land zoning, local government regulations, etc. Government will undertake strategic planning of key tourism sites and will put in place necessary zoning arrangements. Government will also undertake any special institutional or regulatory arrangements that may be required to ensure preservation and management of heritage sites and adjoining areas. Government realizes that presently the museums are antiquated and in serious need of improvement and up-gradation and therefore will also be covered under this policy.

II) Ensuring Safety and Security of Tourists

Government of Punjab gives utmost importance to safety and security of tourists and will accordingly ensure adequate arrangements all year round. Government will also take any institutional or regulatory measures, necessary in this regard.

III) Building a Strong Tourism Brand

Government of Punjab is fully committed to enforcing superior quality standards for various tourism services, supplemented through private technology-driven frameworks and crowd sourcing models to provide credible information to tourists. Government of Punjab will also create a tourism brand identity for Punjab that will depict the province as a reliable safe and quality tourism destination. Government will ensure a wider a) availability of information about its tourism assets, tourist services and other relevant areas and b) dissemination of such information to the targeted audience to create widespread awareness and facilitate potential tourists in planning their visits. Government will strive to attract a wider and more diversified visitor base to the heritage sites and other tourist destinations in order to provide greater income prospects for such areas and creating a price competitive tourism sector.

IV) Developing Talent for Tourism Services

Skills development is critical for the envisaged transformation of the tourism sector. The Provincial Government is committed to skills development in Punjab with an adequate focus on the tourism sector to ensure availability of a well-trained skilled workforce to cater to the projected growth of the sector. Government will endeavour to make the workforce in the hospitality and tourism sector come at par with international standards, not only to create a skilled resource pool for the tourism industry but also to ensure inclusive growth with a special focus on unemployed youth.

V) Sustainable and Inclusive Tourism

Government of Punjab is committed to inclusive and sustainable tourism development and will ensure a widespread and fair distribution of economic and social benefits accruing from developing the sector and specially enhancing the positive impact of tourism development on lives of women and other marginalized groups. Government will ensure that sustainable environmental management remains central to all tourism development initiatives. Government will also ensure integrating local communities, especially the poor and marginalized, in development of various heritage and other tourism destinations to stimulate growth in adjoining areas.

5 Institutional Reform Package for Tourism Sector

The institutional reform package for tourism sector is based on three key principles: a) ensuring federal-provincial coordination and alignment; b) strengthening core governance capacity within provincial government for managing tourism sector; and c) embed private sector-led growth. There are multiple objectives behind each of these principles:

a) Federal-Provincial Coordination and Alignment

- Undertake active advocacy efforts with federal government on key institutional issues in the wake of 18th Amendment
- Coordinate with other provinces for alignment on critical policy issues
- Create limited but sector-focused institutional capacity in federal government for taking up relevant regulatory and policy issues

b) Strengthened Public Sector Capacity for Tourism Sector Management

- Adopt a sector-approach with a cross-departmental oversight mechanism to ensure that there are synergies across various initiatives
- Create a stakeholder-led management structure to facilitate tourism in selected strategic thrust areas rather than traditional public sector-led approach

- Strengthen the core institutional capacity of the provincial government for policy making and implementation
- Create specialized capacity in the government to manage heritage sites

c) Supporting Private Sector-Led Growth

- Develop adequate capacity to promote private investment in the tourism sector
- Support investments in the sector through effective institutional means
- Support skills development through strengthening existing public sector institutions for developing market-based skills
- Mobilize private sector to create a responsible and responsive tourism industry
- Develop regulatory structures to support sustainable tourism; and
- Remove any distortions in the market, which discourages or prevents private investment in the tourism sector

Based on these principles and to address the above-mentioned objectives, Government of Punjab will immediately put in place the following institutional structure. The new institutional structure is carefully thought out to deliver the tourism and is in line with stakeholder views and institutional regimes in other countries.

6 Tourism Investment Package

The tourism investment package forms an important part of Punjab's tourism policy. Government is fully resolved to creating the necessary space to allow private sector growth, while minimizing the role of government in service delivery that inadvertently distorts competition. This package is aimed at catalysing this process and attracting more investment flows from the private sector. The package includes a focus on PPP projects for tourism sector and a set of policy incentives for private investors.

6.1 Public Private Partnership Projects for Tourism Sector

In recent years PPPs have gained popularity in tourism sector in many countries, where much of the investment takes place in typically private sector space, but still driven by the public sector. However, given the nature of the sector such PPPs generally differ from traditional PPP projects. Government of Punjab realizes that the role of government is especially important in tourism PPPs because of government's control over protected areas or tourism sites, especially in case of heritage sites.

Through a focus on PPP projects, Government of Punjab will create a pipeline of potential investment opportunities and provide all required support such as ancillary infrastructure to make such investments successful. The government will undertake all such transactions through a transparent tendering process.

The government is also committed to providing a one-stop solution for facilitating all relevant permits, licensing and regulatory requirements of the provincial government for private investors. The institutional reform package already covers establishment of a PPP node for tourism sector to complement these efforts.

Government of Punjab will undertake these tourism PPPs in many areas such as:

- Participation of private sector in various services under a restricted quota/license given by the government
- Private sector performing a government function (e.g. maintenance of government-owned heritage sites and recover expenses through entry tickets)
- Private sector investing and constructing a property for commercial use on government land (e.g. construction of hotel or theme park, on government land)
- Management of events and festivals by private enterprises
- Traditional infrastructure services to support tourism sector performed by private sector (e.g. safari flights; private sector-run trains for tourists; paid public toilets; toll roads to open up tourism destinations; etc.)

6.2 Incentives for Private Investors for Tourism Sector

Government of Punjab realizes that there is a need to provide an incentive package to attract private investments in tourism sector, beyond the PPP projects. Under the tourism policy, Government of Punjab will therefore announce targeted incentives in following areas:

A) Use of Public Assets and Land

Public assets and publically owned land (or land acquired by Government) will be offered to private sector for development and management and will play a significant role in development of tourism sector in Punjab. These will be especially important in the wake of exorbitant real estate prices. For this purpose, Government will develop an equitable and transparent process for asset/land leasing and establishing special purpose vehicles owing lease to such assets, with equity stake of the government, without transfer of title.

B) Approval for All Permits / Development Plans

The government will ensure prompt and seamless approvals of all permits and plans for tourism projects, as long as they comply with basic criteria, which will be clearly laid out. Government will also notify maximum time limit, within which these approvals will have to be granted, to enhance investors' confidence.

C) Financial arrangements

Government realizes that there is a need to focus on financial arrangements for successful close of mega projects, supporting tourism sector. Commercial banks in Pakistan traditionally shy away from project finance with the exception of a few sectors such as energy. In order to encourage investment in the sector and to support PPP and other smart investments in tourism sector, Government will create an Infrastructure Fund, to support private financing. The fund will take partial stake in commercially viable projects, to encourage other institutional investors. Government will also create other special arrangements for providing partial risk guarantees to investors for selected areas to stimulate investment.

D) Tax Policy Predictability

Government of Punjab realizes that investors some time shy away from investing, apprehending untoward future changes in tax regimes. Unpredictability of tax policy therefore, poses the most critical challenge and risk for the private sector. Government of Punjab will therefore provide guarantee for tax policy predictability for provincial taxes through announcement of a ten years provincial tax package covering all provincial taxes and duties, with any future increase pre-announced in it.

7 Strategy

The basic strategy to be adopted in the development of tourism in Punjab is that it will be driven by the Government of the Punjab and led by the private sector to ensure that the private sector should play a critical role in the future development of tourism industry. Initially, the tourism is growing at various sites in a very ill planned and un-organized manner which not only creates hazards but also hampers growth of this sector. Therefore, now coordinated principles for the development of new sites will be focused on ensuring that these sites are developed in a planned and organized manner. For the development of new sites, the Government will declare new sites as protected areas. Thereafter, the Government will develop the access infrastructure and prepare layout plans for the sites in collaboration with engineering wings of the Departments involved in the process, private sector, stake holders and community so as to evolve better ownership, more collaborative and well accepted planning for sustainable development of the area. Tourism has been given a priority in the economic growth of the province. Government will upgrade the existing and develop new infrastructure to provide better excess to the new sites for future development by the private sector. Various packages and model contracts will be developed for the assistance of private sector to promote investment in this sector.

Govt. of the Punjab will try its level best to develop state of the art infrastructure to promote tourism. In line with the modern-day requirements of the tourism industry, the institutional capacity of the existing outfits will be enhanced and

wherever necessary, the essential institutions or associations of various stake holders will be involved in the process. In addition to this, the existence regulatory regime in the shape of department of tourist services shall be improved along with the existing regulations to make an effective link for standardization of services by various segments of this industry.

At present, the tourism is only confined to Murree and its adjoining areas, and because of the peculiar climate of the area, tourism is limited to summers only. The government of Punjab will make efforts to develop new sites like Kotli Sattian, Salt Range Area, Fort Munro, Cholistan Desert, and new events like Village Tourism and seasonal festivals. The religious tourism potential of Punjab for Sikh, Hindu and Buddhist Communities shall be exploited through the development of better facilities and by creating other necessary linkages in those areas.

Govt. will act as a facilitator / catalyst by providing sports infrastructure facilities such as wayside amenities, tourist information centers, facilities for holding fairs and festivals and a platform for managing a calendar of events.

To design an awareness campaign for the public to create a favorable ambiance and affinity towards tourism, special focus shall be made on involving all segment of society especially the younger generation through seminars, competitions, quiz programs, film festivals, etc.

Through insertion of a chapter in the text books at relevant levels in the school and college curricula, special efforts shall be made to popularize the ideas of youth and educational tourism.

A one window clearance system for facilitation of investors shall be introduced for speedy clearance of various permissions, approvals required under different laws and rules.

Keeping in view the human resource gap in this industry, the capacity of Institute of Tourism and Hotel Management (ITHM and COTHM) is not sufficient. It is proposed that a competitive environment may be created to motivate private sector to invest inhuman resource development by establishing tourism and hospitality institutions. This capacity shall also be enhanced through enrollment of new students more frequently to fill this capacity gap.

Alongside this broader strategy of the government of the Punjab for the development of tourism industry in Punjab, the sector specific, area specific and event specific strategies are as under:

7.1 Sector Specific

7.1.1 Private Sector

It is a well-conceived and well-thought policy of the Government of the Punjab to act as catalyst in the promotion of tourism and let the private sector lead the development of tourism related infrastructure like hotels, motels, activities for the tourists etc. The past experience of the Punjab tourism has not been very useful but it may be due the fact that tourism sector has not used well drafted agreement to safeguard the interests of both the Government of Punjab and the private sector. There was shyness among the tourist industrialists. In order to make private sector a true partner in the development of tourism in Punjab, following policy measures are proposed to be taken in future:

1. The Government of Punjab will identify new sites for the development of tourism and basic access infrastructure will be laid by the Government to assist the private sector in development of the related infrastructure like hotels, motels or any other facilities to attract the tourists.
2. The role of the Government will be only of the facilitator and catalyst.
3. The Government of Punjab will provide technical assistance to Punjab tourism to draft well thought out model agreements which will assure government's interests and protect the interests of private sector too.
4. Maximum facilities relevant to an industry shall be provided to the private sector to make tourism an effective link in the development of tourism as an industry.
5. Various model agreements for Public Private Partnership (PPP) collaboration on the lines of international model agreements shall be developed in collaboration with Planning & Development Department & Law Department, Government of the Punjab.

7.1.2 Tour Operator

It shall be ensured that tour operators provide standardized and well organized tour packages to the tourists. It has been witnessed that tour operators are charging different package prices from the tourist groups which thing creates mistrust and lack of confidence among future tourists. In addition, the committed services are either not provided or their quality is not of the level promised to the tourists. Besides, the tourists do not display their package prices at prominent places for the benefit of the tourists. In order to curb this trend, the services of associations of tour operators shall be utilized to create uniform standards and categories. Only 10 to 20 percent variations shall be allowed to these tour operators. The salient features of this strategy will be as under:

1. Development of Code of Ethics for Tour Operators.

2. Compulsory registration with provincial Department of Tourist Services (DTS) to ensure minimum standards. At a subsequent stage, training from any tourism & hospitality institution may be made compulsory for registration.
3. Each and every service will be separately priced in the package along with indicated standard to ensure proper provision of services to tourists.
4. Various package prices will be displayed prominently in the tour operators' offices to facilitate tourists to make informed choices.
5. The Tour Operators will be asked to utilize modern ICT techniques for provision of various services.

7.1.3 Hoteliers

Living facility is a critical element in the tourism sector and people usually complain about the poor quality of facilities provided by different hotels along with charging exorbitant prices for these facilities. There is no uniform rate policy in a region. Besides, there is no categorization of hotels at various tourist destinations. In view of these peculiar problems, following strategy is suggested to promote the hospitality sector.

1. The hotel industry shall be encouraged to follow the international best practices and to involve ICT techniques for provision of various services.
2. All hoteliers shall be categorized according to revised standardization criteria designed by DTS (Department of Tourist Services).
3. The registration of Rest Houses, Guest Houses, and Clubs shall be made according to the standardization delineated by the DTS.
4. The hoteliers / accommodation providers shall be encouraged to offer low, medium and high season rates.
5. Every hotel and accommodation provider shall be required to hire 70% of trained human resource having certification / degree / diploma from recognized tourism and hospitality sector and other institutions.

7.1.4 Travel Agents

Travels agents are a critical link in the development of tourism industry. However this link has played negligible role in the promotion of Punjab as a tourism destination. The travel agents sometimes play a dubious role in making bookings and misleading tourists which sometimes cost them extra money to adjust their tour plan at a subsequent date. This sometimes shatters the

confidence of tourist sin the travel agents. In order to establish an effective link between the two entities, following necessary measures shall be taken:

1. The travel agents shall be categorized according to their sales and services and registration of all travel agents shall be necessary before entering into any travel business.
2. Hiring of trained / certified Human Resource having certifications from recognized training institutes shall be made mandatory for all travel agencies.
3. Certification form International Standards Organization shall be required to access the travel agencies for categorization.
4. The travel agents shall be encouraged to strengthen themselves by joining platforms like TAAP (Travel Agents Association of Pakistan) and other national / international forums.
5. All travel agents should have risk management plans for risk mitigation.

7.1.5 The Role of NGOs

NGOs, particularly those with an environmental and community-based focus, are expected to play a vital role in the development and sp read of responsible tourism practices. They are expected to play following roles:-

- Contribute to the development of policies and plans for the tourism industry.
- Assist government in developing standards for responsible tourism.
- Assist government, private sector and communities in implementing, monitoring and evaluating responsible tourism
- Source funding from donor agencies to develop specific community-based tourism projects
- Assist communities and community groups in getting organized, preparing themselves for tourism and implementing tourism projects.
- Assist government in conducting tourism and environmental awareness programs among communities and the tourism industry at large.
- Liaison between the private sector and communities to generate more community involvement in the tourism sector and stronger private sector commitment.
- Deliver education, training, and bridging courses to local communities.

7.1.6 The Role of Communities

Communities should ideally be seen as private sector players in the tourism industry. It is recognized that their entry is of a disadvantaged position and that additional efforts by all other stakeholders need to be made to achieve the overall objectives through tourism development. Communities should be involved in the development of tourism in the following ways:-

- Organize themselves at all levels to play a more effective role in the tourism industry and interact with government and role players at all levels.
- Oppose developments that are harmful to the local environment and culture of the community.
- Raise community awareness of resource management and tourism.
- Commitment to developing tourism related enterprises to contribute to economic development of local community.
- Maintain and develop traditions and encourage cultural tourism.
- Enter into joint venture partnerships with private sector.
- Help in provision of conducive tourism environment.
- Actively participate in and promote responsible tourism.

7.1.7 Heritage Sites

Punjab has a wide variety of religious, historical and archaeological sites. These sites include sites sacred to Sikh and Hindu religions. Then there are valuable sites of Buddhist religion. Government of Punjab needs to cash on this rich heritage of various religions in collaboration with the Government of Pakistan. The inflow of non-resident Indian Sikhs and Hindu tourists may be enhanced after careful review and well thought out visa regime. The Government of Punjab shall make the most of concerted efforts of the Federal Government to tap the Buddhist tourist potential both in Punjab and Khyber. Efforts shall also be made to preserve this treasure in an effective manner and allied infrastructure of international standard shall also be developed. Government of Punjab needs to take following policy steps to make better utilization of this treasure:

1. Government of Punjab should declare all these sites protected even if these have not been declared so earlier.
2. All kinds of efforts shall be made by the Government in collaboration with local government institutions to protect ecology of the surrounding areas through all possible remedial measures. Only the organized and controlled access should be provided. Placement of tour guides on these sites with fixed charges shall be made essential as a part of efforts to protect these places.
3. Local community shall be involved in the protection of these sites. In addition to this, religious sanctity of these sites may also be shared with the local community to ensure respect of religious sentiments of the respected community by locals. The education material for local students may also be prepared and shared through the local schools. The economic benefits of tourists for the local community may also be highlighted.
4. Guided tours may only be arranged at these sites along with historical places to ensure their sustainable protection and specific briefing material may be prepared by the TDCP keeping in view the religious

beliefs, sentiments and mythology to keep the interest of tourist alive for these sites and ensure its further promotions through visitors.

5. It should be the Government of Punjab's policy to make efforts during the tours to guide the tourists to take care of these sites being a valuable national treasure for Pakistan and the respective religious community.
6. Efforts shall be made to develop written material on the historical and mythical concepts famous about the site by TDCP for information of tourists in view of the religious sentiments of the concerned community.
7. The preservation and upkeep of these sites shall be made more frequent and regular. Entry charges for maintenance and cleanliness of these sites shall be rationalized.
8. Government of the Punjab in collaboration with the Federal Government and Ministry of Foreign Affairs shall make all efforts to rationalize the visa policy and allied regime. The embassy of Pakistan in the target countries shall be requested to take proactive role to educate the importance of these heritage sites for the respective communities. The material prepared by the Government of Punjab through TDCP shall be forwarded to these embassies more regularly.
9. Efforts shall be made to market these sites through social media and foreign visitors.

7.1.8 Sufi / Mystic Tourism

Pakistan in general and Punjab in particular is land of Sufis and Saints. Islam spread in Indo-Pak sub-continent through un-tiring efforts of these Sufis. Prior to this, the region was a stronghold of Hinduism and its foot prints are visible in Punjab like the Katas Raj. Great Sufis of sub-continent are revered by Muslims around the world. Hence, people have strong inclination for visiting Sufi Shrines like Data Ganj Bakhsh Ali Hajveri, Baba Farid Ganj Shakar, Baha-ud-Din Zikariya and so on. Millions of people visit these places and thus it is a significant part of domestic tourism in the Punjab. We need to make such tourism more organized and useful for the people of Punjab. We need to take following policy steps to ensure better facilities and access to these shrines to middle and poor class tourists.

1. The Government of Punjab through Tourism Development Corporation of Punjab (TDCP) shall prepare a calendar of Sufi festivals along with other festivals to provide opportunity to the tourists to make more organized arrangements to visits these places.
2. The Government of Punjab may prepare standard operating procedures (SOPs) for the handling of tourist in the peak seasons in collaboration with the Auqaf Department, District Administration, Police and local

community to make their visit to these shrines more organized and convenient.

3. Efforts shall be made both by the Government and the custodians of these shrines that these tourists shall be respected according to the sayings of these Sufis and cultural traditions.
4. Minimum standards of transport may be outlined to facilitate the visits of these tourists keeping in view the weather conditions and distances involved during festivals on the shrines of Sufis.
5. The written material about the character buildings and sayings in line with teachings of Islam be prepared for character building and education of visiting tourists and the poor people these shrines.
6. We need to develop informative short stories in the light of the famous saying of these Sufis with the aim of character building of the visitors.
7. For sharing information and educating these tourist in a better way, guided tours through professional tour guides shall be arranged.

7.1.9 Youth Tourism

Like Pakistan provincial population of the Punjab Province is dominated by youth. A rising trend can be seen in youth tourism over the last few years. Tourism can be a source of education for the youth. It may be education, sightseeing, voluntary work, cultural exchange etc. According to UNWTO, almost 20% of the 940 million international travels can be attributed to young people in 2010. According to UNWTO Forecast 2020, there will be about 300 million young people travelling each year. According to the same estimate, the youth accounts for US \$320 billion in market value. In Pakistan this trend is also on the rise and we need to make best use of our youth for the promotion of domestic tourism. Following policy measures are required to be taken:

1. Government of the Punjab may use tourism as an instrument of education through active participation of schools, colleges and universities.
2. In this digital age, the youth exchange programs amongst various provinces to half youth explore new sites in different provinces can be a useful source to market these sites. It may also be beneficial in promotion of domestic tourism.
3. The youth may be provided economical accommodation through youth hostels in exchange for working as ambassador of Punjab tourism not only amongst their family and friends living or studying abroad and at various sports events etc.

4. There are approximately two million social media users in Pakistan of which youth is a major user. So we must involve Youth as 'mouth words' carrier which has more weight than many things.

7.1.10 Food Safety

Pakistan has rich cuisine to offer to various domestic and international tourists but the quality and safety of food for the tourists is a major issue and can play havoc with the growing tourism industry in Pakistan if not taken care of. Food safety measures are either inadequate or non-existent at present. Major role in this respect rests with the Punjab Food Authority. In order to ensure safety of both domestic and international tourists and to avoid any untoward incident, it is essential to take the following policy measures:

1. The trained human resource for cooking like qualified chefs who are well aware of the safety and security of the food and its impact on the health may be employed preferably.
2. The quality and freshness of the food may be ensured at tourist spots across the province in close collaboration with the Punjab Food Authority.
3. Health and food safety campaign may be launched through social media to make all the stakeholders aware of the hazards of unsafe food.
4. Cleanliness of the utensils may be ensured and the staff at various restaurants may be trained on the cleanliness and its impact on hygiene and safety of tourists.
5. International food chains may be encouraged to open their outlets at tourist destinations to create food safety environment.

7.1.11 Tourist Information Centers

The Tourist Information Centers (TICs) in present shape are not contributing enough for the growth and development of tourism in Punjab. The use of modern technology is alien to them and their services are confined to the provision of material. The booking of tours is not real time web based to support the operations of TDCP. It is time to revamp these TICs and make these modern enough to take up modern challenges on the one hand and work as booking office for the tours on the other hand. Following measures needs to be taken:

1. State of the art and modern TICs with modern gadgets may be established at prominent places for facilitation of the tourists.
2. The officers manning these TICs may be trained in public dealing, hospitality and use of information technology and tour booking.
3. Each TIC may be given reasonable targets and the incharge failing to attain these targets may be laid off and an annual register of their activities and achievements may be obtained.

7.2 Strategies for Effective Marketing, Outreach and Communications

Communications strategy encourages proactive participation of several stakeholders, including government departments and ministries, private sector, professional artists, experts and practitioners from creative and heritage industries, service providers and suppliers from tourism and hospitality sector, civil society, development organizations, financial institutions, communities, etc. To this end, a communications Policy will be enacted as part of the Tourism Policy as a three-pronged framework to design and deliver a coherent, comprehensive and differentiated communications and marketing strategy, reaching out to multiple levels of target audience.

Figure 5: Communications framework to support Punjab Tourism and Economic Growth Project



The competition for travellers identified to travel Punjab is fierce and to effectively compete amongst markets, this Policy will have to shift its current traditional marketing approach to one that is more aggressive and competitive. In this context, the Policy purposes an array of marketing tools and strategies to:

1. **Encourage information sharing and coordination at all levels**
2. **Identify stakeholders' engagement platforms**
3. **Sustained advocacy through media:**

The policy will adopt credible, independent and balanced reporting on the governance reforms of tourism sector is an integral part of strategic communications. The higher the frequency of reaching out to people through both online and offline media, the better the chances of clarifying the context of issues and solutions proposed by the reform, which would inevitably contribute towards building an informed and supportive constituencies for change.

4. Pro Poor Tourism Development:

The Policy proposes inclusion of all strata's of society and reaching out to youth and women,

7.3 Priority Areas for Development of Tourism

1. Priority shall be given to revive traditional handicrafts, rural crafts and facilities for setting up Craft Bazars and villages to develop souvenir market like Sillanwali for lacquer woodwork, Multan for blue pottery and Chiniot for carving wood furniture etc.
2. The Cuisine of Punjab shall be promoted by arranging food festivals by involving private sector.
3. The adventure sites shall be identified to promote adventure tourism: Paragliding, Parasailing, Tracking, Bungee Jumping, Mountain Biking, Cliff Jumping and rappelling, etc.
4. Award schemes shall be introduced to recognize / appreciate tourism and hospitality sector, high-achievers, key-performers in relevant fields.
5. Efforts shall be made to declare tourism and hospitality sector as an industry to extend maximum incentives and facilitation like other industries.
6. The areas identified as tourist sites may be declared as protected areas so as to avoid uncontrolled mushroom growth of tourist facilities.
7. Tourists may be charged a small amount of fee as cleaning charges to take care of the litter usually left over by the visiting tourists to keep the sites clean for the other tourists.
8. Charges for facilities such as transport, restaurants and hotels be determined by restricting the variation from the market at about 10 to 20% at the most in collaboration with hoteliers, transporters, and other stake holders.
9. To promote domestic Tourism, focus may also be placed on Sufi festivals as Sufi destinations throughout Punjab are thronged by a large number of local and foreign devotees. A calendar based on these tourism activities shall be prepared by the TDCP and disseminated through website and other media.
10. New ICT technology may be installed to facilitate online booking of all tourist resorts in Punjab to streamline the income processes and enhance tourist confidence and confirm availability. In addition, the ICT system shall be used for monitoring and evaluation purposes in future.
11. Night tourism be introduced like desert camping in Cholistan during moon light nights to promote tourism in Southern Punjab, particularly during summers.
12. New locations identified / proposed to be developed as tourist destinations, or conversion of any public building / property into tourist asset shall be implemented in consultation with relevant stake holders, conducting of feasibility study and development of master plan by the consultant.

13. New sites be identified and protected. Further sale / purchase of land in protected areas be banned for proper growth / control of tourism related activities to preserve the beauty and ecology of the area.
14. Local species of plants / fruit trees be grown at the resorts to introduce those facilities and local cuisine be promoted as part of furtherance of local culture.
15. Community Based Organizations be developed at tourist resorts to involve community to make it tourist friendly. In addition, the local premises may be used to host tourists to enhance the economic status of the natives.
16. Local banks be involved to provide small loans to develop two-room cottages by local residents for tourists for their social uplift and community involvement.
17. An interactive Complaint Management System be put in place in respect of various services and facilities to improve their management and quality for better access with improved systems.

8 Implementation Framework

8.1 Tourism Development Committee

The Government of the Punjab would formulate 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. YASA & Tourism department would act as the Secretariat of the Tourism Development Committee.

8.2 Role of YASA & Tourism Department

The department is mandated by the Government of Punjab to drive the tourism development agenda in the province and would support the committee for this purpose. At present the department has weak institutional capacity. In order to implement this tourism policy the government would revitalize the department to drive the reform agenda and take a central role in capacity building of DTS and TDCP.

9 Conclusion & Way Forward

Punjab has a variety of tourist attractions for both the domestic and international tourists because its core infrastructure is better developed than any other province of Pakistan. It has rich culture, heritage, ecology and cuisine. Though security situation is not ideal but still it is better than other provinces. The institutional framework in a rudimentary form is available but it needs further improvement. The regulation regime is there but its implementation is an

issue. However, the Government of Punjab has assigned tourism a top priority to make it an engine of growth and has decided to diversify tourism opportunities through an inclusive development process with the leadership of private sector. Government has recognized the leading role of private sector because of the reason that it is more innovative, economical, and tourist friendly.

Given the present slow growth of tourism in Punjab, it is essential that government direct the tourism sector but it should assign the lead role to the private sector through development of attractive investment packages, processing facilitation and ensuring safety of their investment. The untapped tourism potential of new sites, religious heritage and festivals should be explored. The new development should be done after proper planning and coordination with all stake holders maintaining the eco-environment of all sites. The calendar of events and festivals shall be developed by the TDCP and marketed through innovative means. The use of information technology shall be enhanced for the existing tourist sites owned by the government to effectively market the existing sites with vibrant financing mechanism. Tourism is a game changer to remove social inequities at the new sites to be developed in future.

The government would confine its role to the development of access infrastructure, planning and development of investment packages, and facilitation of private sector. The private sector shall develop new sites in collaboration with the local communities which will help enhance the sense of ownership which is essential for improving security of tourists and quality of services offered to them. Tourist houses can be developed on the lines of various models adopted by European and even introduced by Akhuwat in the Northern Areas. In addition, both the private sector and government will make efforts to develop state of the art infrastructure in line with the international best practices.

In order to make tourism an effective link for the economic growth of the province, it is essential that the institutional mechanism be improved at the department of Youth Affairs, Sports, Archaeology and Tourism, Department of Tourist Services, and TDCP (Tourism Development Corporation of Punjab) to make these organs more vibrant to play facilitation and regulation roles in an effective and efficient manner. In order to standardize various service sectors of tourism, the regulatory regime would be made more vibrant through voluntary code of ethics and regulations improvement.

This policy also envisages that mid-course policy review to be undertaken after two years of notification of the Policy in order to make further corrections and keep it relevant to the modern-day needs of the tourists.